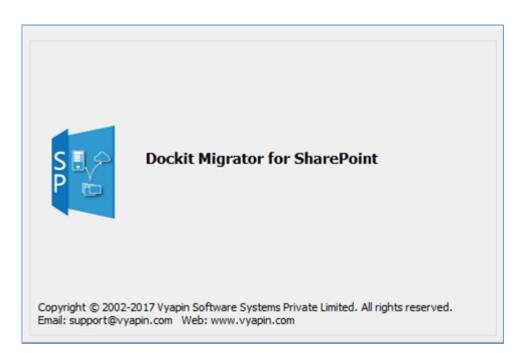
User Manual

Dockit Migrator for SharePoint



Last Updated: November 2017

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Dockit Introduction

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

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 servers 2010:

• 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*.msi in order to install in 64-bit Windows Server 2012 R2 / Windows Server 2012 / Windows Server 2008 / Windows Server 2008 R2

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

You can check the existence of Dockit Server Agent component in target SharePoint server using <u>Test Dockit Server Agent</u> tool available under 'Tools' menu of Dockit 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 **About Dockit** from **Help** menu



2. The **About Dockit** dialog appears as shown below:

	About Dockit	×
Dockit Migrator	for SharePoint v10X	0
	Vyapin Software Systems Private Limited. All rights reserved. com Web: <u>www.vyapin.com</u>	S I C
Computer Name: rd10	03	· · · · · · · · · · · · · · · · · · ·
Full Computer Name:	rd103.vsslab.local	
Program Folder: C:\P	rogram Files (x86)\Dockit10x	
Application Data Fold	ler: C: \Users \Public \Documents \Dockit 10x	
Product:		
License Type: License Description:	15-day Evaluation Copy This software is meant solely for evaluation purposes only. You can	<u> </u>
	migrate up to a maximum of 5 GB data during the 15-day trial period	~
You are on day:	4 of 15	
Remaining Days:	11	
Request license key	Register license key	<u>C</u> lose

3. Click ... 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	
> 💣 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	Move data	\times
?	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.	e all
	<u>C</u> opy <u>M</u> ove Close	

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 for SharePoint 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 for SharePoint -> Dockit Uninstall Wizard.

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

Dockit Migrator for SharePoint Uninstall Wizard ×		
Welcome to Dockit Migrator for SharePoint Uninstall Wizard This wizard helps you to cleanup and uninstall Dockit Migrator for SharePoint completely.		
This wizard will guide you through the steps to cleanup the files that are created by Dockit Migrator for SharePoint v10 x		
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 for SharePoint application		
Note: Use 'Add / Remove Programs' to uninstall Dockit Web Service from your SharePoint server.		
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>Cancel</u>		

Click **Next** to proceed.

2. Select required cleanup options as shown below:

Dockit Migrator for	SharePoint Uninstall Wizard	
Step 1 of 2: Cleanup Options Cleaning up the information based on your selection	S I P	
✓ Cleanup import tasks 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 Dockit application Remove all application files and uninstall Dockit application from the machine.		
	< Back Next > Finish Cancel	

Click **Next** to proceed.

3. Confirm the cleanup and/or uninstall process.

Dockit Migrator for SharePoint Uninstall Wizard
Step 2 of 2: Cleanup Process Cleaning up the information based on your selection
Click 'Finish' button to proceed with the cleanup process or click 'Cancel' button to terminate the uninstall wizard.
< <u>B</u> ack <u>N</u> ext > <u>Finish</u> <u>Cancel</u>

Click **Finish** to run cleanup and/or uninstall process. Click **Cancel** to close the wizard.

4. Once the file cleanup process is complete, the uninstall wizard will automatically run *Windows Installer* program to remove Dockit application from the machine, if you have selected the cleanup option **Uninstall Dockit application** in the wizard

_

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

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 email with the necessary instructions to register the software.

Request License Key

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

1. Select About Dockit from Help menu



2. The **About Dockit** dialog appears as shown below:

	About Dockit	×
Dockit Migrator	for SharePoint v10 X	0
	Vyapin Software Systems Private Limited. All rights reserved. om Web: <u>www.vyapin.com</u>	S ∎∕° P 💾
Computer Name: rd10 Full Computer Name:	rd103.vsslab.local	
	rogram Files (x86)\Dockit10x er: C:\Users\Public\Documents\Dockit10x	
Product:		
License Type: License Description:	15-day Evaluation Copy This software is meant solely for evaluation purposes only. You can migrate up to a maximum of 5 GB data during the 15-day trial period	^
You are on day:	4 of 15	¥
Remaining Days:	11	
Reguest license key	<u>R</u> egister license key	Close

3. Click **Request license Key..** button, the Request license Key dialog will appear as shown below:

Request License Key		\times
	to request a license key to register the product. The ered to the e-mail address stated in this form.	
*Contact <u>N</u> ame:		
* C <u>o</u> mpany:		
* <u>E</u> mail:		
* <u>P</u> hone:		
	(Country Code, Area Code, Phone No.)	
* O <u>r</u> der ID:		
* Full Computer Name:	rd71.voyager.local	
License Type:	(Optional)	
	e.g., Single License, Site License	
	Submit Cancel	

- **Contact Name**: End-user of the product.
- **Company**: End-user Company Name.
- **Email**: Email address where the license key has to be sent.
- **Phone**: Phone number with country code and area code.
- Order ID: Order/Transaction ID reference.
- License Type: License that was purchased.
- 4. Fill-in the form details and click **Submit**.

Register software

Perform the following steps to register the software:

- a) Download evaluation/trial copy of software from the respective product page available in our website at http://www.vyapin.com/
- b) Install the software on the desired computer.
- c) You will receive a license key through e-mail once the purchase process is complete.
- d) Click 'Register license Key...' in Help -> About Dockit menu to see the dialog as shown in Image 1 below.

Register Dockit Migrator for SharePoint	
License Type: 15-day Evaluation Copy To register the software, copy and paste the license key in the textbox below: See example	
	^
<u>Apply</u>	v I

Image 1 - Register screen

e) Copy the license key sent to you through email and paste it in the 'License Key' textbox. For help on how to copy the license key, click 'See example' link in the Register dialog (as shown in Image 2).

How to copy license key	×
BEGIN LICENSE KEY (COPY BELOW THIS LINE) Select and then Copy the selected text	^
MIICFAYJKwYBBAGCN1gDoIICbTCCAmkGCisGAQQBgidYAwGgggJZMIICVQIDAgABA gJmEAICAQAEEAAAAAAAAAAAAAAAAAAAAAAAAEECp60T2meoXl0qWtCMMoNWQEggIg kiq8Saslqyql9gzHGYngf9bNn4383PIBDrebhspa2CVVA7me8jGOnwrQsH9+I2xGLVFi dw86p/ZgMKibs/bnEDxs5lz9sQgDOazCgfyKDvNSZ24gLFQUIjYx2ry5kUUsIRc1HgbuC K5vafpioq3HGrB3GyZzkS4U14qxs39ooP2oNFBimxfQWq1dLkJ9PgTfu5bHtPWSZQ4k DIjAL8/7KKgi8Lzt2E3FrISTAWKeieR5fmnnN5Wg3XQ1WRM722Ag0b7ANQ0TEQY30F G7dBfQHpf2+XiskrfRlyiHRvpPZ+sLFmK3VzBTdxXGykIR40MUtg70xIYr3awJqTcon+o E9Hbzns001Np19AUFPI0zvHW+JXqoomTq+BGTaqeSpMEdXCfkVdnQQTnTHVSNc 4bM0WdzH3VQ1CuTYR2NtNo8kyLD3sZbKYzfP+CP6qiyRmd01JgVDrjvc7siN3wlv/L04 JSbb6m/Q0zJPR9rVmLyflahGuX0pJdpKgalfLElj9PfGsQftU+2xbwFKVdPB+PFZV4mU JpQEx44MgoPhT9v+C0pq9D1A9PEx0WtYXuJh7RonOdHewMKmA=	
END LICENSE KEY (COPY ABOVE THIS LINE)	V

Image 2 - How to copy license key screen

f) Once you paste the license key, click Register button to apply the new license key.

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 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*>\Dockit10x\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*>\Dockit10x\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

Dockit Task Manager

- Task Manager
- <u>Create a new task</u>
- Edit an existing task
- <u>Run a task</u>
- <u>Re-do Task</u>
- Incremental Task
- Delete an existing task
- <u>Copy task</u>
- <u>Reschedule a task</u>
- Manage categories
- <u>Cleanup history</u>
- <u>View task status</u>
- <u>Task History</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.

📂 🚺	Help	Ķ	(II),	Δ	\sim	e h	12		/	Q		Trial days left 🔢	
File share SharePoint Migration Migration New Task	Edit	Run Task	Re-do Migration	Incremental Migration	Delete Task	Copy Task	Reschedule Task	Manage Categories	Cleanup History	View Task Status		Data limit left 5.0	_
ask Name	Descriptio	on		Created			Modified		Total Items	Processed	Total Data	Transferred	Setting
🔲 Blank													
👱 Sample				1/30/2017 8	:02:49 PM		1/30/2017 8:02:49	9 PM	0 Files, 0 Fo	lders	0 KB		¢
👱 🛛 Sample Docume	. Click here to	enter des	cription	1/31/2017 1	0:28:01 AM		1/31/2017 12:03:4	17 PM	3 Files, 0 Fo	lders	0 KB		۵
👱 Test				1/31/2017 9	:56:25 AM		1/31/2017 9:56:25	5 AM	0 Files, 0 Fo	lders	0 KB		٥
Documents													
Library													
Reference													
-										Refresh		View <u>A</u> ctivity Log) X <u>R</u> en
sk History Start Time 💌	End Time		Elaps	ed Time	Items in	Source	Complete	:d	Ignored	Refresh	Dpen Log Folder Errors	O View <u>A</u> ctivity Log Remarks	9 X Rer
-		12:05:33				Source folders, (:d olders, 0 KB	Ignored 0 files, 0 fold			Remarks	g 🗙 <u>R</u> en
Start Time 👻	1/31/2017 PM		00:01:	34	1 files, 0		0 KB 1 files, 0 f			ers, 0 KB	Errors	Remarks B <u>Completed</u> successfully	g 🗙 <u>R</u> er
1/31/2017 12:03:58 PM	1/31/2017 PM 1/31/2017	12:03:31	00:01:	34 37	1 files, 0 1 files, 0	folders, (0 KB 1 files, 0 fi	olders, 0 KB	0 files, 0 fold	ers, 0 KB ers, 0 KB	Errors 0 files, 0 folders, 0 Kl	Remarks B <u>Completed</u> successfully B <u>Completed</u> successfully	a X <u>R</u> en

 Δ - referes the task is in Incremental Mode.

I refers the task is 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**.

Task Name		Description	Created	Modified	Total Items Processed	Total Data Transferred	Settings
🗉 🔲 Blank							
2	Sample		1/30/2017 8:02:49 PM	1/30/2017 8:02:49 PM	0 Files, 0 Folders	0 KB	۵
2	Sample Docume		1/31/2017 10:28:01 AM	1/31/2017 12:03:47 PM	3 Files, 0 Folders	0 KB	ø
2	Test		1/31/2017 9:56:25 AM	1/31/2017 9:56:25 AM	0 Files, 0 Folders	0 KB	ø
Docu	ments						
Librar	ry						
Refer	ence						
🗉 🗖 Lab D	ocuments						

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

Task Settings - Import Task				×
Site Settings				~
URL	https://stone	.voyager.local		
User Option	Use 'voyager'	\farmadmin_sp13-1' credential to conne	ct to SharePoint	
Items to import				_
Click here to view the items		1/3		
Folder Renaming Rule	None			
File Renaming Rule	None			
Perform Incremental Migration / One-way	y Sync No			
Metadata Options				- 1
Metadata File	None			
Column Mapping Template - Blank				
Column Mapping				
Default Columns - Folder/ File / Ite	ms			
Target Column So	исе Туре	Property or Value	Default Value	
Name Cus	tom properties	Name		Ť

The selected tasks can be re-categorized by 'Move Task(s) to' option in 'View' menu.

Home T	Tools View	Help									
Refresh View	Show	Sort ask by •	**	and sks	Trial days left 13						
Task Name		Descrip	Documents	Creat	ed	Modified	Total Items Processed	Total Data Transferred	Settings		
🗉 🔲 Blank	c		Library								
2	Sample		Library	1/30/2	2017 8:02:49 PM	1/30/2017 8:02:49 PM	0 Files, 0 Folders	0 KB	0		
2	Sample Docume.	Click here	Reference	1/31/2	2017 10:28:01 AM	1/31/2017 12:03:47 PM	3 Files, 0 Folders	0 KB	٥		
2	Test		Lab Documen	s 1/31/2	2017 9:56:25 AM	1/31/2017 9:56:25 AM	0 Files, 0 Folders	0 KB	•		
🗉 📃 Docu	iments		-								
🗉 🔜 Libra	ry										
🗄 📕 Refer	rence										
🗄 📃 Lab 🛙	Documents										

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

=	🗆 Blank	t l						
	2	Sample		1/30/2017 8:02:49 PM	1/30/2017 8:02:49 PM	0 Files, 0 Folders	0 KB	¢
	2	Sample Docume	Click here to enter description	1/31/2017 10:28:01 AM	1/31/2017 10:28:01 AM	1 Files, 0 Folders	0 КВ	٩
	2	Test		1/31/2017 9:56:25 AM	1/31/2017 9:56:25 AM	0 Files, 0 Folders	0 KB	۰

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.

Task H	sk History 📀 Refresh 🚡 Open Log Folder 🗂 View <u>A</u> ctivity Le										
	Start Time 🔍	End Time	Elapsed Time	Items in Source	Completed	Ignored	Errors	Remarks			
	1/31/2017 12:03:58 PM	1/31/2017 12:05:33 PM	00:01:34	1 files, 0 folders, 0 KB	1 files, 0 folders, 0 KB	0 files, 0 folders, 0 KB	0 files, 0 folders, 0 KB	Completed successfully			
	1/31/2017 12:01:54 PM	1/31/2017 12:03:31 PM	00:01:37	1 files, 0 folders, 0 KB	1 files, 0 folders, 0 KB	0 files, 0 folders, 0 KB	0 files, 0 folders, 0 KB	Completed successfully			
	1/31/2017 10:28:07 AM	1/31/2017 10:30:01 AM	00:01:53	1 files, 0 folders, 0 KB	2 files, 0 folders, 0 KB	0 files, 0 folders, 0 KB	0 files, 0 folders, 0 KB	Completed successfully			

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:

Home Tools View	ı Help							
File share Migration New Task		Re-do Migration	nental ation Delete	Copy Task	Reschedule Task	Manage Categories	Cleanup History	view Task Status
	< type unde	File share to Sha	arePoint and Of	fice 365 mig	gration			below).
metadata to SharePoint / Import to SharePoint / Import to SharePoint / Import fol Use Dokt E file shares, k libraries. Import fold Import fold Import fold Iscal comput sequential er Assign / up Assign metad	the file shares to SharePoint , Office 365 Lists using the opt Office 365 Libraries lers, files and metadata usin porer view to import folders and cal computer and personal drives lers, files and metadata usin s and files along with metadata fer er and personal drives to SharePo trites in the batch file. date metadata to the docur ata to the documents that alread ased on the entries in the metad	tions below. Ig Explorer mode I files from file servers, netv to SharePoint / Office 365 Ig Batch file mode from file servers, network fil point / Office 365 libraries bar nents in SharePoint Libr dy exists in SharePoint / Office I office 10 for the server of	work le shares, sed on the raries fice	Import to OneDrift Impore Impore	ive for Business inort folders, files an Dodit Explorer view to ers, network file share ness. Foort folders, files and ort folders and files and ort folders and persona ential entries in the ba Point / Office 363 late metadata using ate the list items in a Si	in Office 365 id metadata usin o import folders and in metadata usin ong with metadata f al drives to OneDriv atch file. 5 Lists g Explorer Mode harePoint / Office 365	ng Explorer mode d files along with me nd personal drives ng Batch file mod from file servers, ne ve for Business base 365 list using Dockit File Mode	etadata from file to OneDrive for le etwork file shares, ed on the

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

Click the links below for more information:

- a. Create a task to Import to SharePoint / Office 365 Libraries
- b. Create a task to Import to SharePoint / Office 365 Lists
- c. Create a task to Import to OneDrive for Business in Office 365

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.

Home Tools View	Help								
File share Migration New Task		un ask Re-do Migration	A Incremental Migration	Delete Task	Copy Task	Reschedule Task	Manage Categories	Cleanup History	View Task Status

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.

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:

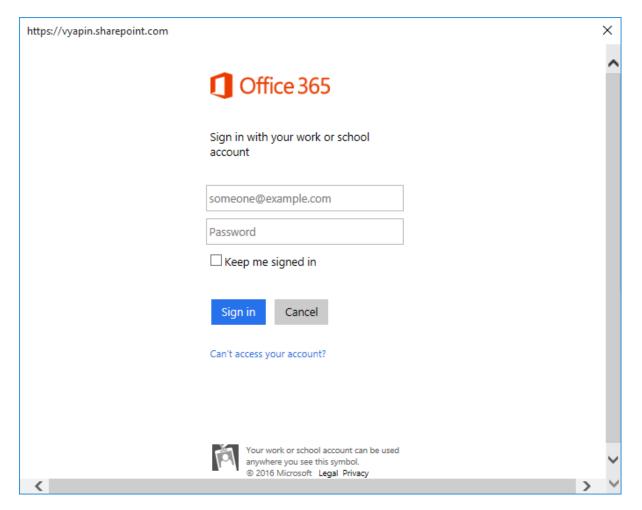
- 1. Select a task from **Task List** pane.
- 2. Click Run Now from Home menu of Dockit main screen.



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

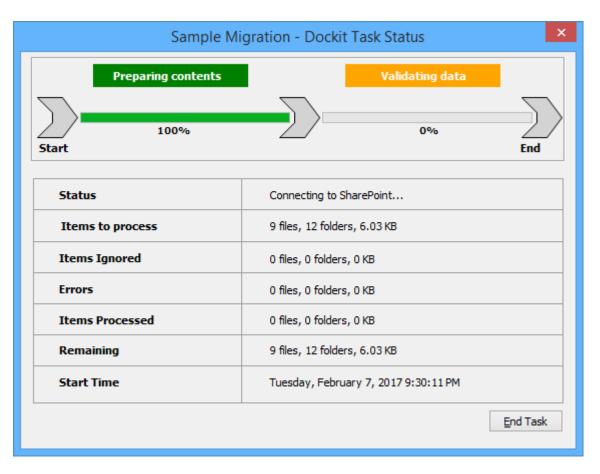
	Sample - SharePoint Login	×
Provide user cre	dentials to connect to SharePoint.	
Authentication:	Windows	
<u>U</u> ser Name:	vsslab\farmadmin_sp16-1	
Password:	(johndoe@contoso.com, contoso\johndoe, johndoe)	
	OK Can	cel

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



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

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



Runtime statistics:

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

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

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.

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

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



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

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



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

Incremental Migration / One-way Sync									
Incremental Migration :									
 Sites and Lists modified or newly created in source Sites and Lists modified or <u>n</u>ewly created in source 	. 5 5								
Reference Template (to avoid list item duplicates) :	Dockit Default 🗸 🛁								
	<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'

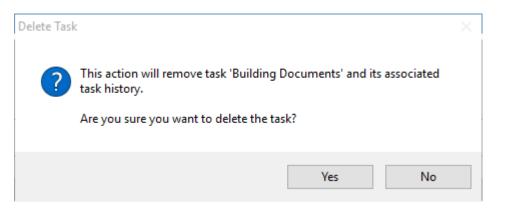
3. Click **OK** will proceed.

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.

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.



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

Home To	ools View	Help										
File share Migration	SharePoint Migration	Edit Task	ぷ Run Task	Re-do Migration	A Incremental Migration	Delete Task	Copy Task	Reschedule Task	Manage Categories	Cleanup History	View Task Status	

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	
Schedule:	Once V 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	1

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

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.

Home Tool	s View	Help									
File share Migration	SharePoint Migration	Edit Task	パ Run Task	Re-do Migration	A Incremental Migration	Delete Task	Copy Task	Reschedule Task	Manage Categories	Cleanup History	View Task Status

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

Ta	sk Categories		×
	Categories		New Delete Color: Black ~
		ОК	Cancel

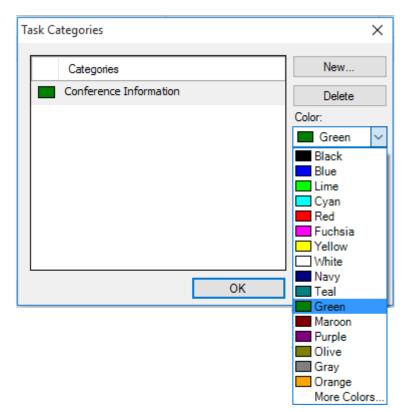
3. In order to add a category, click **New...** button and provide the information about category in the **New Category** dialog as shown below:

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 V
	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.

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:

Clean	nup 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.

To view and manage task status of a selected task:

1. Select View Task Status from Home menu of Dockit main screen.

Home To	ols View	Help									
File share Migration New	SharePoint Migration Task	Edit Task	Å Run Task	Re-do Migration	A Incremental Migration	Delete Task	Copy Task	Reschedule Task	Manage Categories	Cleanup History	View Task Status

2. The **Task Status** dialog appears as shown below:

		Task Status							
iew task status for specifie	ed number of days.								
now status for 7 days 🚽 😥 Refresh 🙀 Open Log Folder 🙀 View Activity Log 🗙 Remove 🖉 Remove									
Task Name	Start Time	End Time	Elapsed Time	Remarks					
ile Migration	2/6/2017 5:10:49 PM	2/6/2017 5:11:06 PM	00:00:17	Completed successfully					
Sample Files	2/6/2017 5:01:10 PM	2/6/2017 5:01:22 PM	00:00:11	Terminated: canceled by	y use				
Festing	2/4/2017 6:06:11 PM	2/4/2017 6:07:43 PM	00:01:32	Terminated: canceled by	y use				
row(s)				Show at startup	ose				
101(3)				Show at <u>startup</u>					

- 3. Show status for <n> days: Upon clicking Go button, displays task history entries of all tasks that were run within the specified number of days.
- 4. **Refresh**: Reloads the task history entries and updates the newly run tasks (if any).
- 5. **Open Log Folder**: Opens the folder that contains the activity log of the currently selected task history item.
- 6. **View activity log**: Displays activity log of the currently selected task history item.
- 7. **Remove**: Removes the currently selected task history entry and its associated log folders and files.

- 8. **Remove all**: Removes all task history entries and their associated log folders and files that are currently displayed.
- 9. Click **Close** button to close this window.

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

To view task history of a particular task:

- 1. Select a task from **Task List** pane.
- 2. The history of task will be displayed at right-bottom of Dockit main window as shown below. Refresh Doen Log Folder 📶 View Activity Log X Remove

Task History

 iscol y						in <u>epencogrouer</u>		icinove
Start Time 👻	End Time	Elapsed Time	Items in Source	Completed	Ignored	Errors	Remarks	
1/30/2017 8:02:53 PM	1/30/2017 8:12:38 PM	00:09:45	1 files, 0 folders, 10.9 KB	0 files, 0 folders, 0 KB	0 files, 0 folders, 0 KB	0 files, 0 folders, 0 KB	Terminated: canceled by user	Retry

Where

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

End Time -> Date and Time a task completed its import process

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

Remarks -> Brief remark about the status of import.

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

The following operations can be performed on Task history items:

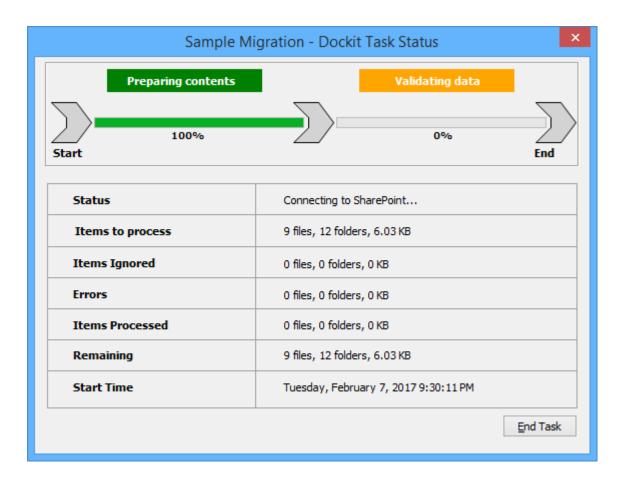
- View activity log •
- Manage task status •
- Retry •

Dockit command line feature allows the user to instantiate a task from DOS command prompt anytime after an import task has been created using Dockit's task wizard.

To run a DocKIT import task from command line:

. Usage: DocKITTaskRunner [/p:password] [/nop	<task name=""> [/profile:<user name="">] [/u:<user name="">] rompt]</user></user></task>
where, DocKITTaskRunner	Name of the DocKIT Task Runner application. Specify absolute path where the DocKITTaskRunner located.
task name	For example:C:\Program Files\DocKIT10x\DocKITTaskRunner Name of the DocKIT Task to be run from DOS command prompt. Enclose the task name in double quotes. For example: "Sample Task1"
/profile	Denotes profilename stored in the current user context using Dockit's Profile Manager, in which DocKIT task must be run. Enclose the user name in double quotes.
/u	For example: "/profile:contoso\johndoe" Denotes user name context in which Dockit task must be run in the <i>domain\user name or user name@domain name or user name</i> format. Enclose the user name in double quotes.
	For example: "/u:VOYAGER\Administrator" "/u:contoso\johndoe" "/u:johndoe@contoso.com" "/u:johndoe"
/p	Denotes the password for the user name specified in /u parameter. Enclose the password in double quotes.
	For example: "/p:2ab45fb"
/noprompt	This optional flag suppresses Dockit's login dialog prompt to enter user credentials to connect to SharePoint

- 2. If **/noprompt** flag is not used, then the **Credential Dialog** will appear based on the options provided in task. The given credential will be used to connect to SharePoint.
- 3. The import 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.
- Once the import task is complete, click **Refresh** button available in Task History pane in DocKIT main application. A new entry will be added in **Task History** section, where you can view the import activity performed when the task ran last.

Examples of invoking an import task from the command prompt:

C:\Program Files\Dockit10x> DockitTaskRunner "mytask1" "/u:voyager\administrator" "/p:2az" /noprompt

C:\Program Files\Dockit10x> DockitTaskRunner "Sample Task1" "/u:voyager\adminuser" "/p:2az\$%&" /noprompt

C:\Program Files\Dockit10x> DockitTaskRunner "Sample Task1" "/profile:voyager\adminuser" /noprompt

D:\> "C:\Program Files\DocKIT9x\DockitTaskRunner" "Sample Task1 (Re-import)" "/u:voyager\adminuser" "/p:2az\$%&" /noprompt

DOS batch file examples:

• To execute Dockit task one by one from a batch file:

"C:\Program Files\DocKIT9x\DockitTaskRunner" "Sample Task1" "/u:voyager\adminuser" "/p:2az\$%&" /noprompt "C:\Program Files\DocKIT9x\DockitTaskRunner" "Sample Task2" "/profile:voyager\testuser" /noprompt

• To execute multiple Dockit tasks simultaneously:

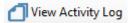
start "cmd" "C:\Program Files\DocKIT10x\DockitTaskRunner" "Sample Task1"
"/u:voyager\user1" "/p:ctest1" /noprompt
start "cmd" "C:\Program Files\DocKIT10x\DockitTaskRunner" "Sample Task2"
"/profile:voyager\user2" /noprompt

To view activity log associated with a task history item:

1. Select an item from **Task History** pane.

Task H	listory					Refres	h h Open Log Folder 🌔] View <u>A</u> ctivity Log 🗙 E	Remove
	Start Time 💌	End Time	Elapsed Time	Items in Source	Completed	Ignored	Errors	Remarks	
	1/30/2017 8:02:53 PM	1/30/2017 8:12:38 PM	00:09:45	1 files, 0 folders, 10.9 KB	0 files, 0 folders, 0 KB	0 files, 0 folders, 0 KB	0 files, 0 folders, 0 KB	Terminated: canceled by user	Retry

2. Click **View Activity Log** from Dockit main screen.



3. The **Activity Log Viewer** dialog appears as shown below.

a		Activity Log Viewer		×			
View task statistics, task results, detailed file results and file errors. Use up-down arrow key buttons to view previous or next task activity history.							
Task Name: Sample							
Task Statistics File Errors File Results Task Settings Resolution Tips The table below summarizes the task import summary statistics and detailed statistics for each library. Image: Comparison of the task import summary statistics and detailed statistics for each library. Image: Comparison of the task import summary statistics and detailed statistics for each library.							
Target	Items in Source	Completed	Ignored	Errors			
1. https://stone.voyager.local/x Jap	1 files, 0 folders, 10.9 KB	0 files, 0 folders, 0 KB	0 files, 0 folders, 0 KB	0 files, 0 folders, 0 KB			
Total	1 files, 0 folders, 10.9 KB	0 files, 0 folders, 0 KB	0 files, 0 folders, 0 KB	0 files, 0 folders, 0 KB			
Save Results Open Log) Folder			Close			

- 4. The activity log of a task is classified into four different categories (seen under separate tabs):

 - a. Task Statistics: Displays a brief summary of the import process.
 b. Task Results: Displays the task level detailed report of the import process.
 c. File Errors: Displays detailed report of errors that occurred during import.
 d. File Results: Displays detailed log of all items processed in the import task.
 - e. **Task settings:** Displays settings specified for the task at the time of import.

- 5. Click **Save Results** button to save the task results in Microsoft Excel format. Each tab in Activity LogViewer dialog is stored as a separate worksheet in MS-Excel.
- 6. Click **Open Log Folder** button to open the folder that contains the activity log of the currently displayed task history item.

Note: For all errors, refer **File Errors** section of **Activity Log** to view a description of the actual error that occurred during import.

The Re-try tool will help you re-import folders / files that had errors in them or yet to be processed due to partial migration during the previous import. Re-try is similar to a new task, except that you can import only folders / files that resulted in errors or folders / files that did not migrate to the destination library during the import process. You can make a few changes to the original task settings in a re-try.

1. Click Retry button on the last instance as shown below:



2. Retry dialog will appear as shown below; you can select your desired items here.

Transaction details	Folder / File location D:\Sample Files\1 D:\Sample Files\2 D:\Sample Files\3	Sub-folders & files 7 6 1	Completed 0 0	Errors 0 0	Yet to Process 8 7	Size 0 KB 0 KB
	D:\Sample Files\2 D:\Sample Files\3	6	-	-	-	
	D:\Sample Files\3	-	0	0	7	0 KB
_		1				
		-	0	0	2	0 KB
	D:\Sample Files\4	1	0	0	2	0 KB
	D:\Sample Files\5	1	0	0	2	6.03 KB
The Pre-migration Validation tool does not import any actual documents to the destination location.						

3. Click OK will proceed you to re-execute the failed items.

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 Template Manager	x				
	Create reusable templates for migration tasks.					
File Share Migration SharePoint Migration						
Column Mapping	Centre Template Name:					
User / Group Mapping	Source Column Target Column Default Value					
Domain Mapping						
Permission Mapping	Ame ••• Name					
A B Replace Illegal Characters	🌣 Data Created ••• Data Created	_				
	Date Modified ••• Date Modified	_				
		+				

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

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 Template Manager
	Create reusable templates for migration tasks.
File Share Migration SharePoint Migration	
Column Mapping	Template Name: Sample
User / Group Mapping	Source Target
Domain Mapping	· · · · ·
Permission Mapping	
A B 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.

	Dockit Template Manager	×
	Create reusable templates for migration task	(5.
File Share Migration SharePoint Migration		
Column Mapping	Template Name: Sample	
User / Group Mapping	Source	Target
Domain Mapping	· · · · · · · · · · · · · · · · · · ·	· +
Permission Mapping		
A B Replace Illegal Characters		
	U VSSLAB	

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:

	Dockit Template Manager	×
	Create reusable templates for migration tas	ks.
File Share Migration SharePoint Migration		
Column Mapping	Femplate Name: Sample	
User / Group Mapping	Source	Target
Domain Mapping	VOYAGER	VSSLAB ~ -
Permission Mapping	~	· +
A B Replace Illegal Characters		· · · · · · · · · · · · · · · · · · ·

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 Template Manager
	Create reusable templates for migration tasks.
File Share Migration SharePoint Migration	
Column Mapping	Template Name:
User / Group Mapping	Source Target
Domain Mapping	· · · · · · · · · · · · · · · · · · ·
Permission Mapping	
A B Replace Illegal Characters	

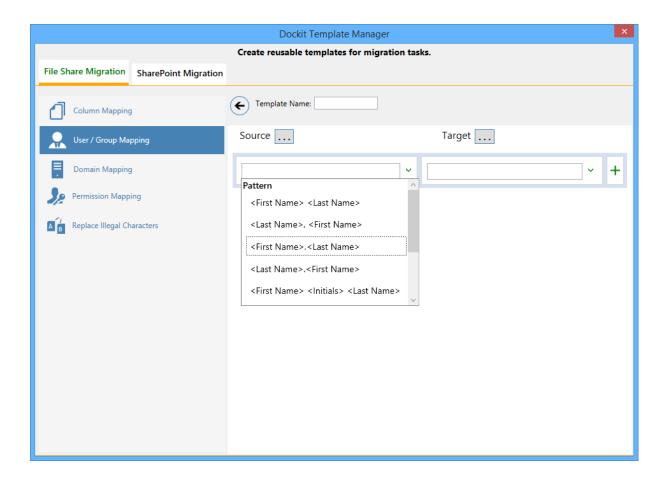
User / group Mapping Template consists of following panes to configure user / group mapping:

- 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 Template Manager	×
	Create reusable templates for migration tas	iks.
File Share Migration SharePoint Migration		
Column Mapping	Template Name:	
User / Group Mapping	Source	Target
Domain Mapping	BUILTIN\USERS ~	vsslab\aaron ~ -
Permission Mapping	~	
A B Replace Illegal Characters		

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 dialog will appear and enter a unique template name and continue to map the permission in template manager as shown below:

		Dockit Template Manager
		Create reusable templates for migration tasks.
File Share Migration	SharePoint Migration	
Column Mapping	1	Template Name: Sample
User / Group Mag	pping	Source Target
Domain Mapping)	· · · · · · · · · · · · · · · · · · ·
🥠 Permission Mapp	ing	
A Replace Illegal Ch	naracters	

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 Template Manager	×
File Chara Minasting	Create reusable templates for migration tas	sks.
File Share Migration SharePoint Migration		
Column Mapping	Template Name: Source	Target
User / Group Mapping	Change ~	Full Control ~ -
Permission Mapping	Share Permission	· +
Replace Illegal Characters	Full Control Change Read NTFS Permission FullControl Modify, Synchronize ReadAndExecute, Synchronize	
		OK Cancel

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 Template Manager	×
	Create reusable templates for migration tas	ks.
File Share Migration SharePoint Migration		
Column Mapping	Template Name: Sample	
User / Group Mapping	Source	Target
Domain Mapping	Full Control 🗸	Full Control -
Permission Mapping	v	· +
A B Replace Illegal Characters		

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:

get
ntrol 🗸 🗕
· +

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).

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 dialog. 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:

		Doc	kit Template Mana	ager	×
		Create reusabl	e templates for m	igration tasks.	
File share Migration	SharePoint Migration				
Column Mappin	g				
User / Group Ma		1			
Domain Mappin		New	A B File Rule	A B Folder Rule	
A B Replace Illegal C					
L					

- 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 Template Manager		×
	Create reusable templates for migration	n tasks.	
File Share Migration SharePoint Migration			
Column Mapping	Template Name: Sample		
User / Group Mapping	Rules		
Domain Mapping	Find	Replace	
Permission Mapping	۵	· –	
A B Replace Illegal Characters		+	
		-	
			t
			Ť
			F

- 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

Sample renaming rules:

File Name	Find	Replace	Result	Remarks
SampleV1	*V1	{empty}	Sample	Truncate V1, if the
				file ends with V1
SampleV1	*V1	Α	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
Campie	. 6	[0		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	> r	{empty}	HelloWorld	
[Document		Word	WordDocument	
Word]		Document	WordDocument	
(File		Sample	SampleFile	
Sample))	Document	SampleDocument	l

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 Template Manager	×
	Create reusable templates for migration tasks.	
File Share Migration SharePoint Migration		
Column Mapping	Template Name: Sample	
User / Group Mapping	Source Column Target Column Default Value	
Domain Mapping		٦
Permission Mapping	🌣 File Name 🔹 Name –	·]
Site and List templates	File Created Date •••• Created	·
Reference Templates	•••	•]

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

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		
Source Column T	arget Column	Default Value
🔅 File Name 🔹	Name	
File Created Date •••	Created	-
• • •		+

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 Template Manager
	Create reusable templates for migration tasks.
File Share Migration SharePoint Migration	
Column Mapping	Central Template Name: Sample
User / Group Mapping	Source Target
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:

Dockit Template Manager		
Create reusable templates for migration tasks.		
File Share Migration SharePoint Migration		
Column Mapping	Template Name: Sample	
User / Group Mapping	Source Target	
Domain Mapping	· +	
Permission Mapping	Users VSSLAB\aaron	
Site and List templates	VSSLAB\Robert	
Reference Templates	VSSLAB\kalu VSSLAB\keith VSSLAB\michael	

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 Template Manager	×
Create reusable templates for migration tasks.		
File Share Migration SharePoint Migration		
Column Mapping	Template Name:	
User / Group Mapping	Source	Target
Domain Mapping	BUILTIN\USERS ~	vsslab\aaron v –
Permission Mapping	·	· +
A B Replace Illegal Characters		

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 Template Manager	X
Create reusable templates for migration tasks.		
File Share Migration SharePoint Migration		
Column Mapping	Template Name: Sample	
User / Group Mapping	Source	Target
Domain Mapping	·	· +
Permission Mapping		
A B 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 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.

Dockit Template Manager		
Create reusable templates for migration tasks.		
File Share Migration SharePoint Migration		
Column Mapping	Template Name: Sample	
User / Group Mapping	Source	Target
Domain Mapping	~	
Permission Mapping		
A B Replace Illegal Characters		
	□ VOYAGER	

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:

	Dockit Template Manager	×
Create reusable templates for migration tasks.		
File Share Migration SharePoint Migration		
Column Mapping	Template Name: Sample	
User / Group Mapping	Source	Target
Domain Mapping	VOYAGER	VSSLAB ~ -
Permission Mapping	~	~ +
A B Replace Illegal Characters		

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 Template Manager		
	Create reusable templates for migration tasks.	
File Share Migration SharePoint Migration		
Column Mapping	Centre Template Name: Sample	
User / Group Mapping	Source Target	
Domain 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:

Dockit Template Manager		
	Create reusable templates for migration ta	sks.
File Share Migration SharePoint Migration		
Column Mapping	Template Name: Sample	
User / Group Mapping	Source	Target
Domain Mapping	Microsoft Word 97-2003 document 🗸 🗸	Microsoft Word document v
Permission Mapping	Document Library 🗸	Picture Library ~ +
Site and List templates		
Reference Templates		

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:

Dockit Template Manager	×	
Create reusable templates for migration tasks.		
	_	
+ >		
New Dockit Default		
	reate reusable templates for migration tasks.	

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 Template Manager		
Create reusable templates for migration tasks.		
File Share Migration SharePoint Migration		
Column Mapping	Template Name:	
User / Group Mapping	Source Target	
Domain Mapping	Full Control +	
Permission Mapping		
Site and List templates		
Reference Templates		

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:

Dockit Template Manager		
Create reusable templates for migration tasks.		
File Share Migration SharePoint Migration		
Column Mapping	Template Name:	
User / Group Mapping	Source	Target
Domain Mapping	Full Control 🗸	Full Control +
Permission Mapping		
Site and List templates		
Reference Templates		

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 Template Manager		
Create reusable templates for migration tasks.		
File share Migration SharePoint Migration		
Column Mapping	Template Name: Sample	
User / Group Mapping	List Type / List URL	Reference Column
Domain Mapping	Links	Created +
Permission Mapping		
Site and List templates		
Reference Templates		

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 Template Manager	×
	Create reusable templates for migration ta	sks.
File share Migration SharePoint Migration		
Column Mapping	Ce Template Name: Sample	
User / Group Mapping	List Type / List URL	Reference Column
Domain Mapping	Links	Created
Permission Mapping	Announcement	Created by _
Site and List templates		
Reference Templates		

Dockit Tools

- <u>Manage Templates</u>
 <u>Test Dockit Server Agent</u>
- <u>Metadata Extractor</u>
 <u>List 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 Manage Templates from Tools menu of Dockit main screen.



Then Template Manager dialog will appear as shown below:

Dockit Template Manager			
	Create reusable templates for migration tasks.		
File share Migration SharePoint Migration			
Column Mapping			
User / Group Mapping			
Domain Mapping	New Dockit Default		
Permission Mapping			
Site and List templates			
Reference Templates			
]	

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



See the following sections for more information

<u>Column Mapping</u> <u>Domain Mapping</u> <u>User / Group Mapping</u> <u>Permission Mapping</u> <u>Folder and File Renaming rules</u>

Test Dockit Server Agent

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

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

Hom	e Tools View	Help	
	nage plates Server Agent	File share Metadata Extractor	
2. <u>T</u>	he Test Dockit	Server Agent dialog appears as shown below:	
		Test Dockit Server Agent	
	Sharepoint Server. Y	is an optional server-side component that must be installed in the 'ou can check the existence of Dockit Server Agent in the target sing this tool by specifying a SharePoint site URL and a credential to	
	Site URL:	✓	
	Authentication:	Windows 🗸	
	User name:	vsslab\farmadmin_sp16-1 v (johndoe@contoso.com, contoso\johndoe, johndoe)	
	Password:		
	<u>Help</u>	<u>V</u> erify Close	

- 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 component in the target SharePoint Server. When clicking this button, Dockit connects to the specified SharePoint server and checks the availability of Dockit Server Agent component. Dockit will display the Web Service status as shown below:

	Test Dockit Server Agent ×		
Dockit Server Agent is an optional server-side component that must be installed in the Sharepoint Server. You can check the existence of Dockit Server Agent in the target SharePoint server using this tool by specifying a SharePoint site URL and a credential to connect.			
Site URL: http://plan	et.vsslab.local/Dockit Lib/Forms/AllItems.aspx		
Authentication:	Windows		
User name:	vsslab\farmadmin_sp16-1 v (johndoe@contoso.com, contoso\johndoe, johndoe)		
Password:			
	Server Agent Service component is installed in the SharePoint farm of the ed SharePoint URL.		
<u>Help</u>	<u>V</u> erify Close		

You can verify whether **Dockit Server Agent** is installed in the target SharePoint Server using the icon representation displayed in the top-right corner of **Test Dockit Server Agent** dialog as described in the table below:



This icon implies that **Dockit Server Agent** component is installed in the target SharePoint farm.



This icon implies that there is a discrepancy in **Dockit Server Agent** version. Uninstall the existing **Dockit Server Agent** component installed on all frontend web servers or application servers in the target SharePoint farm and reinstall the version of **Dockit Server Agent** component that corresponds with Dockit client application version (bundled with client application).



This icon implies that **Dockit Server Agent** component is not installed in the target SharePoint farm. Install **Dockit Server Agent** component on all frontend web servers or application servers in the target SharePoint farm using the appropriate **Dockit Server Agent** setup bundled with Dockit client application. Dockit File share 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 File share Metadata Extractor allows you to extract file properties that are specific to the file extension. For example, Dockit provides almost 30+ properties for PDF file format alone. Dockit enumerates folders and sub-folders and generates metadata for all the files available underneath them.

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



2. The File share Metadata Extractor dialog appears as shown below:

File share Metadata Extractor			
Dockit Metadata Extractor tool allows you to capture metadata for all files (summary and custom properties) in the given source folder location. The source folder locations can be mapped drives, network shares and local hard drives.			
Source Folder Location	n:	÷	
Folder Path	Folder Options	\times	
		0	
Export Options:	s only O Folders only O All items (folders and files)		
File Type:	Custom Property (MS Office documents only)	:	
General	×	÷	
Available File Properties	s: Required File Properties:	\times	
File Extension Keywords Modified Subject	>	↑ ↓	
Title			
Metadata Location:	C: \Users \Public \Documents \Dockit 10x \Extractor		
Metadata <u>F</u> ile Name:	Dockit Metadata		
Metadata File Format:	CSV ✓ Sheet Name:		
	Run <u>C</u>lose		

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

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

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

File share Metadata Extractor			
Dockit Metadata Extractor tool allows you to capture metadata for all files (summary and custom properties) in the given source folder location. The source folder locations can be mapped drives, network shares and local hard drives.			
Source Folder Location	:	💠	
Folder Path		Folder Options	
D:\Sample Files		Include sub-folders	
Export Options:	only O Folders	s only All items (folders and files) 	
File Type:		Custom Property (MS Office documents only):	
General	~	÷	
Available File Properties	:	Required File Properties:	
		General Author Comments Created File Extension Keywords Modified Subject	
Metadata Location:	C: \Users \Public \Documen	ts\Dockit10x\Extractor	
Metadata <u>F</u> ile Name:	Dockit Metadata		
Metadata File Format:	CSV ¥	Sheet Name:	
		<u>R</u> un <u>C</u> lose	

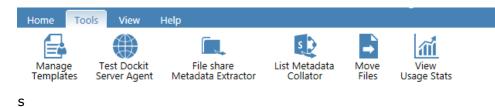
5. Click **Run** to commence extraction process. Once File share Metadata Extractor completes its job, it enables you to view the metadata file right away as below.

File share Metadata Extractor	
Metadata file created successfully in 'C:\Users\Public\Documents\Dockit10x\Extractor\Dockit Metadata.csv'. Do you want to open the metadata file?	
<u>Y</u> es <u>N</u> o	

List Metadata Collator

The Dockit List 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 List Metadata Collator from Tools menu of Dockit main screen.



2. The List Metadata Collator dialog appears as shown below:

8	List Metadata	Collator –	□ ×	
Export metadata for library / list items to a file. Enter a list or folder location URL along with the user credentials to proceed.				
List or folder URL:	https://catalyst.vsslab.local/Dockit	t/Lists/Test/		
Authentication:	Windows	~		
User Name:	vsslab\farmadmin_sp10-1	¥		
	johndoe@contoso.com, contoso\joh	ndoe, johndoe)		
Password:	•••••			
Columns:			<u>C</u> onnect	
Column Name		Column Type	^	
Content Type		Calculated		
✓ Title		Single line of text		
 Modified 		Date and Time		
Created		Date and Time		
Created By		Person or Group	¥	
Options: Export absolute <u>Traversal option</u>: 	URL of the items O Export <u>b</u> a	se URL of the items		
All items and folders	 Retrieves ite 	m and folder URL		
Export location:	1	<u>1</u> etadata file name: <u>F</u> i	le type:	
C: \Users \Public \Docu	uments\Dockit10x E	Building Information C	sv 🗸	
✓ Open metadata f	ile once export is complete	Start export	Close	
Completed successfu	ully. Total count is 20.			

- 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.

R	List Metadata Coll	ator	– 🗆 🗙	
Export metadata for library / list items to a file. Enter a list or folder location URL along with the user credentials to proceed.				
List or folder URL:	https://catalyst.vsslab.local/Dockit/List	s/Test/		
<u>A</u> uthentication:	Windows	~		
User Name:	vsslab\farmadmin_sp10-1	×		
	(johndoe@contoso.com, contoso\johndoe	, johndoe)		
Password:	•••••			
Columns:			<u>C</u> onnect	
Column Name		Column Type	^	
Content Type		Calculated		
✓ Title		Single line of text		
 Modified 		Date and Time		
Created		Date and Time		
Created By		Person or Group	×	
Options: Export absolute <u>Traversal option</u> :		RL of the items		
All items and folders	Retrieves item an	d folder URL		
Export location:	<u>M</u> eta	data file name:	File type:	
C:\Users\Public\Doc	uments\Dockit10x Buildir	ng Information	CSV 🗸	
✓ Open metadata f	île once export is complete	<u>S</u> tart export	Close	
Completed successf	ully. Total count is 20.			

- 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 dialog appears as shown below:

B	List Me	tadata Collato	or	- 🗆 🗙
Export metadata for lit credentials to proceed	orary / list items to a file. E	inter a list or folder	r location URL along v	vith the user
List or folder URL:	https://catalyst.vsslab.lo	ocal/Dockit/Lists/Te	est/	
<u>A</u> uthentication:	Windows		\checkmark	
User Name:	vsslab\farmadmin_sp10-1		v	
0	johndoe@contoso.com, co	ontoso\johndoe, jo	hndoe)	
Password:	•••••			
Columns:				<u>C</u> onnect
Column Name			Column Type	^
Content Type			Calculated	
 ✓ Title ✓ Modified 			Single line of text Date and Time	
			Date and Time	
Created By			Person or Group	~
Options:				
Export absolute I	JRL of the items 🛛 🔘 I	Export <u>b</u> ase URL o	f the items	
Traversal option:				
All items and folders	✓ Re	trieves item and fo	older URL	
Export location:		<u>M</u> etadat	ta file name:	<u>F</u> ile type:
C:\Users\Public\Docu	ments\Dockit10x	Building I	nformation	XLSX 🗸
✓ Open metadata fi	le once export is complete		Stop Export	Close
10 items				

If you want to stop the export process, click **Stop export...** 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 **Close** button to close the List Metadata Collator dialog.

Moving Source Files To Target Location

The 'Move Files' tool will help you to move the already imported source files and folders to the specified location. You can filter the files to be moved to the target location by specifying appropriate file options available in the tool.

1. Click **Move Files** from Dockit main screen.







2. The Move Files dialog appears as shown below.

	Move Files	×
for the selected to	ve the source folders and files to the user specified target location ask instance. Select required file options and target location where the folders and files.	
Eile Options:	 Move source folders and files contain <u>no</u> errors and warning Move all source folders and files (ignore <u>warnings</u>) Move all source folders and files (ignore <u>errors</u> and warning 	
Target location:	C:\Users\Public\Documents\Dockit10x\Backup ✓ Create target location if it does not exist ✓ Create current timestamp folder under target loation Move Close]

- 3. Select File Options given below
 - 1. Move source folders and files that contain no warnings Move source folders and files that were imported without any warnings.
 - Move all source folders and files (ignore warnings) Move source folders and files that were imported, but warnings may be reported in the 'File Errors' tab of the Activity Log Viewer dialog.

3. Move all source folders and files (ignore errors and warnings) - Move all source folders and files that were used to import. This option will move all the files regardless of their errors and warnings caused while importing into SharePoint.

4. Specify a Target Location where the source folders and files are to be moved. You can also click browse ('...') button to launch folder browser dialog.

Note: Ensure that the user who invokes move process has sufficient permissions to delete folders and files in the source location and create them in the target location.

5. Create target location if it does not exist - Automatically creates the folder structure if unavailable in the target location and proceeds with the file move process.

- 6. Delete files with the same name in the target location Overwrite files if the file with the same name already exists in the target location during the move process. By default, this option will be unselected, so as to ignore the file move if a file with the same name exists in the target location.
- 7. Click Move button to commence the move process.

	Move Files ×
for the selected ta	ve the source folders and files to the user specified target location ask instance. Select required file options and target location where e the folders and files.
File Options:	Move source folders and files contain <u>n</u> o errors and warnings
	 Move all source folders and files (ignore <u>w</u>arnings)
	O Move all source folders and files (ignore errors and warnings)
Target location:	C:\Users\Public\Documents\Dockit10x\Backup ✓ Create target location if it does not exist ✓ Create current timestamp folder under target loation
Completed succe	ssfully
Open Activity	Log <u>M</u> ove <u>C</u> lose

Once the move process is complete, click **Open Activity Log** to view the activity log file.

Dockit Features

File Share Migration SharePoint Migration

File Share Migration

Import to SharePoint / Office 365 Libraries

Import to SharePoint / Office 365 Lists

Import to OneDrive for Business in Office 365

Import to SharePoint / Office 365 Libraries

Import folders, files, and metadata using 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 Step 10: Pre-migration Validation

Import folders, files and metadata using Batch file mode

Batch file structure <u>Metadata file structure</u> <u>Step 1: Batch File Options</u> <u>Step 2: Metadata Options</u> <u>Step 3: Column Mapping</u> <u>Step 4: Import Conditions</u> <u>Step 5: Mapping Templates</u> <u>Step 6: File Settings</u> <u>Step 7: Post Migration Settings</u> <u>Step 8: Task Schedule Settings</u> <u>Step 9: Pre-migration Validation</u>

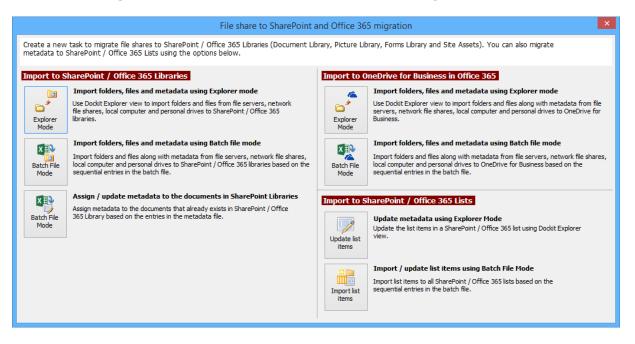
Assign / Update Metadata to the Documents in SharePoint Libraries

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 Step 7: Pre-migration Validation

Import folders, files and metadata using 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 Import folders, files and metadata to SharePoint Libraries in Migrate content to SharePoint Libraries dialog as shown below:



- 2. Specify the SharePoint Destination Location
- 3. Select Items to Import
- 4. Specify Metadata Options
- 5. Specify Column Mapping
- 6. Specify Import Conditions
- 7. Specify Mapping Templates
- 8. Specify File Settings
- 9. Specify <u>Post Migration Settings</u>
- 10. Specify Task Settings
- 11. Specify Pre-migration Validation
- 12. 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.	"Windows 7"
	Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	

Lookup (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the column value in the metadata file. Dockit will	"Stock Details; Accounts; Product Details"
	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	Global Audience name, Security / Distribution Group name and SharePoint	"All site users; Admins; Viewers; Administrators;

(Multiple value) (Applicable only for a MOSS / Microsoft SharePoint Server 2010 and above library)	Group name can be given to this field. Global Audience and Security / Distribution Group should be crawled and stored in User Profile Store of SSP / Services. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the respective group list and assign the ID of the matching group name to the Target Audiences column of the imported file, only if the group name exists. Moreover, in order to assign the values that belong either to Global Audience or Security / Distribution Group require Dockit Server Agent component to be installed in the destination SharePoint Server 2010 and above).	SPUsers; Contributors; Designers
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) Publishing HTML (Applicable only for Collaboratio n Portal / Publishing	HTML content can be given in this field. You can use HTML tags in order to create rich content in the field.	<pre>" NewsArticleImage.jpg" It is sample text</pre>
Portal Site) 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 for SharePoint" 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"

Task Outcome	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. Text or Numeric value can be given to this field. Do not use multiple values for this column type.	"New York, United States" "Complete" "4"
Geolocation	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.	"30:-60"
	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.	North America Country United States States California;Continent North America Country United States States Alaska" "Washington;California; 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 ';'.	"Continent North America Country United States States Washington;Co ntinent
	specified term value and assign the first matching term value for the corresponding managed metadata column.	

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 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:		
Authentication:	Windows	
User Name:	vsslab\JohnDoe	
Password:	(johndoe@contoso.com, contoso\johndoe, johndoe)	
	< <u>B</u> ack <u>Next</u> > <u>F</u> inish	<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.

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

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

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

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

ckit Task Wizard E ep Number: :	SharePoint destination location	
	oint URL of a site / library / folder location into which you wish to import folders user credential to connect to SharePoint when running the import task.	and files from file
SharePoint URL:	https://vyapin.sharepoint.com/sites/dev/dockit/	
Authentication:	Federated Identity ~	
User Name:	vsslab \andrew 🗸	
Password:	(johndoe@contoso.com, contoso\johndoe, johndoe)	
	< Back Next >	Finish <u>C</u> ancel

Upon clicking button to proceed, you will be prompted for login credentials (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 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 Wizar	d - Sample1		×
Step 2 of 10: Items to impor Select folders or files to import by clic				
Delete? Source Path	Destination Location	Contains	Folder Traversal Option	
Total: 0 item(s), 0 KB			Refresh Size	Browse
Renaming Rules:				
Folder Renaming Rule : Folder Rule	✓ File Ren	aming Rule : File	e Rule 🗸 🗸	
Truncated folder names, ma	x length 128	Truncated file	names, max length 128	
Perform Incremental Migration	/ One-way Sync			
 Documents modified or newly created 		ng <u>D</u> ockit		
(Last migration date: NONE)				
O Documents modified or newly created and the second se	eated, since last update in <u>S</u> ha	arePoint		
O Documents modified or newly created and the second se	eated This Week	·		
		< <u>B</u> ack N	lext > <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 ite	ems to import				>
elect folders and files espective tree-view.		or a folder location and click Add button to	add items. Click Remove butt	ton to remove se	elected items fro	om import. Press F5 to refresh	
Source: D:\Sam	nple Files						-
 Image: Constraint of the constraint	ockit Migrator ocKIT Multi-Lingual Source ocKIT_SetUp ature (frastructure atch dll atch Release rojects2010	 Name Backup Bulk File Catalyst CheckDS CheckIt123456789abcdef CLENTS DocSet FileCheck 	Size	Type Folder 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 4:49:57 PM 2/16/2017 9:59:07 AM	
Re Sa	rojects2012 eference elease Details ample Files //catalyst.vsslab.local/Dockit/ only Ubraries and sub-sit			Folder Folder Folder	Refresh	2/20/2017 10:41:56 AM 2/20/2017 10:34:23 AM 3/6/2017 3:51:15 PM 	
	viny 🦳 Luraites and SUD-SI	Source	Destination		Contains	Folder Traversal Option	
		<					

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 item	s to import					
spective t	tree-view.	y or a	folder location and click Add button to ad	d items. Click Remove butt	ton to remove	selected items f	rom import. Press F5 to refresh		
ource:	D:\Sample Files								
	표 퉲 Dockit Migrator	^	Name	Size	Туре		Modified Date		
	표 퉬 DocKIT Multi-Lingual Source		Backup		Folder		1/12/2017 11:33:38 AM		
	🗉 퉬 DocKIT_SetUp		📗 Bulk File		Folder		7/4/2017 5:54:18 PM		
	🗉 퉲 Feature		Catalyst		Folder		4/22/2017 12:10:29 PM		
	1 Infrastructure		🍌 CheckDS		Folder		2/9/2017 11:22:53 AM		
	🗉 🗾 Patch dll		beckIt123456789abcdef		Folder		1/12/2017 12:08:49 PM		
	Patch Release		LIENTS		Folder		2/2/2017 4:24:39 PM		
			JocSet		Folder		1/30/2017 4:49:57 PM		
	Projects2010		Je FileCheck		Folder		2/16/2017 9:59:07 AM		
	표 🍌 Projects2012		Je FileName		Folder		2/20/2017 10:41:56 AM		
	표 퉬 Reference		FileNameTest		Folder Folder		2/20/2017 10:34:23 AM		
	표 퉬 Release Details				Folder		3/6/2017 3:51:15 PM	>	
			<					2	
	Sample Files	~	3 objects selected						
			it Test			Refres		dd nove	
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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			
	ers and files to import destination librar tree-view.	y or a f	folder location and click Add button to add	items. Click Remove button to remove sel	lected items from	import. Press F5 to refresh	I
ource:	D:\Sample Files						E
	표 鷆 Dockit Migrator	^	Name	Size Type		Modified Date	
	🗉 퉬 DocKIT Multi-Lingual Source		📗 Backup	Folder		1/12/2017 11:33:38 AM	
	🗄 퉲 DocKIT_SetUp		🌗 Bulk File	Folder		7/4/2017 5:54:18 PM	
	🗉 퉲 Feature		Jatalyst	Folder		4/22/2017 12:10:29 PM	
	🗉 📗 Infrastructure		UneckDS CheckDS	Folder		2/9/2017 11:22:53 AM	
	🗉 📗 Patch dll		CheckIt123456789abcdef	Folder		1/12/2017 12:08:49 PM	
	Patch Release		DocSet	Folder		2/2/2017 4:24:39 PM	
	Projects2010		FileCheck	Folder		1/30/2017 4:49:57 PM 2/16/2017 9:59:07 AM	
	Projects2012 Projects2012		FileName	Folder	2/16/2017 9:59:07 AM 2/20/2017 10:41:56 AM		
			FileNameTest	Folder		2/20/2017 10:34:23 AM	
			Fol	Folder		3/6/2017 3:51:15 PM	
	🗉 🃗 Release Details		<			-,-,	>
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estinatio	on: https://catalyst.vsslab.local/Docki	t/Docki	t Test				٩dd
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iow:) Contractions Doc Doc Doc) Libraries only () Libraries and sub-		Items added for import	Destination https://catalyst.vsslab.local/Dockit/ Test	Contains I 1 <u>0 Files, 3</u> Folders, 0	ize 🗙 Remove 🥜 Rem Folder Traversal Option	
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1000: 0) Libraries only O Libraries and sub- cKIT BulkTask CheckedOutLib Demand Demo Dockit Test Documents		Items added for import Source D:\Sample Files\Backup D:\Sample Files\Bulk File	https://catalyst.vsslab.local/Dockit/ Test https://catalyst.vsslab.local/Dockit/ Test	Contains I <u>Contains</u> I <u>Folders, 0</u> <u>KB</u> <u>A 3 Files, 0</u> <u>295 MB</u> <u>47 Files, 1</u> <u>23</u>	Folder Traversal Option mport all files and folders	
Image:	Libraries only Clibraries and sub- cKIT BulkTask CheckedOutLib Demand Demo Dockit Test Documents fpdatasources		Items added for import Source D:\Sample Files\Backup D:\Sample Files\Bulk File	https://catalyst.vsslab.local/Dockit/ Test https://catalyst.vsslab.local/Dockit/ Test https://catalyst.vsslab.local/Dockit/	Contains I <u>Contains</u> I <u>Folders, 0</u> <u>KB</u> <u>Solutions</u> I <u>Folders, 0</u> <u>Folders, 0</u> <u>295 MB</u> <u>A 47 Files, 1</u> I	Folder Traversal Option mport all files and folders	
	Libraries only Libraries and sub- cKIT BulkTask CheckedOutLib Demand Demo Dockit Test Documents fpdatasources LibMigration		Items added for import Source D:\Sample Files\Backup D:\Sample Files\Bulk File	https://catalyst.vsslab.local/Dockit/ Test https://catalyst.vsslab.local/Dockit/ Test https://catalyst.vsslab.local/Dockit/	Contains I O Files, 3 Folders, 0 KB A 3 Files, 0 Folders, 295 MB A 47 Files, 1 23 Folders, Folders, 1 Folders, 1 F	Folder Traversal Option mport all files and folders	
) Libraries only O Libraries and sub- cKIT BulkTask CheckedOutLib Demand Demo Dockit Test Documents fpdatasources LibMigration Master Page Gallery		Items added for import Source D:\Sample Files\Backup D:\Sample Files\Bulk File	https://catalyst.vsslab.local/Dockit/ Test https://catalyst.vsslab.local/Dockit/ Test https://catalyst.vsslab.local/Dockit/	Contains I O Files, 3 Folders, 0 KB A 3 Files, 0 Folders, 295 MB A 47 Files, 1 23 Folders, Folders, 1 Folders, 1 F	Folder Traversal Option mport all files and folders	
) Libraries only O Libraries and sub- cKIT BulkTask CheckedOutLib Demand Demo Dockit Test Documents fpdatasources LibMigration Master Page Gallery MyLibrary	sites	Items added for import Source D:\Sample Files\Backup D:\Sample Files\Bulk File D:\Sample Files\Bulk File D:\Sample Files\Catalyst D:\Sample Files\Catalyst	https://catalyst.vsslab.local/Dockit/ Test https://catalyst.vsslab.local/Dockit/ Test https://catalyst.vsslab.local/Dockit/	Contains I O Files, 3 Folders, 0 KB A 3 Files, 0 Folders, 295 MB A 47 Files, 1 23 Folders, Folders, 1 Folders, 1 F	Folder Traversal Option mport all files and folders	move
how: () () () () () () () () () () () () () () Libraries only O Libraries and sub- cKIT BulkTask CheckedOutLib Demand Demo Dockit Test Documents fpdatasources LibMigration Master Page Gallery		Items added for import Source D:\Sample Files\Backup D:\Sample Files\Bulk File	https://catalyst.vsslab.local/Dockit/ Test https://catalyst.vsslab.local/Dockit/ Test https://catalyst.vsslab.local/Dockit/	Contains I O Files, 3 Folders, 0 KB A 3 Files, 0 Folders, 295 MB A 47 Files, 1 23 Folders, Folders, 1 Folders, 1 F	Folder Traversal Option mport all files and folders	

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								
	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 : Renamin	0 item(s), 0 KB g Rules:			Refresh Size 🛅	Browse				
Folder Rer	Folder Renaming Rule : Folder Rule File Renaming Rule : File Rule Truncated folder names, max length 128 Truncated file names, max length 128								
 Perform Incremental Migration / One-way Sync Documents modified or newly created, since last migration using Dockit (Last migration date: NONE) Documents modified or newly created, since last update in SharePoint 									
O Do	O Documents modified or newly created This Week V								
		<	Back Ne	ext > Finish	<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?	
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	Metada	ita O	ptions	step	appears	as	shown	below
±.	THC	Ficture		prions	JUCP	appears	us	3110 1011	DCIOW

Dockit Task Wiz	zard
	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:	
Date format:	<use default=""> V Time format: <no time=""> V</no></use>
	olumns in file:
	< <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	X
-	er: Metadata Options adata 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=""> V Time format: </use>	~
Metadata co	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	<u>N</u> ext > <u>F</u> inish <u>C</u> ancel

Click Next to proceed.

Column Mapping

To perform column mapping

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

ckit Task Wizard					
tep 2 of 7: Colui Map metadata proper		harePoint columr	ns.		
Column	Mapping Template:	Blank	~	🛃 Save As 🤞	† <u>R</u> eset
Source Co	lumn	Targ	jet Column	Default Value	
Name	~	Name	~		_
	~		~		+
Assign Content Type -			Constitution of the		
			Specify the cont	ent type to be assigned for	document /
Document Content Ty			 folder. You can oproviding the do 'Folder Content' 	create a folder as documen cument set content type n Type'. If left blank, default target SharePoint library	t set by ame under 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.

Eep Number: Column Map metadata properties t		harePoint columns.			
Column Mapp	oing Template:	Blank	~	🛃 Save As 🤞	• <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	~		
	~		~		4 🗸
Assign Content Type			Coorify the coor	tent time to be perioded for	daa maat I
Document Content Type:	Content Type	• ~	folder. You can	tent type to be assigned for create a folder as document ocument set content type na	t set by
Folder Content Type:	Folder Conte	ntType 🗸	'Folder Content	: Type'. If left blank, default he target SharePoint library v	content type

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

ckit Task Wizard					
tep Number: Column Map metadata properties t					
Column Map;	oing Template:	Blank	~	🛃 Save As	€ <u>+</u> <u>R</u> eset
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 Type Folder Conte		folder. You can providing the do 'Folder Content'	ent type to be assigned create a folder as docu cument set content typ Type'. If left blank, def e target SharePoint libra	ment set by be name under ault content type
			< <u>B</u> ack	lext > Einish	<u>C</u> ancel

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		×
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	

- 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 \vee	= *	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 Wiz	ard X			
Specify import conditions to be satisfied for folders and files to be migrated to SharePoint.				
● BASIC ○	ADVANCED			
F <u>o</u> lder Import Condition	<pre></pre>			
File Import Condition	<pre></pre> Pre> Pre> Pre> Pre> Pre> Pre> Pre> Pre> Pre> Pre> Pre> Pre> Pre> Pre> Pre> Pre> Pre>			
	< <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:

Specify rule that must be satisfied before creating folders to SharePoint. For example,				
you can create fol	ders only when [Folder N	lame' 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:		() 🕅	<u>}</u> X Ø	
	File Property)] = 'Confere ime (File Property)] = 'Ro			
T		6-1 O		
	ove condition is: 🖲 satis	-		
Apply the above	condition for: O All F	olders The folders		

- 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		
	File Property)] = 'Confer me (File Property)] = 'Ro			
Import if the abo	ove condition is:) sati	isfied 🔘 not satisfied		
Apply the above	e condition for: O All F	Folders The folders at level 3		
		<u>O</u> K Cance		

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

Dockit Task Wize	ard X	
	ber: 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	[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 sour	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? 🔘 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 Share	ePoint? 🔾 Yes 💿 No		
Permission Mapping Template:	None 🗸			
		<u>M</u> anage 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 Templates Select the mapping templates to use for the task and specify the appropriate options.				
Domain Mapping:				
Are the users/groups in the sourc	e and target locations in different AD domains? 💿 Yes No			
Domain Mapping Template:	Sample v * This mapping will be used for all person or group fields.			
User Mapping:				
Do you want to map users who ar	re no longer in the organization to different set of users in target SharePoint? \odot Yes \bigcirc 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?			
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	-					
O not overwrite folders						
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						
O Overwrite						
O Create new file in the name - Prepend	<file name=""> Append</file>					
O Create new version	* denotes incremental index					
$_{\Box}$ 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 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:					
O 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: Do not overwrite Overwrite Create new file in the name - Prepend Create new file in the name - Prepend 					
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> ance					

- 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:				
O not overwrite folders				
Create new folder in the name - Prepend <pre></pre>				
* denotes incremental index				
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></pre>				
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				

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 Wizar	b.
	ttings to move files / folders added for import based on the migration results
Move folders 8	& files after migration:
Do you want to r	move folders & files after migration is complete? 🔿 Yes 💿 No
Move Options:	Move source folders and files that contain no errors and warnings $$
Target location:	C:\Users\Public\Documents\Dockit10x\Backup
	Create current timestamp folder under target location
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel

- 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 Wizar	rd -	×	
Specify the settings to move files / folders added for import based on the migration results			
Move folders	& files after migration:		
Do you want to r	move folders & files after migration is complete? Yes No 		
Move Options:	Move source folders and files that contain no errors and warnings $$		
Target location:	C:\Users\Public\Documents\Dockit10x\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:

	ask Schedule Settings e for the import task and specify schedule ta	ask settings.			×
<u>T</u> ask Name:					
Category Name:	Blank		×		
Description:					
Task Option O Run later Run now O Schedule					
		< <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 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.

T							
Task Name:	Test task						
Category Name:	Blank				~		
Description:							
	Connect to	SharePoint a	5:				
Task Option	Authenticatio	n: Window	5		~		
O Run later	User Name:	vsslab\a	odrow		~	- 1 [
Run now		VSSIGD (d	iu ew				
Schedule	Password:	•••••	•••••	••			
	Schedule S	ettings					
	Run <u>A</u> s:	vsslab\andrev	/				Set Password
	Schedule:	Daily	~	Start time:	7:02 PM		Advanced
	- Schedule T	ask Daily					_
	Every		dav(s)				
	Every	1 두	day(s)				

- 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. For Federated authentication (Web Single Sign-on) credential based import task, the Web Single Sign-on framework expects the username and password to be given by user interactively in a browser based login dialog, including scheduled tasks. Upon clicking Finish button, you will be prompted for the credentials (username and password).

https://vyapin.sharepoint.com		×
	Office 365	^
	Sign in with your work or school account	
	someone@example.com	
	Password	
	C 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	~
<	2	\rightarrow \checkmark

Provide username and password in the respective textboxes and click **Sign in** button to proceed.

6. Click **Finish** button in the **Dockit Task Wizard** to create the task.

Pre-migration Validation

Pre-migration Validation tool helps you validate the exact steps performed by Dockit during the import process. This tool does not import 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 import task settings or any SharePoint settings to ensure correctness.

1. The **Pre-migration Validation** step in the Dockit Task Wizard appears as shown below:

Dockit Task Wizard - Sample Migration		
Step 10 of 10: Pre-migration Validation This tool will help you identify the most common errors that may occur during the import and minimize such errors during a live migration.		
Run the Pre-migration Validation tool to help you validate the document migration task. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there are any changes to the migration task settings or any SharePoint settings to ensure correctness.		
Note: The Pre-migration Validation tool does not import any actual documents to the destination location.		
Start		
Validation		
< <u>B</u> ack <u>N</u> ext > <u>Finish</u> <u>Cancel</u>		

- 2. Click **Start Validation** button to invoke the Pre-migration Validation tool.
- 3. The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.

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

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			×
	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

4. You will notice a task progress bar in a new window as shown below.

Sample Mi	gration - Dockit Task Status	×
Preparing contents	Validating data	
100% Start	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	
		End Task

5. Once the Pre-migration validation is complete, **View Results** button will be enabled (as shown below). Click **View Results** button to view the Pre-migration validation test results.

Dockit Task Wizard - Sample Migration
Step 10 of 10: Pre-migration Validation This tool will help you identify the most common errors that may occur during the import and minimize such errors during a live migration.
Run the Pre-migration Validation tool to help you validate the document migration task. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there are any changes to the migration task settings or any SharePoint settings to ensure correctness.
Note: The Pre-migration Validation tool does not import any actual documents to the destination location.
Start Validation Click 'View Results' to view the Pre-migration validation results. Take corrective action as necessary and
proceed with the import.
View <u>R</u> esults
Last Validation Run On: 2/7/2017 9:30:11 PM
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel

6. The **Task Validation Results** dialog will appear as shown below.

ask Name : Sa	mple 1	La	st Run On:2/7/20	17 6: 11:06 PM	Showing	1 - 50 of 64	i← ← → →i
Summary	Detailed View	Errors					
Source Path		Destination U	RL	Item & Size	Rema	arks	Statu ^
D:\Sample File	s/1	http://planet. Lib/1	vsslab.local/Dockit	1 Folder			✓
D:\Sample File	es\1\2	http://planet. Lib/1/2	vsslab.local/Dockit	1 Folder			~
D:\Sample File	es\1\2\Sample.txt	http://planet. Lib/1/2/Sample	vsslab.local/Dockit e.txt	1 File, 0 KB			~
D:\Sample File	es\1\2\3	http://planet. Lib/1/2/3	vsslab.local/Dockit	1 Folder			~
D:\Sample Files\1\2\3\Sa	mple.txt	http://planet. Lib/1/2/3/Sam	vsslab.local/Dockit ple.txt	1 File, 0 KB			~
D:\Sample File	es\1\2\3\4	http://planet. Lib/1/2/3/4	vsslab.local/Dockit	1 Folder			~
D:\Sample Files\1\2\3\4\	Sample.txt	http://planet. Lib/1/2/3/4/Sa	vsslab.local/Dockit mple.txt	1 File, 0 KB			~
D:\Sample File	es\1\2\3\4\5	http://planet. Lib/1/2/3/4/5	vsslab.local/Dockit	1 Folder			 ✓
D:\Sample File	es\2	http://planet. Lib/2	vsslab.local/Dockit	1 Folder			~
D:\Sample File	es\2\2.txt	http://planet. Lib/2/2.txt	vsslab.local/Dockit	1 File, 0 KB			 Image: A second s
D:\Sample File	es\2\3	http://planet. Lib/2/3	vsslab.local/Dockit	1 Folder			~
D:\Sample File	es\2\3\3.txt	http://planet. Lib/2/3/3.txt	vsslab.local/Dockit	1 File, 0 KB			 Image: A second s
D:\Sample File	es\2\3\4	http://planet. Lib/2/3/4	vsslab.local/Dockit	1 Folder			~
D:\Sample File	es\2\3\4\4.txt	http://planet. Lib/2/3/4/4.tx	vsslab.local/Dockit t	1 File, 0 KB			 Image: A second s
D:\Sample File	es\2\3\4\5	http://planet.	vsslab.local/Dockit	1 Folder			~ ~
<							>

Refers the items that succeeded during pre-validation.

imes - Refers the items that failed the test during pre-validation.

Checks performed by Pre-migration Validation tool

Dockit performs the following checks during the Pre-migration validation process:

- source and target locations are accessible in the given user context
- file/folder names validity, including their length
- all specified columns in the application are available in the target library
- user columns, date columns, managed metadata columns, multi-choice columns etc. have proper syntax in the metadata file or any other source.
- all mandatory columns have values or default values
- given import condition syntax is correct by applying the query and validating the results
- checks all function builder functions to validate results
- given Permission Levels exist in the target site
- file extension is blocked in target web application (applicable only if the Dockit Server Agent component installed in target SharePoint servers 2010, 2013 and 2016)

- duplicate columns in target list / library with same title (may be available from two different content types)
- given value is available in target location for the below column types
 - Look-up columns Checks for the reference lists, reference values
 - $_{\odot}$ $\,$ Managed Metadata Checks for the term that matches the given value
 - \circ $\:$ User / Group Check whether the user / group available in target location
 - o Choice Check whether the given value available under choice list

Limitations of Pre-migration Validation tool

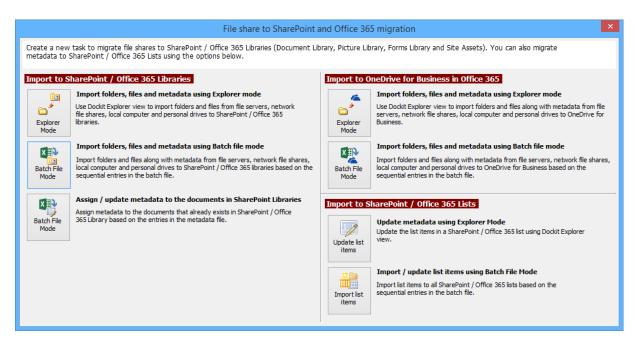
The Pre-migration validation check and the actual import results may vary in certain circumstances. The Pre-migration Validation Tool does not perform a few checks as the checks may either slowdown the validation process or a few errors will occur only when performing an actual live transfer. Please note the following additional information about the Pre-migration Validation tool:

- a) It is sufficient for the given user credential to have read permissions in the destination library for the Pre-migration validation tool to execute. The Pre-migration validation tool does not check for other permissions that may be required for the import task to run successfully.
- b) File level security permissions are not checked in the Pre-migration validation.
- c) The Pre-migration validation tool does not verify if the give user credentials can perform check-in / cancel check-out operations on an existing document.
- d) The final document status requested in the task settings is not verified in the Premigration validation process.
- e) Document import may fail due to automatic propagation of file properties during a live transfer to SharePoint and the Pre-migration validation does not have the ability to trap such related errors.
- f) When a particular folder location does not exist in the destination location and is expected to be created as a new folder using the batch descriptor line item entry, the Pre-migration validation tool may report any sub-folder under the new folder to be a non-existent folder location. You can safely ignore this error message.
- g) List validation rules are not checked in the Pre-migration validation as this SharePoint validation error message is reported only at the time of live import to SharePoint.

Import folders, files and metadata using 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 Mode from Import folders, files and metadata to SharePoint Libraries (Batch File Mode) in Migrate contents to SharePoint Libraries dialog as shown below.



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

Batch File Structure

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

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

- 1. **Path:** The 'Path' column should contain the path of the source document / folder.
- 2. **Destination Path:** The 'Destination Path' column should contain the target location where the source gets moved.
- 3. **New Name:** The 'New Name' should contain the name in which the source document(s) gets moved to target location.
- 4. **New Folder:** The column 'New Folder' is an optional column in the batch descriptor file. Using this column, you can provide the relative path to be created in the respective destination location given under 'Destination Path' column prior to importing the 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	folder2/folder3
	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	Conten t Type	Manag er
M:\file1.as px	http://vyapin/projec t documents/folder1	Sample Test.doc	http://www.google.co m	Link to a docume nt	John Doe
M:\file1.as px	http://vyapin/projec t documents/folder1/s ub1	Microsoft Corporati on	http://www.microsoft. com	External URL	John Doe

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

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

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

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

Sample format of a CSV / TEXT batch file:

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

"Path","Destination Path","New Folder"

"C:\My Documents\Sample Brochure.doc", "http://sharepoint/libone1", "Folder1"

"C:\My Sales\Sample Sales Template.xlsx","http://sharepoint/libone2","FolderA/FolderAA/FolderAAA"

"C:\My Sales\Sample Product Demo.ppt", "http://sharepoint/libone3/folder", "Folder3"

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

"Path", "Destination Path", "New Folder", "Title", "Description"

"C:\My Documents\Sample Brochure.doc","http://sharepoint/libone1","Folder1","Test Document1", "To add custom columns"

"C:\My Sales\Sample Sales Template.xlsx","http://sharepoint/libone2","FolderA/FolderAA/FolderAAA","Test Document2", "To add custom columns"

"C:\My Sales\Sample Product Demo.ppt", "http://sharepoint/libone3/folder", "Folder3", "Test Document2", "To add custom columns"

Alternatively, you can use separate CSV / XLSX file as metadata file. For more information about how to prepare metadata file, click <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.	"Windows 7"
	Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	

Lookup	Taxt or Number values can be given to	"Stock Dotailer Accounter
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 ';'.	"Stock Details; Accounts; Product Details"
	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	Global Audience name, Security / Distribution Group name and SharePoint	"All site users; Admins; Viewers; Administrators;

(Multiple value) (Applicable only for a MOSS / Microsoft SharePoint Server 2010 and above library)	Group name can be given to this field. Global Audience and Security / Distribution Group should be crawled and stored in User Profile Store of SSP / Services. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the respective group list and assign the ID of	SPUsers; Contributors; Designers
	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 /	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 for SharePoint" 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 ';'.	"Continent North America Country United States States Washington;Co ntinent North
	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 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 ';#'.	";#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	×
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.	b
Batch File:	
File Name: Sample	
Sheet Name: View View	
Renaming Rules:	
Folder Renaming Rule : Folder Rule Y File Renaming Rule : File Rule Y	
Truncated folder names, max length 128 Truncated file names, max length 128	
Incremental Migration:	
Perform Incremental Migration / One-way Sync	
Occuments modified or newly created, since last migration using Dockit	
(Last migration date: NONE)	
\bigcirc Documents modified or newly created, since last update in <u>S</u> harePoint	
◯ Documents modified or newly created This Week ∨	
Folder Option:	
Do you want to create the top-level folder(s) included for import? Yes O No	
< <u>B</u> ack <u>Next</u> > <u>F</u> inish <u>C</u> anc	:el

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	×
Specify bat	9: Batch File Options tch file to use to import items in SharePoint. Specify user credential to connect to SharePoint when e import task.	<u>ت</u> ر
Batch File:		
File Name:	D:\Sample Files\prevalidation - Copy.xlsx Sample	
Sheet Name:	Sheet1 V <u>V</u> iew <u>C</u> lear	
Renaming R	Rules:	
Folder Renam	ming Rule : Folder Rule 💙 File Renaming Rule : File Rule 💙	
🗌 Tr	runcated folder names, max length 128 Truncated file names, max length 128	
Incrementa	al Migration:	<u> </u>
Perform	n Incremental Migration / One-way Sync	
Docum	ments modified or newly created, since last migration using Dockit	
(Las	st migration date: NONE)	
O Docum	ments modified or newly created, since last update in <u>S</u> harePoint	
O Docum	ments modified or newly created This Week 🗸	
Folder Optio	on:	
	vant to create the top-level folder(s) included for import?	
	< Back Next > Finish Cance	

- 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	ard X
	Der: Metadata Options adata file to update document properties in SharePoint.
Metadata Fi	le:
File Name:	S <u>a</u> mple
	Use batch file as metadata file
Sheet Name:	∽ <u>V</u> iew <u>C</u> lear
Date format:	<use default=""> Time format: No Time ></use>
Metadata co	lumns in file:
	Select All 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	izard X
Step Numb	per: Metadata Options
Specify meta	adata file to update document properties in SharePoint.
Metadata Fi	ile:
File Name:	C:\Users\Public\Desktop\batch.XLSX Sample
Sheet Name:	sheet2 ~ <u>V</u> iew <u>C</u> lear
Date format:	<use default=""> V Time format: <no time=""> V</no></use>
Metadata co	olumns in file:
	Approver Comments
	Column1
	V Title
	Multi Column
	Choice
	CustomerNo
	Look up
	Taxonomy
	Multi Taxonomu
	Keywords
	Approval Status
	Content Type v 18 Metadata columns selected
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel

7. Click **Next** to proceed.

Column Mapping

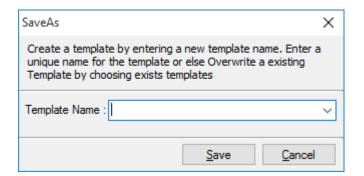
To perform column mapping

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

ckit Task Wizard tep 2 of 7: Column Mapping Map metadata properties to the desired S	harePoint columns.			
Column Mapping Template:	Blank	~	Save As	<u>R</u> eset
Source Column	Target Column	De	efault Value	
Name ~	Name	~		-
~		~		4
Assign Content Type	, Spec	fy the content type	to be assigned for do	cument /
Document Content Type:	→ folde provi 'Folde	r. You can create a ding the document s er Content Type'. If	folder as document se set content type name left blank, default con SharePoint library will b	t by under tent type
	< <u>B</u> ac	k <u>N</u> ext >	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.
- 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.



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

ockit Task Wizard					>
Step Number: Column Mapping Image: Column Mapping Map metadata properties to the desired SharePoint columns. Image: Column SharePoint Columns.					
Column Mapp	ping Template:	Blank	~	🛃 Save As	€ <u>R</u> eset
Source Column		Target Col	umn	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 Conte		folder. You can providing the d 'Folder Content	tent type to be assigned create a folder as docum ocument set content type :Type'. If left blank, defa e target SharePoint librar	ent set by name under ult content type
			< <u>B</u> ack	Next > <u>F</u> inish	<u>C</u> ancel

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:

	er: Import Conditions t conditions to be satisfied for folders and files to be migrated to S	harePoint.	×
● BASIC ○	ADVANCED		
F <u>o</u> lder Import Condition			
File Import Condition			~
	< <u>B</u> ack	<u>N</u> ext > <u>F</u> inish	<u>C</u> ancel

- 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:

5 11 1 1 C 12 (D 1)			~
Folder Import Condition (Basic)			×
Specify condition to apply at the folder Information'].	level. For example	, you can Import folders when [Folder Nam	e' = 'Conference
Property	Operator	Value	Connector
Folder Name ~	- •	Conference Information	OR -
Folder Name \vee	= •	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 Wize	ard X
	er: Import Conditions t conditions to be satisfied for folders and files to be migrated to SharePoint.
● BASIC ○	ADVANCED
F <u>o</u> lder Import Condition	<pre></pre>
File Import Condition	<pre></pre> Pre> Pre> Pre> Pre> Pre> Pre> Pre> Pre> Pre> Pre> Pre>
	< <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:

	nust be satisfied before o	reating folders to Share	Point. For example.
you can create fol	ders only when [Folder N	lame' 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:		() 🕅	<u>}</u> X Ø
	File Property)] = 'Confere ime (File Property)] = 'Ro		
T		6-1 O	
	ove condition is: 🖲 satis	-	
Apply the above	condition for: O All F	olders The folders	

- 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)			×
		creating folders to SharePoint. For examp Name' Starts With 'Team'].	e,
<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	
	File Property)] = 'Confer me (File Property)] = 'Ro		
Import if the abo	ove condition is:) sati	isfied 🔘 not satisfied	
Apply the above	e condition for: O All F	Folders The folders at level 3	
		<u>O</u> K Cance	

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

Dockit Task Wize	ard X				
	Specify import 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 Wiza	rd - FileLength
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? 🔘 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	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 Share	ePoint? 🔿 Yes 💿 No
Permission Mapping Template:	None 🗸	
		Manage Templates
	[< Back Next > Finish Cancel

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 Wiza	rd - FileLength
Step Number: Mapping Select the mapping templates	Templates to use for the task and specify the	appropriate options.
Domain Mapping:		
Are the users/groups in the sourc	e and target locations in different	AD domains? () Yes () 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 a	re 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
Permission Mapping:		
Do you want to propagate NTFS	permissions in file shares to Share	Point? • Yes 🔿 No
Permission Mapping Template:	Sample Permission 🗸 🗸	
		Manage Templates
		< Back Next > Einish Cancel

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 W	/izard ×	
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:	
Do not overwrite folders		
○ 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 		
0	Ch News Arrest	
Create new file in the name - Prepend	<file name=""> Append * denotes incremental index</file>	
Create new version	denotes ind emental 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 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: If a folder with the same name already exists in the destination location: O Do not overwrite folders	
O Overwrite folders	
Create new folder in the name - Prepend <pre></pre>	x
File Settings: If a file with the same name already exists in the destination location:	
Do not overwrite Overwrite	
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> anc	el

- 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:		
O not overwrite folders		
O Overwrite folders		
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:		
O Do not overwrite		
Overwrite		
Oreate new file in the name - Prepend		
 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		

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	d X
	r: Post Migration Settings tings to move files / folders added for import based on the migration results
Move folders 8	& files after migration:
Do you want to n	nove folders & files after migration is complete? 🔿 Yes 💿 No
Move Options:	Move source folders and files that contain no errors and warnings $$
Target location:	C:\Users\Public\Documents\Dockit10x\Backup
	Create current timestamp folder under target location
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel

- 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 Wizar	rd 🕢	×
	ttings to move files / folders added for import based on the migration results	
Move folders 8	& files after migration:	
Do you want to r	move folders & files after migration is complete? Yes No 	
Move Options:	Move source folders and files that contain no errors and warnings $$	
Target location:	C:\Users\Public\Documents\Dockit10x\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

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:

	ask Schedule Settings e for the import task and specify schedule ta	ask settings.			×
Task Name: Category Name: Description: Task Option O Run later O Run now	Blank		✓…		
		< <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.

t Password
dvanced

- 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. For Federated authentication (Web Single Sign-on) credential based import task, the Web Single Sign-on framework expects the username and password to be given by user interactively in a browser based login dialog, including scheduled tasks. Upon clicking Finish button, you will be prompted for the credentials (username and password).

https://vyapin.sharepoint.com		×
	Office 365	^
	Sign in with your work or school account	
	someone@example.com	
	Password	
	C 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 username and password in the respective textboxes and click **Sign in** button to proceed.

6. Click **Finish** button in the **Dockit Task Wizard** to create the task.

Pre-migration Validation

Pre-migration Validation tool helps you validate the exact steps performed by Dockit during the import process. This tool does not import 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 import task settings or any SharePoint settings to ensure correctness.

1. The **Pre-migration Validation** step in the Dockit Task Wizard appears as shown below:

Dockit Task Wizard - Sample Migration
Step 10 of 10: Pre-migration Validation This tool will help you identify the most common errors that may occur during the import and minimize such errors during a live migration.
Run the Pre-migration Validation tool to help you validate the document migration task. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there are any changes to the migration task settings or any SharePoint settings to ensure correctness.
Note: The Pre-migration Validation tool does not import any actual documents to the destination location.
Start Validation
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel

- 2. Click **Start Validation** button to invoke the Pre-migration Validation tool.
- 3. The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.

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

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			×
	Office 365		^
	Sign in with your work or school account		
	someone@example.com		
	Password		
	C 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		~
<		>	V

4. You will notice a task progress bar in a new window as shown below.

Sample Mi	gration - Dockit Task Status	×
Preparing contents	Validating data	
100% Start	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	
		End Task

5. Once the Pre-migration validation is complete, **View Results** button will be enabled (as shown below). Click **View Results** button to view the Pre-migration validation test results.

Dockit Task Wizard - Sample Migration 🗙
Step 10 of 10: Pre-migration Validation This tool will help you identify the most common errors that may occur during the import and minimize such errors during a live migration.
Run the Pre-migration Validation tool to help you validate the document migration task. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there are any changes to the migration task settings or any SharePoint settings to ensure correctness.
Note: The Pre-migration Validation tool does not import any actual documents to the destination location.
Start Validation
Click 'View Results' to view the Pre-migration validation results. Take corrective action as necessary and proceed with the import.
View <u>R</u> esults
Last Validation Run On: 2/7/2017 9:30:11 PM
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel

6. The **Task Validation Results** dialog will appear as shown below.

Task Name : Sample1		Last Run On:2/7/2017 6:11:06 PM		Show	Showing 1 - 50 of 64		
Summary	Detailed View	Errors					
Source Path		Destination UR	L	Item & Size	Re	emarks	Statu ^
D:\Sample File	s\1	http://planet.vs Lib/1	sslab.local/Dockit	1 Folder			~
D:\Sample File	s\1\2	http://planet.vs Lib/1/2	sslab.local/Dockit	1 Folder			~
D:\Sample File	s\1\2\Sample.txt	http://planet.vs Lib/1/2/Sample.	sslab.local/Dockit txt	1 File, 0 KB			~
D:\Sample File	s\1\2\3	http://planet.vs Lib/1/2/3	sslab.local/Dockit	1 Folder			~
D:\Sample Files\1\2\3\Sample.txt		http://planet.vs Lib/1/2/3/Sampl	sslab.local/Dockit e.txt	1 File, 0 KB			~
D:\Sample Files\1\2\3\4		http://planet.vs Lib/1/2/3/4	sslab.local/Dockit	1 Folder			~
D:\Sample Files\1\2\3\4\Sample.txt		http://planet.vs Lib/1/2/3/4/Sam	sslab.local/Dockit ple.txt	1 File, 0 KB			 Image: A set of the set of the
D:\Sample Files\1\2\3\4\5		http://planet.vs Lib/1/2/3/4/5	sslab.local/Dockit	1 Folder			 ✓
D:\Sample Files\2		http://planet.vs Lib/2	sslab.local/Dockit	1 Folder			 Image: A set of the set of the
D:\Sample Files\2\2.txt		http://planet.vs Lib/2/2.txt	sslab.local/Dockit	1 File, 0 KB			 ✓
D:\Sample Files\2\3		http://planet.vs Lib/2/3	sslab.local/Dockit	1 Folder			~
D:\Sample Files\2\3\3.txt		http://planet.vs Lib/2/3/3.txt	sslab.local/Dockit	1 File, 0 KB			 ✓
D:\Sample Files\2\3\4		http://planet.vs Lib/2/3/4	sslab.local/Dockit	1 Folder			 Image: A set of the set of the
D:\Sample Files\2\3\4\4.txt		http://planet.vs Lib/2/3/4/4.txt	sslab.local/Dockit	1 File, 0 KB			~
D:\Sample File	s\2\3\4\5	http://planet.vs	sslab.local/Dockit	1 Folder			~ ~
<							>

Refers the items that succeeded during pre-validation.

imes - Refers the items that failed the test during pre-validation.

Checks performed by Pre-migration Validation tool

Dockit performs the following checks during the Pre-migration validation process:

- source and target locations are accessible in the given user context
- file/folder names validity, including their length
- all specified columns in the application are available in the target library
- user columns, date columns, managed metadata columns, multi-choice columns etc. have proper syntax in the metadata file or any other source.
- all mandatory columns have values or default values
- given import condition syntax is correct by applying the query and validating the results
- checks all function builder functions to validate results
- given Permission Levels exist in the target site
- file extension is blocked in target web application (applicable only if the Dockit Server Agent installed in target SharePoint servers 2010 and 2013)

- duplicate columns in target list / library with same title (may be available from two different content types)
- given value is available in target location for the below column types
 - Look-up columns Checks for the reference lists, reference values
 - $_{\odot}$ $\,$ Managed Metadata Checks for the term that matches the given value
 - \circ $\:$ User / Group Check whether the user / group available in target location
 - o Choice Check whether the given value available under choice list

Limitations of Pre-migration Validation tool

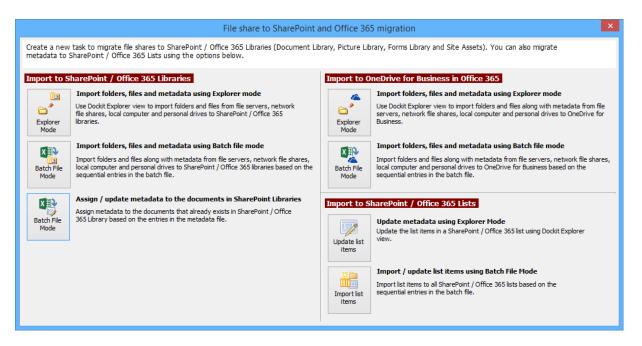
The Pre-migration validation check and the actual import results may vary in certain circumstances. The Pre-migration Validation Tool does not perform a few checks as the checks may either slowdown the validation process or a few errors will occur only when performing an actual live transfer. Please note the following additional information about the Pre-migration Validation tool:

- h) It is sufficient for the given user credential to have read permissions in the destination library for the Pre-migration validation tool to execute. The Pre-migration validation tool does not check for other permissions that may be required for the import task to run successfully.
- i) File level security permissions are not checked in the Pre-migration validation.
- j) The Pre-migration validation tool does not verify if the give user credentials can perform check-in / cancel check-out operations on an existing document.
- k) The final document status requested in the task settings is not verified in the Premigration validation process.
- Document import may fail due to automatic propagation of file properties during a live transfer to SharePoint and the Pre-migration validation does not have the ability to trap such related errors.
- m) When a particular folder location does not exist in the destination location and is expected to be created as a new folder using the batch descriptor line item entry, the Pre-migration validation tool may report any sub-folder under the new folder to be a non-existent folder location. You can safely ignore this error message.
- n) List validation rules are not checked in the Pre-migration validation as this SharePoint validation error message is reported only at the time of live import to SharePoint.

Assign / Update Metadata to the Documents in SharePoint 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 Assign metadata to documents in SharePoint Libraries option in Migrate contents to SharePoint Libraries dialog as shown below



- 2. Specify the Metadata Options
- 3. Specify the <u>Column Mapping</u>
- 4. Specify the Mapping Templates
- 5. Specify the Document Status
- 6. Specify the Import Conditions
- 7. Specify the Task Settings
- 8. Specify Pre-migration Validation
- 9. Click **Finish** button to create the task, or click **Back** button to change the any task settings.

Create Metadata File

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

- 1. The first row of the metadata file should contain the Field Names as headers. In an import task, data type of the columns must be the same across all libraries. SharePoint Columns that are read-only will not be updated by Dockit.
- 2. The first field should be named as '**Destination Path**'. 'Destination Path' field should be followed by other field names separated by a delimiter character such as comma (,), semi-colon (;) etc. The delimiter character used in the external metadata file should be same as 'Format' string value available in the registry key (HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Jet\4\Engines\Text).

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

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

- 3. The first column of all the rows should contain the full destination path of the file e.g., <u>http://sharepointserver/sample sales documents/sample folder/sample file.xlsx</u>.
- 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-1-1	John Doe
http://sharepoint:9000[62WZ4WH5D27C-1-2	Peter

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 File.txt	New Document.txt

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

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

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

Please see the sample snippet below:

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

- 7. For CSV and TXT formats, all field names and their corresponding metadata values should be enclosed within double quotes ("") e.g., "John Doe". When using accented characters such as [á é í ó] in folder / file names, the CSV / TXT metadata file must be in UNICODE encoded format.
- 8. For Microsoft Excel file formats (XLSX), do not enclose the field names and their corresponding metadata values within double quotes.
- 9. Ensure date values are in 'Date Only' or 'Date And Time' format.
- 10. Lookup data type value will be assigned based on column value only. Lookup columns referring to **non-existing list and column** will not be updated by Dockit.
- 11. People or Group data type value should be user name, Active Directory (AD) group name or SharePoint group name. User or group name referring to **non-existing user or group** will not be updated by Dockit. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account.
- 12. The **New Name** field will not be carried forward as a metadata field into SharePoint.
- 13. Business Data (BDC) / External Data (BCS) column values must be provided with the appropriate filter name to use in order to query the LOB records. Dockit will be unable to update the BDC column values if the filter name is incorrect or does not exist. You must provide the BDC column value in the format: *<filter name>:<value>*. For example: *"Company Name:NorthWind"*
- 14. The Managed Metadata column values can be term labels or synonyms of term labels or full path of the term value (full term path). Dockit will search the specified term value under the specified parent term of the corresponding term set and assign the ID of the matching term value for the managed metadata column. You must provide the path of the term label in the format: *ParentTerm*|*TermLabel1*|*TermLabel2*|*TermLabel3*.

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

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

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

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

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

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

SharePoint Data Type	Remarks	Example
Yes/No	If any other value appears in the metadata file, other than Yes/No, default value will be assigned.	"Yes" "No"
Text	The text length should not exceed 255 characters.	"This is sample text"
Multi-line Text	The text length should not exceed 255 characters (preferred).	"This is sample text\nThis is sample for multi-line text"
Date and Time	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2009 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	
People or Group (Single Value)	be assigned. 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	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 ';'.	
and above 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 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" "

		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 for SharePoint" 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 ';'. 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 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

Charles Malasa	P	Simel Decode
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 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	ard X
	Der: Metadata Options Indata 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>C</u> lear
Date format:	<use default=""> Time format: No Time ></use>
Metadata co	lumns in file:
	Select All O 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	adata 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>Q</u> lear
Date format:	<use default=""> V Time format: </use>	~
Metadata co	lumns in file:	
	Approver Comments	A
	✓ column1	
	✓ Title	
	✓ single	
	Multi Column	
	Choice	
	CustomerNo	
	C Look up	
	Taxonomy	
	Multi Taxonomu	
	Keywords	
	Approval Status	Select All
	Content Type	 V 18 Metadata columns selected
	< <u>B</u> ack	<u>N</u> ext > <u>F</u> inish <u>C</u> ancel

7. Click **Next** to proceed.

Column Mapping

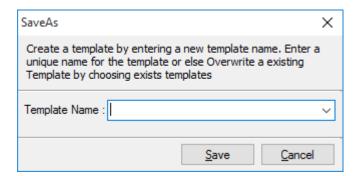
To perform column mapping

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

ckit Task Wizard tep 2 of 7: Column Mapping Map metadata properties to the desired S	harePoint columns.			
Column Mapping Template:	Blank	~	Save As	<u>R</u> eset
Source Column	Target Column	De	efault Value	
Name ~	Name	~		-
~		~		4
Assign Content Type	, Spec	fy the content type	to be assigned for do	cument /
Document Content Type:	→ folde provi 'Folde	r. You can create a ding the document s er Content Type'. If	folder as document se set content type name left blank, default con SharePoint library will b	t by under tent type
	< <u>B</u> ac	k <u>N</u> ext >	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.

ckit Task Wizard					;
tep Number: Column Map metadata properties t					
Column Map;	ping Template:	Blank	~	Save As	€ <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 Conte		folder. You can providing the d 'Folder Content	itent type to be assigned create a folder as docum ocument set content type Type'. If left blank, defa ne target SharePoint libra	ent set by name under sult content type
			< <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.

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 SharePoint.
BASIC O ADVANCED	
F <u>o</u> lder Import Condition	
File Import Condition	
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel

- 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)		Х
Specify rule that m example, you can i	ust be satisfied before in mport documents only w	nporting documents to SharePoint. For vhen ['File Extension' = 'docx'].	
Field Name		~	
<u>O</u> perator	~		
<u>V</u> alue		~	
	' <u>A</u> ND' to Filter	' <u>O</u> R' to Filter	
Conditions:		() 🚷 🔭 🗸 🖉	•
	[File Property)] = #10/7/ fied (File Property)] = #1		
Import if the abo	we condition is:) satis	sfied 🔘 not satisfied	
		<u>Q</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: Import Conditions Specify import conditions to be satisfied for folders and files to be migrated to SharePoint.	
O BASIC ADVANCED	
[Folder Name (File Property)] = 'Conference Information' AND [Folder Name (File Property)] = 'Root Folder' Folder Import Condition	
File Import Condition [Date Created (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 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 differe	ent 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 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>Back 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					
	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 * This mapping will be used for all person or group fields.				
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				
Manage Templates					
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel				

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	ີ
Versioning	
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.	e
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> ar	ncel

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:

	ask Schedule Settings e for the import task and specify schedule ta	ask settings.			×
<u>T</u> ask Name: <u>C</u> ategory Name: Description:	Blank		×		
Task Option O Run later () 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 <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		Gettings and specify schedule task settings.		
Task Name:	Test task			
Category Name:	Blank		×	
Description:				
Task Option Run later Run now Schedule	Connect to Shar Authentication: User Name: Password:	ePoint as: Windows vsslab\andrew	~	
	Schedule Setti	ngs		
	Run <u>A</u> s: vssl	ab\andrew		Set Password
	Schedule: Dail	y <u>S</u> tart time:	7:02 PM	<u>A</u> dvanced
	Schedule Task D	▲ day(s)		
	At 7:02 PM every	day, starting 1/31/2017		
		< <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. For Federated authentication (Web Single Sign-on) credential based import task, the Web Single Sign-on framework expects the username and password to be given by user interactively in a browser based login dialog, including scheduled tasks. Upon clicking Finish button, you will be prompted for the credentials (username and password).

https://vyapin.sharepoint.com		>	×
	Office 365		^
	Sign in with your work or school account		
	someone@example.com		
	Password		
	C 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 username and password in the respective textboxes and click **Sign in** button to proceed.

6. Click **Finish** button in the **Dockit Task Wizard** to create the task.

Pre-Migration Validation

Pre-migration Validation tool helps you validate the exact steps performed by Dockit during the import process. This tool does not import 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 import task settings or any SharePoint settings to ensure correctness.

1. The **Pre-migration Validation** step in the Dockit Task Wizard appears as shown below:

Dockit Task Wizard - Sample Migration
Step 10 of 10: Pre-migration Validation This tool will help you identify the most common errors that may occur during the import and minimize such errors during a live migration.
Run the Pre-migration Validation tool to help you validate the document migration task. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there are any changes to the migration task settings or any SharePoint settings to ensure correctness.
Note: The Pre-migration Validation tool does not import any actual documents to the destination location.
Start Validation
< <u>B</u> ack <u>N</u> ext > <u>Finish</u> <u>Cancel</u>

- 2. Click **Start Validation** button to invoke the Pre-migration Validation tool.
- 3. The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.

	Sample - SharePoint Login		×
Provide user cre	dentials to connect to SharePoint.		
Authentication:	Windows		
<u>U</u> ser Name:	vsslab\farmadmin_sp16-1	<u></u>	
	(johndoe@contoso.com, contoso\johndoe, johndoe)		
Password:	•••••		
	<u>Q</u> K <u>C</u> a	ncel	

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			×
	Office 365		^
	Sign in with your work or school account		
	someone@example.com		
	Password		
	C 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		~
<		>	V

4. You will notice a task progress bar in a new window as shown below.

Sample Mi	gration - Dockit Task Status	×
Preparing contents	Validating data	
100% Start	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	
		End Task

5. Once the Pre-migration validation is complete, **View Results** button will be enabled (as shown below). Click **View Results** button to view the Pre-migration validation test results.

Dockit Task Wizard - Sample Migration
Step 10 of 10: Pre-migration Validation This tool will help you identify the most common errors that may occur during the import and minimize such errors during a live migration.
Run the Pre-migration Validation tool to help you validate the document migration task. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there are any changes to the migration task settings or any SharePoint settings to ensure correctness.
Note: The Pre-migration Validation tool does not import any actual documents to the destination location.
Start Validation
Click 'View Results' to view the Pre-migration validation results. Take corrective action as necessary and proceed with the import.
View <u>R</u> esults
Last Validation Run On: 2/7/2017 9:30:11 PM
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel

6. The **Task Validation Results** dialog will appear as shown below.

ask Name : Sar	mple1	Last	Run On : 2/7/20	17 6:11:06 PM	Showing	1 - 50 of 64 ∢	⊢ ← → →
Summary	Detailed View	Errors					
Source Path		Destination UR	L	Item & Size	Rem	arks	Statu ^
D:\Sample File	s\1	http://planet.vs Lib/1	slab.local/Dockit	1 Folder			
D:\Sample File	s\1\2	http://planet.vs Lib/1/2	slab.local/Dockit	1 Folder			~
D:\Sample File	s\1\2\Sample.txt	http://planet.vs Lib/1/2/Sample.	slab.local/Dockit txt	1 File, 0 KB			~
D:\Sample File	s\1\2\3	http://planet.vs Lib/1/2/3	slab.local/Dockit	1 Folder			~
D:\Sample Files\1\2\3\Sa	mple.txt	http://planet.vs Lib/1/2/3/Sampl	slab.local/Dockit e.txt	1 File, 0 KB			~
D:\Sample File	s\1\2\3\4	http://planet.vs Lib/1/2/3/4	slab.local/Dockit	1 Folder			~
D:\Sample Files\1\2\3\4\	Sample.txt	http://planet.vs Lib/1/2/3/4/Sam	slab.local/Dockit ple.txt	1 File, 0 KB			~
D:\Sample File	s\1\2\3\4\5	http://planet.vs Lib/1/2/3/4/5	slab.local/Dockit	1 Folder			~
D:\Sample File	s\2	http://planet.vs Lib/2	slab.local/Dockit	1 Folder			~
D:\Sample File	s\2\2.txt	http://planet.vs Lib/2/2.txt	slab.local/Dockit	1 File, 0 KB			~
D:\Sample File	s\2\3	http://planet.vs Lib/2/3	slab.local/Dockit	1 Folder			~
D:\Sample File	s\2\3\3.txt	http://planet.vs Lib/2/3/3.txt	slab.local/Dockit	1 File, 0 KB			 Image: A second s
D:\Sample File	s\2\3\4	http://planet.vs Lib/2/3/4	slab.local/Dockit	1 Folder			~
D:\Sample File	s\2\3\4\4.txt	http://planet.vs Lib/2/3/4/4.txt	slab.local/Dockit	1 File, 0 KB			~
D:\Sample File	s\2\3\4\5	http://planet.vs	slab.local/Dockit	1 Folder			
<							>

Refers the items that succeeded during pre-validation.

imes - Refers the items that failed the test during pre-validation.

Checks performed by Pre-migration Validation tool

Dockit performs the following checks during the Pre-migration validation process:

- source and target locations are accessible in the given user context
- file/folder names validity, including their length
- all specified columns in the application are available in the target library
- user columns, date columns, managed metadata columns, multi-choice columns etc. have proper syntax in the metadata file or any other source.
- all mandatory columns have values or default values
- given import condition syntax is correct by applying the query and validating the results
- checks all function builder functions to validate results
- given Permission Levels exist in the target site
- file extension is blocked in target web application (applicable only if the Dockit Server Agent installed in target SharePoint servers 2010, 2013 and 2016
-)

- duplicate columns in target list / library with same title (may be available from two different content types)
- given value is available in target location for the below column types
 - Look-up columns Checks for the reference lists, reference values
 - $_{\odot}$ $\,$ Managed Metadata Checks for the term that matches the given value
 - \circ $\:$ User / Group Check whether the user / group available in target location
 - \circ $\;$ Choice Check whether the given value available under choice list

Limitations of Pre-migration Validation tool

The Pre-migration validation check and the actual import results may vary in certain circumstances. The Pre-migration Validation Tool does not perform a few checks as the checks may either slowdown the validation process or a few errors will occur only when performing an actual live transfer. Please note the following additional information about the Pre-migration Validation tool:

- It is sufficient for the given user credential to have read permissions in the destination library for the Pre-migration validation tool to execute. The Pre-migration validation tool does not check for other permissions that may be required for the import task to run successfully.
- p) File level security permissions are not checked in the Pre-migration validation.
- q) The Pre-migration validation tool does not verify if the give user credentials can perform check-in / cancel check-out operations on an existing document.
- r) The final document status requested in the task settings is not verified in the Premigration validation process.
- s) Document import may fail due to automatic propagation of file properties during a live transfer to SharePoint and the Pre-migration validation does not have the ability to trap such related errors.
- t) When a particular folder location does not exist in the destination location and is expected to be created as a new folder using the batch descriptor line item entry, the Pre-migration validation tool may report any sub-folder under the new folder to be a non-existent folder location. You can safely ignore this error message.
- u) List validation rules are not checked in the Pre-migration validation as this SharePoint validation error message is reported only at the time of live import to SharePoint.

Update metadata using Explorer Mode

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

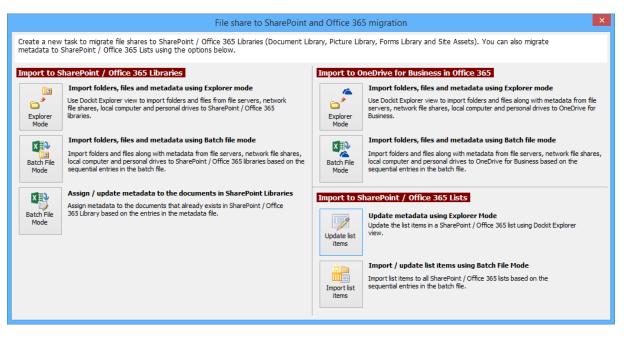
Import / Update lists items using Batch File Mode

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

Update list items (Explorer Mode)

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

1. Select **Update list items** option from **Import to SharePoint / Office 365 Lists** in **File Share to SharePoint and Office 365 migration** dialog as shown below. Ensure the action to perform is **Update list items** and click **OK** to proceed.



- 2. Specify the <u>SharePoint list location</u>
- 3. Select <u>Items to update</u>
- 4. Specify Task 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 ×
-	: SharePoint list location Point list URL to update metadata for list items.
SharePoint URL:	
Authentication:	Windows 🗸
User Name:	vsslab \aaron \checkmark (johndoe@contoso.com, contoso \johndoe, johndoe)
Password:	•••••
	< <u>B</u> ack <u>N</u> ext > Einish <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	×
-	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 ~	
	(johndoe@contoso.com, contoso\johndoe, johndoe)	
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		Х
		^
	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		<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 ite	ems dialog					×
Select Sh	arePoint list items to update and click A	dd button to add contents. Click Remove button t	o remove selected items fro	om the list. Press F5 to i	refresh respective view.	
Source:	https://alpine.vsslab.local		∭ Select <u>L</u> ist →	↔ <u>R</u> efresh		
Folder:						>
		Default		彦 UP 🛛 🖹 R	efresh 📰 Select Views	• 🖻 •
		Name				
Items to	update			A	× P	
Destin	ation Path		*	Add items to update	🗙 🗙 Remove 🥥 Remo	VE AII
Destina	ation Path			Inte		
					OK Cance	el

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

Select ite	ms dialog				×
Select Sha	arePoint list items to update and click A	dd button to add contents. Click Remove button to	remove	e selected items from the list. Press F5 to refre	sh respective view.
Source:	https://alpine.vsslab.local		<u> </u>	elect List 👻 😽 Refresh	
Folder:			111	ann	→
		Default		Announcements	📰 Select Views 👻 🕶 🕶
		Name	- 111	c	
		Name	111	cal	
				Calendar	
			111	cl	
			111	Clist	
			111	Content and Structure Reports	
			111	custL1	
			111	Custom List	
			111	CustomDT	
			811	customlist	
			811	custper	
			811	dd	
	1.		11	DisBoard	
Items to u	Ipdate		111	DiscBoard	
			111	ghj	emove 🥥 Remove All
Destinat	tion Path		111	Link list1	
			111	linklist1	
			111	Links	
			111	llist	
			111	My List	
			111	Projects	
			111	Ragnar	
			111	Requirement Management System	
			111	Reusable Content	
			111	sample	2K <u>C</u> ancel
			811	spfr tasks	ZK Cancel .:
			111	SPFR-ListIssue	
			111	Tasks	
			111	Team Discussion	
			1917	Term test	
			1917	test1Discuss	
			111	Workflow Tasks	

- 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.

The items added for update will appear as shown below:

Select ite	ms dialog					×	
Select Shi	Select SharePoint list items to update and click Add button to add contents. Click Remove button to remove selected items from the list. Press F5 to refresh respective view.						
Source:	https://alpine.vsslab.local		🔟 Custom List 🝷	4 <u>R</u> efresh			
Folder:						>	
🕀 🛅 C	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		
		Demo	3	System Account	3/18/2016 5:34		
		Research	2	System Account	3/18/2016 5:34		
		Projects	1	System Account	3/18/2016 5:33	3/18/2016 5:33	
		<				>	
Items to u	update						
3 items				Add items to up	date 🗙 Remove 🍐	🕜 Remove All	
Destina	tion Path			Title			
https://a	lpine.vsslab.local/Lists/Custom List/Den	10		Demo			
https://a	lpine.vsslab.local/Lists/Custom List/3(000		Demo			
https://a	lpine.vsslab.local/Lists/Custom List/1(000		Projects			
					OK	Cancel	
					<u> </u>	Sauce	

- 6. Click Refresh button to reload list names.
- Click OK button to proceed or click Cancel to discard the changes.
 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 Options		Add / Edit
	< <u>B</u> ack <u>N</u> ext >	<u>F</u> inish <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:

	ask Schedule Sett e for the import task and	-	k settings.			×
<u>T</u> ask Name: <u>C</u> ategory Name:	Blank			 ✓		
Description:						
Task Option O Run later () 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 <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: Task Schedule Settings Enter a unique name for the import task and specify schedule task settings.								
<u>T</u> ask Name:	Test task							
Category Name:	🔲 Blank		~					
Description:								
	Connect to Shar	ePoint as:						
Task Option	Authentication:	Windows	\sim					
	User Name:	vsslab \andrew	~					
 Schedule 	Password:	•••••						
	- Schedule Settir	ngs						
	Run <u>A</u> s: vssl	ab\andrew		Set Password				
	Schedule: Dail	y <u>S</u> tart time:	7:02 PM	Advanced				
	Schedule Task D	Daily						
	Every 1	▲ day(s)						
	At 7:02 PM every	day, starting 1/31/2017						
		< <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., <u>johndoe@vyapin.onmicrosoft.com</u>) and Federated Identity (configured via ADFS e.g., johndoe@vyapin.com).

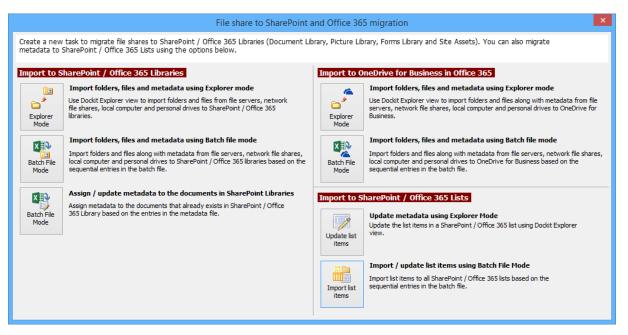
5. For **Federated authentication (Web Single Sign-on)** credential based import task, the **Web Single Sign-on** framework expects the username and password to be given by user interactively in a browser based login dialog, including scheduled tasks. Upon clicking Finish button, you will be prompted for the credentials (username and password).

https://vyapin.sharepoint.com		>	<
	Office 365		^
	Sign in with your work or school account		
	someone@example.com		
	Password		
	C 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 username and password in the respective textboxes and click **Sign in** button to proceed 6. Click **Finish** button in the **Dockit Task Wizard** to create the task.

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 **Import list items** from **Import to SharePoint / Office 365 Lists** option in **File Share to SharePoint and Office 365 migration** dialog as shown below.



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

Batch File Structure

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

- 1. The first row of the batch file should contain the Field Names as headers. In manage metadata task, data type of the columns must be the same across all lists. SharePoint Columns that are read-only will not be updated by Dockit.
- 2. The first field should be named as Destination Path. The 'Destination Path' field should be followed by other field names separated by delimiter characters such as comma (,), 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 documents/Folder1	*	Traverse all items and sub-folders presented in the Base URL and perform the specified action.
http://sharepoint/lists/technical lists/Folder2		It will perform the specified action for the top level folder only.

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

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 Title 1	Manager	Updates the 'Designation' column as 'Manager' if the list item under Destination Path has 'Title' as 'Sample Title 1'.
http://sharepoint/lists/Project Tasks	Sample Title 2	Production Executive	If any item or folder has the specified 'Title' value in the specified list or folder, Dockit perform the delete operation for referenced item.
http://sharepoint/lists/Annual Sales	Sample Title 3	Sales Executive	If any item or folder has the specified 'Title' value in the specified

			list or folder, Dockit performs the update operation. If the list item does not exists, Dockit creates a new item under 'Annual Sales' list.
http://sharepoint/technical documents/Folder2	Sample Title 4	Product Manager	Dockit creates a new item with the specified 'Title' value under 'Folder2' with specified metadata.
http://sharepoint/technical documents/Folder3	*	Marketing Manager	Dockit updates all items and sub-folders under Folder3.
http://sharepoint/technical documents/Folder4	Sample*	Production Manager	Dockit updates all items that start with Sample in its reference value under Folder4. The maximum limit of processing list items is 50.
http://sharepoint/technical documents/Folder5	*Title*	Sales Manager	Dockit updates all items that contain Title in its reference value under Folder5. The maximum limit of processing list items is 50.

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 documents/folder1	folder2/folder3

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	Text or Number values can be given to	"Windows 7; Windows Vista;
(Multiple values)	this field. The values can be of single or multiple. Multiple values should be separated with ';'.	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	"Stock Details; Accounts; Product Details"
People or Group (Single Value)	be assigned.	"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) (Applicable only for a MOSS / Microsoft SharePoint Server 2010 and above library)	Global Audience name, Security / Distribution Group name and SharePoint Group name can be given to this field. Global Audience and Security / Distribution Group should be crawled and stored in User Profile Store of SSP / Services. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the respective group list and assign the ID of the matching group name to the Target Audiences column of the imported file, only if the group name exists. Moreover, in order to assign the values that belong either to Global Audience or Security / Distribution Group require Dockit Server Agent to be installed in the destination SharePoint Server (MOSS / Microsoft SharePoint Server 2010 and above).	"All site users; Admins; Viewers; Administrators; SPUsers; Contributors; Designers
Publishing Schedule Start Date (Applicable only for 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"

De de l'art d		112/20/2000 10 FO AN4"
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</td></tr><tr><td>Publishing
Portal Site)</td><td></td><td>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	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	"Company Name:Vyapin" "ID:1000" "Product Name:Dockit Migrator for SharePoint" If the filter name contains
SharePoint Enterprise Edition)	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	colon (:) in its name, use the following syntax: "FILTER:Product:Product
	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.	ID,QUERY:Dockit" "FILTER:ID:Name,QUERY:100 0AX"
Managed Metadata	Text or Number value can be given to this field. Do not use multiple values unless	"Continent North America Country United States States Alaska"

(Single Value)	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.	"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 the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder.	"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"

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

Multi-Value Example Final Result

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

Sample format of a CSV / TEXT metadata file:

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

"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		Х
-	Batch Import Settings e to import list items in SharePoint list. Specify an unique reference to use to identify the list item.	
Metadata File: -		
Excel Sheet Name:	Sample View Clear	
File Description:	Reference column name: v to retain unique values (no duplicate	s)
	Attachment column name:	
Metadata colum	Date and Time format: <pre></pre>	
	Select All	
	0 Metadata columns selected	
	< <u>Back</u> <u>Next</u> > <u>Finish</u> <u>Cancel</u>	

- 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				×
Step Number: Batch Import Settings 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 v10.0.xlsx		S <u>a</u> m	ple
Excel Sheet Name:	Sheet2		✓ … <u>V</u> iew <u>Q</u> les	ar
File Description:	Reference column name:	<none></none>	\sim to retain unique values (no dupli	cates)
	Attachment column name:	<none></none>	~	
	Date and Time format:	<use default=""> < <no td="" time<=""><td>:> ~</td><td></td></no></use>	:> ~	
Metadata column	s:			
	 Single Gender Build Number Product ID Created By Modified By Department 			
			<u>Select All</u> Metadata columns selected	I
		< <u>B</u> ack	<u>N</u> ext > <u>F</u> inish <u>C</u> an	cel

6. Click **Next** to proceed.

Column Mapping

To perform column mapping

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

tep 2 of 7: Colui Map metadata proper		narePoint colum	ns.		
Column	Mapping Template:	Blank	~	Save As	Reset
Source Co	lumn	Targ	get Column	Default Value	
Name	~	Name	~ [
	~		~		+
Assign Content Type -					
Assign Content Type – Document Content Ty Folder Content Type:	·		 folder. You can providing the do 'Folder Content 	tent type to be assigned for o create a folder as document ocument set content type nar Type'. If left blank, default o e target SharePoint library wi	set by ne under ontent type

- 2. **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 enterin unique name for the template Template by choosing exists	
Template Name :	~
	Save Cancel

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

ckit Task Wizard tep Number: Column Map metadata properties t		harePoint columns.			> C
Column Map;	ping Template:	Blank	~	Save As	Reset
Source Column		Target C	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 Type Folder Conte		folder. You can c providing the doc 'Folder Content T	ent type to be assigned for reate a folder as document sument set content type na Type'. If left blank, default target SharePoint library v	set by me under content type
			< <u>B</u> ack <u>N</u> e	ext > Einish	<u>C</u> ancel

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 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.		
		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 valid.

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 Templates 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?			
Domain Mapping Template:	Sample 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? \odot Yes \bigcirc 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	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 	
	\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 Import</u> <u>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:Handing duplicate records Specify versioning to be 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:

ockit Task Wizard			×
Step Number: Import Con Specify conditions to be satisfied		the specified action in SharePoint.	
Do not apply any conditions	O Apply the following con	ditions	
<u>F</u> ield Name	Operator	Value	
<u>A</u> dd to Filter	Add Fields	✓ ['] <u>O</u> R' to Filter	~
Conditions:		() 6	$\gg \times $
Derform action against folder (list i	tame if the should conditions	ray anticfied on patientic field	
Pertorm action against folder / list i	tems if the above conditions a	re:	
		< <u>B</u> ack <u>N</u> ext > <u>F</u> inish	Cancel

- 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 for		the specified action in SharePoint.				
 Do not apply any conditions) Apply the following con	nditions				
Field Name	Operator	<u>V</u> alue				
Product ID	~ =	~ 1				
' <u>A</u> ND' to Filter	Add Fields	' <u>O</u> R' to Filt	ter			
Conditions:		()	🔕 🔭 🗙 🖉			
AND [Product ID (Metadata File)] = '1'	[Build Number (Metadata File)] <> '1024'					
		< <u>B</u> ack <u>N</u> ext > E	inish <u>C</u> ancel			

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 Nam	ie	Column Type	
		OV	Canaal
		<u>U</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 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.	4		
O Do not apply any conditions O App	ly 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:			x X 🧷		
Conditions: [Build Number (Metadata File)] <> '1024' AND [Product ID (Metadata File)] = '1' Perform action against folder / list items if the above conditions are: O satisfied O 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.

7. The **Task Schedule Settings** step appears as shown below:

Dockit Task Wizard Step Number: T	ack Schodulo S	attings				X
		and specify schedule	task settings.			
Task Name:						
Category Name:	🔲 Blank			~		
Description:						
 Run later Run now 						
) Schedule						
			< <u>B</u> ack	<u>N</u> ext >	<u>F</u> inish	<u>C</u> ancel

- 8. Enter a unique task name in **Task Name** textbox.
- 9. 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.
- 10. 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		Gettings and specify schedule task settings.		
Task Name:	Test task			
Category Name:	Blank		~	
Description:				
Task Option Run later Run now Schedule	Connect to Shar Authentication: User Name: Password: Schedule Settin	Windows vsslab\andrew	~	
		ab \andrew		Set Password
	Schedule: Dail	Daily	e: 7:02 PM	<u>A</u> dvanced
	Every 1 At 7:02 PM every	day(s)		
		< <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).

11. For **Federated authentication (Web Single Sign-on)** credential based import task, the **Web Single Sign-on** framework expects the username and password to be given by user interactively in a browser based login dialog, including scheduled tasks. Upon clicking Finish button, you will be prompted for the credentials (username and password).

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	~	
<)	· · ·	٢

Provide username and password in the respective textboxes and click **Sign in** button to proceed.

12. Click **Finish** button in the **Dockit Task Wizard** to create the task.

Import to OneDrive for Business in Office 365

Import folders, files and metadata to OneDrive for Business (Explorer Mode)

Metadata file Structure Step 1: OneDrive destination location Step 2: Items to import Step 3: Metadata Options Step 4: Column Mapping Step 5: Mapping Templates Step 6: File Settings Step 7: Task Schedule Settings Step 8: Pre-migration Validation

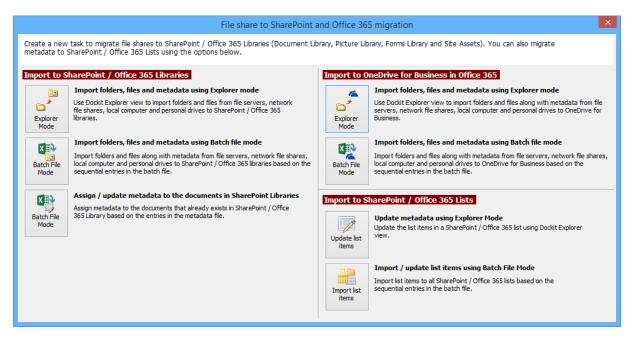
Import folders, files and metadata to OneDrive for Business (Batch File Mode)

Batch file Structure Metadata file Structure Step 1: Batch File Options Step 2: Metadata Options Step 3: Column Mapping Step 4: Mapping Templates Step 5: File Settings Step 6: Task Schedule Settings Step 7: Pre-migration Validation

Create Task

To create a task to import folders and files along with metadata from File System to OneDrive for Business:

1. Select Explorer Mode from Import folders, files and metadata to SharePoint Libraries option in Dockit Import Task dialog as shown below:



- 2. Specify the OneDrive destination location
- 3. Select Items to Import
- 4. Specify Metadata Options
- 5. Specify <u>Column Mapping</u>
- 6. Specify <u>Mapping Templates</u>
- 7. Specify File Settings
- 8. Specify Task Settings
- 9. Specify Pre-migration Validation

10. 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.	"Windows 7"
	Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	

Lookup (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the column	"Stock Details; Accounts; Product Details"
	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	Global Audience name, Security / Distribution Group name and SharePoint	"All site users; Admins; Viewers; Administrators;

(Multiple value) (Applicable only for a MOSS / Microsoft SharePoint Server 2010 and above library)	Group name can be given to this field. Global Audience and Security / Distribution Group should be crawled and stored in User Profile Store of SSP / Services. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the	SPUsers; Contributors; Designers
	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 /	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 for SharePoint" 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"

Task Outcome Related Items	 separated by ':'. The latitude value must be between -90 and +90 and longitude value must be between -180 and +180. Text or Numeric value can be given to this field. Do not use multiple values for this column type. The http absolute URL of any list item (including file) within the site collection 	"Complete" "4" "http://sharepoint/Document s/Sample 1.doc;
Geolocation	column. Location co-ordinates or name can be given to this field. The co-ordinates value must have latitude and longitude values	"30:-60" "New York, United States"
	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	
	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 Alaska" "Washington;California; 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 will search the	North America Country United States States California;Continent North
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
	specified term value and assign the first matching term value for the corresponding managed metadata column.	

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
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"

OneDrive destination location

To specify a OneDrive URL location into which you wish to upload folders and files from the file system, perform the steps given below:

1. The **OneDrive destination location** step appears as shown below:

DocKIT Task Wizard		×
Specify a Sharepoi	OneDrive destination location int OneDrive URL of a site / library / folder location into which you wish to import folders and Specify user credential to connect to OneDrive when running the import task.	files Crebie
Enumerate person	nal site of : Current user Selected users All users in the personal site collection 	n
OneDrive URL:	(e.g., https://contoso-my.sharepoint.com/personal/johndoe_contoso_onmicrosoft	_com)
Authentication:	Federated Identity \checkmark	
User Name:	vsslab\JohnDoe	
Password:		
	< <u>B</u> ack <u>N</u> ext > Einish	<u>C</u> ancel

2. Enumerate Personal site of:

- a. **Current user:** This option helps you to migrate documents to the current user's OneDrive location.
- b. **Selected users:** This option helps you to migrate documents to multiple users' OneDrive location in a single task by providing the URL of the admin center and the users e-mail one per line.

Enumerate person	al site of : 🔘 Current user 🖲 Selected use	ers O All users in the personal site o	ollection
Admin Center URL	:		
		(e.g., https://contoso-admin.shar	epoint.com)
Enter User List: (one per line)			<u>^</u>
	<		>
Authentication:	Federated Identity	(e.g., johndoe@contoso.onmic	rosoft.com)
User Name:	vsslab\JohnDoe	✓	
Password:	(johndoe@contoso.com, contoso\johndoe, jo	ohndoe)	
assworu.	•••••		

c. **All users in the personal site collection:** This option helps you to migrate documents located in user's local personal drive to their corresponding OneDrive locations (in a single task) by providing the admin center URL.

Enumerate personal	site of : O Current user O Selected use	ers All users in the personal site collection 	1
Admin Center URL:			
		(e.g., https://contoso-admin.sharepoint.c	om)
Authentication:	Federated Identity	\sim	
User Name:	vsslab\JohnDoe	×	
	(johndoe@contoso.com, contoso\johndoe, j	ohndoe)	
Password:	•••••		

- 3. Specify a valid OneDrive URL in the textbox. You can specify a OneDrive folder location in the URL textbox. Dockit will load the tree view of the destination location from the level specified in this textbox.
 - a. To connect to SharePoint site configured with Windows or Forms based authentication, you can select one of the below options as applicable and click Next to proceed.

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

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

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

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

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

Upon clicking **Next** button to proceed, you will be prompted for login credentials (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 import

To add folders and files to import to the OneDrive 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:			Reliest Size	r biowse		
Folder Renaming Rule : Folder Rule	✓ File Rer	aming Rule : File	Rule	v		
Truncated folder names, ma	x length 128	Truncated file	names, max length 128			
Perform Incremental Migration						
Documents modified or newly cre		na Dockit				
(Last migration date: NONE)						
O Documents modified or newly created and the second se	O Documents modified or newly created, since last update in SharePoint					
O Documents modified or newly cre	eated This Week	4				
		< <u>B</u> ack <u>N</u>	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:

Irce: C:\Sample Files								
🗄 📙 Program Files (x86)	^	Name	Size	Туре		Modi	fied Date	
🕀 🔤 ProgramData		Account Files		Folder		5/2/3	2016 2:59:05 PM	
🗉 📊 Sample Files		Audit Files		Folder			2016 2:59:06 PM	
표 🔄 Share		Convert Levels		Folder			2016 2:59:06 PM	
🗄 📊 Users		Dimble Files		Folder			2016 2:59:06 PM	
🗉 📃 Visual Studio 2010 with Si	P1	DocKIT9x		Folder			2016 2:59:06 PM	
Windows		Icon Files		Folder Folder			2016 2:59:06 PM	
		Management Records		Folder			2016 2:59:09 PM 2016 2:59:09 PM	
adminuser 1		Meetings Infermation		Folder			2016 2:59:09 PM 2016 2:59:10 PM	
Libraries		MS documents		Folder			2016 2:59:10 PM	
		Readers		Folder			2016 2:59:10 PM	
🗉 🎑 Network		Upload Documents		Folder		5/2/3	2016 2:59:10 PM	
CneDrive	v 1	15 objects						
tination: https://mod625253-admin.sha	arepoint.	com/						Add
🗉 🚈 Dorena Paschke	^ 1	tems added for import			2 R	efresh Size	X Remove	Remov
🗉 盋 Fabrice Canel	Г	Source	Destination		Contains	Folder Tra	versal Option	
🗉 🚈 Garret Vargas								
🗉 🝊 Garth Fort								
🗉 🚈 Janet Schorr								
🗉 📥 Julian Isla								
🗉 📥 Junmin Hao								
🗄 🚈 Kari Furse								
🗉 🤷 Katie Jordan								
MOD Administrator								
MOD Administrator Molly Demosey								
 MOD Administrator Molly Dempsey Pavel Bansky 								

- 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.
- 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.

urce: C:\Sample Files						
표 📙 Program Files (x86)	^	Name	Size Type		Modified Date	
표 📙 ProgramData		Account Files	Folder	·	5/2/2016 2:59:05 PM	1
🗉 🔄 Sample Files		Audit Files	Folder		5/2/2016 2:59:06 PM	1
🗉 🔄 Share		Convert Levels	Folder		5/2/2016 2:59:06 PM	1
🕀 📕 Users		Dimble Files	Folder	·	5/2/2016 2:59:06 PM	1
		DocKIT9x	Folder		5/2/2016 2:59:06 PM	
Windows		Icon Files	Folder		5/2/2016 2:59:06 PM	
		Image Files	Folder		5/2/2016 2:59:09 PM	
		Management Records	Folder Folder		5/2/2016 2:59:09 PM 5/2/2016 2:59:10 PM	
🗄 👗 adminuser 1		MS documents	Folder		5/2/2016 2:59:10 PM	
Ibraries		Readers	Folder		5/2/2016 2:59:10 PM	
🕀 🎑 Network		Upload Documents	Folder		5/2/2016 2:59:10 PM	
🗄 🕋 OneDrive		L5 objects				*
stination: https://mod625253-my.sharepo		n/personal/alexd_mod625253_onmic	rosoft_com/Documents		Refresh Size X Remove	<u>A</u> dd Remove
🖃 盋 Alex Darrow		Source	Destination	Contains	Folder Traversal Option	
 Image: Book State Stat		C:\Sample Files\Account Files	https://mod625253-my.sharepoint.	42 Files, 2 Folders, 1.91 MB	Import all files and folders	
 		C:\Sample Files\Audit Files	https://mod625253-my.sharepoint.	10 Files, 0 Folders, 96.9 KB	Import all files and folders	
🕀 🛅 Solution Gallery ⊕ 🛐 Style Library		C:\Sample Files\Image Files	https://mod625253-my.sharepoint.	32 Files, 1 Folders, 1.82 MB	Import all files and folders	
🗉 🛅 Theme Gallery		C:\Sample Files\Image Files\Robert.png	https://mod625253-my.sharepoint.	1 Files, 0 Folders,	Not applicable	
Gillery Gillery Allie Bellew		Files (Robert.phg		70.7 KB		

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-bystep guide to import them as a single file with versions.
- 8. Click **OK** button to proceed or click **Cancel** to discard the changes.

	Dockit Task Wizard - Sample1						
	of 10: Items to impor folders or files to import by click						
Delete?	Source Path	Destination Location	Contains	Folder Traversal Option			
×	D:\Sample Files\Account Files	https://alpine.vsslab.local/De	<u>60 Files, 3</u> 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						
Renamin Folder Rer	naming Rule : Folder Rule	✓ File Renam	ing Rule : File	Rule 🗸			
] Truncated folder names, max		-	names, max length 128			
Perfo	rm Incremental Migration						
 Documents modified or newly created, since last migration using Dockit (Last migration date: NONE) Documents modified or newly created, since last update in SharePoint Documents modified or newly created This Week 							
		<	<u>B</u> ack <u>N</u> e	ext > <u>F</u> inish	Cancel		

9. 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	Х
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.

10. 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.

11. 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.

12. 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'

13. 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	×
-	Der: Metadata Options adata file to update document properties in SharePoint.	
Metadata Fi	le:	
File Name:		S <u>a</u> mple
	Use batch file as metadata file	
Sheet Name:		✓ <u>V</u> iew <u>C</u> lear
Date format:	<use default=""> V Time format: <no time=""></no></use>	\sim
Metadata co	lumns in file:	
		Select All
		0 Metadata columns selected
	< <u>B</u> ack	Next > Einish Cancel

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, click here.

- 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	Wizard	×
-	Iber: Metadata Options etadata file to update document properties in SharePoint.	
Metadata Fi	File:	
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:	at: <use default=""> ~ Time format: <no time=""> ~</no></use>	
Metadata co	columns in file:	
	✓ Approver Comments ▲ ✓ column 1 Title ✓ single Multi Column ✓ Choice ✓ ✓ CustomerNo ✓ ✓ Look up ✓ ✓ Taxonomy ✓ ✓ Multi Taxonomu ✓ ✓ Keywords ✓ ✓ Approval Status ✓ ✓ Content Type ✓	ected
	< <u>B</u> ack <u>Next</u> > <u>F</u> inish	<u>C</u> ancel

Click Next to proceed.

Column Mapping

To perform column mapping

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

ockit Task Wizard				×
Step 2 of 7: Column Mapping Map metadata properties to the desired SharePoint columns.				
Column Mapping Templat	e: Blank	~	🛃 Save As 🐓	<u>R</u> eset
Source Column	Target Column		Default Value	
Name	Name	~		—
	/	~		~
Assign Content Type		pacify the cash	ent turne to be accidenced for d	acument (
Document Content Type:	fr p 'F	older. You can o roviding the do older Content	ent type to be assigned for d create a folder as document s cument set content type nam Type'. If left blank, default co e target SharePoint library wil	et by e under intent type
	<	Back N	ext > Finish	Cancel

- 2. **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 unique name for the template of Template by choosing exists te	or else Overwrite a existing
Template Name :	~
	Save Cancel

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

Map metadata properties to the appropriate SharePoint column a		narePoint columns. Customize the colu :hanges.	mn mappings by selecting the	a '
Column Mapping	Template:	Blank ~	Save As	f <u>R</u> eset
Source Column		Target Column	Default Value 🌖	
Name	~	Name	~	
Approver Comments	~	Approver Comments	~	
column 1	~	column1	~	
Title	~	Title	~	
single	~	single	~	_
Multi Column	~	Multi Column	~	_
Choice	~	Choice	~	_
CustomerNo	~	CustomerNo	~	_
Look up	~	Look up	~	

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 sour	rce and target locations in differen	nt AD domains? 🔵 Yes 💿 No		
Domain Mapping Template:	None	\checkmark * 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 💿 No		
User / group Mapping Template:	None	This mapping will be used for all person or group fields.		
		Manage Templates		
		< <u>Back N</u> ext > <u>Finish C</u> ancel		

2. Domain Mapping Template:

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 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 valid.

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 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 ×					
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?					
Domain Mapping Template: Sample 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? 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					

5. 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 V	Vizard ×				
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	on:				
O not overwrite folders					
Overwrite folders					
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 					
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				

- 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: If a folder with the same name already exists in the destination location:
○ Do not overwrite folders
O Overwrite folders
Create new folder in the name - Prepend <pre></pre>
* denotes incremental index
File Settings: If a file with the same name already exists in the destination location:
Do not overwrite
Create new file in the name - Prepend <pre></pre>
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>Back</u> <u>Next</u> > <u>Finish</u> <u>Cancel</u>

- 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:
Do not overwrite folders Overwrite folders
Create new folder in the name - Prepend <pre></pre>
File Settings:
O Do not overwrite
Overwrite Overwrite Create new file in the name - Prepend
Create new version * denotes incremental index
If the file is checked-out by either current user or other user Example 1 Example 2
Cverwrite current version
Check-in and create new version
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel

4. 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:

	ask Schedule Settings e for the import task and specify schedule ta	ask settings.			×
<u>T</u> ask Name:					
Category Name:	🔲 Blank		×		
Description:					
Task Option O Run later Run now O Schedule					
		< <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 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.

<u>T</u> ask Name:	Test task						
Category Name:	Blank				~		
Description:							
	Connect to Si	narePoint as:					
Task Option	Authentication	Windows			```	/	
ORun later	User Name:	vsslab \andrev	N		· · · · · · · · · · · · · · · · · · ·		
Schedule	Password:	•••••	•••••	•			
	- Schedule Se	ttings					
	Run <u>A</u> s:	vsslab \andrew					Set Password
	Schedule:	Daily	~	Start time:	7:02 PM	-	Advanced
	Schedule Tas	sk Daily					
	Every	1 🚖 day	(s)				

- 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. For Federated authentication (Web Single Sign-on) credential based import task, the Web Single Sign-on framework expects the username and password to be given by user interactively in a browser based login dialog, including scheduled tasks. Upon clicking Finish button, you will be prompted for the credentials (username and password).

https://vyapin.sharepoint.com		×
	Office 365	^
	Sign in with your work or school account	
	someone@example.com	
	Password	
	C 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 username and password in the respective textboxes and click **Sign in** button to proceed.

6. Click **Finish** button in the **Dockit Task Wizard** to create the task.

Pre-migration Validation

Pre-migration Validation tool helps you validate the exact steps performed by Dockit during the import process. This tool does not import 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 import task settings or any SharePoint settings to ensure correctness.

The **Pre-migration Validation** step in the Dockit Task Wizard appears as shown below:

Dockit Task Wizard - Sample Migration
Step 10 of 10: Pre-migration Validation This tool will help you identify the most common errors that may occur during the import and minimize such errors during a live migration.
Run the Pre-migration Validation tool to help you validate the document migration task. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there are any changes to the migration task settings or any SharePoint settings to ensure correctness. Note: The Pre-migration Validation tool does not import any actual documents to the destination location.
Start Validation
< <u>B</u> ack <u>N</u> ext > <u>Finish</u> <u>Cancel</u>

- 7. Click **Start Validation** button to invoke the Pre-migration Validation tool.
- 8. The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.

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

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

9. You will notice a task progress bar in a new window as shown below.

Sample Mi	gration - 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

10. Once the Pre-migration validation is complete, **View Results** button will be enabled (as shown below). Click **View Results** button to view the Pre-migration validation test results.

Dockit Task Wizard - Sample Migration
Step 10 of 10: Pre-migration Validation This tool will help you identify the most common errors that may occur during the import and minimize such errors during a live migration.
Run the Pre-migration Validation tool to help you validate the document migration task. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there are any changes to the migration task settings or any SharePoint settings to ensure correctness.
Note: The Pre-migration Validation tool does not import any actual documents to the destination location.
Click 'View Results' to view the Pre-migration validation results. Take corrective action as necessary and proceed with the import.
View <u>R</u> esults
Last Validation Run On: 2/7/2017 9:30:11 PM
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel

11. The **Task Validation Results** dialog will appear as shown below.

ask Name : Sa	mple 1	Li	ast Run On:2/7/20	17 6: 11:06 PM	Showing 1 -	50 of 64 🛛 🖛	← → →
Summary	Detailed View	Errors					
Source Path		Destination l	JRL	Item & Size	Remarks		Statu ^
D:\Sample Files\1		http://planet Lib/1	.vsslab.local/Dockit	1 Folder			 ✓
D:\Sample File	es\1\2	http://planet Lib/1/2	.vsslab.local/Dockit	1 Folder			~
D:\Sample File	es\1\2\Sample.txt	http://planet Lib/1/2/Samp	.vsslab.local/Dockit le.txt	1 File, 0 KB			~
D:\Sample File	es\1\2\3	http://planet Lib/1/2/3	.vsslab.local/Dockit	1 Folder			~
D:\Sample Files\1\2\3\Sa	mple.txt	http://planet Lib/1/2/3/San	.vsslab.local/Dockit nple.txt	1 File, 0 KB			~
D:\Sample File	es\1\2\3\4	http://planet Lib/1/2/3/4	vsslab.local/Dockit	1 Folder			~
D:\Sample Files\1\2\3\4\	Sample.txt	http://planet Lib/1/2/3/4/S	.vsslab.local/Dockit ample.txt	1 File, 0 KB			~
D:\Sample File	es\1\2\3\4\5	http://planet Lib/1/2/3/4/5	.vsslab.local/Dockit	1 Folder			~
D:\Sample File	es\2	http://planet Lib/2	.vsslab.local/Dockit	1 Folder			~
D:\Sample File	es\2\2.txt	http://planet Lib/2/2.txt	.vsslab.local/Dockit	1 File, 0 KB			~
D:\Sample File	es\2\3	http://planet Lib/2/3	.vsslab.local/Dockit	1 Folder			~
D:\Sample File	es\2\3\3.txt	http://planet Lib/2/3/3.txt	.vsslab.local/Dockit	1 File, 0 KB			~
D:\Sample File	es\2\3\4	http://planet Lib/2/3/4	.vsslab.local/Dockit	1 Folder			~
D:\Sample File	es\2\3\4\4.txt	http://planet Lib/2/3/4/4.t	.vsslab.local/Dockit kt	1 File, 0 KB			~
D:\Sample File	es\2\3\4\5	http://planet	vsslab.local/Dockit	1 Folder			~ ~
<							>

Refers the items that succeeded during pre-validation.

imes - Refers the items that failed the test during pre-validation.

Checks performed by Pre-migration Validation tool

Dockit performs the following checks during the Pre-migration validation process:

- source and target locations are accessible in the given user context
- file/folder names validity, including their length
- all specified columns in the application are available in the target library
- user columns, date columns, managed metadata columns, multi-choice columns etc. have proper syntax in the metadata file or any other source.
- all mandatory columns have values or default values
- given import condition syntax is correct by applying the query and validating the results
- checks all function builder functions to validate results
- given Permission Levels exist in the target site
- file extension is blocked in target web application (applicable only if the Dockit Server Agent installed in target SharePoint servers 2010, 2013 and 2016)

- duplicate columns in target list / library with same title (may be available from two different content types)
- given value is available in target location for the below column types
 - Look-up columns Checks for the reference lists, reference values
 - $_{\odot}$ $\,$ Managed Metadata Checks for the term that matches the given value
 - \circ $\:$ User / Group Check whether the user / group available in target location
 - o Choice Check whether the given value available under choice list

Limitations of Pre-migration Validation tool

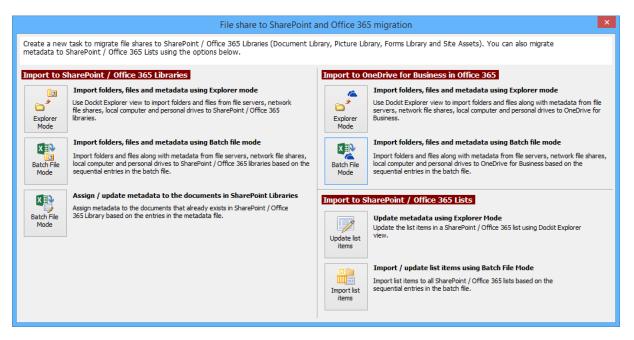
The Pre-migration validation check and the actual import results may vary in certain circumstances. The Pre-migration Validation Tool does not perform a few checks as the checks may either slowdown the validation process or a few errors will occur only when performing an actual live transfer. Please note the following additional information about the Pre-migration Validation tool:

- a) It is sufficient for the given user credential to have read permissions in the destination library for the Pre-migration validation tool to execute. The Pre-migration validation tool does not check for other permissions that may be required for the import task to run successfully.
- b) File level security permissions are not checked in the Pre-migration validation.
- c) The Pre-migration validation tool does not verify if the give user credentials can perform check-in / cancel check-out operations on an existing document.
- d) The final document status requested in the task settings is not verified in the Premigration validation process.
- e) Document import may fail due to automatic propagation of file properties during a live transfer to SharePoint and the Pre-migration validation does not have the ability to trap such related errors.
- f) When a particular folder location does not exist in the destination location and is expected to be created as a new folder using the batch descriptor line item entry, the Pre-migration validation tool may report any sub-folder under the new folder to be a non-existent folder location. You can safely ignore this error message.
- g) List validation rules are not checked in the Pre-migration validation as this SharePoint validation error message is reported only at the time of live import to SharePoint.

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 Import folders, files and metadata to OneDrive for Business option in Migrate content to OneDrive for Business dialog as shown below



- 2. Specify Batch File Options
- 3. Specify Metadata Options
- 4. Specify Column Mapping
- 5. Specify Mapping Templates
- 6. Specify File Settings
- 7. Specify Task Settings
- 8. Specify Pre-migration Validation
- 9. Click **Finish** button to create a task, or click **Back** button to change any task settings.

Batch file structure

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

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

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

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

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	Conten t Type	Manag er
M:\file1.as px	http://vyapin/projec t documents/folder1	Sample Test.doc	http://www.google.co m	Link to a docume nt	John Doe
M:\file1.as px	http://vyapin/projec t documents/folder1/s ub1	Microsoft Corporati on	http://www.microsoft. com	External URL	John Doe

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

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

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

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

Sample format of a CSV / TEXT batch file:

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

"Path","Destination Path","New Folder"

"C:\My Documents\Sample Brochure.doc", "http://sharepoint/libone1", "Folder1"

"C:\My Sales\Sample Sales Template.xlsx","http://sharepoint/libone2","FolderA/FolderAA/FolderAAA"

"C:\My Sales\Sample Product Demo.ppt", "http://sharepoint/libone3/folder", "Folder3"

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

"Path", "Destination Path", "New Folder", "Title", "Description"

"C:\My Documents\Sample Brochure.doc","http://sharepoint/libone1","Folder1","Test Document1", "To add custom columns"

"C:\My Sales\Sample Sales Template.xlsx", "http://sharepoint/libone2", "FolderA/FolderAA/FolderAAA", "Test Document2", "To add custom columns"

"C:\My Sales\Sample Product Demo.ppt", "http://sharepoint/libone3/folder", "Folder3", "Test Document2", "To add custom columns"

Alternatively, you can use separate CSV / XLSX file as metadata file. For more information about how to prepare metadata file, click <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.	"Windows 7"
	Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	

Lookun	Taxt or Number values can be given to	"Stock Datailas Accountas
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 ';'.	"Stock Details; Accounts; Product Details"
	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	Global Audience name, Security / Distribution Group name and SharePoint	"All site users; Admins; Viewers; Administrators;

(Multiple value) (Applicable only for a MOSS / Microsoft SharePoint Server 2010 and above library)	Group name can be given to this field. Global Audience and Security / Distribution Group should be crawled and stored in User Profile Store of SSP / Services. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the	SPUsers; Contributors; Designers
	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 /	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 for SharePoint" 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 ';'.	"Continent North America Country United States States Washington;Co ntinent North
	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 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 Sales\Sample Product Demo.ppt","09/09/1999","David Blake","Sales 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	×
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: Sample]
Sheet Name: View View	
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:	
Perform Incremental Migration / One-way Sync	
Occuments modified or newly created, since last migration using Dockit	
(Last migration date: NONE)	
\bigcirc Documents modified or newly created, since last update in <u>S</u> harePoint	
◯ 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 > <u>F</u> inish <u>C</u> ar	ncel

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.

- 2. Documents Modified or newly created, since last migration using Dockit
- 3. Documents Modified or newly created, since last migration in SharePoint
- 4. 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	×			
Specify bat	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 Files\prevalidation - Copy.xlsx Sample				
Sheet Name:	Sheet1 V <u>V</u> iew <u>C</u> lear				
Renaming I	Rules:				
Folder Renam	File Renaming Rule : File Rule Y runcated folder names, max length 128 Truncated file names, max length 128				
_	al Migration: 1 Incremental Migration / One-way Sync				
Docur	ments modified or newly created, since last migration using Dockit				
(Las	st migration date: NONE)				
🔘 Docur	ments modified or newly created, since last update in SharePoint				
🔘 Docur	ments modified or newly created This Week 🗸				
Folder Opti Do you w	on: ant to create the top-level folder(s) included for import?				
	< <u>B</u> ack <u>N</u> ext > 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	ard X
	Der: Metadata Options adata file to update document properties in SharePoint.
Metadata Fi	le:
File Name:	S <u>a</u> mple
	Use batch file as metadata file
Sheet Name:	∽ <u>V</u> iew <u>C</u> lear
Date format:	<use default=""> Time format: No Time ></use>
Metadata co	lumns in file:
	Select All 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		×
	Iber: Metadata Options etadata file to update document properties in SharePoint.	
Metadata Fi	File:	
File Name:	C:\Users\Public\Desktop\batch.XLSX Sample	2
Sheet Name:	:: sheet2 ~ <u>V</u> iew	<u>C</u> lear
Date format:	t: <use default=""> Time format:</use>	
Metadata co	columns in file:	
	 Approver Comments column 1 Title single Multi Column Choice CustomerNo Look up Taxonomy Multi Taxonomu Keywords Approval Status Content Type Y Select All 18 Metadata columns set 	elected
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish	Cancel

7. Click **Next** to proceed.

Column Mapping

To perform column mapping

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

ockit 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:	 folder. You ca providing the 'Folder Conter 	ontent type to be assigned for document / in 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

- 2. **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 enterin unique name for the template Template by choosing exists	
Template Name :	~
	Save Cancel

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

ckit Task Wizard					
Step Number: Column Mapping Map metadata properties to the desired SharePoint columns.					
Column Mapp	ing Template:	Blank	~	🛃 Save As	€ <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 Conte		folder. You can o providing the do 'Folder Content	ent type to be assigned create a folder as docu cument set content typ Type'. If left blank, def a target SharePoint libra	ment set by be name under ault content type
			< <u>B</u> ack N	ext > <u>F</u> inish	<u>C</u> ancel

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 sour	rce and target locations in differe	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	to 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.
		<u>M</u> anage 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 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 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 valid.

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 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		
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 * This mapping will be used for all person or group fields.	
User Mapping: Do you want to map users who a	are no longer in the organization to different set of users in target SharePoint? Yes No	
User / group Mapping Template:	User Sample 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	

5. 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:

Docki	t 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 destinat	ion location:		
Do not overwrite folders			
○ 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 ot	her 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 folder name and imports the newly created folder. Note: * is the reserved character and denotes incremental index.

Dockit Task Wizard	x		
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 Do not overwrite folders			
Overwrite folders Overwrite folder in the name - Prepend <-Folder Name > Appendnew * denotes incremental index			
File Settings: If a file with the same name already exists in the destination location:			
 Do 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>Finish</u> <u>Cancel</u>			

- 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:		
O not overwrite folders		
O Overwrite folders		
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:		
O Do not overwrite		
Overwrite		
Create new file in the name - Prepend <pre></pre>		
 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>Cancel</u>		

4. 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:

	ask Schedule Settings e for the import task and specify schedule ta	ask settings.			×
<u>T</u> ask Name:					
Category Name:	🔲 Blank		×		
Description:					
Task Option O Run later 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.

- 1.0								
<u>T</u> ask Name:	Test task							
Category Name:	Blank					~		
Description:								
	Connect to 9	ShareP	oint as:					
Task Option	Authenticatio	n: V	/indows				\sim	
O Run later	User Name:	V	sslab \andrew				~	
 Schedule 	Password:	•	•••••	•••••	•			
	Schedule S	etting	;					
	Run <u>A</u> s:	vsslab\	andrew					Set Password
	Schedule:	Daily		~	Start time:	7:02 PM		<u>A</u> dvanced
	Schedule T	ask Daily	/					
	Every	1	🚖 day(s)					
			day(s)					

- 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. For Federated authentication (Web Single Sign-on) credential based import task, the Web Single Sign-on framework expects the username and password to be given by user interactively in a browser based login dialog, including scheduled tasks. Upon clicking Finish button, you will be prompted for the credentials (username and password).

https://vyapin.sharepoint.com		×
	Office 365	^
	Sign in with your work or school account	
	someone@example.com	
	Password	
	C 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 username and password in the respective textboxes and click **Sign in** button to proceed.

6. Click **Finish** button in the **Dockit Task Wizard** to create the task.

Pre-migration Validation

Pre-migration Validation tool helps you validate the exact steps performed by Dockit during the import process. This tool does not import 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 import task settings or any SharePoint settings to ensure correctness.

The **Pre-migration Validation** step in the Dockit Task Wizard appears as shown below:

Dockit Task Wizard - Sample Migration						
Step 10 of 10: Pre-migration Validation This tool will help you identify the most common errors that may occur during the import and minimize such errors during a live migration.						
Run the Pre-migration Validation tool to help you validate the document migration task. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there are any changes to the migration task settings or any SharePoint settings to ensure correctness. Note: The Pre-migration Validation tool does not import any actual documents to the destination location.						
Start Validation						
< <u>B</u> ack №ext > <u>F</u> inish <u>C</u> ancel						

- 1. Click **Start Validation** button to invoke the Pre-migration Validation tool.
- 2. The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.

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

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		×
	Office 365	î
	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	~
<		> ~

3. You will notice a task progress bar in a new window as shown below.

Building Information - DocKIT Task Status		×
Preparing contents	Validating data	
Start 100%	0%	End
Status	Connecting to SharePoint	
Items to process	2 files, 1 folders, 0.0 KB	
Items Ignored	0 files, 0 folders, 0.0 KB	
Errors	0 files, 0 folders, 0.0 KB	
Items Processed	0 files, 0 folders, 0.0 KB	
Remaining	2 files, 1 folders, 0.0 KB	
Start Time	Wednesday, March 16, 2016 6:13:50 PM	
		<u>E</u> nd Task

4. Once the Pre-migration validation is complete, **View Results** button will be enabled (as shown below). Click **View Results** button to view the Pre-migration validation test results.

Dockit Task Wizard - Sample Migration
Step 10 of 10: Pre-migration Validation This tool will help you identify the most common errors that may occur during the import and minimize such errors during a live migration.
Run the Pre-migration Validation tool to help you validate the document migration task. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there are any changes to the migration task settings or any SharePoint settings to ensure correctness.
Note: The Pre-migration Validation tool does not import any actual documents to the destination location.
Start Validation
Click 'View Results' to view the Pre-migration validation results. Take corrective action as necessary and proceed with the import.
View <u>R</u> esults
Last Validation Run On: 2/7/2017 9:30:11 PM
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel

5. The **Task Validation Results** dialog will appear as shown below.

ask Name : Sa	mple 1	Li	ast Run On:2/7/20	17 6: 11:06 PM	Showing 1 -	50 of 64 🛛 🖛	← → →
Summary	Detailed View	Errors					
Source Path		Destination l	JRL	Item & Size	Remarks		Statu ^
D:\Sample File	s/1	http://planet Lib/1	.vsslab.local/Dockit	1 Folder			 ✓
D:\Sample File	es\1\2	http://planet Lib/1/2	.vsslab.local/Dockit	1 Folder			~
D:\Sample File	es\1\2\Sample.txt	http://planet Lib/1/2/Samp	.vsslab.local/Dockit le.txt	1 File, 0 KB			~
D:\Sample File	es\1\2\3	http://planet Lib/1/2/3	.vsslab.local/Dockit	1 Folder			~
D:\Sample Files\1\2\3\Sa	mple.txt	http://planet Lib/1/2/3/San	.vsslab.local/Dockit nple.txt	1 File, 0 KB			~
D:\Sample File	es\1\2\3\4	http://planet Lib/1/2/3/4	vsslab.local/Dockit	1 Folder			~
D:\Sample Files\1\2\3\4\	Sample.txt	http://planet Lib/1/2/3/4/S	.vsslab.local/Dockit ample.txt	1 File, 0 KB			~
D:\Sample File	es\1\2\3\4\5	http://planet Lib/1/2/3/4/5	.vsslab.local/Dockit	1 Folder			~
D:\Sample File	es\2	http://planet Lib/2	.vsslab.local/Dockit	1 Folder			~
D:\Sample File	es\2\2.txt	http://planet Lib/2/2.txt	.vsslab.local/Dockit	1 File, 0 KB			~
D:\Sample File	es\2\3	http://planet Lib/2/3	.vsslab.local/Dockit	1 Folder			~
D:\Sample File	es\2\3\3.txt	http://planet Lib/2/3/3.txt	.vsslab.local/Dockit	1 File, 0 KB			~
D:\Sample Files\2\3\4		http://planet Lib/2/3/4	.vsslab.local/Dockit	1 Folder			~
D:\Sample File	es\2\3\4\4.txt	http://planet Lib/2/3/4/4.t	.vsslab.local/Dockit kt	1 File, 0 KB			~
D:\Sample File	es\2\3\4\5	http://planet	vsslab.local/Dockit	1 Folder			
<							>

Refers the items that succeeded during pre-validation.

imes - Refers the items that failed the test during pre-validation.

Checks performed by Pre-migration Validation tool

Dockit performs the following checks during the Pre-migration validation process:

- source and target locations are accessible in the given user context
- file/folder names validity, including their length
- all specified columns in the application are available in the target library
- user columns, date columns, managed metadata columns, multi-choice columns etc. have proper syntax in the metadata file or any other source.
- all mandatory columns have values or default values
- given import condition syntax is correct by applying the query and validating the results
- checks all function builder functions to validate results
- given Permission Levels exist in the target site
- file extension is blocked in target web application (applicable only if the Dockit Server Agent installed in target SharePoint servers 2010, 2013, and 2016)

- duplicate columns in target list / library with same title (may be available from two different content types)
- given value is available in target location for the below column types
 - Look-up columns Checks for the reference lists, reference values
 - $_{\odot}$ $\,$ Managed Metadata Checks for the term that matches the given value
 - \circ $\:$ User / Group Check whether the user / group available in target location
 - \circ Choice Check whether the given value available under choice list

Limitations of Pre-migration Validation tool

The Pre-migration validation check and the actual import results may vary in certain circumstances. The Pre-migration Validation Tool does not perform a few checks as the checks may either slowdown the validation process or a few errors will occur only when performing an actual live transfer. Please note the following additional information about the Pre-migration Validation tool:

- a) It is sufficient for the given user credential to have read permissions in the destination library for the Pre-migration validation tool to execute. The Pre-migration validation tool does not check for other permissions that may be required for the import task to run successfully.
- b) File level security permissions are not checked in the Pre-migration validation.
- c) The Pre-migration validation tool does not verify if the give user credentials can perform check-in / cancel check-out operations on an existing document.
- d) The final document status requested in the task settings is not verified in the Premigration validation process.
- e) Document import may fail due to automatic propagation of file properties during a live transfer to SharePoint and the Pre-migration validation does not have the ability to trap such related errors.
- f) When a particular folder location does not exist in the destination location and is expected to be created as a new folder using the batch descriptor line item entry, the Pre-migration validation tool may report any sub-folder under the new folder to be a non-existent folder location. You can safely ignore this error message.
- g) List validation rules are not checked in the Pre-migration validation as this SharePoint validation error message is reported only at the time of live import to SharePoint.

Migrate Site & Lists using Explorer mode

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

Migrate Sites & Lists using Batch file mode

Batch File Options Site / List elements to migrate External Metadata File Mapping Templates Migration Conditions Task Settings 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 Home menu of Dockit main screen.

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

Create a new task to migrate content across SharePoint versions. Migrate SharePoint 2003 / 2007 / 2010 / 2013 / 2016 content to SharePoint 2013 / 2016 & Office 365. Migrate SharePoint content to SharePoint / Office 365 Migrate Sites & Lists using Explorer Mode Use Dockit Explorer view to migrate sites and lists to SharePoint / Office 365.		SharePoint migration	x
Migrate Sites & Lists using Explorer Mode Use Dockit Explorer view to migrate sites and lists to SharePoint / Office 365. Explorer			
Use Dockit Explorer view to migrate sites and lists to SharePoint / Office 365. Explorer	Migrate Sh		
Migrate Sites & Lists using Batch File Mode Use batch file mode to migrate sites and lists to SharePoint / Office 365. Mode			

- 2. Specify SharePoint Location
- 3. Add Items to migrate
- 4. Specify Site / List elements to migrate
- 5. Specify <u>Mapping Templates</u>
- 6. Specify Task Settings
- 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]	? ×
	SharePoint location Point URL of source and target locations to migrate contents	ē 🤿
Source Locatio	on:	
Source Site URL:		
<u>Authentication:</u>	Windows ¥	
User Name:	vsslab\farmadmin_sp10-1	
	(johndoe@contoso.com, contoso\johndoe, johndoe)	
Password:	•••••	
Destination Lo Target Site URL: <u>A</u> uthentication:		
<u>U</u> ser Name:	voyager\farmadmin_sp13-1 v (johndoe@contoso.com, contoso\johndoe, johndoe)	
Password:		
-		
	< <u>B</u> ack <u>N</u> ext > Einish	<u>C</u> ancel

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]	? ×
-	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	
<u>U</u> ser Name:	vsslab\farmadmin_sp10-1 V	
	(johndoe@contoso.com, contoso\johndoe, johndoe)	
Password:	•••••	
Destination Lo	ocation:	
Target Site URL:	https://mod799074-my.sharepoint.com/	
<u>Authentication:</u>	Federated Identity V	
User Name:	voyager\farmadmin_sp13-1 V	
	(johndoe@contoso.com, contoso\johndoe, johndoe)	
Password:	••••••	
	< Back Next > 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 - [Exp	olorer Mode]			? ×
Step 2 of 5: Items to migrate Select sites, libraries and lists to migrate					، دا دا
<u>Click here</u> to select items to m	igrate				
		< <u>B</u> ack	<u>N</u> ext >	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:

	Dockit Exp	lorer	×
Select sites, libraries, lists and/or list items to migrate. Select t Press F5 to refresh respective view.	arget location and click Migrate b	utton to add contents. Click Remove button to remove selected items from m	igration.
Source: https://mars.vsslab.local	2	Target: http://venus.vsslab.local	2
Explorer View Items View		Explorer View	
 Grant Mars Grant Mars		Pluto P	~
		and the second s	a All
Source URL	Target URL	Contains	Ť
			+
			+
			*
		QK	ancel

4. **a. Select content to migrate** dialog contains a tree-view, which provides explorer like view to select a site, list or folder. This option will helps if you are interesting in migrating whole site / list.

		Dockit E	Explorer				×
	sites, libraries, lists and/or list items to migrate. Select to 5 to refresh respective view.	arget location and click Migrat	e button to ad	d contents. C	lick Remove button to remove	e selected items from migratio	on.
Source	e: https://mars.vsslab.local	2	Target:	http://ven	us.vsslab.local		2
Explore	er View Items View [34]		Explorer	View			
	Image: mail 123 Image: 2013ApprovalWorkflow Tasks Image: 2013Approval Documents Image: 2013Approval Documents <tr< th=""><th></th><th></th><th> Annound appdata Cache P Cache P Check in Check-in Check-in Check-in CL CL CL CL CL CL Content Content Content Content Content Content Content Content Content </th><th>rofiles r 2013 1 Comments 1 Comments 10 comments 10 ed Looks and Structure Reports Organizer Rules type publishing error log type service application error Character Library ed Forms</th><th>r log</th><th>~</th></tr<>			 Annound appdata Cache P Cache P Check in Check-in Check-in Check-in CL CL CL CL CL CL Content Content Content Content Content Content Content Content Content 	rofiles r 2013 1 Comments 1 Comments 10 comments 10 ed Looks and Structure Reports Organizer Rules type publishing error log type service application error Character Library ed Forms	r log	~
						🕜 Remove All	
	Source URL	Target URL			Contains		Ŧ
×	https://mars.vsslab.local/ab	http://venus.vsslab.local			<u>1 list, 75 items</u>		+
×	https://mars.vsslab.local/Lists/Audit	http://venus.vsslab.local			<u>1 list, 6 items</u>		+ +
						<u>O</u> K <u>C</u> ancel	

b. The Items View tab will display the items/documents and their default column values that exist directly under the selected node (not any of the sub-folders and its items under the selected node). The Items View tab is only available when a list, document library, or folder node is selected in the Explorer View tab.

		Dockit E	Explorer	×
Select sites, libraries, lists and/or list items to Press F5 to refresh respective view.	migrate. Select target locatio	n and click Migrate	te button to add contents. Click Remove button to remove selected items from migration.	
Source: https://mars.vsslab.local		2	Target: http://venus.vsslab.local	
Explorer View Items View [34]			Explorer View Items View	
Search in Name 4 Item(s)		S	Announcements	
Name ID	,	Created	Calendar Calendar	
<pre>test1.docx 6 Retry image.png 1 delete.xlsx 4 Audit Checked-Out Ite 3</pre>	portsiteapppool System Account	7/12/201 1/30/201 3/22/201 3/22/201	Greckin 2013 Greckin Comments Greckin Comments Greckin Comments 10 Greckin Comments 10 Greckin Composed Looks Greckin Composed Looks Greckin Composed Looks Greckin Content and Structure Reports Greckin Content type service application error log Greckin Content type service application error log	
Source URL	Target URI		Contains	Ē
× https://mars.vsslab.local/ab		is.vsslab.local	1 list, 75 items	
https://mars.vsslab.local/Lists/Audit	http://venu	ıs.vsslab.local	<u>1 list, 6 items</u>	- 1
https://mars.vsslab.local/341/Retry in	mage.png http://venu	ıs.vsslab.local/DC	Lib	
https://mars.vsslab.local/341/Audit C Items-20170322-172011.xlsx	hecked-Out http://venu	ıs.vsslab.local/DC	C Lib	
			<u>Q</u> K <u>C</u> ancel	

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.

	Dockit Explo	rer	×		
Select sites, libraries, lists and/or list items to migrate. Select target location and click Migrate button to add contents. Click Remove button to remove selected items from migration. Press F5 to refresh respective view.					
Source: https://mars.vsslab.local	2	Farget: http://venus.vsslab.local	2		
Explorer View Items View [34]	f	Explorer View Items View			
mars 123 12		Announcements appdata appdat Cache Profiles dedia 2013 Gete Arin Comments Composed Looks Gis Content and Structure Reports Content Organizer Rules Content type publishing error log Gontent type service application error log Gontent type service application error log Gis Control Character Library Gis Converted Forms Gis Contents De Lib DC Lib07	~		
		<i>.</i>	Remove All		
Source URL	Target URL	Contains	<u>^</u>		
https://mars.vsslab.local/ab	http://venus.vsslab.local	<u>1 list, 75 items</u>	Ť		
https://mars.vsslab.local/Lists/Audit http://venus.vsslab.local		<u>1 list, 6 items</u>	 ↓ ↓ 		
https://mars.vsslab.local/341/Retry image.png	y image.png http://venus.vsslab.local/DC Lib				
https://mars.vsslab.local/341/Audit Checked-Out Items-20170322-172011.xlsx	http://venus.vsslab.local/DC Lib		~		
		QK	<u>C</u> ancel		

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 Lists Source: https://stone.voyager.local/dms/Lists/Sample	Metadata File: None
Source: https://stone.voyager.local/dins/Lists/Sample X 1 list, 1 items Target: https://stone.voyager.local/Blank Traversal Y Filters	Filter: Off
Folders	
Source: https://stone.voyager.local/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 <u>Site Migration Options</u>

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.



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 \mathbf{OK} button to proceed or click \mathbf{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					
Site Bements			· · · · ·			
Master Pages (SP 2007 a	and above)	Content Types				
Home Page as in source	site (SP 2010 and above)	🗌 Root level web pages				
Themes (SP 2007 and all	bove)	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	Inclusion / Exclusion List					
List Elements		 C	Select All			
Associate Web Parts		Root level web pages (1)				
List Views	Indusion / Exclusion List	Maintain same Document ID as in source				
List Permissions [2]		Quick Launch links as in source (SP 2010 and above	e)			
Columns	Inclusion / Exclusion List	☐ Workflows				
Content Types		Workflow history				
Maintain same List Item	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 > Einish	Cancel			

 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	e site (SP 2010 and above)				
Themes (SP 2007 and a	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 Sha	arePoint	2007	' and	abo	ove.		

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

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 Templ Select the mapping templates to use	lates for the task and specify the appropriate options.	i
Column Mapping:		
Do you want to map source and target	: SharePoint columns? 💿 Yes 🔿 No	
Column Mapping Template : Dod	kit Default 🗸 🛄 Map columns using: 💿 Display name 🔿 Internal name	2
User Mapping:		
Map users who are no longer in t	the source SharePoint server to the user performing migration in target SharePoint server	
O Map users who are no longer in t	the source SharePoint server to this user account in target SharePoint	0
O Map users who are no longer in t	the source SharePoint server to different set of user accounts in target SharePoint server as per t	the mapping
User Map 🗸 🗸		
Domain Mapping:		
Are the users/groups in the source and	l target locations in different AD domains? 🔿 Yes 💿 No	
Domain Mapping Template : Non	ie v	
Site and List Mapping:		
Do you want to replace / map unavailab	ble site and list template in source to new template in target? 🔿 Yes 💿 No	
Site and List Mapping Template : Non	e v * Dockit Server Agent is required in the source server	
Permission Mapping:		
Do you want to replace / map unavaila	ble permission in source to different permission in target? \bigcirc Yes \odot No	
Permission Mapping Template : Non	ne 🗸	
	Manage Ter	nplates
	< <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 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 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 Tel Select the mapping templates to	mplates o use for the task and specify the appropriate options.	3
Column Mapping:		
Do you want to map source and ta	arget SharePoint columns?	
Column Mapping Template :	Dockit Default Map columns using: Display name Internal name	
User Mapping:		
O Map users who are no longe	r in the source SharePoint server to the user performing migration in target SharePoint server	
O Map users who are no longe	er in the source SharePoint server to this user account in target SharePoint	0
Map users who are no longe	er in the source SharePoint server to different set of user accounts in target SharePoint server as per the mapp	ing
User Map	✓ …	
Domain Mapping:		
	e and target locations in different AD domains? 🔿 Yes 💿 No	
Domain Mapping Template :	None V	
Site and List Mapping:	INFINE IN INFINITION	
	vailable site and list template in source to new template in target? O Yes 💿 No	
Site and List Mapping Template :	None	
Permission Mapping:		
	vailable permission in source to different permission in target? 🔘 Yes 💿 No	
Permission Mapping Template :	None 🗸	
	Manage 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: T Enter a unique r	ask Settings name for the migration task and specify schedule task settings.	• •
<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	O 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 day(s)	
	At 2:44 PM every day, starting 1/28/2017	
	< <u>B</u> ack <u>N</u> ext > <u>Finish</u>	<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.
- Use federated authentication (Web SSO) for the SharePoint site- This option is e. 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. For **Federated authentication (Web Single Sign-on)** credential based migration task, the **Web Single Sign-on** framework expects the username and password to be given by user interactively in browser based login dialog, including schedule tasks. The task settings for **Run later** or **Run now** task option will appear as shown below:

	Dockit Task Wizard - [Explorer Mode]	? ×		
Step 5 of 5: T Enter a unique n	T ask Settings name for the migration task and specify schedule task settings.	63 🦡 63		
<u>T</u> ask Name:				
<u>C</u> ategory	🗋 Blank 🗸 🗸			
Description:				
Task Option	Connect to source SharePoint server as			
O Run later	This user: vsslab \farmadmin_sp10-1 ✓ <u>Manage Profile</u>			
Run now	O 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 aday(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		

Upon clicking **Finish**, you will be prompted for credentials (username and password).

Web Single Sign-on Login Dialog ×			
Provide user credentials to connect to SharePoint.			
URL: https://mod623653.sharepoint	com/sites/acttest	Connect	
	Office 365 Work or school, or personal Microsoft account	^	
Connect July Vert	john@microsoft.com]	
A COSA Midua	Password		
	☐ Keep me signed in	- 1	
	Sign in Back Can't access your account?	- 1	
	© 2016 Microsoft	~	

Provide username and password in the respective textboxes and click **Sign in** button to proceed.

6. 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 ame for the migration task and specify schedule task settings.	•
Task Name: Category Description: Task Option O Run later O Run now Schedule	Testing Schedule Blank Onnect to source SharePoint server as This user: vslab\farmadmin_sp10-1 Use 'Run As' user context given below Connect to destination SharePoint server 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 V Start time: 2:44:08 PM 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

7. Click **Finish** button to create the 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 Home menu of Dockit main screen.

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

	SharePoint migration	x
	task to migrate content across SharePoint versions. Migrate SharePoint 2003 / 2013 / 2016 content to SharePoint 2013 / 2016 & Office 365.	
Migrate Sh	arePoint content to SharePoint / Office 365	
Explorer Mode	Migrate Sites & Lists using Explorer Mode Use Dockit Explorer view to migrate sites and lists to SharePoint / Office 365.	
Batch file Mode	Migrate Sites & Lists using Batch File Mode Use batch file mode to migrate sites and lists to SharePoint / Office 365.	

- 2. Specify Batch Descriptor File
- 3. Specify Site / List Elements to migrate
- 4. Specify External Reference File
- 5. Specify <u>Mapping Templates</u>
- 6. Specify Migration Conditions
- 7. Specify <u>Task Settings</u>
- 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, libr to another SharePoint location.	aries and their contents with its associated metadata	ب دقا دق
File Name:		Sample
Sheet Name:	✓ View Clear	
Site Migration Option		
🔘 Create as sub-site / replace sub-site in target site 🧃	1	
💿 Merge sites 🌐		
If list / library already exists in the target location:		
Overwrite list / library		
Retain list / library and merge content only		
O 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 ex 	sting 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?) Yes 🔘 No	
	< <u>B</u> ack <u>N</u> ext > Einis	<u>C</u> ancel

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 $_4$.

- **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.

Select anyone of the list migration options given below to specify the cotents 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 itms / 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.

Specify bai	6: Batch descriptor file tch descriptor file to use in order to migrate sites, lists, libra SharePoint location.	ries and their contents with its associated me	tadata
File Name:	C:\Sample.xlsx		
			Sam
Sheet Name:	Sheet1	✓ <u>V</u> iew	Clear 1 row(s)
Site Migrati	on Ontion		
_	e as sub-site / replace sub-site in target site		
 Merge 			
	/ 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)		
🔘 Repla	ce site in target location 🏾 🍈		
List Migratio	on Option		
Repla	ce list in target location		
Merge	e lists		
lf list	items / documents already exist in the target location:		
(Overwrite list item / document		
(Add source list item / document as new version(s) to exis 	ting 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?	Yes 💿 No	

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 ab	ove)	
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				
		< <u>B</u> ack <u>N</u> ext > Einish	<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)					
There (CD 2007 and all sure)					
 Themes (SP 2007 and a 	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 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, libraries and their content.Note: Dockit Server Agent is required in the target SharePoint server to migrate user alerts for on-premise.		
Site Permissions:	To migrate site permissions. Note: Dockit Server Agent is required in the <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 Bements	
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 - [Batch Mode]				
Step 3 of 6: External Metadata File Specify an external metadata file to use to update list item metadata in the destination SharePoint list / library.				
File Name:	lame:			
Sheet Name:	Use batch file as external metadata file V View Clear			
Date and Time	format: Use default> 			
	< <u>B</u> ack <u>N</u> ext > Einish	<u>C</u> ancel		

2. **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 - [Batch Mode] ?			
Step 3 of 6: External Metadata File Specify an external metadata file to use to update list item metadata in the destination SharePoint list / library.				
File Name: D:\Sample Files\ItemsToMigrate.csv				
	✓ Use batch file as external metadata file			
Sheet Name:	✓ … <u>Vi</u> ew <u>Q</u> lear	4 row(s)		
Date and Time	e format: Use default> 			
	< <u>Back</u> <u>N</u> ext > Einish	<u>C</u> ancel		

5. Click **Next** to proceed.

Mapping Templates

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

	Dockit Task Wizard - SharePoint Migration [2]	? ×
Step 4 of 5: Mapping To Select the mapping templates	emplates to use for the task and specify the appropriate options.	د ج ا
Column Mapping:		
Do you want to map source and	target SharePoint columns?	
Column Mapping Template :	Dockit Default V Map columns using: Display name Inter	rnal name
User Mapping:		
Map users who are no long	ger in the source SharePoint server to the user performing migration in target SharePoint server	r
Man users who are no long	ger in the source SharePoint server to this user account in target SharePoint	
Map users who are no long	ger in the source SharePoint server to different set of user accounts in target SharePoint server	r as per the mapp
User Map	✓	
Domain Mapping:		
Are the users/groups in the sour	ce and target locations in different AD domains? 🔵 Yes 💿 No	
Domain Mapping Template :	None Vertication	
Domain Mapping Template : 5ite and List Mapping:	None V	
Domain Mapping Template :		
Domain Mapping Template : 5ite and List Mapping: Do you want to replace / map un	None V navailable site and list template in source to new template in target? Yes No	ver
Domain Mapping Template : 5ite and List Mapping: Do you want to replace / map un Site and List Mapping Template :	None V navailable site and list template in source to new template in target? Yes No	ver
Domain Mapping Template : Site and List Mapping: Do you want to replace / map un Site and List Mapping Template : Permission Mapping:	None V navailable site and list template in source to new template in target? Yes No	ver
Domain Mapping Template : Site and List Mapping: Do you want to replace / map un Site and List Mapping Template : Permission Mapping: Do you want to replace / map un	None ✓ navailable site and list template in source to new template in target? O Yes Image: None None ✓ * Dockit Server Agent is required in the source server	ver
Domain Mapping Template : Site and List Mapping: Do you want to replace / map un Site and List Mapping Template : Permission Mapping:	None navailable site and list template in source to new template in target? Yes None * Dockit Server Agent is required in the source ser navailable permission in source to different permission in target? Yes None	ver mage Templates

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 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 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 Tel Select the mapping templates to	mplates o use for the task and specify the appropriate options.	3
Column Mapping:		
Do you want to map source and ta	arget SharePoint columns?	
Column Mapping Template :	Dockit Default Map columns using: Display name Internal name	
User Mapping:		
O Map users who are no longe	r in the source SharePoint server to the user performing migration in target SharePoint server	
O Map users who are no longe	er in the source SharePoint server to this user account in target SharePoint	0
Map users who are no longe	er in the source SharePoint server to different set of user accounts in target SharePoint server as per the mapp	ing
User Map	✓ …	
Domain Mapping:		
	e and target locations in different AD domains? 🔿 Yes 💿 No	
Domain Mapping Template :	None V	
Site and List Mapping:	INFINE IN INFINITION	
	vailable site and list template in source to new template in target? O Yes 💿 No	
Site and List Mapping Template :	None	
Permission Mapping:		
	vailable permission in source to different permission in target? 🔘 Yes 💿 No	
Permission Mapping Template :	None 🗸	
	Manage Templates	
	< <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: Migr Specify conditions for	ration Filters or webs, lists, folders, items to migrate from SharePoint	، دا دا
● BASIC ○	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 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 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	• 🖶	
Clear				OK <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: Migration Filters Specify conditions for webs, lists, folders, items to migrate from SharePoint				
BASIC O ADVANCED				
<u>W</u> eb Level		\$\lambda \left\$		
<u>L</u> ist Level		~ ~		
<u>F</u> older Level	<pre></pre> </td <td>×</td>	×		
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 must be satisfied before migrating item from source SharePoint. For example, you can migrate folder only when [Created By' = 'john doe'].				
Field Name	Modified Date (SharePoint) 🗸 🔽		
<u>O</u> perator	= ~			
<u>V</u> alue	1/28/2017			
	' <u>A</u> ND' to Filter	'O <u>R</u> ' to Filter		
Conditions:				
	= 'Conference Information' ne] = 'Root Folder'			
Migrate List Items if above condition is satisfied not satisfied 				
		<u>O</u> K <u>C</u> ancel		

click (...)button to add the SharePoint columns in Filed Name edropdown. The Add Fileds Dialog appears as shown below:

Add Fields Dialog					
Name:					
Type:	Text			~	
			<u>A</u> dd	<u>R</u> emove	
Column N	ame	(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.

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: Migration Filters Specify conditions for webs, lists, folders, items to migrate from SharePoint						
O BASIC	ADVANCED					
<u>W</u> eb Level						
List 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 r	Fask Settings name for the migration task and specify schedule task settings.	•
<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	O Prompt me for user context at task run time	
◯ Schedule	Connect to destination SharePoint server	
	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 aday(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.
- Use federated authentication (Web SSO) for the SharePoint site- This option is e. 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 Cloud Identity (Office 365 Online User e.g., both Credential johndoe@vyapin.onmicrosoft.com) and Federated Identity (configured via ADFS e.g., johndoe@vyapin.com).
- 5. For **Federated authentication (Web Single Sign-on)** credential based migration task, the **Web Single Sign-on** framework expects the username and password to be given by user interactively in browser based login dialog, including schedule tasks. The task settings for **Run later** or **Run now** task option will appear as shown below:

	Dockit Task Wizard - [Explorer Mode]	? ×
Step 5 of 5: T Enter a unique n	Fask Settings name for the migration task and specify schedule task settings.	م دغا دغا
Task Name:		
<u>C</u> ategory	🗆 Blank 👻	
Description:		
Task Option	Connect to source SharePoint server as	
O Run later	O This user: vsslab \farmadmin_sp10-1 ✓ <u>M</u> anage Profile	
Run now	○ Prompt me for user context at task run time	
○ Schedule	Connect to destination SharePoint server	
	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 day(s)	
	At 2:44 PM every day, starting 1/28/2017	
	< <u>Back</u> Next > Einish	<u>C</u> ancel

Upon clicking **Finish**, you will be prompted for credentials (username and password).

	Web Single Sign-on Login Dialog	×
Provide user credentials to connect	o SharePoint.	
URL: https://mod623653.sharepoint	com/sites/acttest	Connect
	Office 365 Work or school, or personal Microsoft account	^
Connect July Vert	john@microsoft.com]
A COSA Midua	Password	
	☐ Keep me signed in	- 1
	Sign in Back Can't access your account?	- 1
	© 2016 Microsoft	~

Provide username and password in the respective textboxes and click **Sign in** button to proceed.

6. 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.	به دا دا
<u>T</u> ask Name: <u>C</u> ategory Description: Task Option	Testing Schedule Blank Image: mail of the server as	
Run later Run now Schedule	Orhiect to source sharePoint server as Image Profile Ise 'Run As' user context given below Connect to destination SharePoint server Image Using federated authentication (Web SSO). Check session status in <u>Web SSO Dashboard</u>	
	Schedule Settings Run As: VSSLAB\adminuser1 Schedule: Daily Schedule: Daily Schedule Task Daily Every 1 Schedule	
	At 2:44 PM every day, starting 1/28/2017 < Back	Cancel

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

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. Import folders, files and metadata to SharePoint Libraries (Explorer Mode) Option:

Follow the steps in the <u>Import folders, files and metadata to SharePoint Libraries (Explorer Mode)</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\version2, C:\My Documents\Sales Proposals\version3 etc. You can add the folders version1, version2, version3 etc. to the destination location in this intended order or use the navigation buttons to the right of the grid to order them. Dockit will automatically process the added folders / files in the order in which it appears in the grid. Select **Create new version** option in the File Settings wizard step to handle file versions correctly.

2. Import folders, files and metadata to SharePoint Libraries (Batch File Mode) Option:

Follow the steps in <u>Import folders</u>, files and metadata to <u>SharePoint Libraries</u> (<u>Batch File Mode</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\version2, C:\My Documents\Sales Proposals\version3 etc. You can create a batch descriptor file as follows to import the file versions correctly:

"Path","Destination		Path"
"C:\My	Documents\Sales	Proposals\version1","http://sharepoint/DocLib"
"C:∖My	Documents\Sales	Proposals\version2","http://sharepoint/DocLib"
"C:\My Documents	\Sales Proposals\version3","http	o://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	*_v?	{empty}	As we left the replace textbox with an empty
Sample_v2.txt			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 "F:\Document	Path" Store\Sample_v1.txt","http://sharepoint.vyapin.demo/sites/migration/Shared
Documents" "F:\Document Documents"	Store\Sample_v2.txt","http://sharepoint.vyapin.demo/sites/migration/Shared
"F:\Document Documents"	Store\Sample_v3.txt","http://sharepoint.vyapin.demo/sites/migration/Shared

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):

		Dockit Template Manager		×
		Create reusable templates for migration	n tasks.	
File Share Migration	SharePoint Migration			
Column Mapping	3	Template Name: Sample		
User / Group Ma	pping	Rules		
Domain Mapping	9	Find	Replace	
Permission Mapp	bing	0	-	-
A B Replace Illegal Cł	-			+
				*
				T
				+
				Ŧ

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.

lect folders and files to import destinatio		- Colden la coltana and state Add bu	then be additioned Click Demons by	the state of the second st		
spective tree-view.	ri library or	a folder location and click Add bu	ttori to addittems. Click Remove bu	ittori to remove selected items ind	in import. Press F5 to refresh	
C:\Users\adminuser1.VSSLA	AB\Docume	nts\Versions				
Desktop This PC Characteris Characteris Characteris Characteris Characteris Characteris Characteris Documents Characteris Documents Documents Documents Duilding Document Duilding Ducument Ducu	^	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	
SavedPictures Stimation: https://stone.voyager.loca	l/aa	t objects Items added for import			× Remove Ø Re	<u>A</u> dd

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 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	<u>32 Files, 1</u> Folders, <u>1.82 MB</u>	Import all files and folders			
Total : Renamin	0 item(s), 0 KB			Refresh Size 🗁	B <u>r</u> owse		
	naming Rule : Folder Rule	✓ File Renam		Rule 🗸			
	Truncated folder names, max		-	names, max length 128			
Derfo	rm Incremental Migration		in an earlest the i	T20			
	-	ated, since last migration using I	Dockit				
	Last migration date: NONE)	acca, since last nigrador asing i	<u>b</u> ochic				
	2 ,	ated, since last update in Share	Point				
	ocuments modified or newly crea						
		<	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.

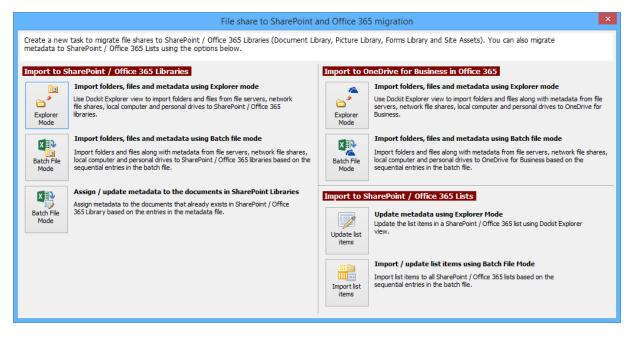
Create Document Sets

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:

1. In Dockit application, create a task from **Import folders, files and metadata to SharePoint Libraries** in **Dockit Import Task** dialog as shown below and click **Explorer Mode.**



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.

- 2. 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	×
Specify a SharePo	stination 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.	
SharePoint URL:	https://www.vyapin.sharepoint.com/sites/dev/DocKIT	
Authentication:	Windows ~	
User Name:	JohnDoe v (johndoe@contoso.com, contoso\johndoe, johndoe)	
Password:		
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish	<u>C</u> ancel

- 3. In '**Items to import**' step, select and add the desired folders which you want to create as document set in SharePoint library.
- 4. Proceed with steps provided in Dockit Task Wizard.
- 5. In Mapping Templates step, click **Manage Templates...** button to create a template with the content type to create new document sets. Then the templates dialog will appear as shown below:

	Dock	it Task Wizard -	File share Mig	ration	
Step 3 of 9: Column I Map metadata properties to	••••••	harePoint columns.			
Column Mapp	ing Template:	Blank	¥	🛃 Save As 🧉	• <u>R</u> eset
Source Column		Target Co	olumn	Default Value	
Name	~	Name	~		
Created by	~	Created By	~		
Modified by	~	Modified By	~		
Created	~	Created	~		
Modified	~	Modified	~		
Approval Status	~	Approval Status	~		
Assign Content Type Document Content Type: Folder Content Type: Folder Content Type: Content Type Folder Content Type Content Type Folder Content Type Content Type Folder Content Type Content Content Type Content Content			t set by ame under content type		
	Metadata Approval 3 Content T Created Created b Folder Cor Modified Modified b	Status ype y ntent Type	< Back	<u>N</u> ext > Einish	Cancel

- 6. In the dialog, specify the folder content type as any 'Document Set' derived content type to create a document set using one of the options given below:
 - a. 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.
- 7. Click **Next** and proceed the subsequent steps.

Function Builder

Dockit provides an ability to assign a calculated value for a SharePoint column based on user-defined functions. The custom function generates column values based on metadata file column, file properties or free text entered by the user. Dockit will prepare the metadata value based on the custom function and assign it to respective SharePoint column.

The metadata file column or file property (like Title.[metadatafile], Author.[fileproperty]) can be input as a parameter in a specific syntax. Note that the Function Builder tool recognizes the given parameter as metadata file column only if it ends with .[metadatafile] and similarly it recognizes the parameter as file property only if it ends with .[fileproperty].

To create a custom function and assign it to the SharePoint column, perform the following steps:

1. Select <new function> under 'Function Builder' as Source from the list as shown below:

	Dockit Task Wizard	×
Step 2 of 7: Column Mapping Map metadata properties to the desire		
Column Mapping Templa	te: Blank V Save As	<u>R</u> eset
Source Column	Target Column Default Value	
Name Shared Document Slide Count Subject Template Thumbnail Title Total Edit Time Version Word Count Function Builder	Name	₽
Anous Exection 2	Specify the content type to be assigned for do folder. You can create a folder as document set providing the document set content type name 'Folder Content Type'. If left blank, default con configured in the target SharePoint library will be configured in target SharePoint library will be configured in target SharePoint library will be configured in target SharePoint library w	t by under itent type

2. The Function Builder Dialog will appear as shown below:

Function Builder	×
2 Insert	
=	
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 f x Left f 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 Builder	×
	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 Build	der ×
		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	×
	Insert
=Left("Title.[FileProperty]",3)	
	OK Cancel

8. You can also use nested functions too as shown below:

Function Builder	×	
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.

Function 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","MMM","MMMM")

GetYear

Returns the year value of the given date.

Syntax

GetYear(Date value, Format)

- **Date Value:** File / Metadata property or enter free text in double quotes. Note: "Now" free text is used to set a current date and time.
- **Format:** Year format to extract.("YY","YYYY")

GetTime

Returns the time value of the given date.

Syntax

GetTime(Date value)

• **Date Value:** File / Metadata property or enter free text in double quotes. Note: "Now" free text is used to set a current date and time.

GetDateDiff

Returns the difference between two date values.

Syntax

GetDateDiff(Date value, Date value)

• **Date Value:** File / Metadata property or enter free text in double quotes. Note: "Now" free text is used to set a current date and time.

If

Checks the condition, and returns one value if TRUE, and another value if FALSE.

Syntax

If(Property / Value, Condition, True part, False part)

- **Property/Value:** File / Metadata property or enter free text in double quotes.
- **Condition:** Specified formula condition.(StartsWith,EndsWith,EqualsTo)
- True Part: Characters or String.
- False Part: Characters or String.

GetString

Returns the string value that matches with the regular expression pattern.

Syntax

GetString(Property / Value, Pattern)

- **Property/Value:** File / Metadata property or enter free text in double quotes.
- **Pattern:** Any regular expression pattern to search.

Split

Split the given string with a specified character and returns the value from the specified occurrence.

Syntax

Split(Property / Value, Split Character, Occurrence)

- **Property/Value:** File / Metadata property or enter free text in double quotes.
- Split Character: Character separator to split the given string.
- **Occurrence:** Integer value to return the string at specified occurrence.

Example of custom functions and their resultant values:

Function	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	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 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\Sample Presentation.pptx	United States	Washington;California;Alaska	Dockit will 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\Sample Report.pdf	Continent North America Country United States	Continent North America Country United States States Washington; Continent North America Country United States States California; Continent North America Country United States States Alaska	If there are duplicates in the same term sets, it is recommended to use Absolute Term Path as stated in this example. Dockit will assign the specified term to the associated column.

You can also specify options to create unavailable terms as part of document import. Dockit checks if the term set is open to creating new terms and then adds the unavailable terms to the exact term hierarchy.

Profile Manager

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.

1. The **Profile Manager** dialog will be shown 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, click Add.					
	<u>A</u> dd				
	<u>R</u> emove				
<u>o</u> k	<u>C</u> lose				

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 ×				
Create a new user profile and store it in Microsoft Windows Stored UserNames and Passwords applet / Credential Manager to connect to SharePoint.					
<u>U</u> ser 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, click 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				

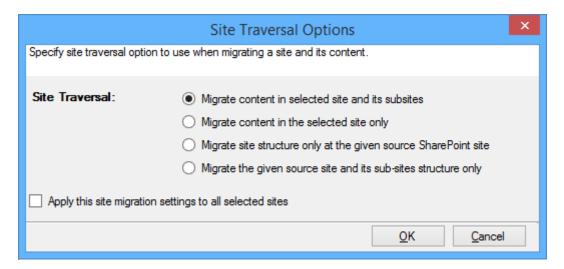
- 4. Henceforth, the stored user profile can be used as credential input in Dockit application in order to connect to the SharePoint environment.
- 5. Click **Close** button to close the **Profile Manager** dialog.
- 6. Additional References:

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

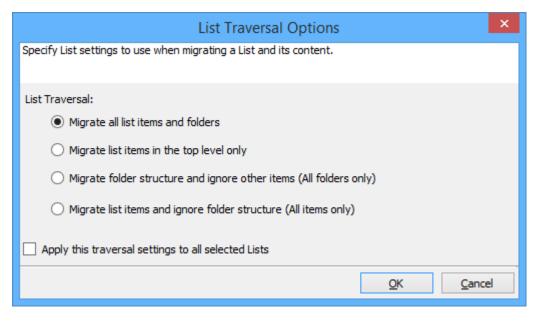
1. Site Traversal Options dialog will appear as shown below:



- 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 an its sub sites.
- 3. Click **OK** to proceed.

List Traversal Options

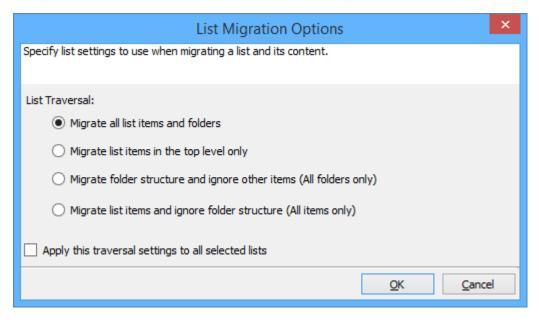
1. List Traversal Options dilaog will appear as shown below:



- 2. Select anyone of the list traversal options given below to specify the cotents 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 toplevel 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

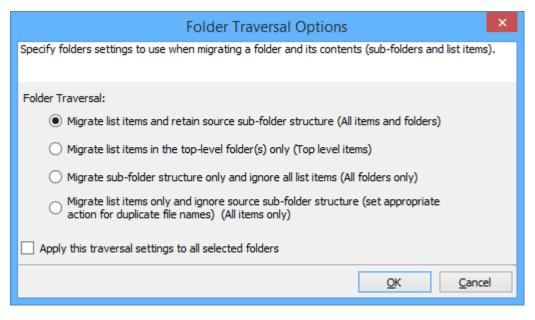
1. Library Traversal Options dilaog will appear as shown below:



- 2. Select anyone of the library traversal options given below to specify the cotents 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 toplevel 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 (subfolders).
- 3. Click **OK** to proceed.

Folder Traversal Options

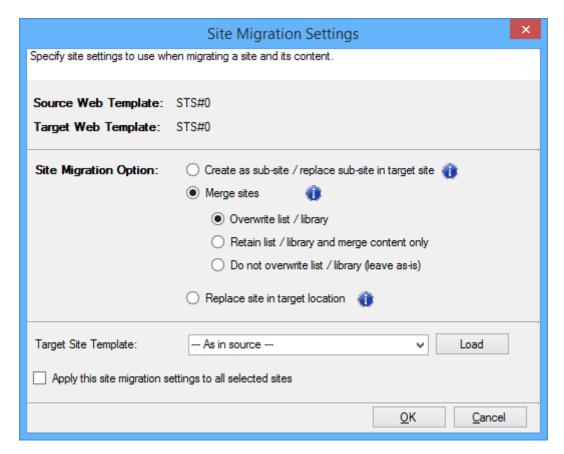
1. Folder Migration Option dialog will appear as shown below:



- 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 cotents 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 wh	en migrating a site and its content.	
Source Web Template: Target Web Template:	STS#0 STS#0	
Site Migration Option:	 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 () 	
Target Site Template: Apply this site migration s	Team Site Load Load ettings to all selected sites	
	<u>O</u> K <u>C</u> ance	;I

List Migration Options

1. List Migration Options dilaog 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	

- 2. Select anyone of the list migration options given below to specify the cotents 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 nsettings to all selected lists.
- 4. Click **OK** to proceed.

Library Migration Options

1. Library Migration Options dilaog 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> ancel	

- 2. Select anyone of the list migration options given below to specify the cotents 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 nsettings 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 a list items).	nd
Do you want to create the selected folder in the destination list? \bigcirc Yes \bigcirc 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	

- 2. Select the appropriate option to create the selected folder by selecting the option buttons (Yes / No).
- 2. Select anyone of the list migration options given below to specify the cotents 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) ~
<u>L</u> ist 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 button to specify the respective filter condition. The migration filter dialog will appear as shown below:

Folder Migration Filters (Basic)							
Specify condition to apply a	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	• 🖶		
Clear					OK Cancel		

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

	Migration Filters	x
Specify conditions for v	webs, lists, folders, items to migrate from SharePoint	
● BASIC ○ A	DVANCED	
<u>W</u> eb Level		^ ~
<u>L</u> ist Level		^ ~
<u>F</u> older Level	<where> <or> <eq> <fieldref name="Folder Name"></fieldref> <value type="Text">Conference Information</value> </eq></or></where>	^
<u>I</u> tem Level		~
Apply this filter cond	dition to all items OK Cano	xel

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 F	ilters (Advanced)
	-	rating item from source SharePoint. For
Field Name Operator	Modified Date (SharePoint)	¥ <u>.</u>
<u>V</u> alue	10/20/2016	
	' <u>A</u> ND' to Filter	'O <u>R</u> ' to Filter
Conditions: [Folder Name AND [Modified	(SharePoint)] = 'Employee De d Date (SharePoint)] = #10/20	() () (∧) × × / / / / / / / / / / / / / / / / /
Migrate items	if above condition is	satisfied O not satisfied
		QK <u>C</u> ancel

8. Click (...)button to add the SharePoint columns in Filed Name edropdown. The Add Fileds Dialog appears as shown below

	Add Managed	Properties Dialo	og ×
Name:			
Type:	Text		~
		Add	<u>R</u> emove
Column	Name	Column Type	
		<u>0</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	x
Specify conditions for webs, lists, folders, items to migrate from SharePoint	
O BASIC ADVANCED	
<u>W</u> eb Level	
List Level	
Folder Level [Folder Name] = 'Conference Information' AND [Modified Date (SharePoint)] = #1/31/2017#	
<u>I</u> tem Level	
Apply this filter condition to all items OK Cancel	

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 dialog. 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 Template Manager						×
	Create reusable templates for migration tasks.					
File share Migration	SharePoint Migration					
Column Mappin	g					
User / Group Ma	apping	_	B	B		
Domain Mappin	g	-	AB	AB		
Permission Map	ping	New	File Rule	Folder Rule		
A B Replace Illegal C	naracters					

- 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.

		Dockit Template Manager		×
		Create reusable templates for migration	1 tasks.	
File Share Migration	SharePoint Migration			
Column Mapping	,	Template Name: Sample		
User / Group Mag	pping	Rules		
Domain Mapping	1	Find	Replace	
Permission Mapp	ing	œ	-	
A B Replace Illegal Ch	naracters		+	·
				T
				↑ ↓
				Ŧ

- You can Edit the existing renaming rule by selecting the appropriate rule.
 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	Truncate V and the file name
				character following it
				(immediately succeeding
				character), if the file names
				contains V and followed by
a 1	2			any one character.
Sample	?р	{empty}	Sale	Truncate one character
				preceding the letter p in the
SampleV12	V??	(omntu)	Sample	file name. Truncate two characters
Sampleviz	Vff	{empty}	Sample	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	<u> </u>	Word	WordDocument	
Word]	1	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 Separator	Equivalent Format String
, (comma)	CSVDelimited
; (semi-colon)	Delimited(;)
* (asterisk)	Delimited(*)

- 3. The 'Source Path' and 'Destination Path' fields will not be carried forward as a metadata column in SharePoint.
- 4. The 'Source Path' column of all the rows should contain the URL of the source SharePoint site / list / folder / file / list item. e.g., "http://sharepoint/site1", "<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., http://RD65/technical.documents/folder1.
- 7. The column 'New Folder' is an optional column in the batch descriptor file. Using this column, you can provide the relative path to be created in the respective destination location given under 'Destination Path' column prior to migrating the content. For instance, please see the batch descriptor file snippet given below:

Source Path	Destination Path	New Folder
http://sharepoint.vyapin.com/Documents/Sample File.xls	http://sharepoint/technical documents/folder1	folder2/folder3
http://sharepoint.vyapin.com/Lists/Contacts/1000	http://sharepoint/Employee Details	Sales/Executives

Dockit automatically creates the folders (folder2/folder3) specified in the column 'New Folder' underneath the specified destination location (folder1). The 'Sample File.xls' will be migrated into the new destination location 'http://RD65/technical documents/folder1/folder2/folder3'.

8. The column '**Site Template**' is an optional column in the batch descriptor file. Using this column, you can provide the site template for the sites being migrated to target SharePoint. For instance, please see the batch descriptor file snippet given below:

Source Path	Destination Path	Site Template
http://sharepoint.vyapin.com/sites/Mission/Wild	http://sharepoint/sites/Missio n	Team Site
http://sharepoint.vyapin.com/sites/Adventure/Es tuary	http://sharepoint/sites/Missio n/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 guotes.
- 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" "http://sharepoint.vyapin.com/Lists/Tasks/10_.000", "http://sharepoint/Lists/Tasks/Folder", "09/12/20 09", "Crouch", "Sales Executive", "Consumer Sales"

File Structure for Metadata Update

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.	

Laaluur	Taut an Number select a little	
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 ';'.	"Stock Details; Accounts; Product Details"
	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	Global Audience name, Security / Distribution Group name and SharePoint	"All site users; Admins; Viewers; Administrators;

(Multiple value) (Applicable only for a MOSS / Microsoft SharePoint Server 2010 and above library)	Group name can be given to this field. Global Audience and Security / Distribution Group should be crawled and stored in User Profile Store of SSP / Services. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the respective group list and assign the ID of the matching group name to the Target Audiences column of the imported file, only if the group name exists. Moreover, in order to assign the values that belong either to Global Audience or Security / Distribution Group require Dockit Server Agent to be installed in the destination SharePoint server (MOSS / Microsoft	SPUsers; Contributors; Designers
Publishing Schedule Start Date (Applicable only for Collaboratio n Portal / Publishing Portal Site)	SharePoint Server 2010 and above). 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 /	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 for SharePoint" 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 ';'.	"Continent North America Country United States States Washington;Co ntinent North
	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 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"

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"
	Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	

Lookup	Text or Number values can be given to	"Stock Details; Accounts;
(Multiple values)	this field. The values can be of single or multiple. Multiple values should be separated with ';'.	Product Details"
	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	Global Audience name, Security / Distribution Group name and SharePoint	"All site users; Admins; Viewers; Administrators;

(Multiple value) (Applicable only for a MOSS / Microsoft SharePoint Server 2010 and above library)	Group name can be given to this field. Global Audience and Security / Distribution Group should be crawled and stored in User Profile Store of SSP / Services. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the respective group list and assign the ID of the matching group name to the Target Audiences column of the imported file, only if the group name exists. Moreover, in order to assign the values that belong either to Global Audience or Security / Distribution Group require Dockit Server Agent to be installed in the destination SharePoint server (MOSS / Microsoft	SPUsers; Contributors; Designers
Publishing Schedule Start Date (Applicable only for Collaboratio n Portal / Publishing Portal Site)	SharePoint Server 2010 and above). 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 /	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 for SharePoint" 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"

	charing term value and accien the first	
	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 ';'.	"Continent North America Country United States States Washington;Co ntinent North
	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 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 ';#'.	";#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"

Error Messages and Resolution

You may notice one or more of the error messages given below when using Dockit to connect to SharePoint and perform an import. This is not an exhaustive compilation of all error messages, but an attempt to include as many known error messages and how to resolve the errors. Please refer Troubleshooting section for more information.

Error Message	Resolution
The remote server returned an error: (407) Proxy Authentication Required.	Enable the Bypass proxy server for local addresses option available at LAN Settings of Internet Options of Internet Explorer Browser.
The server could not sign you in. Make sure your user name and password are correct and then try again. Check if you have a persistent session if you use federated identity.	If you use federated identity to connect to the SharePoint site, Dockit expects a persistent connection (already established connection) to be available for the SharePoint site to commence the import task in unattended mode or scheduled mode.
Unable to establish existence of the account specified.	The user account specified in the scheduled task should be a trusted domain user account.
The file or folder name contains invalid characters.	Map the invalid characters (~#%&{}) into valid character using 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.

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

b. -

Metadata log file - e.g., *<Application Data Folder>*\TaskHistory\Dockit Task\20121222-183919\logs\MetadataErrors.txt

с.

Dockit error log file - e.g., *<Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\logs\DockitErrorLog.txt

d.

Move Activity log file - e.g., *<Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\logs\MoveActivityLog.txt

e.

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.

Process details file - e.g., *<Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\settings\ListItemProcessCount.xml

h.

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