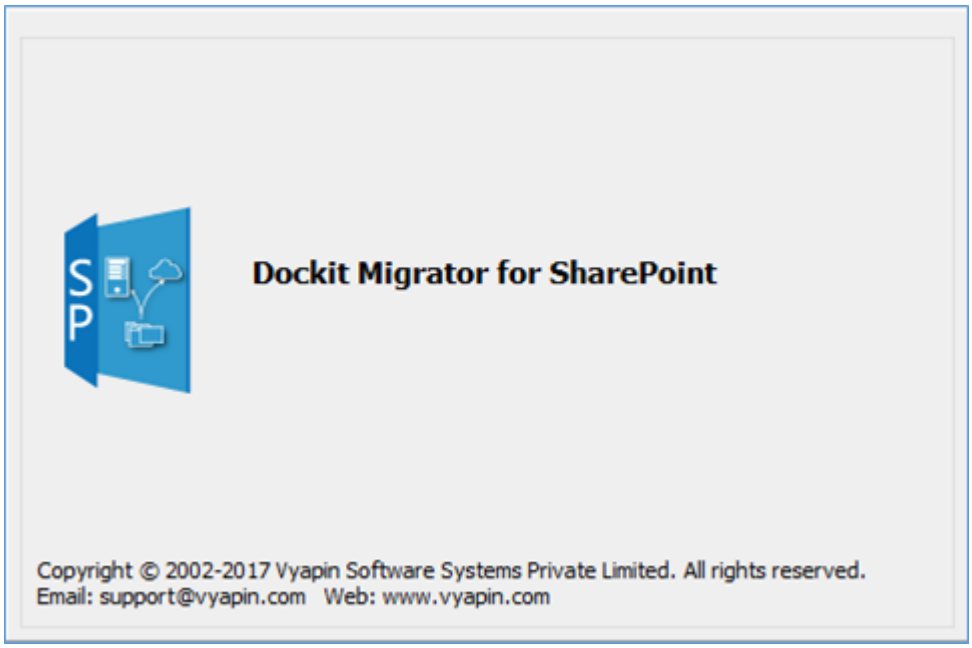
User Manual

Dockit Migrator for SharePoint



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Dockit Introduction

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

Install Dockit Server Agent

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

For SharePoint 2007 servers:

- Use *DockitServerAgent_2007_x86.msi* in order to install in 32-bit Windows Server 2003 (or) Windows Server 2008
- Use *DockitServerAgent_2007_x64.msi* in order to install in 64-bit Windows Server 2003 (or) Windows Server 2008

For SharePoint 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.

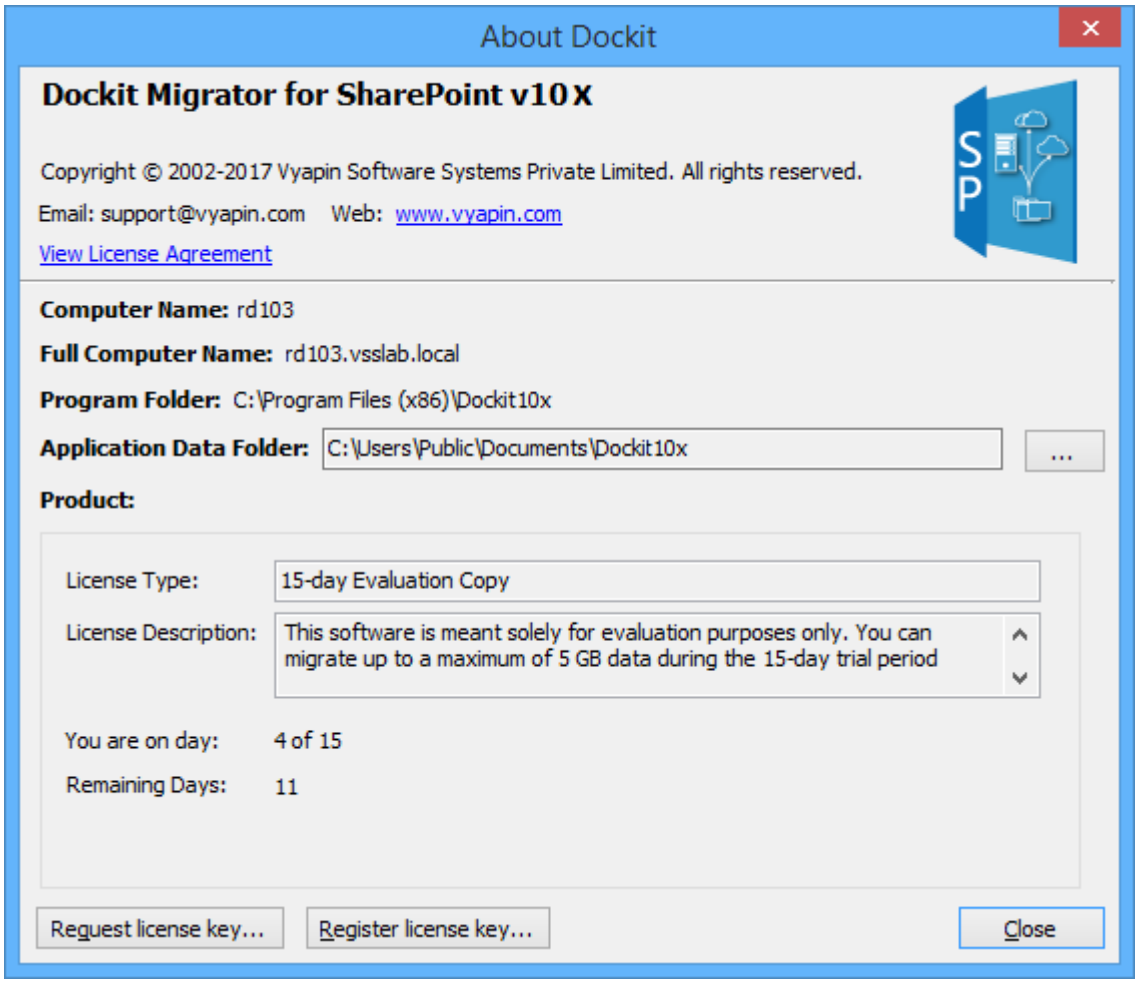
You can check the existence of Dockit Server Agent component in target SharePoint server using Test Dockit Server Agent tool available under 'Tools' menu of Dockit main screen.

Change Application Data folder location

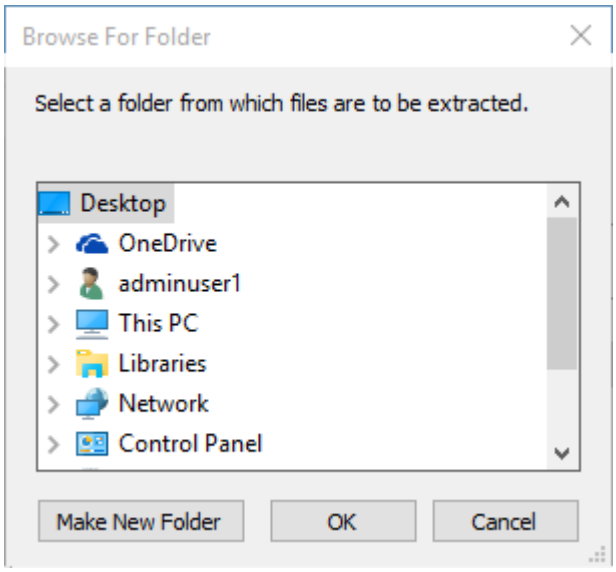
Dockit enables you to change **Application Data** folder location, where Dockit's import tasks and related settings, file renaming rules, activity logs and error logs are stored, at any time after installing Dockit software. To change the Application Data folder location, perform the following steps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

1. Select **About Dockit** from **Help** menu

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

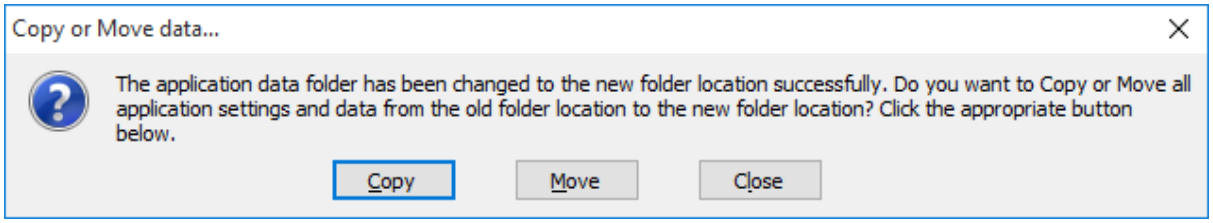


3. Click ... button to change **Application Data** folder location of Dockit application. The Browse For Folder location dialog will appear as shown below:



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

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



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

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.

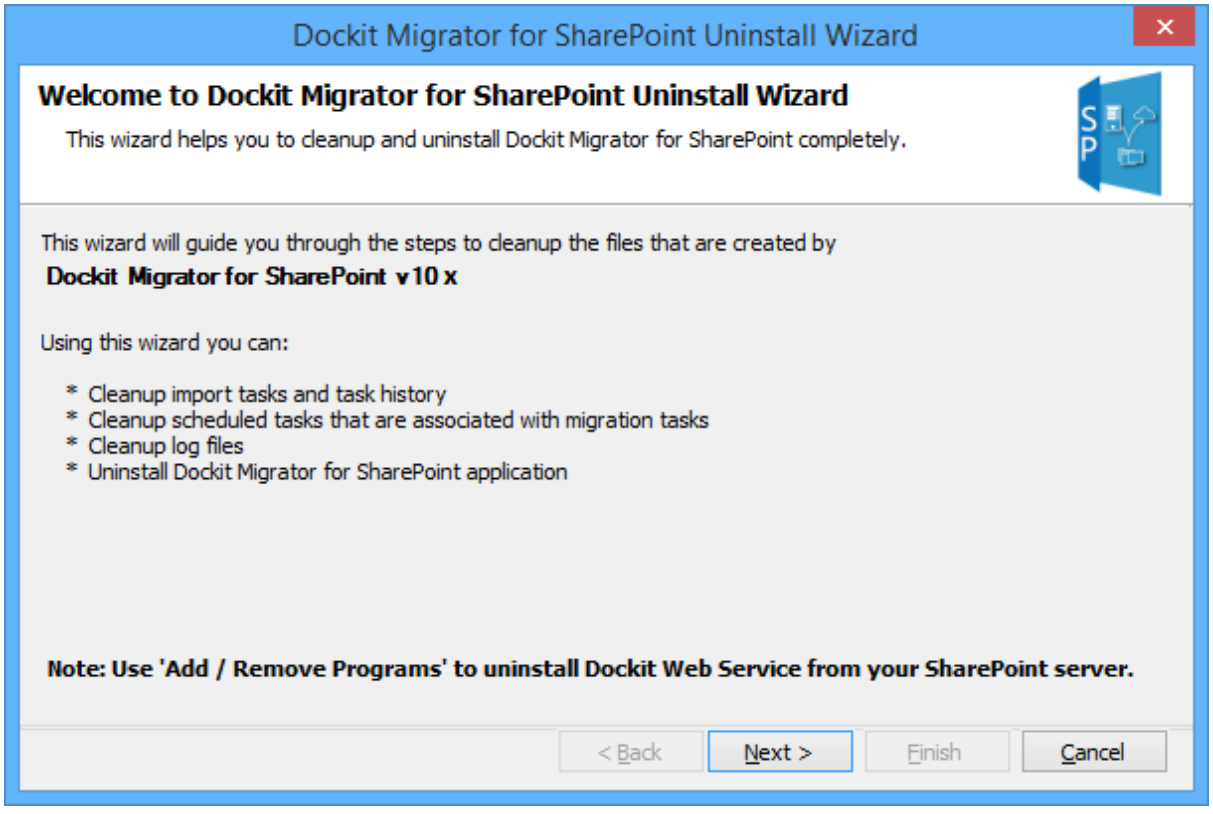
Use this wizard to clean up the files / profiles that are created by Dockit Migrator for SharePoint application selectively and uninstall Dockit completely from the machine.

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.

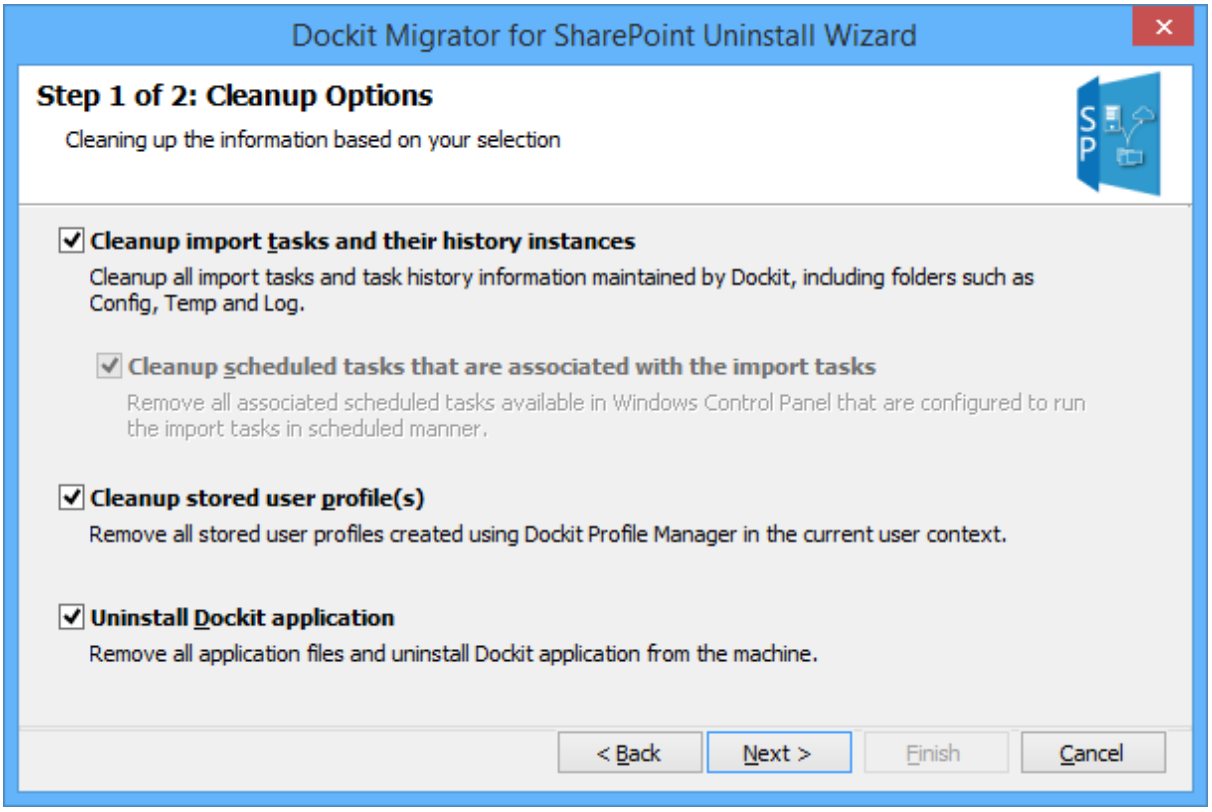
1. Launch the uninstall wizard by clicking Start -> Programs -> Dockit Migrator for SharePoint -> Dockit Uninstall Wizard.

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



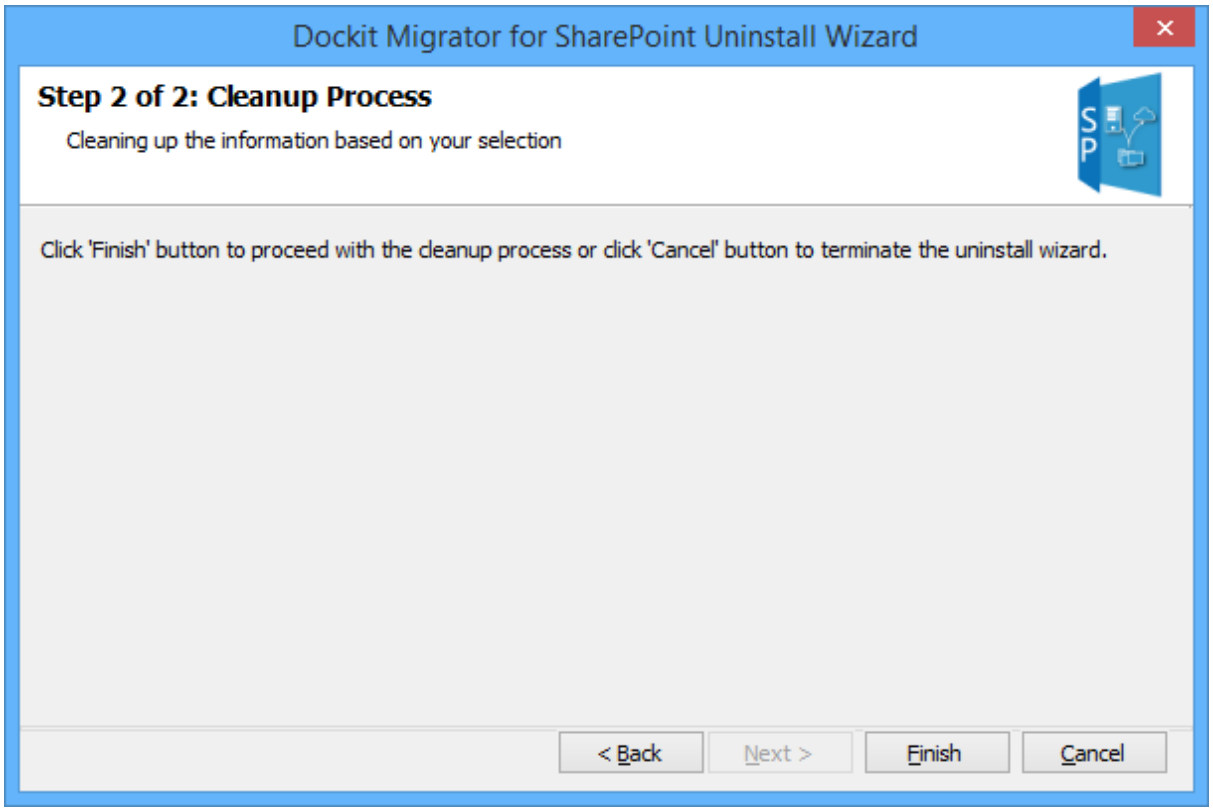
   Click **Next** to proceed.

2. Select required cleanup options as shown below:



Click **Next** to proceed.

3. Confirm the cleanup and/or uninstall process.



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

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

How to purchase?

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.

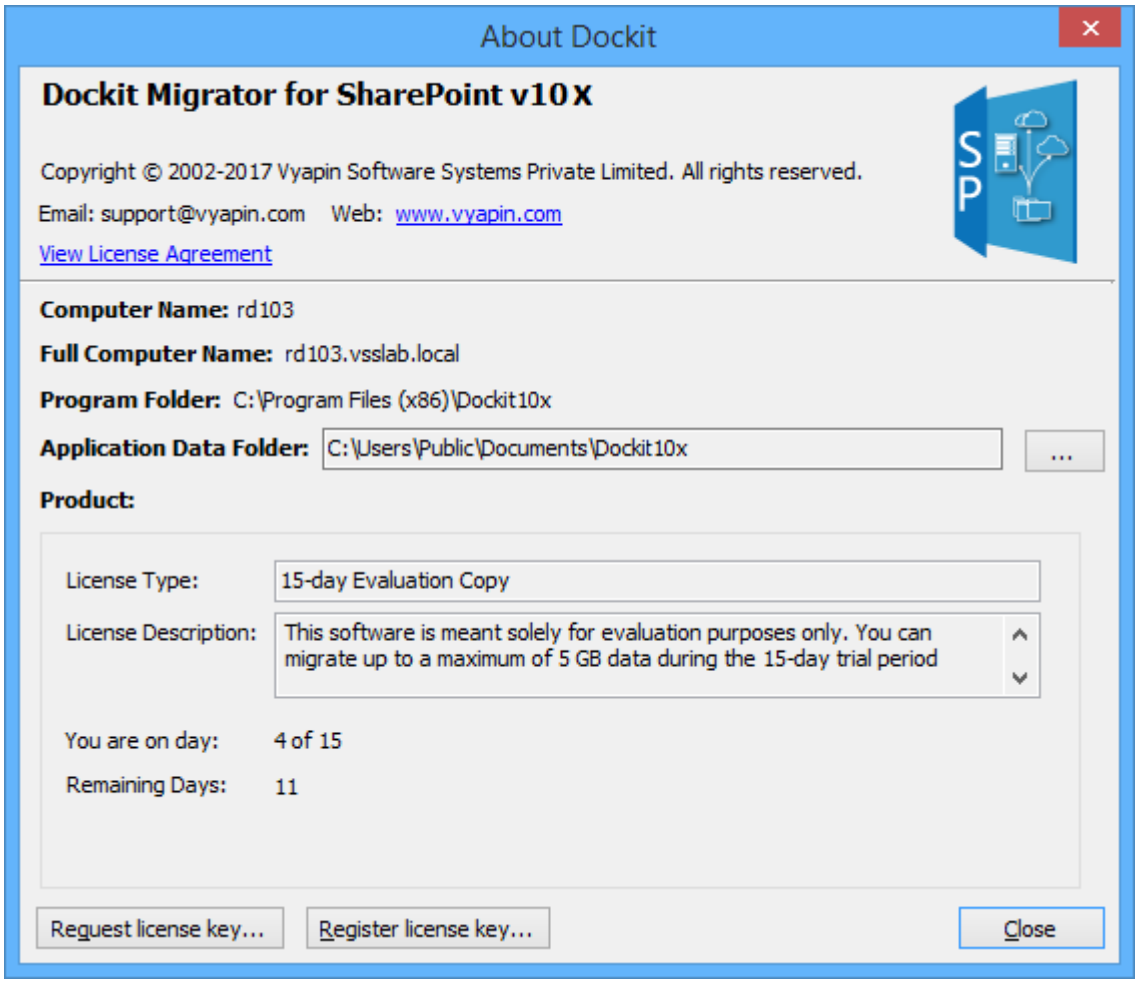
Once you purchase the software online or through any one of our resellers, you will receive a purchase notification through e-mail from our sales department. We will send you an e-mail with the necessary instructions to register the software.

Request License Key

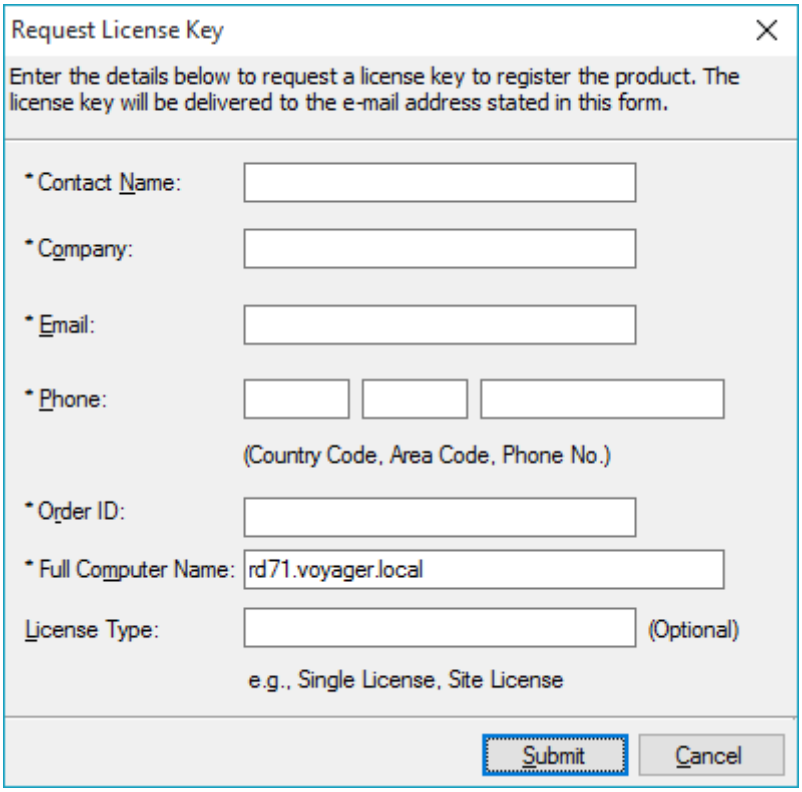
In case you do not receive an e-mail from our sales team after you purchase the software, please contact our sales department at sales@vyapin.com with the sales order number. You can also request the license by the filling up the form shown below. Please allow 12 hours from the time of purchase for our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

1. Select **About Dockit** from **Help** menu

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



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



- **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.

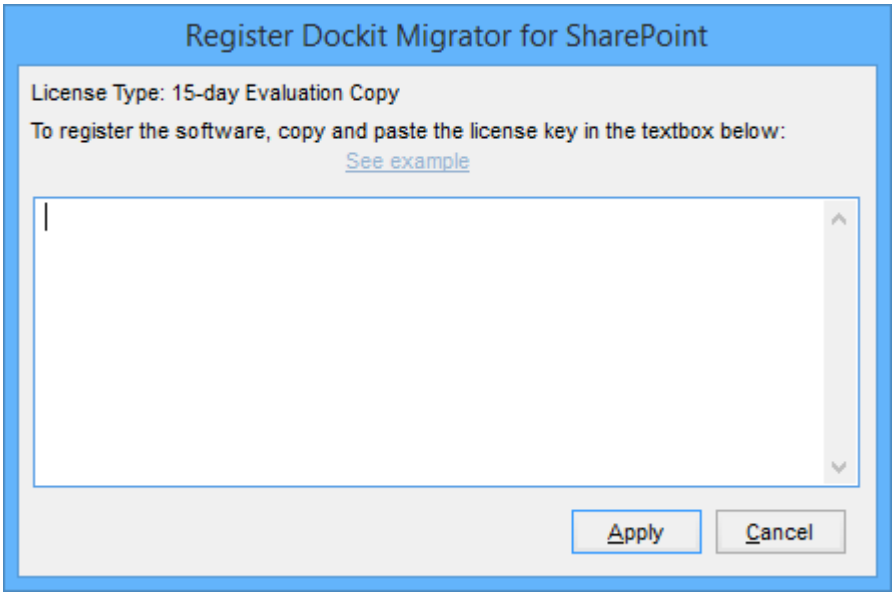


Image 1 - Register screen

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).

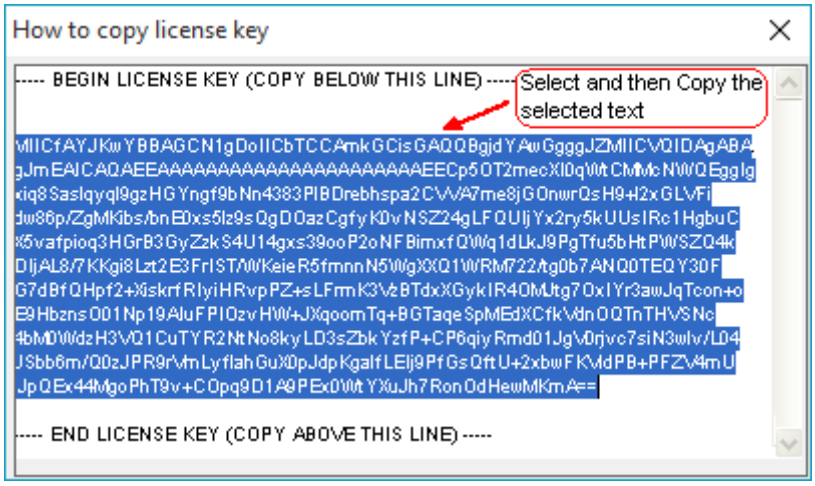


Image 2 - How to copy license key screen

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

Technical Support

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

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

1) Version of Dockit 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:

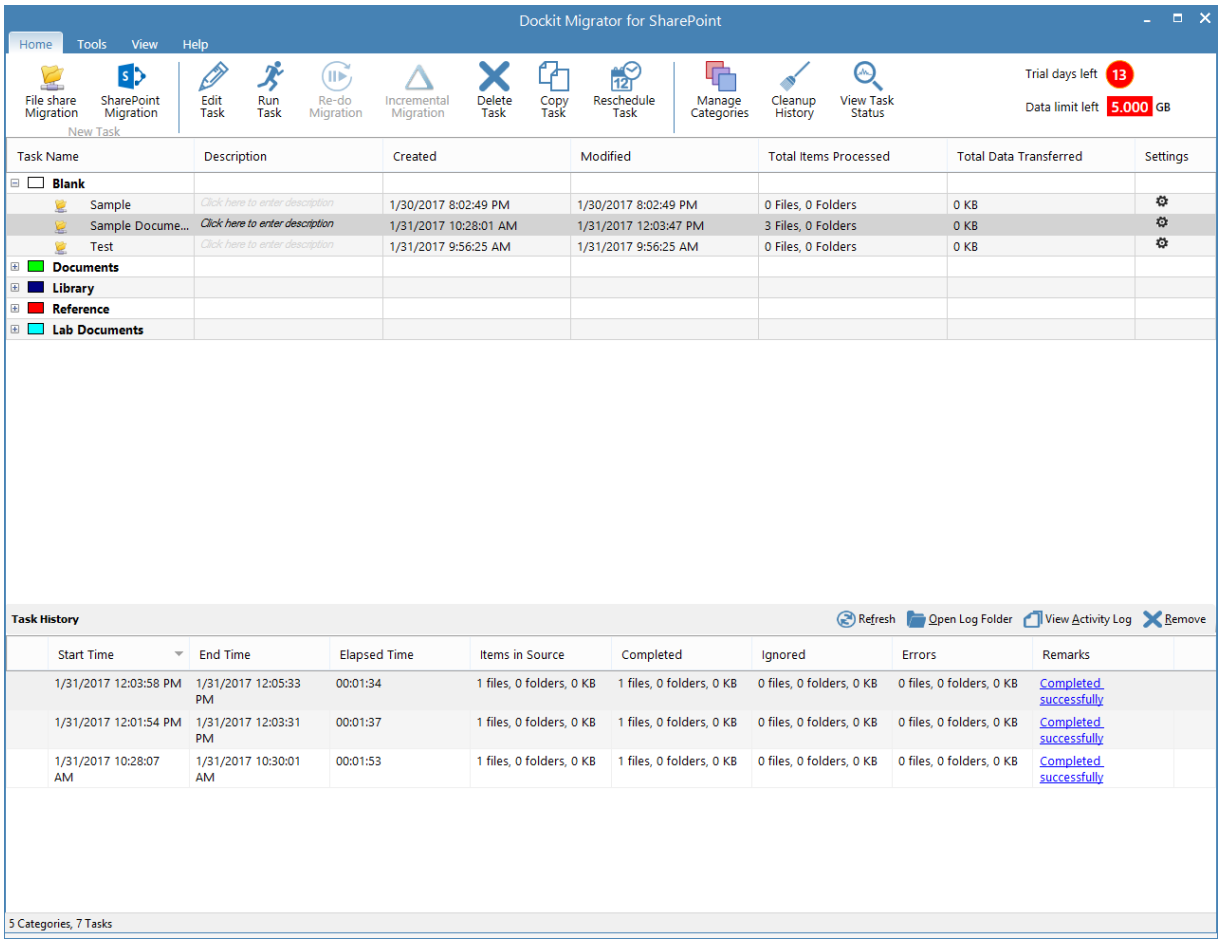
- Windows 10 / Windows 8 / Windows 7, Windows Server 2012 R2 / Windows Server 2012 / Windows Server 2008 R2 / Windows Server 2008 - C:\Users\Public\Documents

Dockit Task Manager

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

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.



Δ - referes the task is in Incremental Mode.

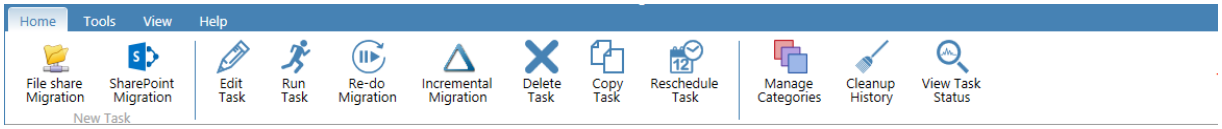
- refers the task is schedule in Windows task Scheduler.

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

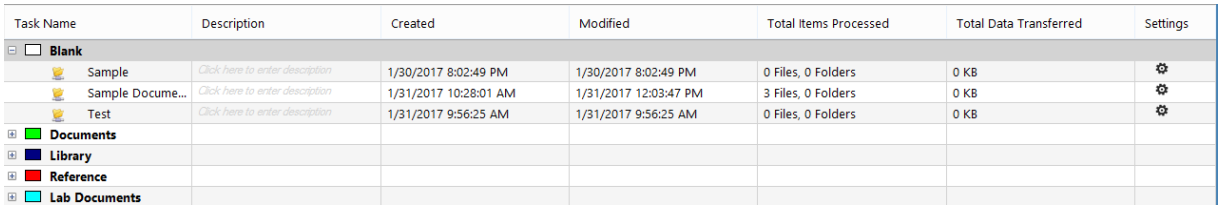
Standard menu bar and toolbar

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

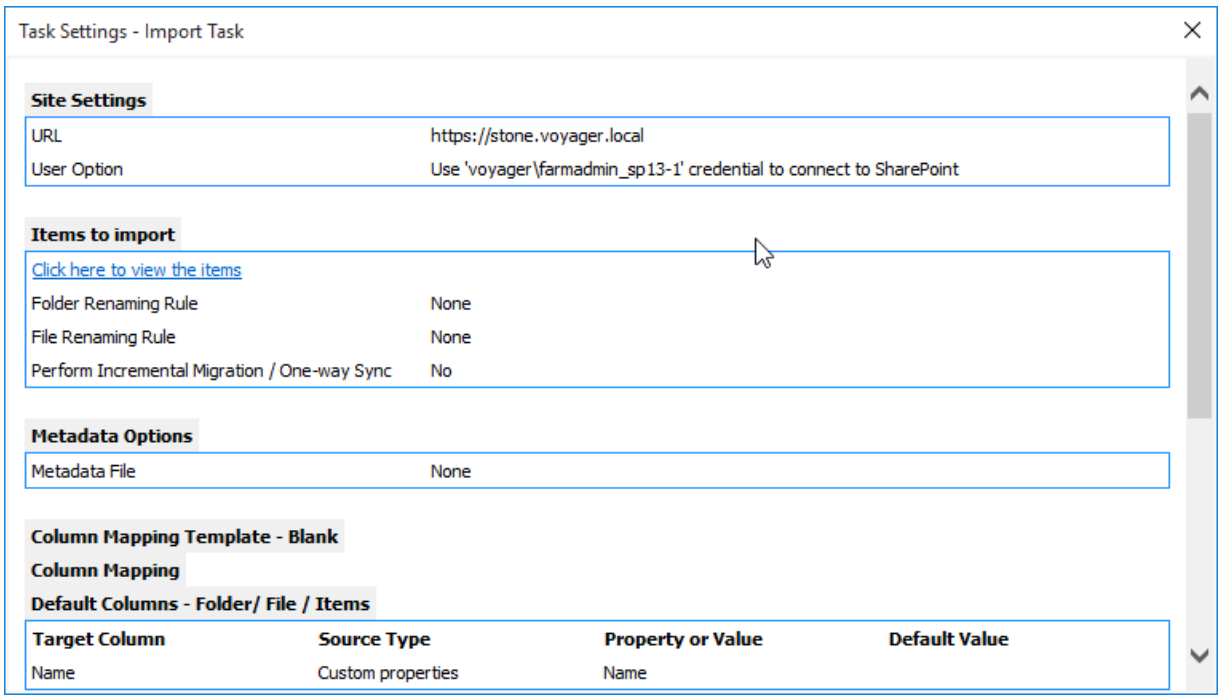


Task List:

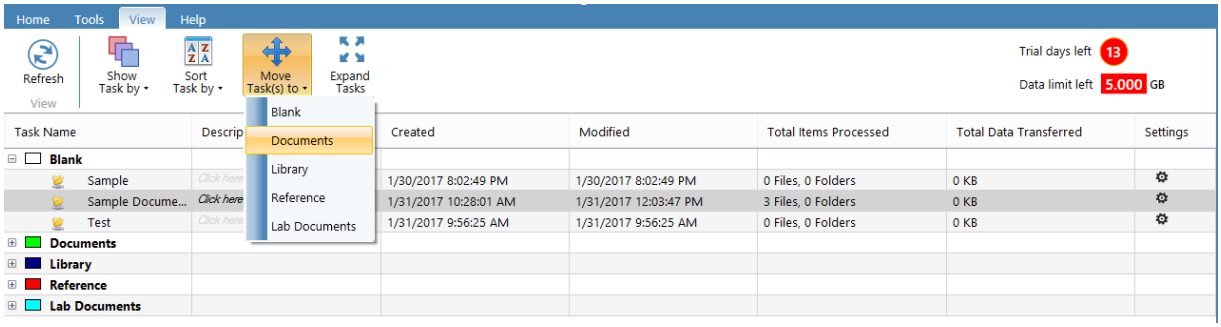
Task List pane contains all export tasks created by the user. Task related operations such as Edit Task, Copy Task, Delete Task and Run Now can be performed based on the selected task in the Task List pane. It provides information about task such as Description, Created Date, Modified Date, Total Items 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**.



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



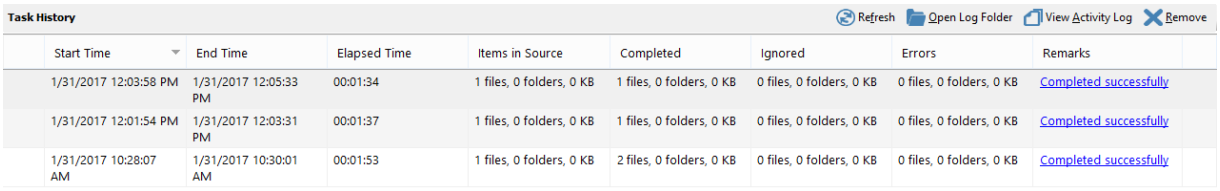
The selected tasks can be re-categorized by **'Move Task(s) to'** option in **'View'** menu.



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

Task History:

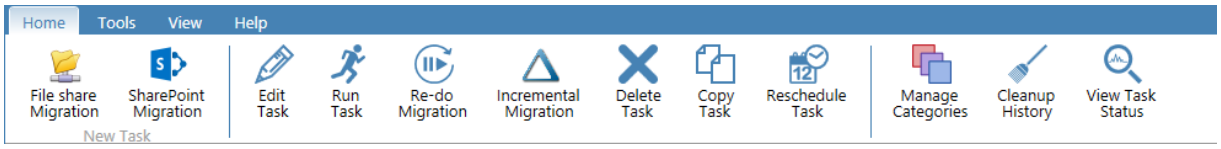
Task History pane maintains every task run information as a list. It displays the required information about task execution status. It displays Task's Start Time, End Time, Elapsed Time and Remarks.



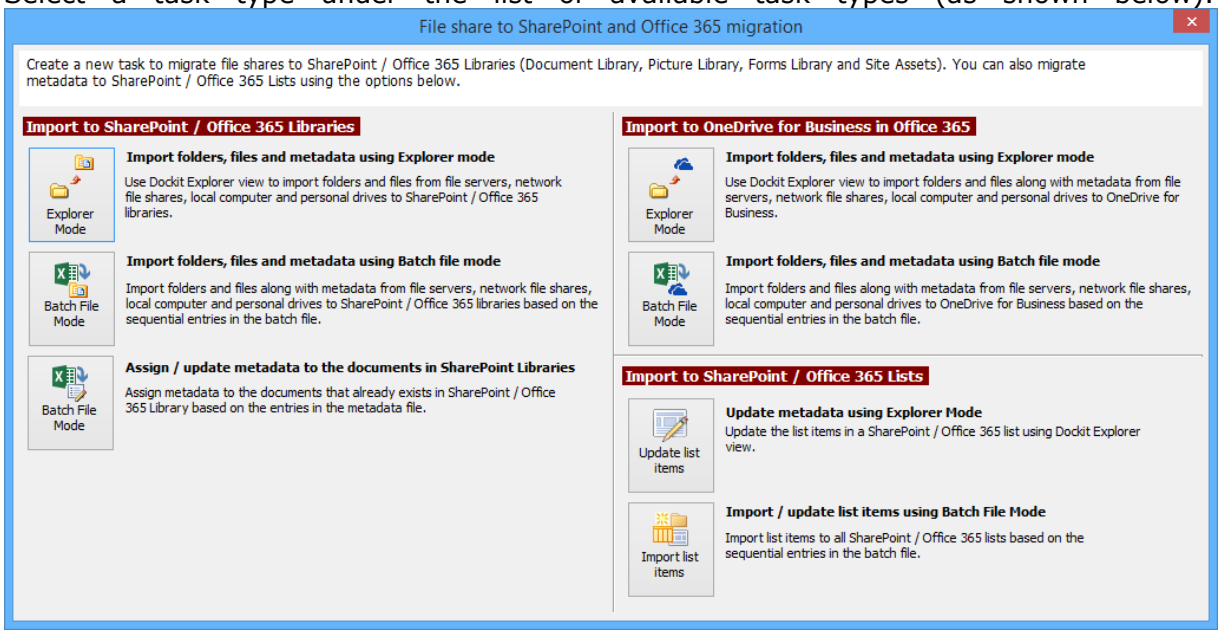
Create New Task

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

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



Select a task type under the list of available task types (as shown below).



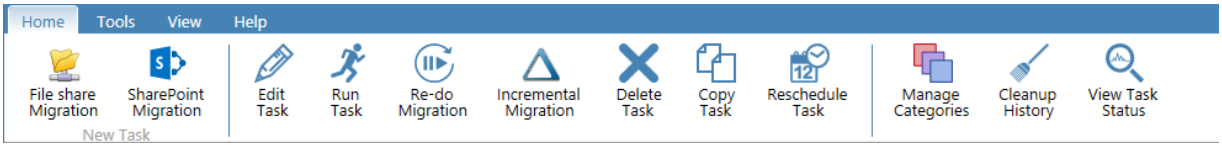
Click the links below for more information:

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

Edit Task

To edit an existing task:

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

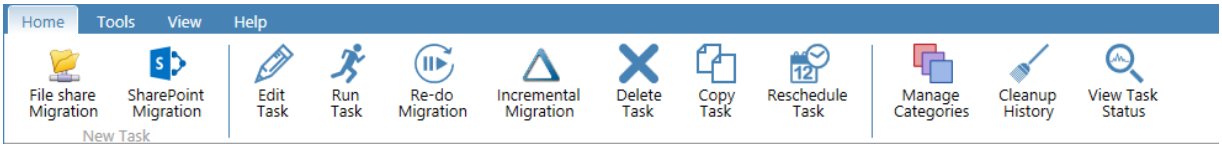


3. **Dockit Task Wizard** will load the selected task settings and appears as seen in Create New Task wizard. However, some of the options may be disabled when editing a task.

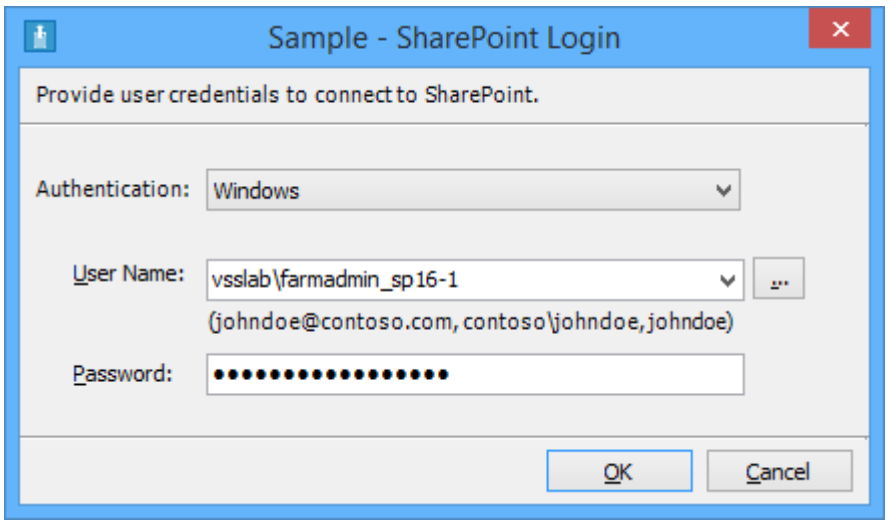
Run a Task

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

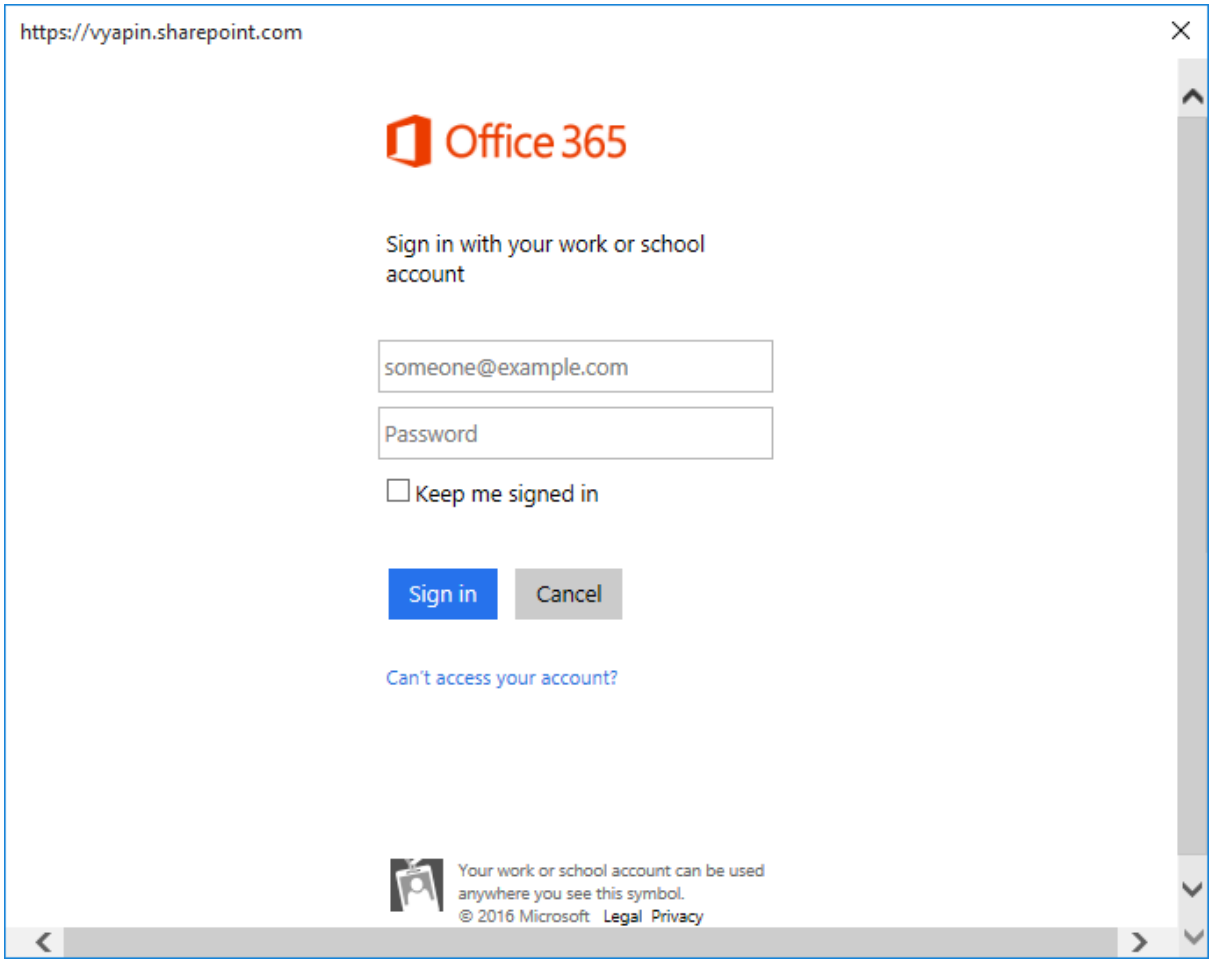
1. Select a task from **Task List** pane.
2. Click **Run Now** from Home menu of Dockit main screen.



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

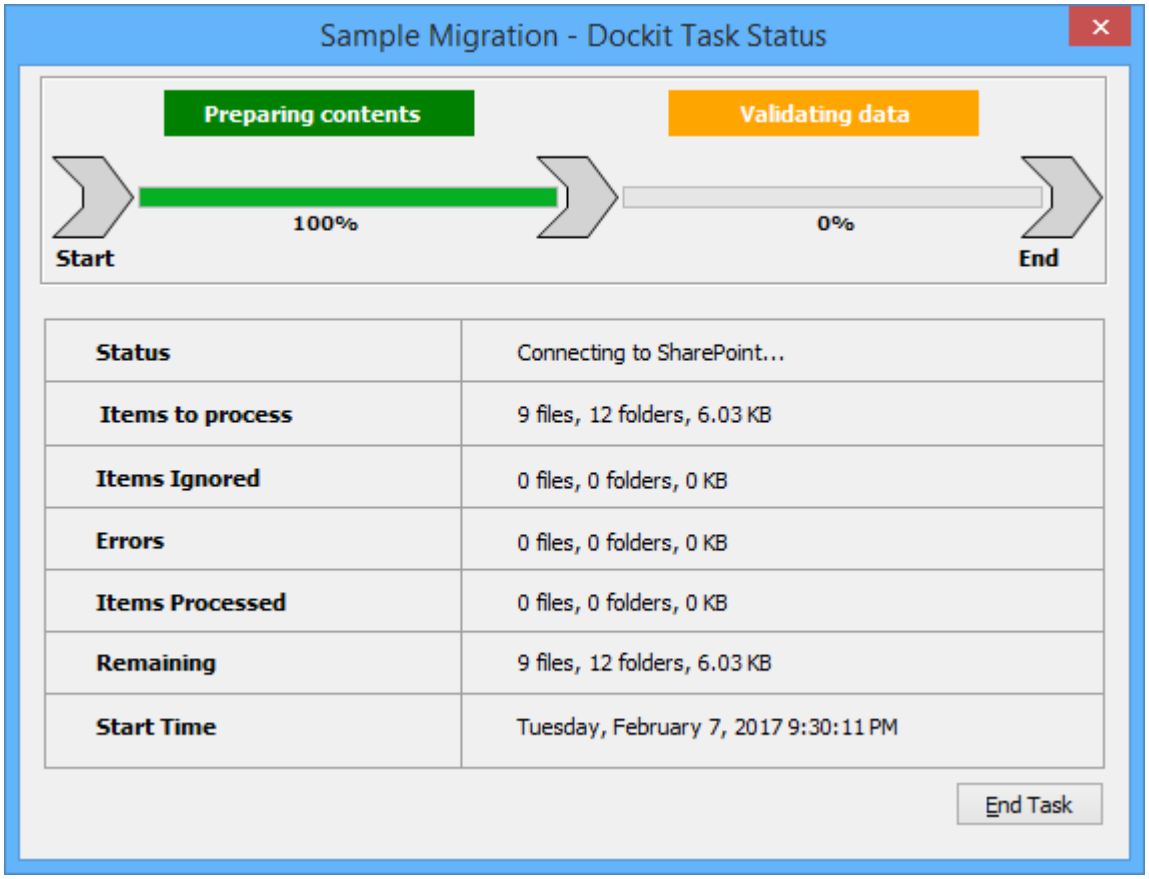


For **Federated authentication (Web Single Sign-on)** credential based import task. The Web Login Dialog to connect to SharePoint will appear as shown below:



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

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



Runtime statistics:

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

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

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

Re-do Migration

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.

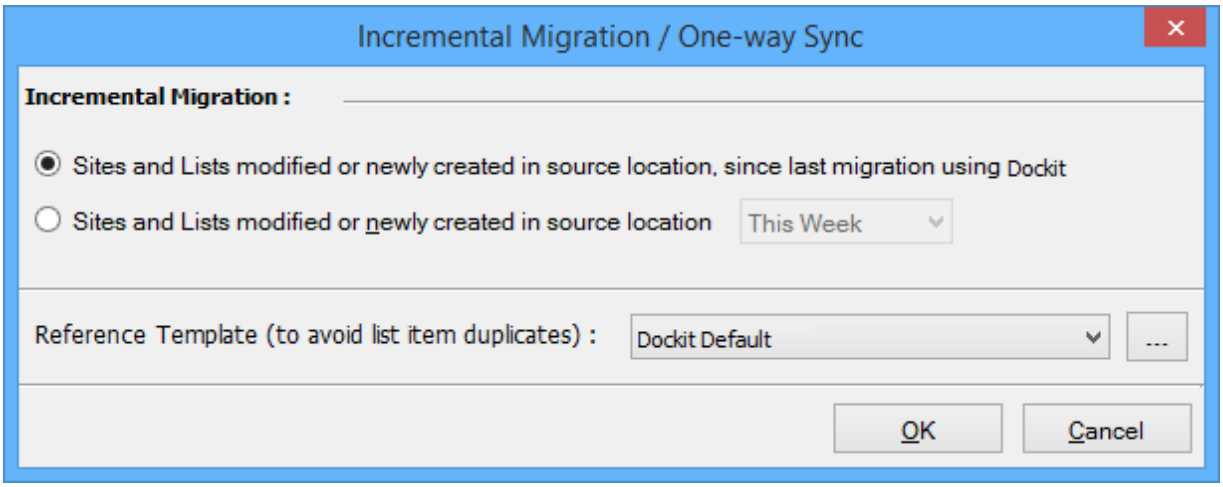
Click 'Re-do' button from **Home** menu of Dockit main screen.

Incremental Migration

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

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

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



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

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

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

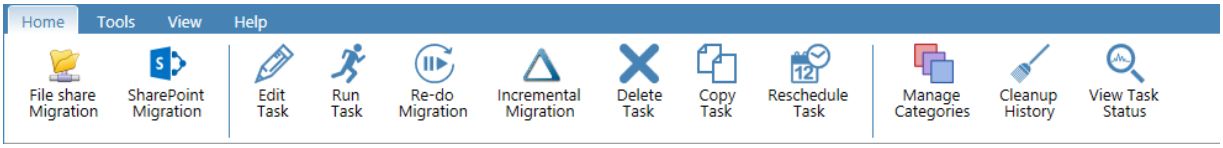
'This Week' 'Last 7 days' 'This Month' 'Last Week' 'Last 14 days' 'Last Month' 'Today' 'Yesterday' 'Last N Days'

3. Click **OK** will proceed.

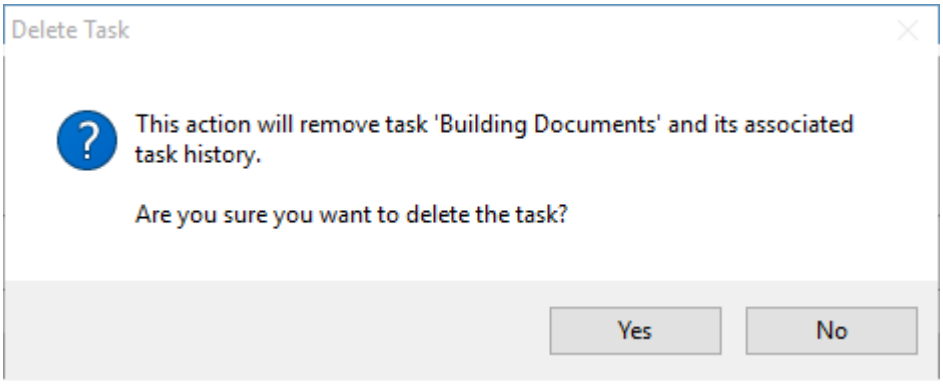
Delete an existing task

To delete a Dockit import task:

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



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

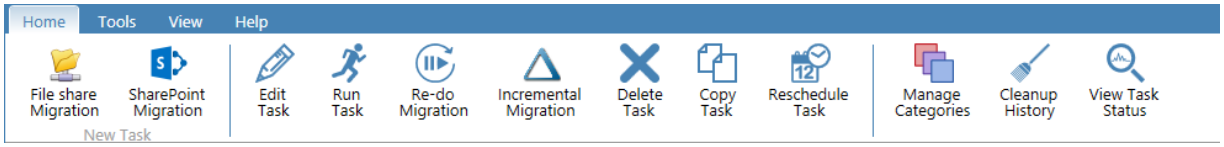


Note: Deleting a task will permanently delete the selected task and its task history items.

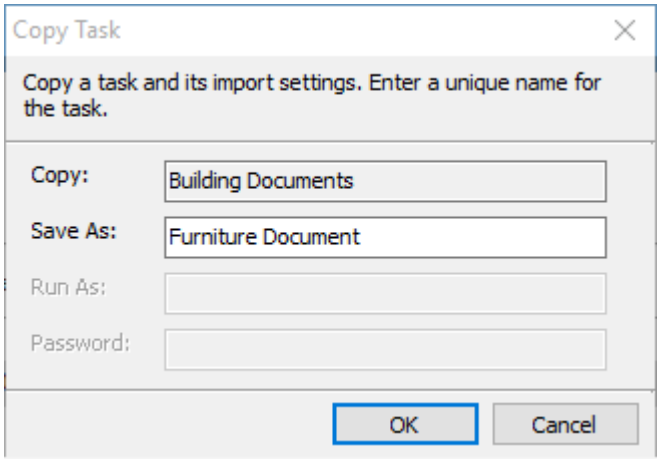
Copy an existing task

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

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



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.



Reschedule Task

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

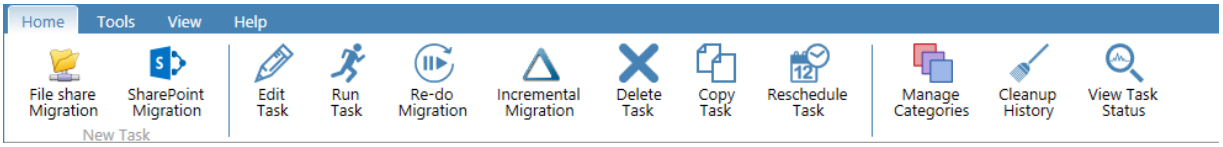
This tool helps you to re-create the Windows Schedule Task in the following two scenarios:

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

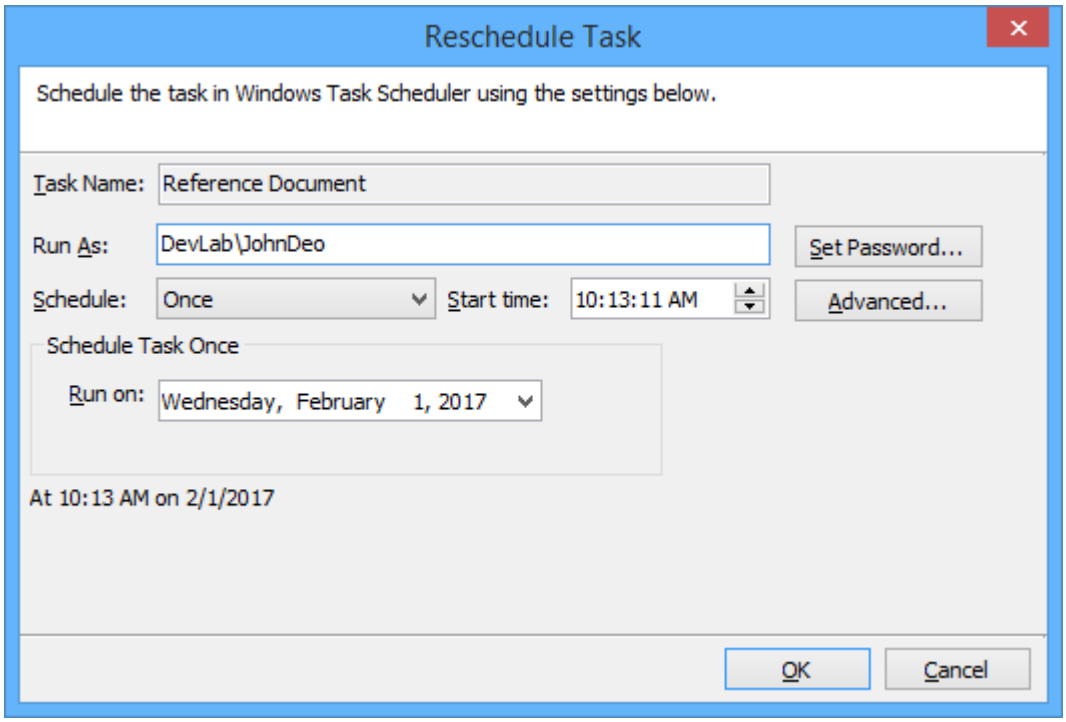
1. Select a task from the **Task List**

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



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

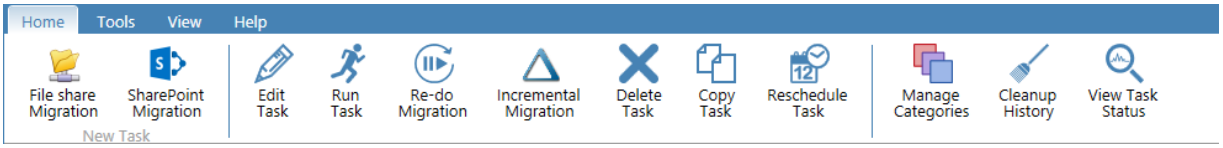


Schedule: To create a Windows scheduled task. Dockit will create a schedule task in the Windows Scheduled Tasks with the given settings.

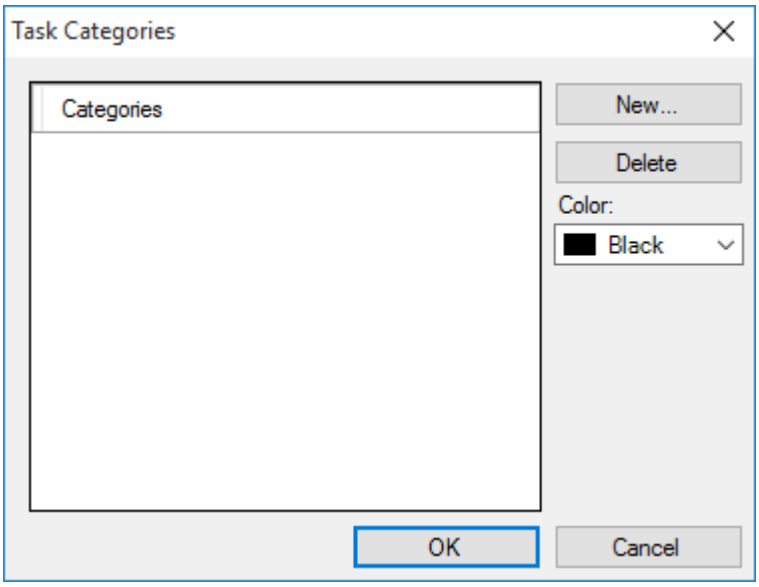
Manage Categories

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

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



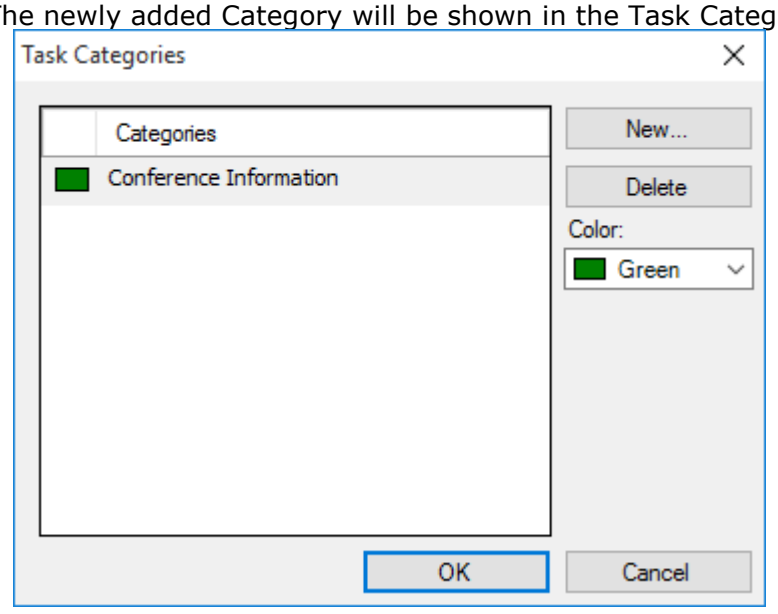
2. The **Task Categories** dialog will be shown as below:



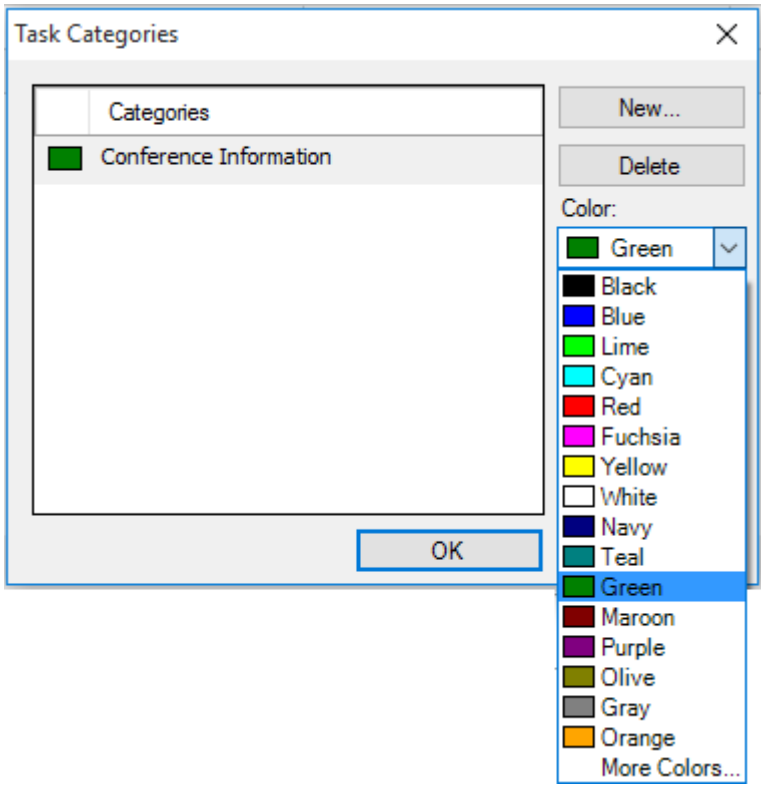
3. In order to add a category, click **New...** button and provide the information about category in the **New Category** dialog as shown below:

   Click OK.

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



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



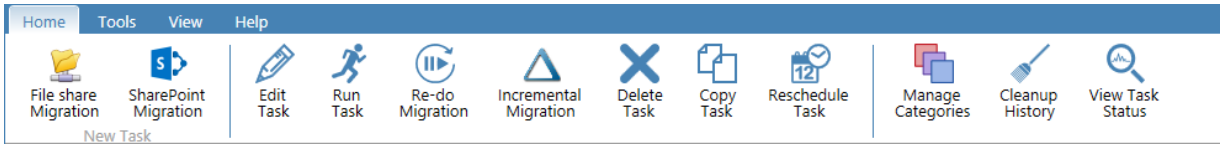
Click **OK** to enable the feature.

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

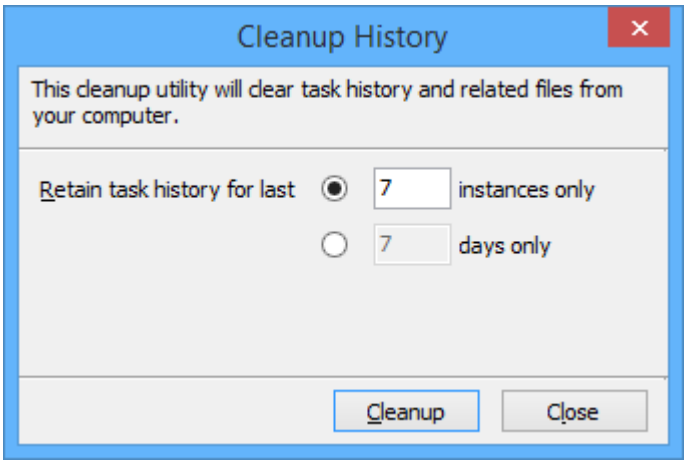
Cleanup history

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

1. Select **Cleanup History** from **Home** menu of Dockit main screen



2. The Cleanup History dialog appears as shown below:

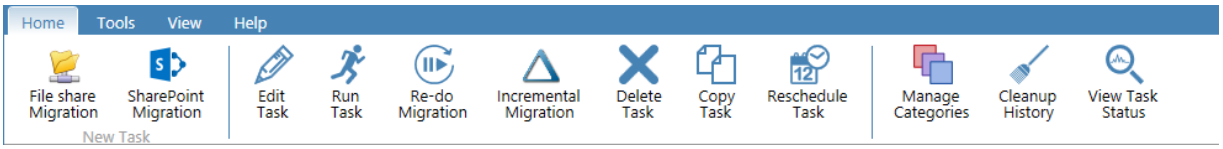


   a. Selecting **Retain task history for last <n> runs only** option will remove all history entries for each task that are older than <n> runs (task instances).
   b. Selecting **Retain task history for last <n> days** only option will remove all history entries for each task that are older than <n> days.

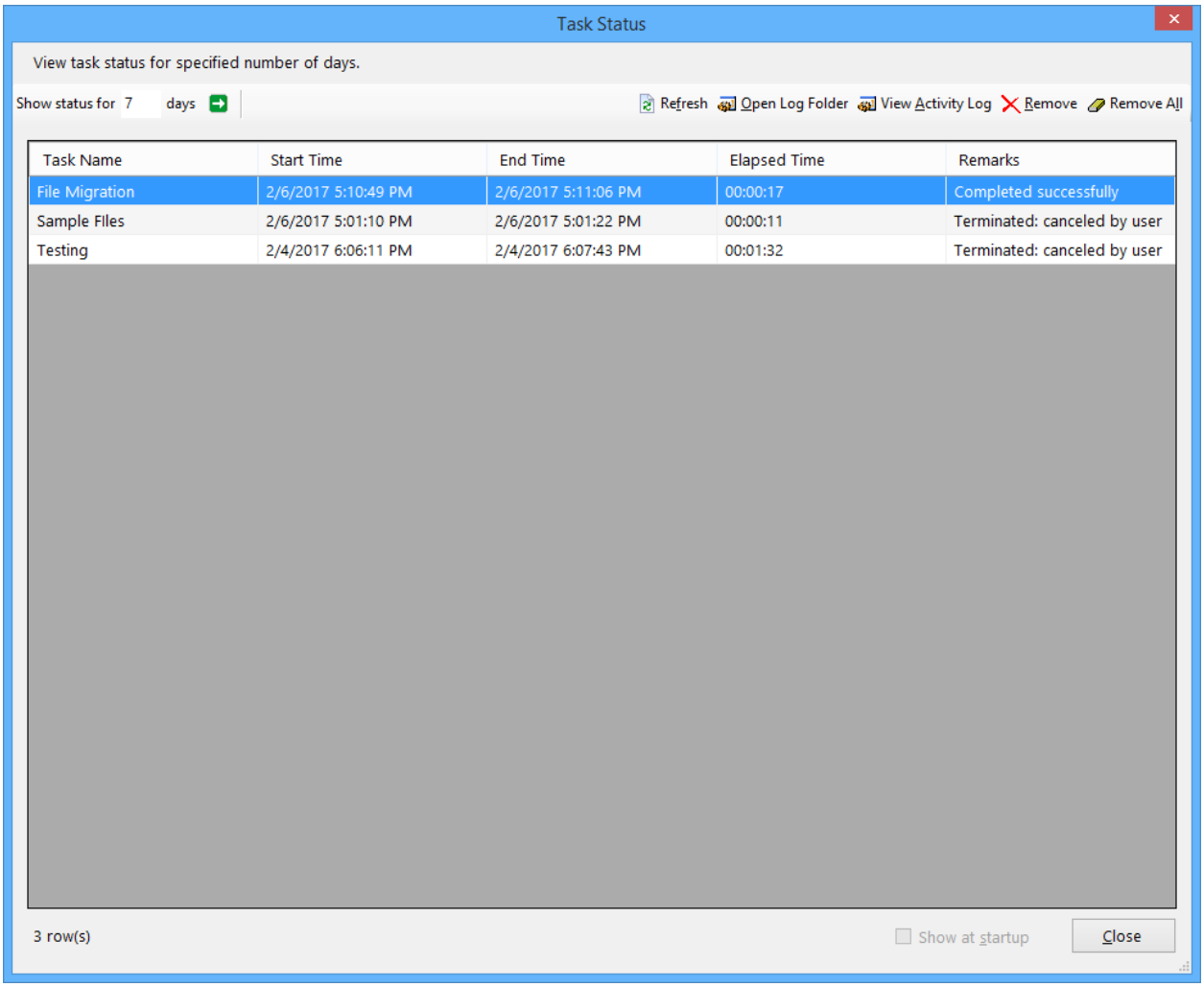
Task status

To view and manage task status of a selected task:

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



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



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

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

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

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

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

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

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

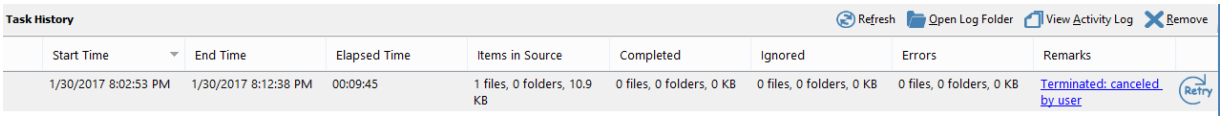
Task History

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

To view task history of a particular task:

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

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



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

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

The following operations can be performed on Task history items:

- View activity log
- Manage task status
- Retry

Run a task from command line

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.

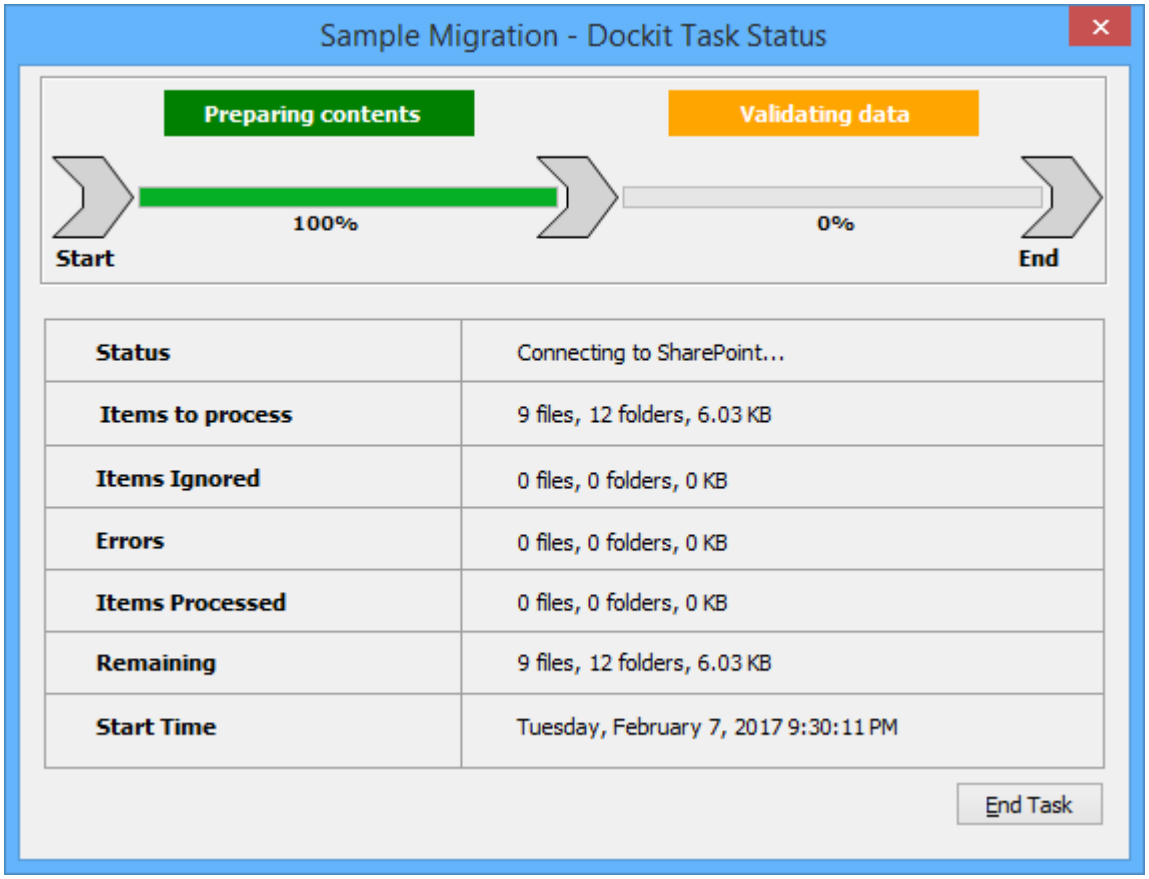
To run a DocKIT import task from command line:

1. **Usage:**
   DocKITTaskRunner <**task name**> [**/profile:**<user name>] [**/u:<**user name>] [**/p**:password] [**/noprompt**]
   where,

DocKITTaskRunner	Name of the DocKIT Task Runner application. Specify absolute path where the DocKITTaskRunner located. For example:C:\Program Files\DocKIT10x\DocKITTaskRunner
task name	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 ProfileManager, in which DocKIT task must be run. Enclose the user name in double quotes. For example: "/profile:contoso\johndoe"
/u	Denotes user name context in which Dockit task must be run in the *domain\user name or user name@domain name or user name* 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.

4. 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
  ```

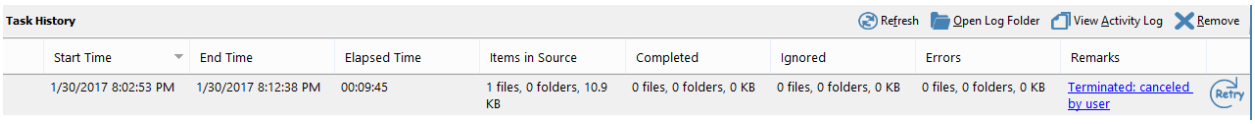
- To execute multiple Dockit tasks simultaneously:

  ```
  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
  ```

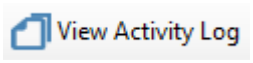
View activity log

To view activity log associated with a task history item:

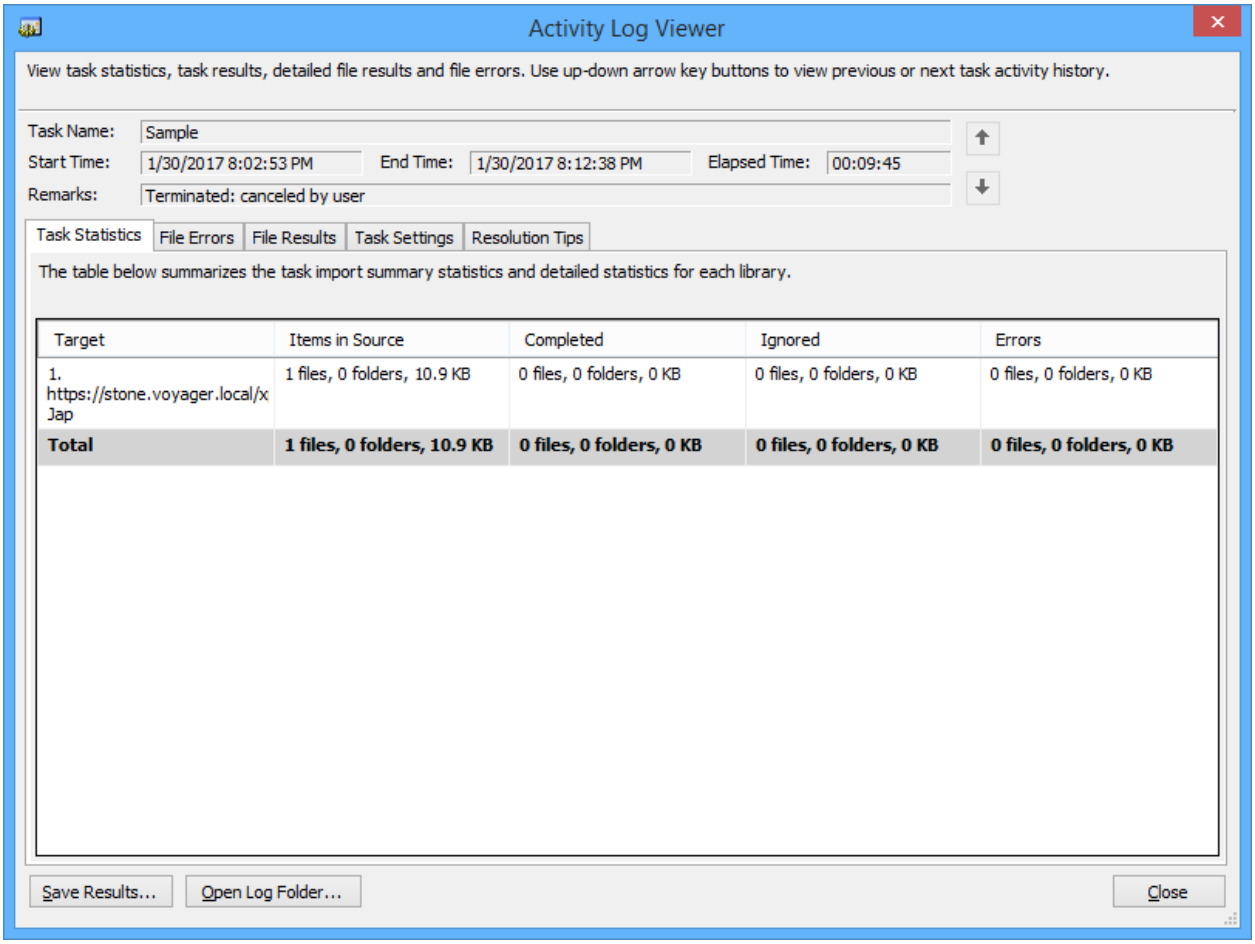
1. Select an item from **Task History** pane.



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



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



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.

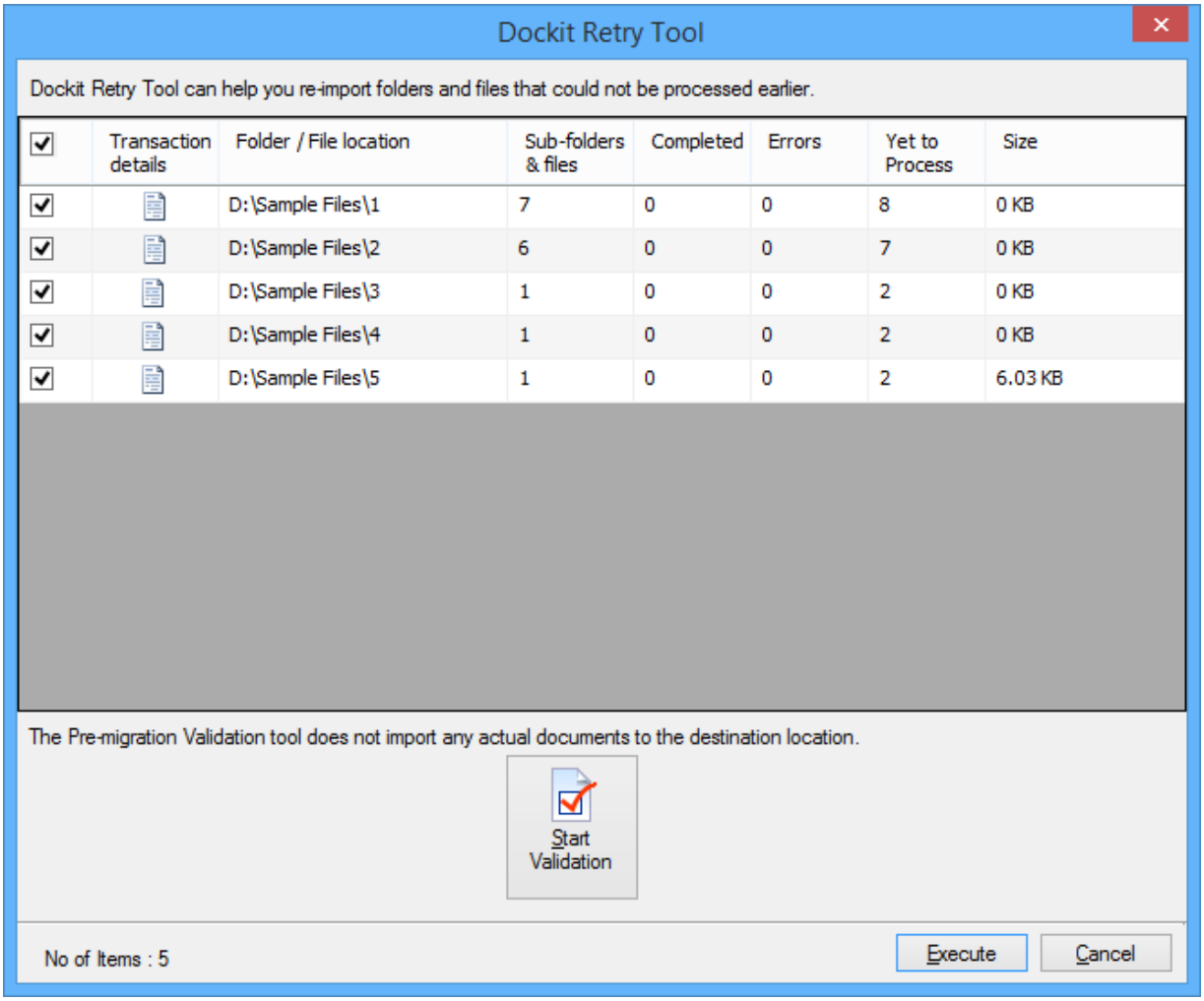
   Note: For all errors, refer **File Errors** section of **Activity Log** to view a description of the actual error that occurred during import.

Re-try

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.

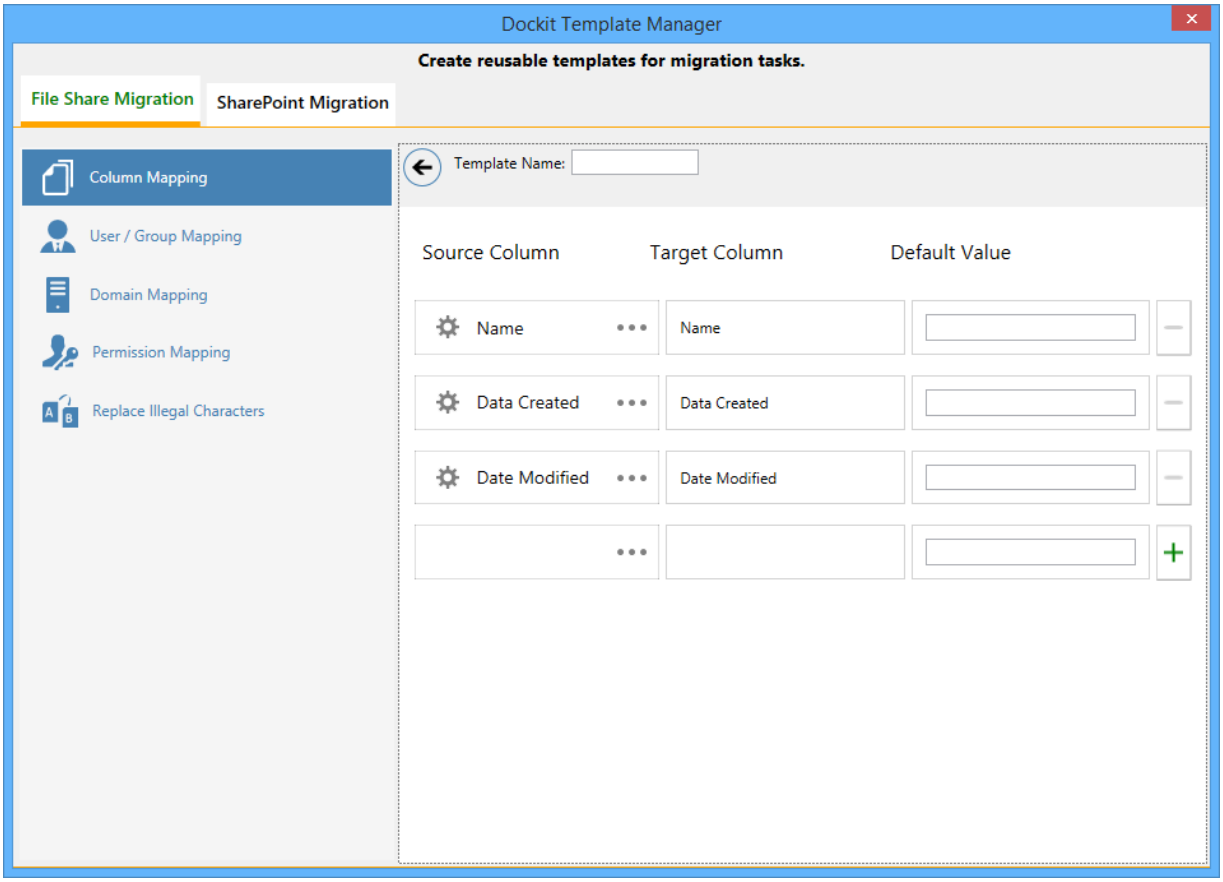


3. Click OK will proceed you to re-execute the failed items.

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:



Column Mapping Template view

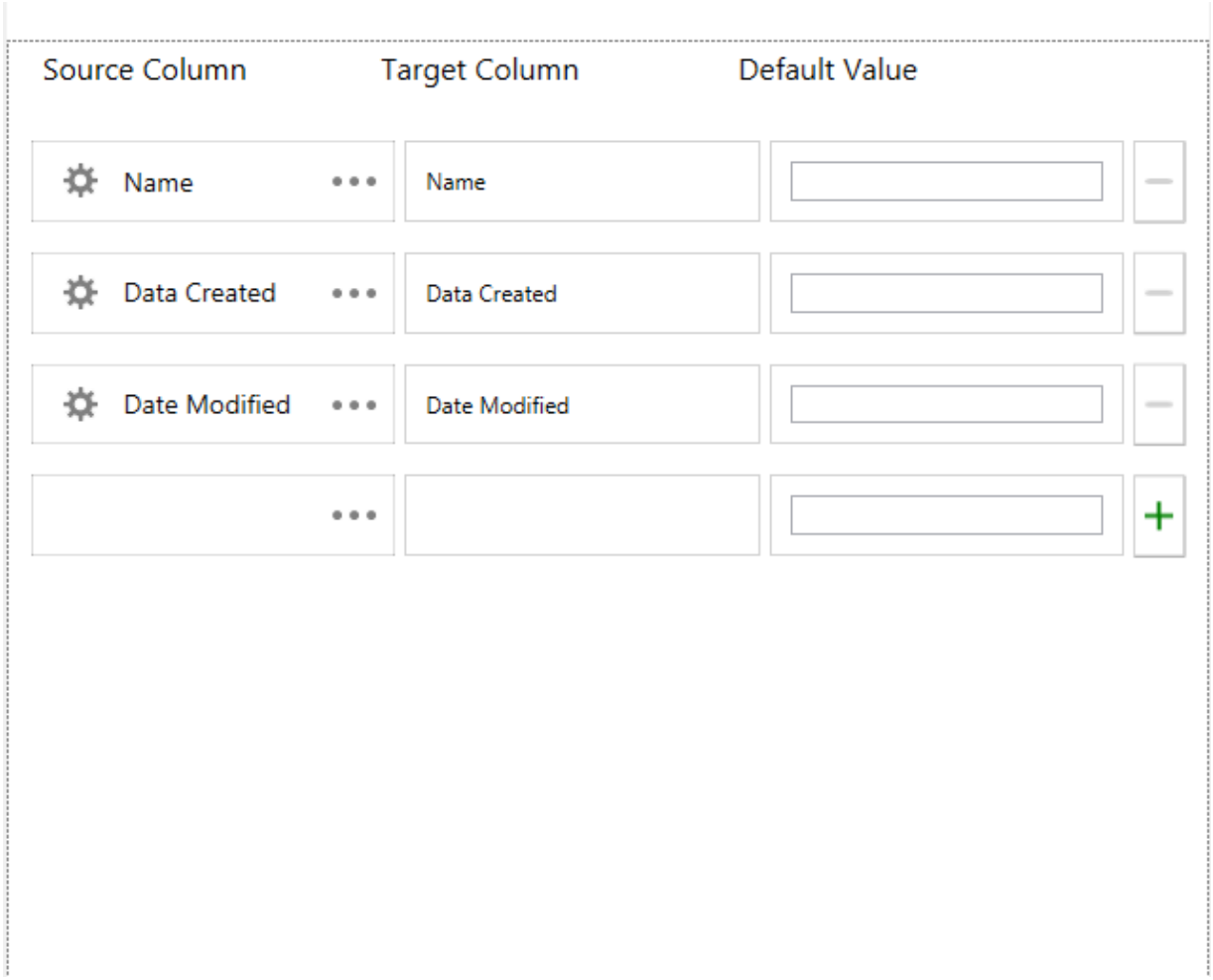
Template list pane in Dockit template manager tool transformed into Column Mapping template view upon selecting a node (column mapping template) under the group Column Mapping Template in template tree pane.

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.

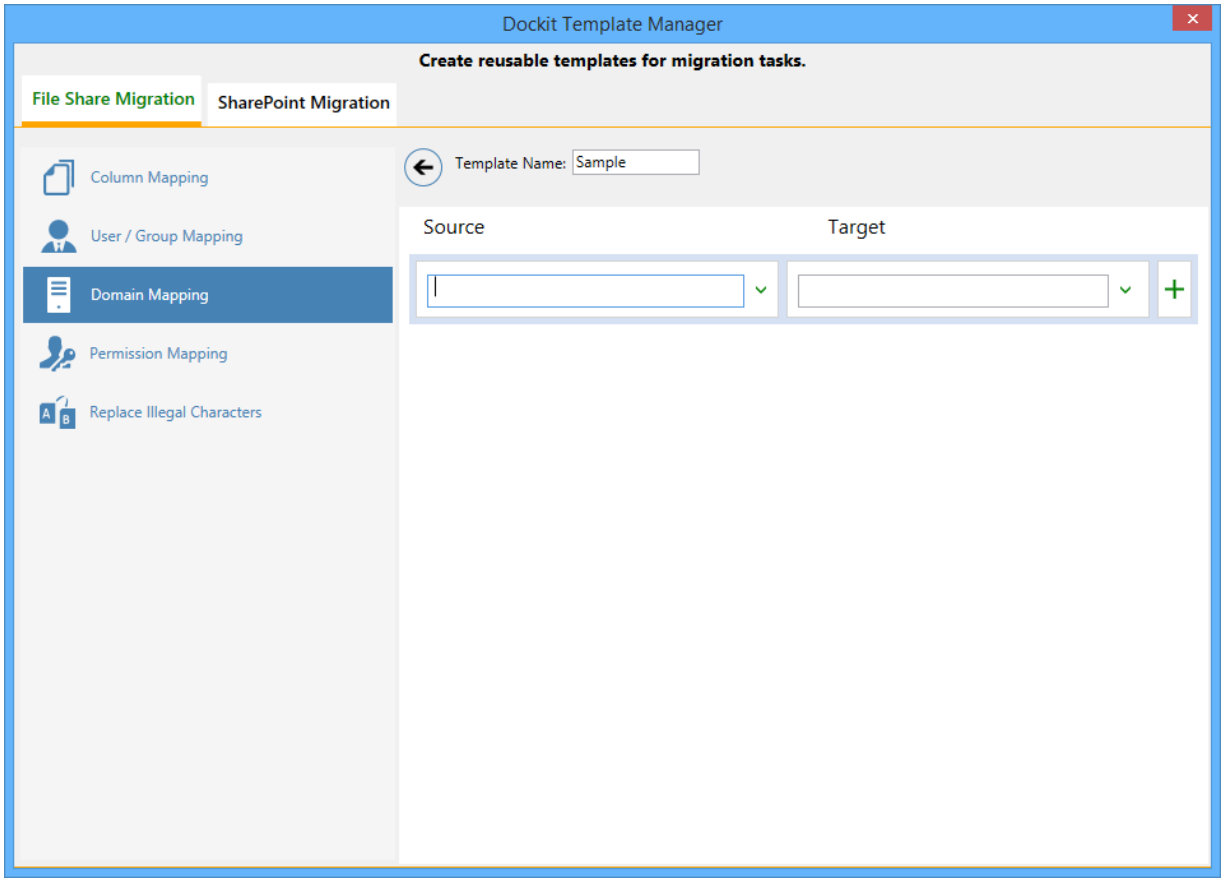

Source Column
Target Column
Default Value
Name
Name
Data Created
Data Created
Date Modified
Date Modified

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

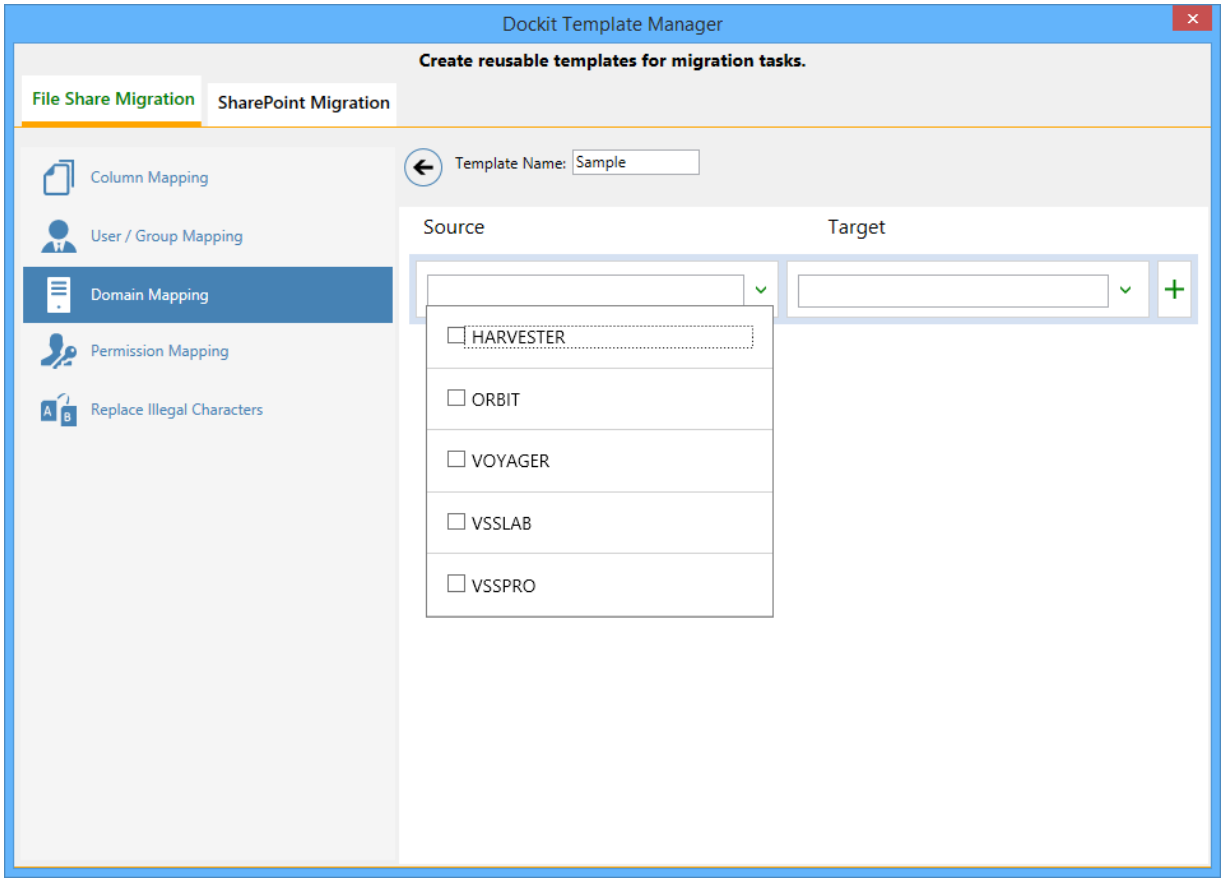
Select New from the Templates Tools pane. The new template pane will appear and enter a unique template name for the template as shown below:



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

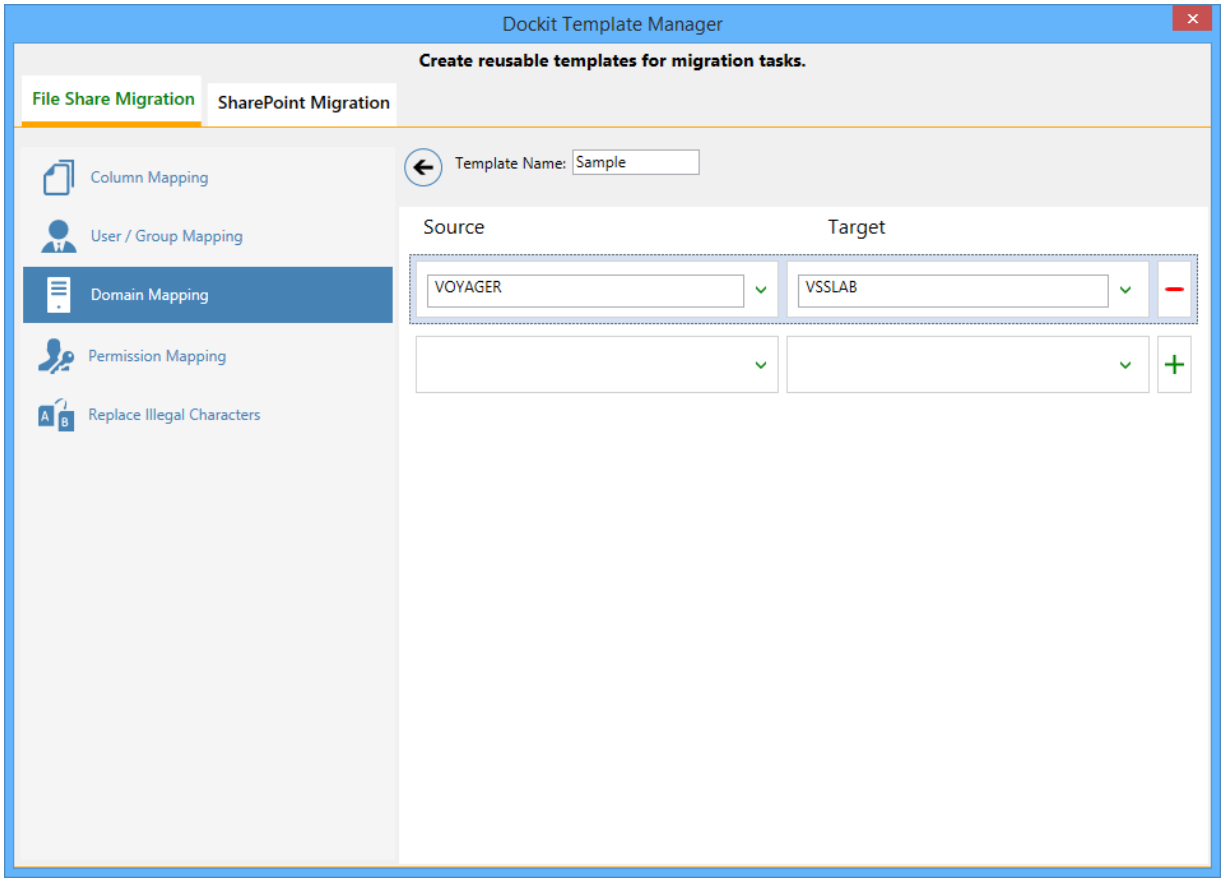


Then you have to select the appropriate source domain (s) from the source domain list and select the target domain to map from the list of available target domains. Then finally click Map button to map the domains.

You can also have the option to enter the domain names of your own in the respective textboxes and finally click + button to map. Dockit allows you to enter either domain names or UPN suffixes under the text boxes. For example, research, vyapin.onmicrosoft.com etc...

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

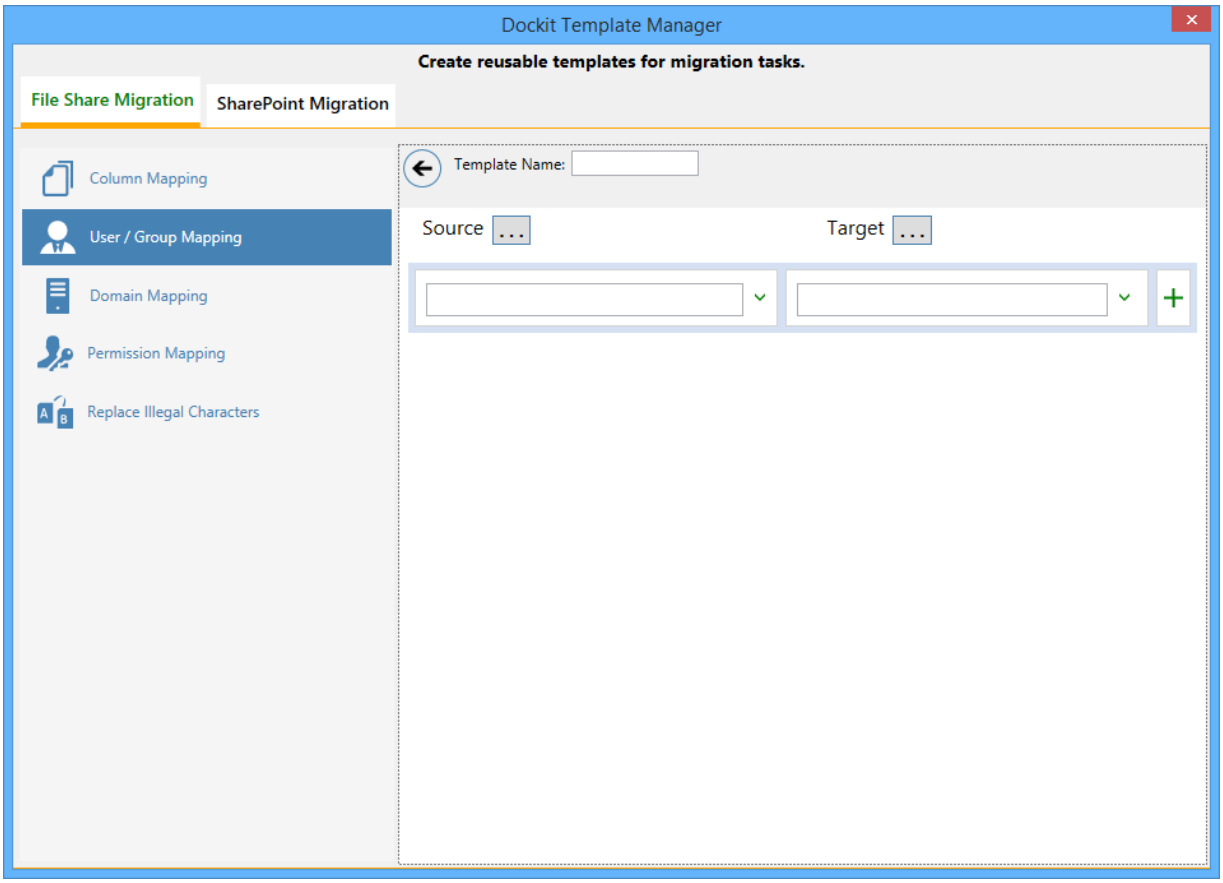
Once you click + button, selected domains are mapped and the mapped data is displayed in the domain mapping pane as shown below:


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

User / Group Mapping Template

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

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

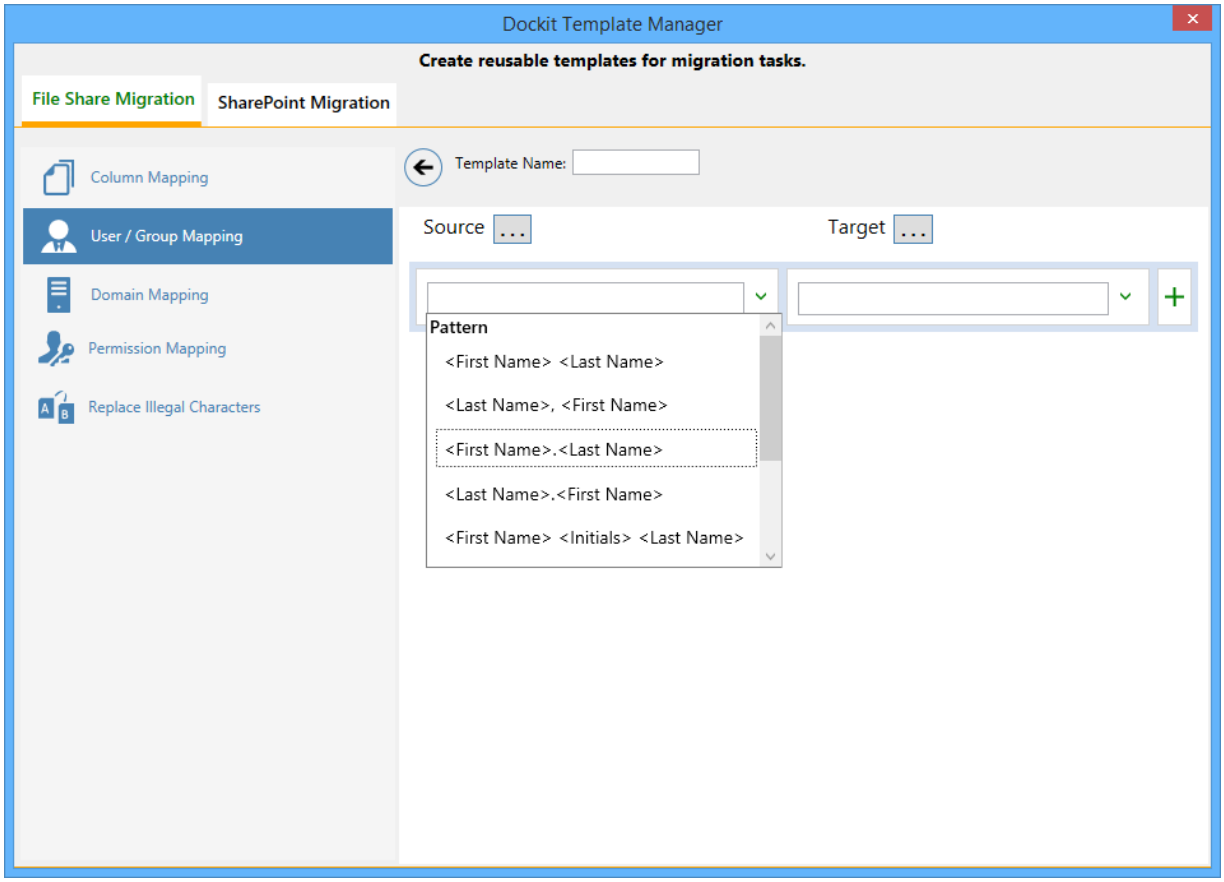


User / group Mapping Template consists of following panes to configure user / group mapping:

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

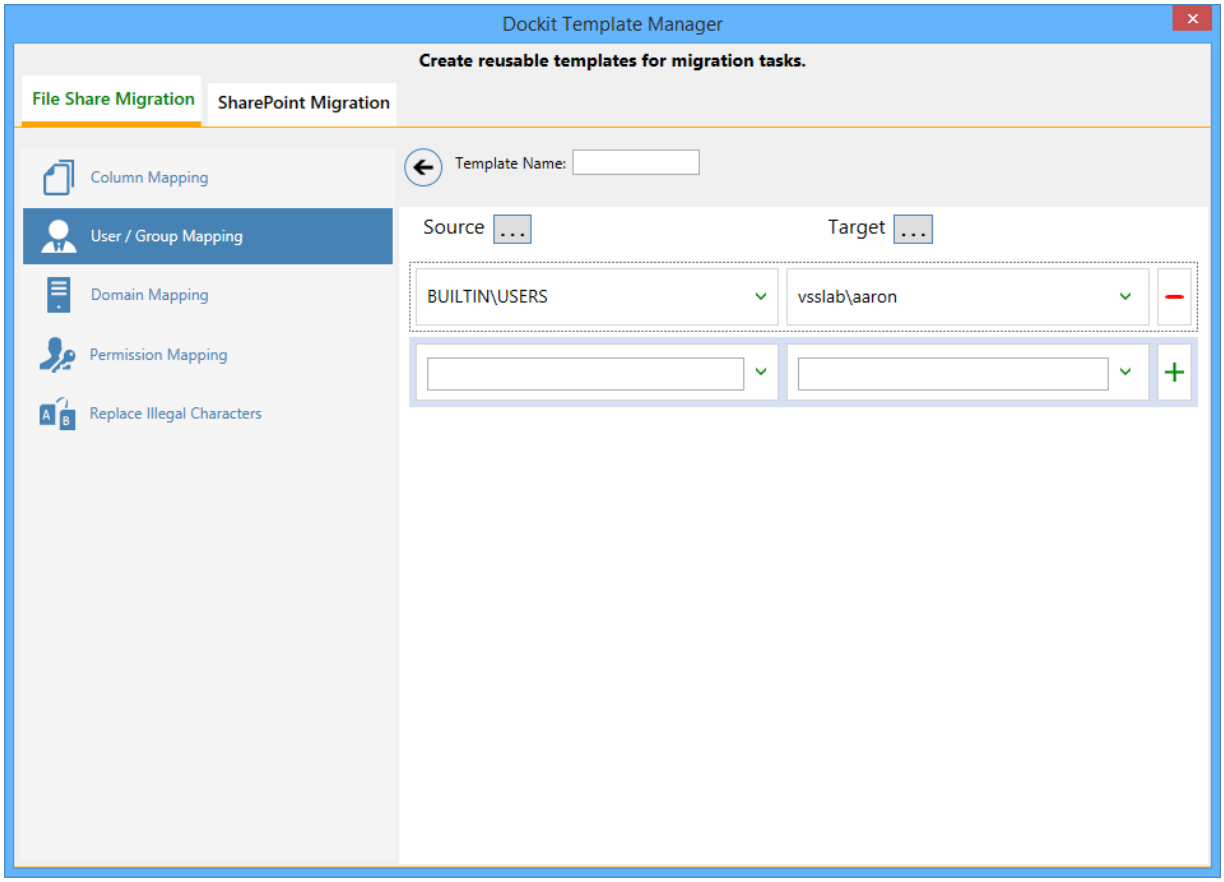
Dockit user / group mapping template enables you to load the list of source users / groups from various options either by clicking the appropriate button in the source load options pane or load source users / groups menu as shown below. For more information, click Source users / groups loading options.

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.

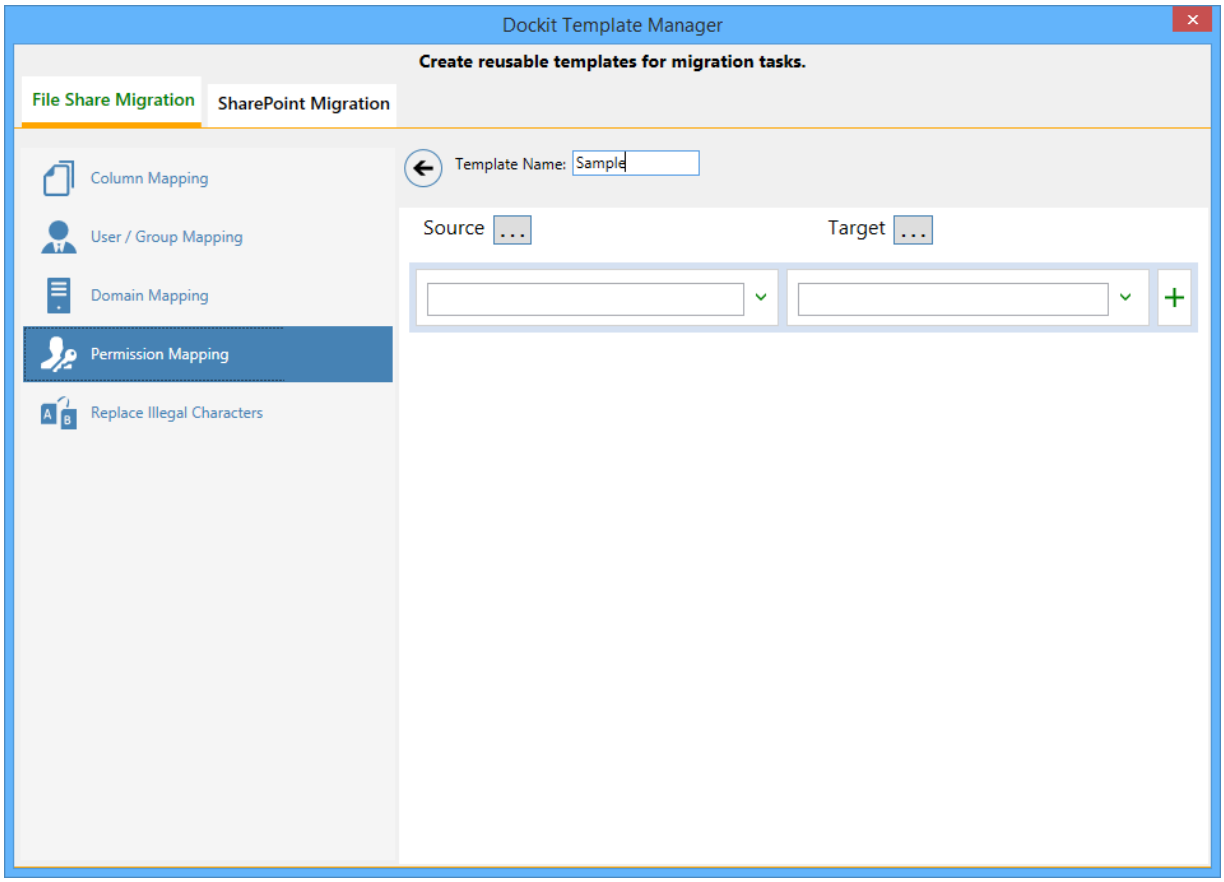
You can also have the option to enter the user / group names of your own in the respective textboxes and finally click + button to map. Once you click + button, selected user / group are mapped and the mapped data is displayed in the user / group mapping pane as shown below:


Dockit Template Manager
Create reusable templates for migration tasks.
File Share Migration
SharePoint Migration
Column Mapping
User / Group Mapping
Domain Mapping
Permission Mapping
Replace Illegal Characters
Template Name:
Source ...
Target ...
BUILTIN\USERS
vsslab\aaron

Permission Mapping Template

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

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

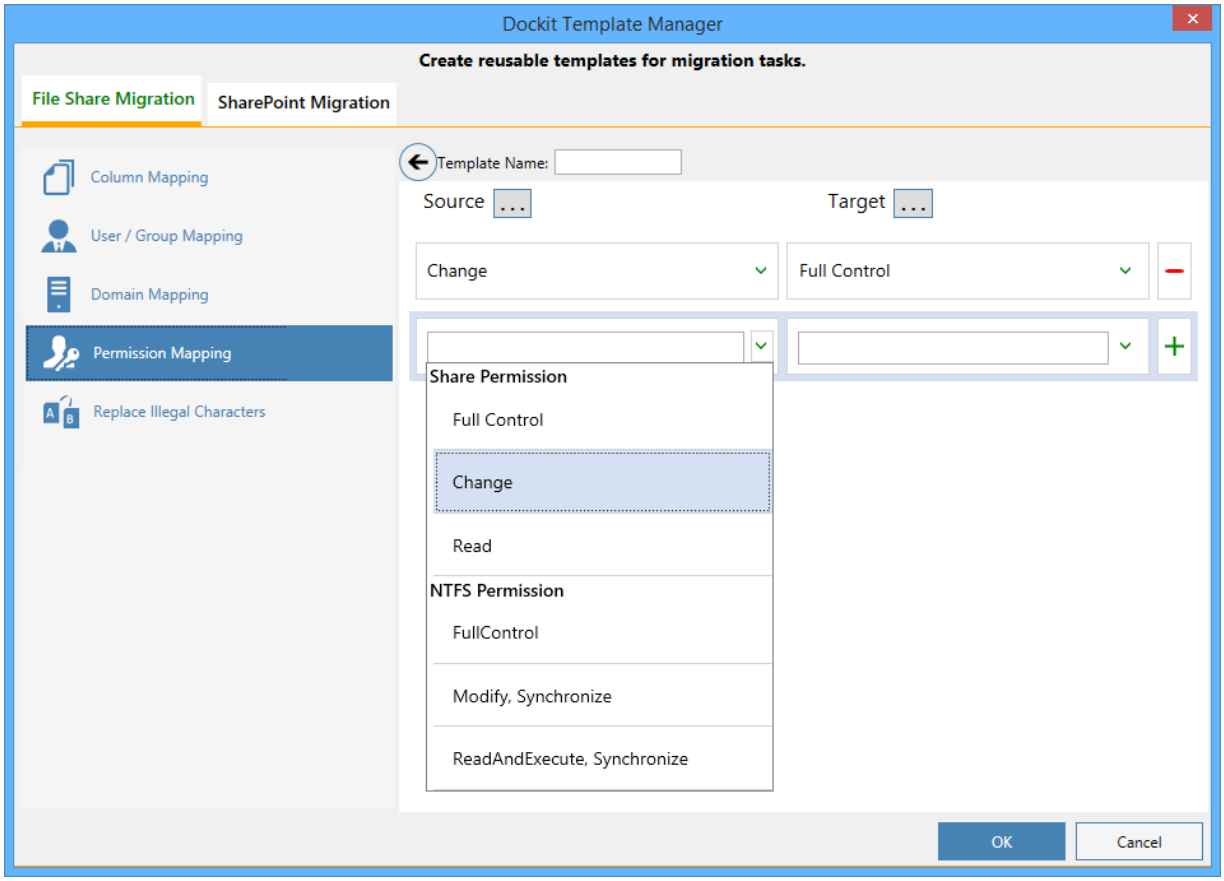


Permission Mapping Template consists of following panes to configure permissions mapping:

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

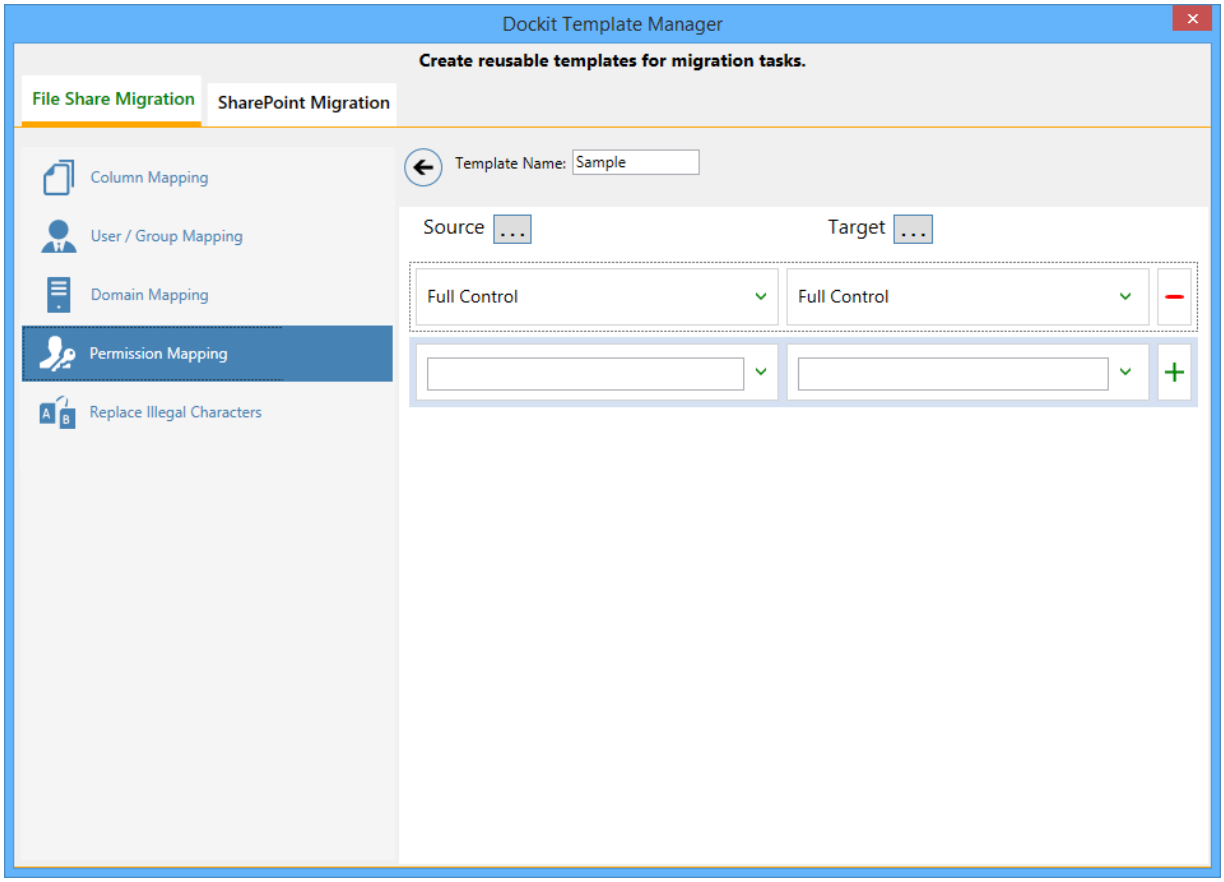
Dockit Permission mapping template enables you to load the list of source permissions from network location either by clicking the appropriate button in the source load options pane or load source permissions menu as shown below.

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:



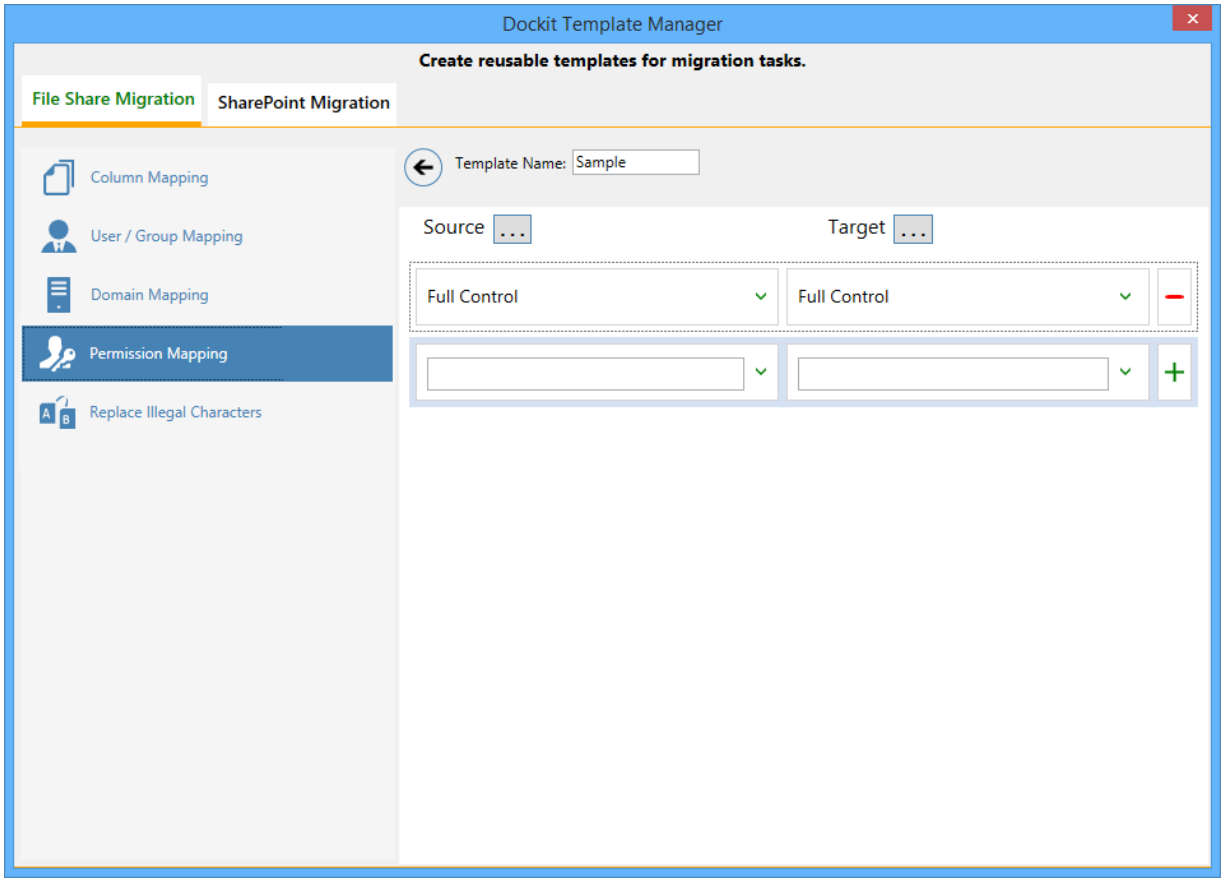
Dockit permission mapping template enables you to load the list of target permissions from site collection either by clicking the appropriate button in the target load options pane or load target permissions menu as shown below.

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:



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:



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

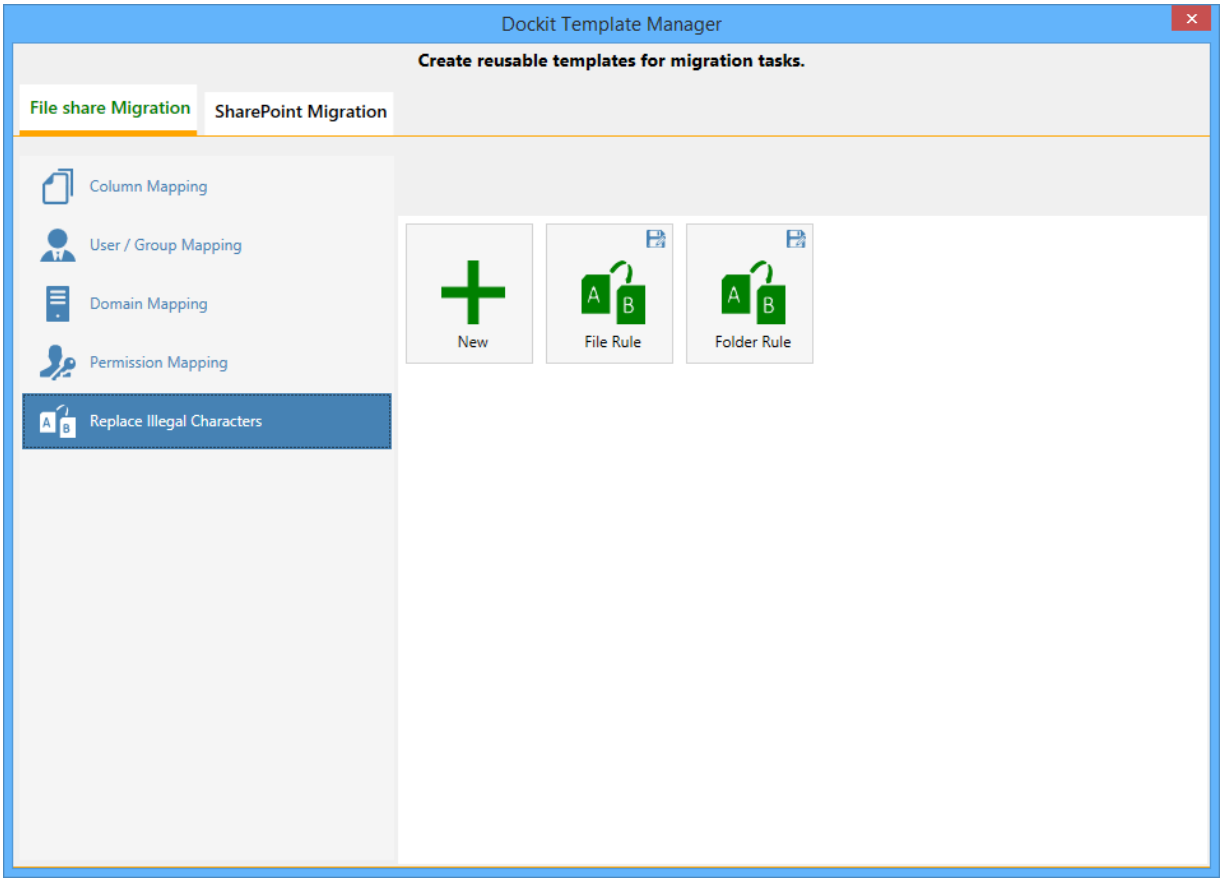
Folder and File Renaming rules

SharePoint does not permit certain characters in folder and file names. Dockit provides an ability to rename invalid character(s) to valid character(s) and also support any character(s) to be renamed using rules, thereby eliminating the tedious step of renaming the source folders / files. You can create naming rules, save them as **Naming Rules** and re-use them in your import tasks.

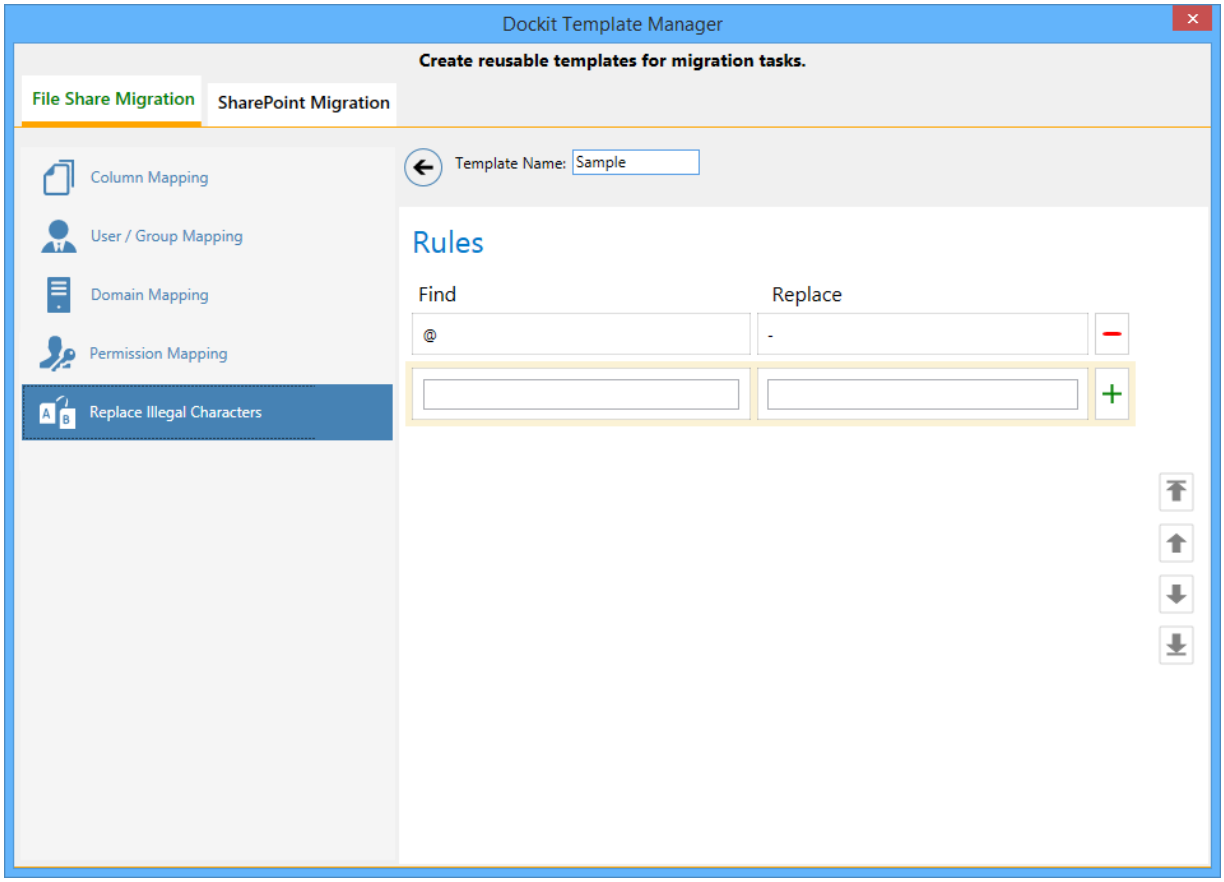
Dockit uses 'Regular Expressions' technique which enables you to create generic renaming rules in order to specify the pattern for file name conventions in Folder & File Renaming rules dialog. The 'regular expressions' technique is widely used in software where pattern matching is crucial.

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:



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.



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

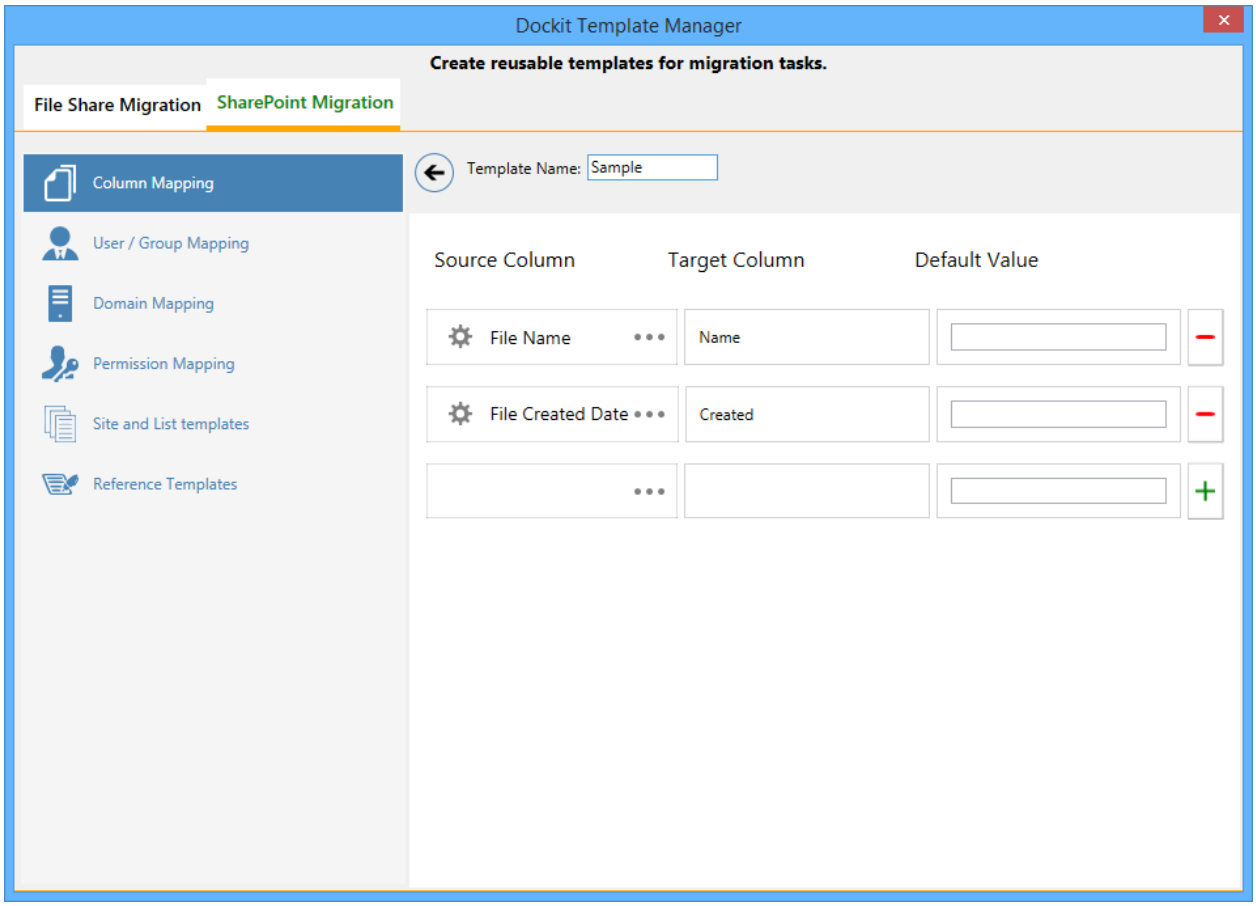
Sample renaming rules:

File Name	Find	Replace	Result	Remarks
SampleV1	*V1	*{empty}*	Sample	Truncate V1, if the file ends with V1
SampleV1	*V1	A	SampleA	Replace V1 with A, if the file name ends with V1
Hello_World	*_World	*{empty}*	World	Truncate Hello_, if the file name starts with Hello_
Hello_World	*_World	*{empty}*	Hello	Truncate _World, if file name ends with _World
SampleV1	v?	*{empty}*	Sample	Truncate V and the file name character following it (immediately succeeding character), if the file names contains V and followed by any one character.
Sample	?p	*{empty}*	Sale	Truncate one character preceding the letter p in the file name.
SampleV12	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	<	*{empty}*	HelloWorld	
Hello>World	>	*{empty}*	HelloWorld	
[Document	[	Word	WordDocument	
Word]	]	Document	WordDocument	
(File	(	Sample	SampleFile	
Sample)	)	Document	SampleDocument	

SharePoint Migration – Column Mapping Template

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

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



Column Mapping Template view

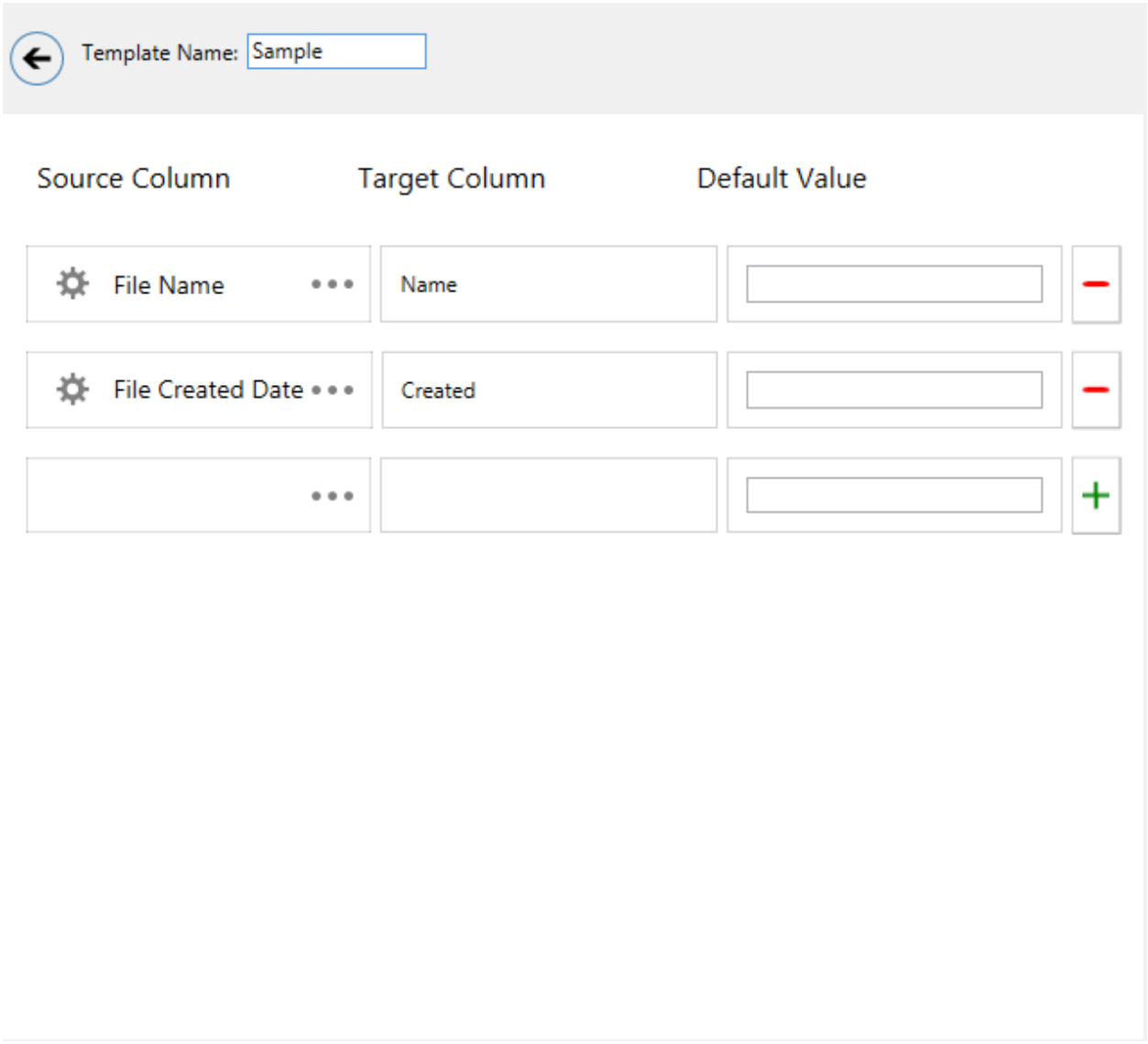
Template list pane in Dockit template manager tool transformed into Column Mapping template view upon selecting a node (column mapping template) under the group Column Mapping Template in template tree pane.

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

Column mapping pane

Column Mapping Pane

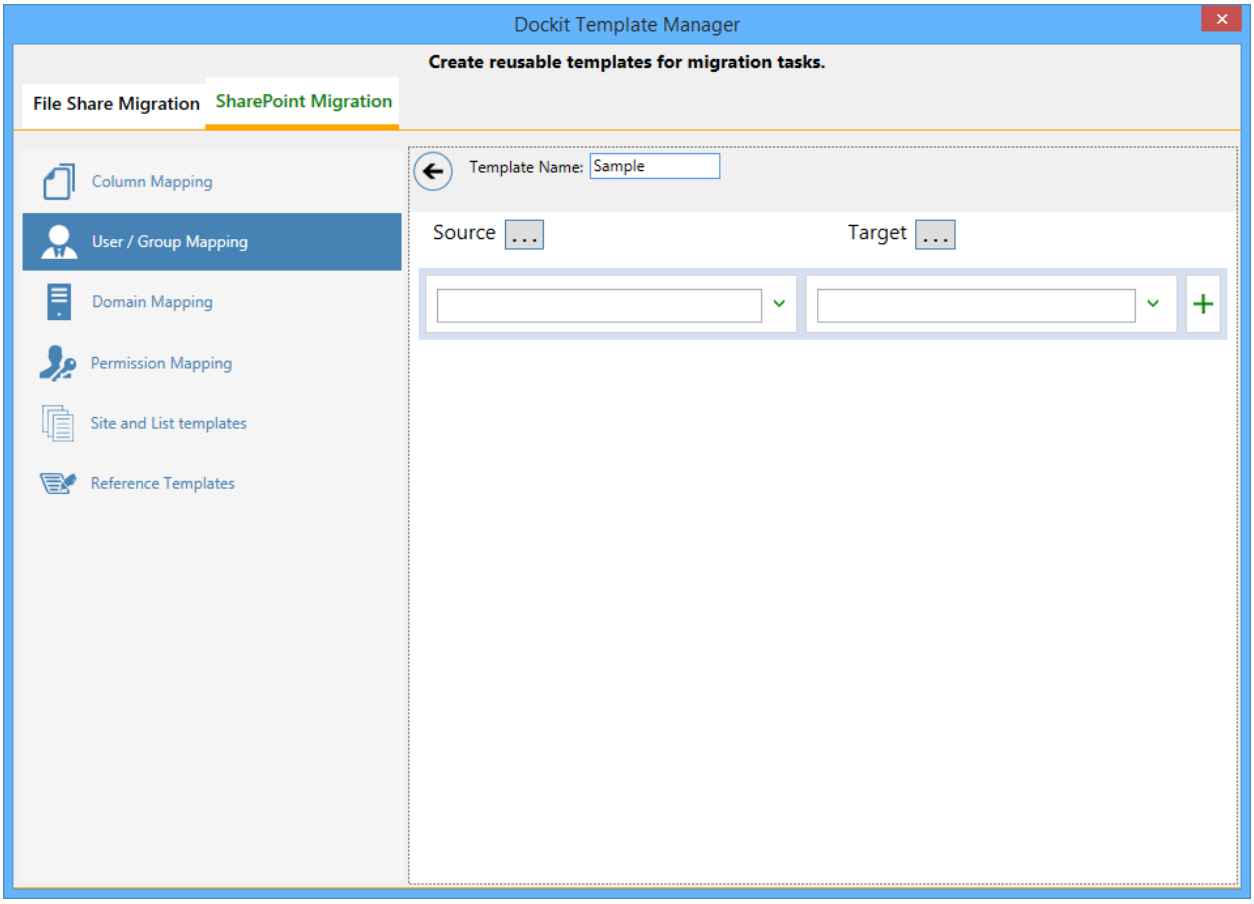
Column Mapping pane displays the column mapping structure for the selected template. It provides the mapping information (metadata value or source assigned) for SharePoint destination column(s) configured in the template. Column Mapping related operations can be performed by using the Column Mapping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



SharePoint Migration – User / Group Mapping Template

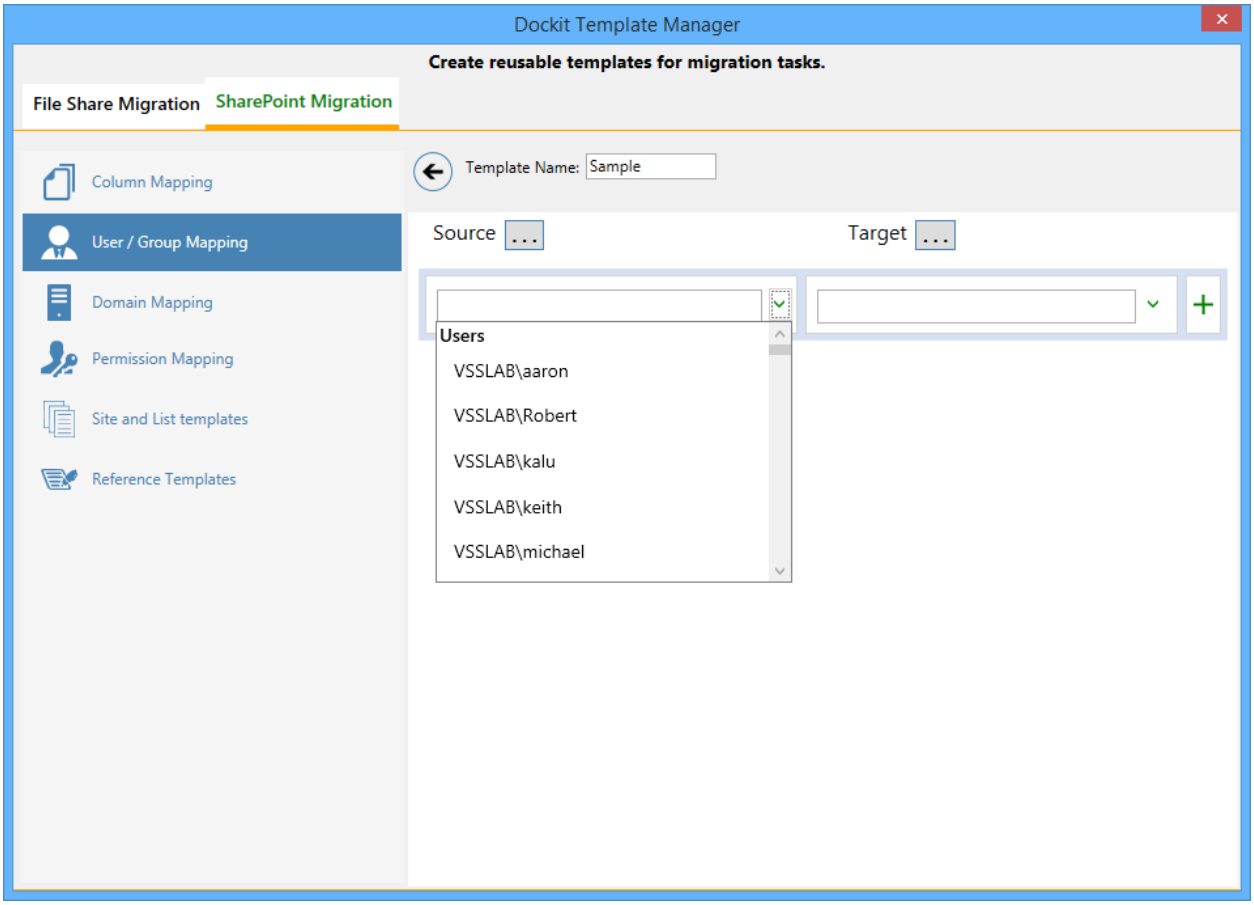
Dockit uses user / group mapping template to replace the unavailable users / groups with valid / new SharePoint users / groups when assigning user / groups or permissions for the folder / document during content migration from one SharePoint environment to another. You can use this mapping template for 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 user / group mapping template enables you to load the list of users / groups from various sources, either by clicking the appropriate button or load users / groups menu as shown below:

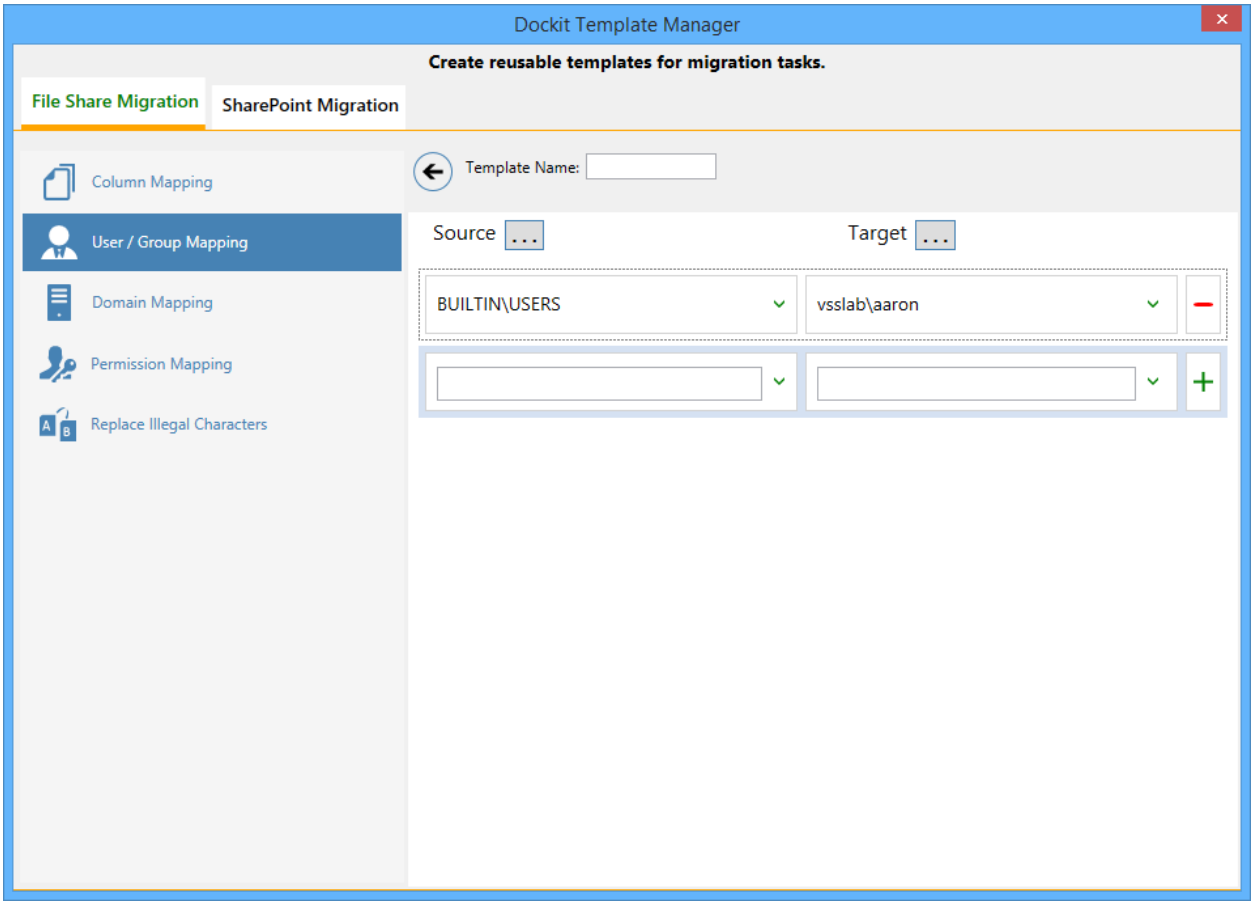
Once you select the option and provide the appropriate inputs for source and target user, the list of users / groups are displayed on the respective users / groups list pane as shown below:



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

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

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

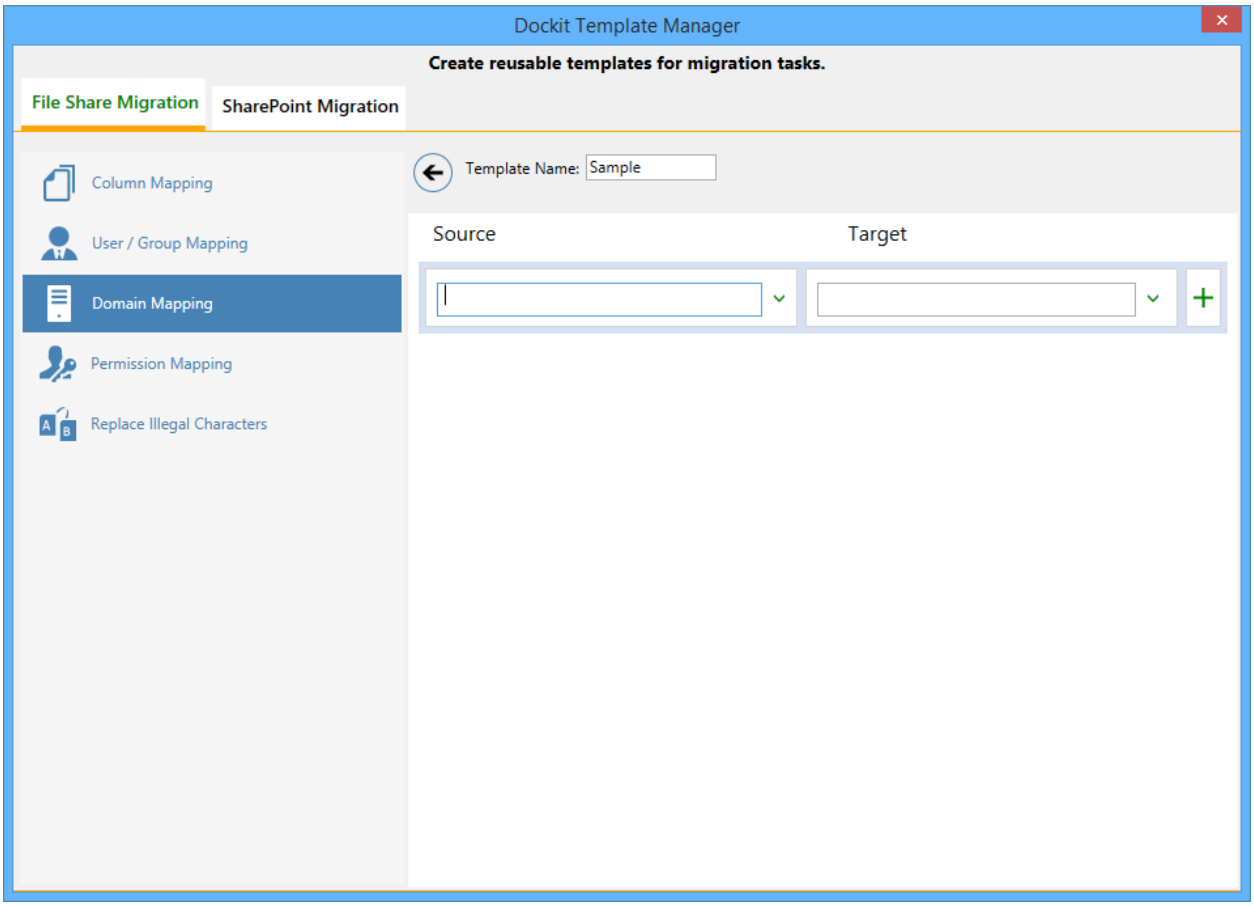

Dockit Template Manager
Create reusable templates for migration tasks.
File Share Migration
SharePoint Migration
Column Mapping
User / Group Mapping
Domain Mapping
Permission Mapping
Replace Illegal Characters
Template Name:
Source ...
Target ...
BUILTIN\USERS
vsslab\aaron

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,

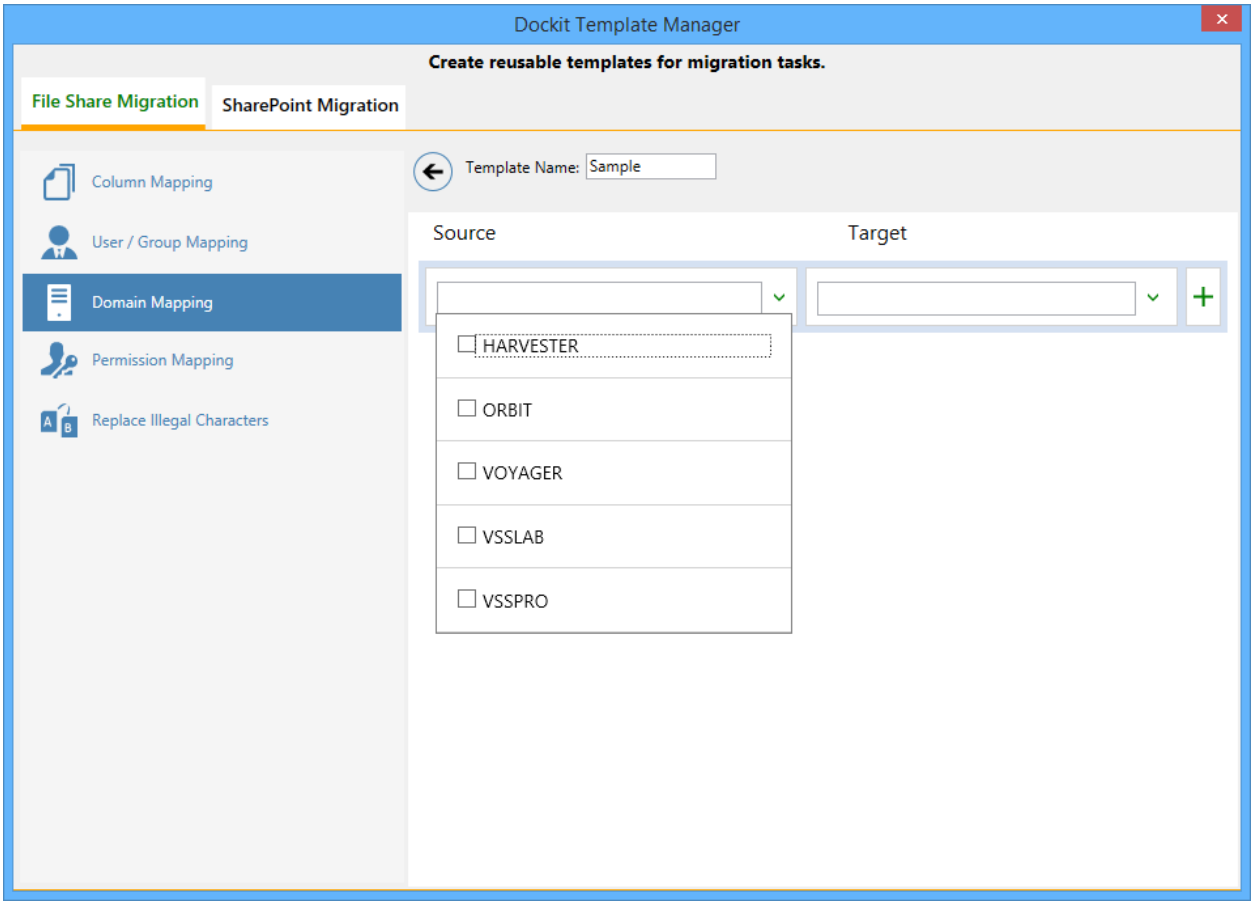
Select New from the Templates Tools pane. The new template will appear enter an unique template name for the template as shown below:



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

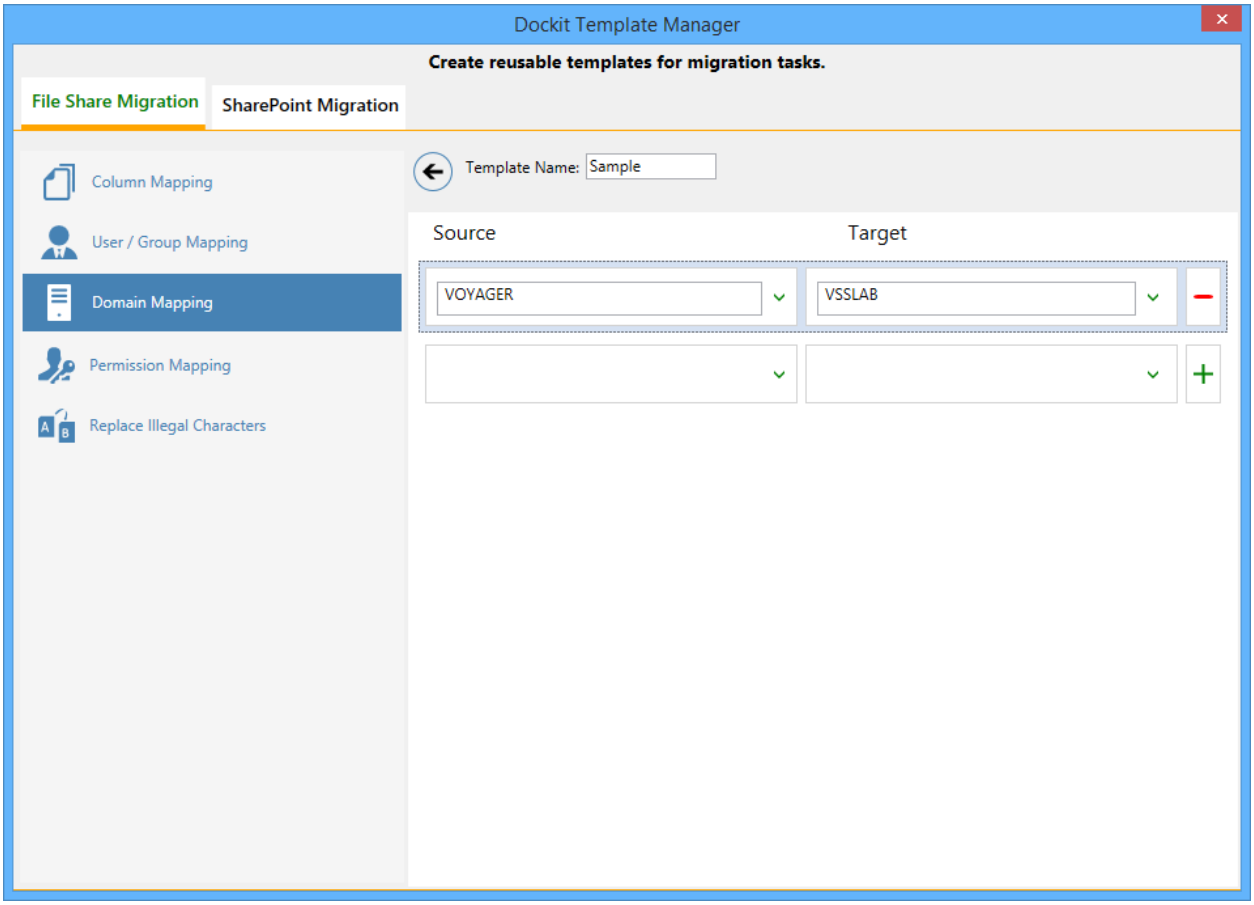


Then you have to select the appropriate source domain (s) from the source domain list and select the target domain to map from the list of available target domains. Then finally click + button to map the domains.

You can also have the option to enter the domain names of your own in the respective textboxes and finally click + button to map. Dockit allows you to enter either domain names or UPN suffixes under the text boxes. For example research, vyapin.onmicrosoft.com etc...

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

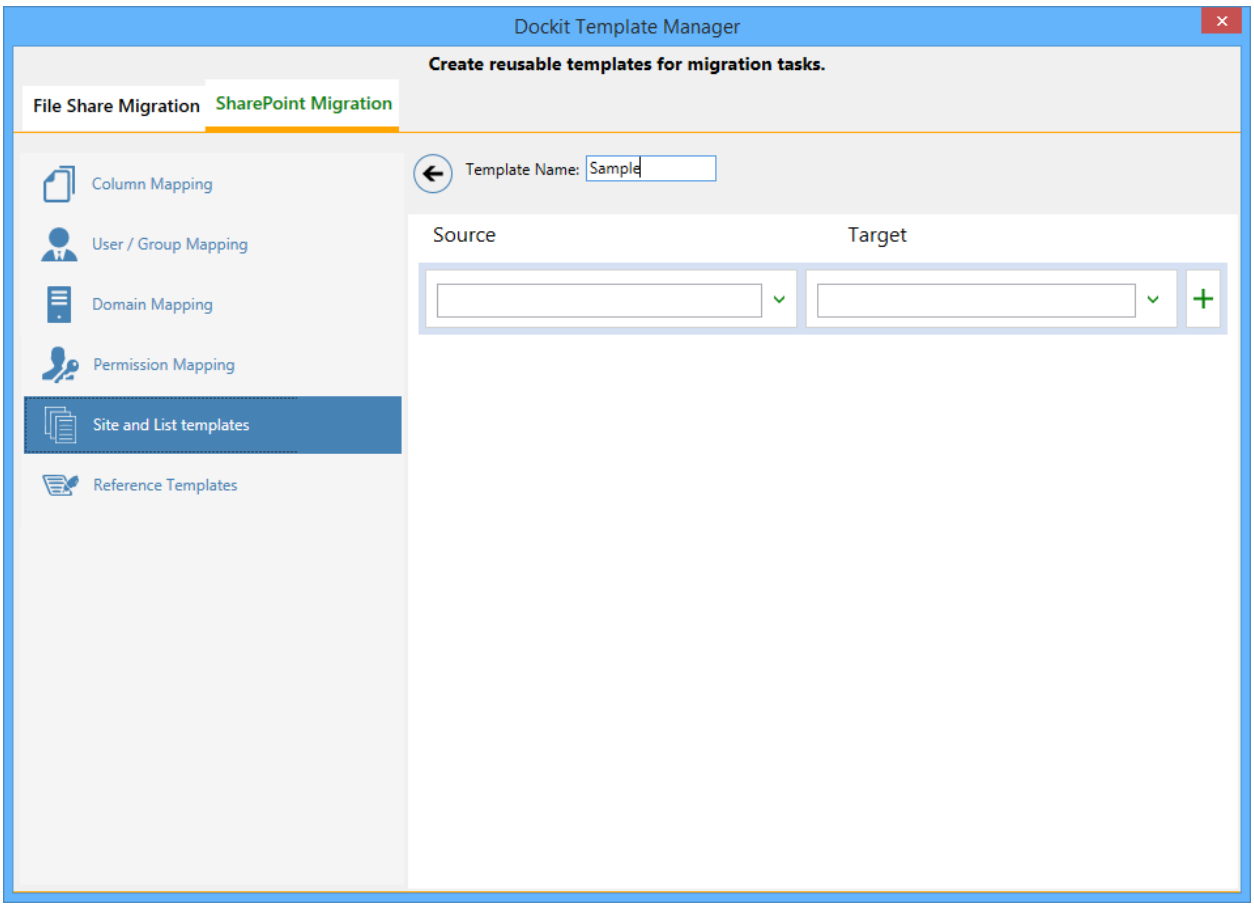
Once you click + button, selected domains are mapped and the mapped data is displayed in the domain mapping pane as shown below:


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

SharePoint Migration – Site and List Mapping Template

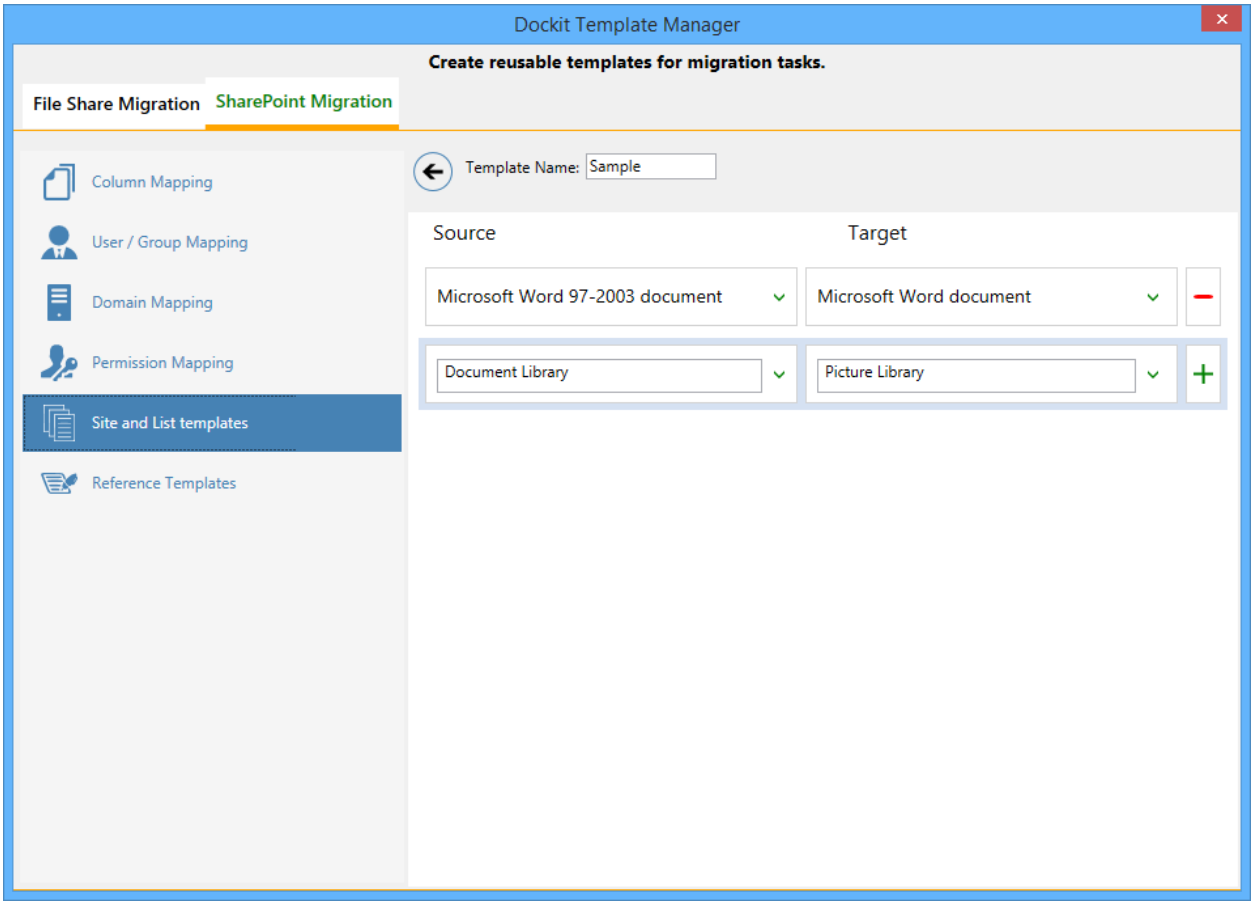
Dockit uses site and list template mapping to replace the unavailable site and list templates with valid / new SharePoint site and list templates when creating unavailable sites and lists during content migration from one SharePoint environment to another.

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:



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.

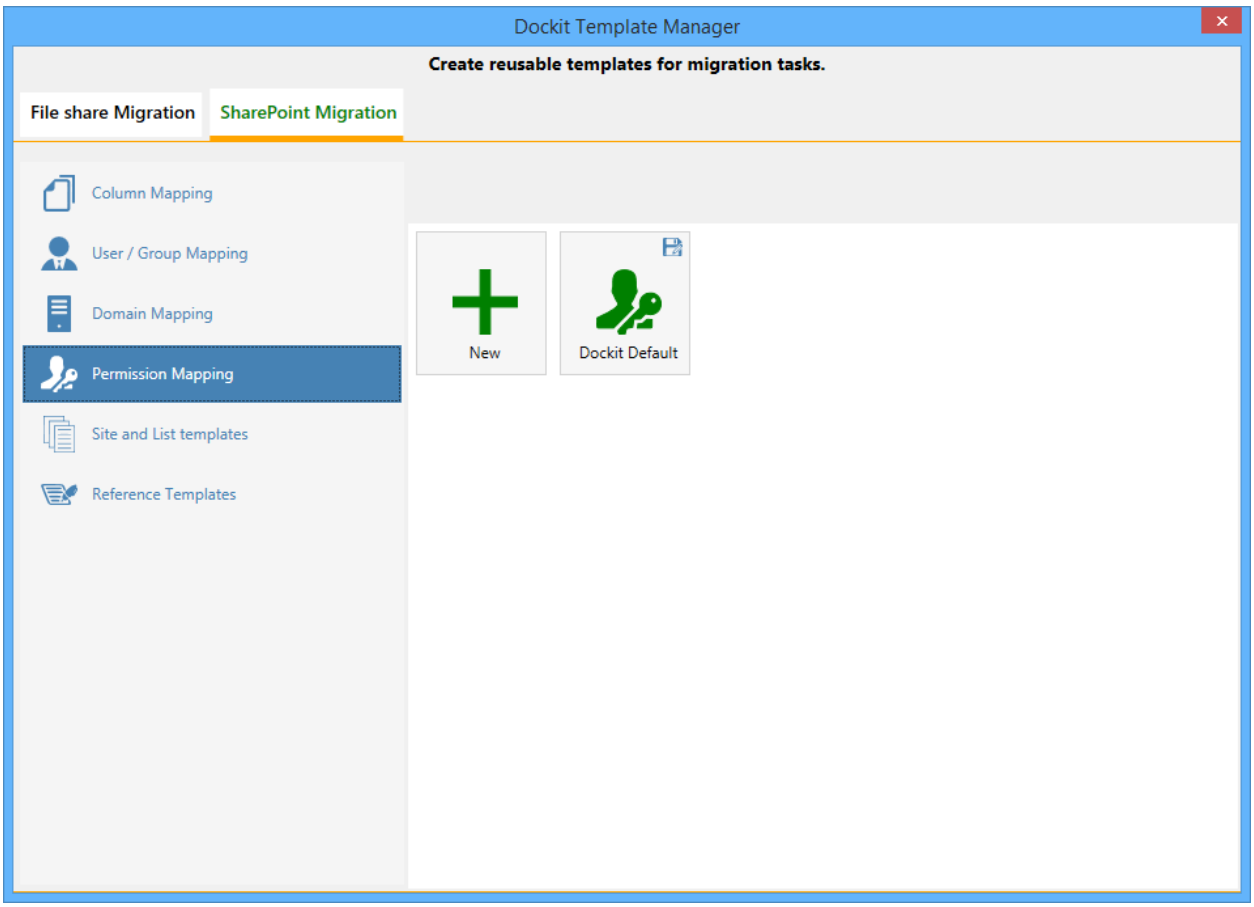
You also have the option to enter the template names in the respective combo boxes and finally, click + button to map. Once you click + button, selected templates are mapped and the mapped template pair is displayed in the Site and List Template mapping pane as shown below:


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

SharePoint Migration – Permission Mapping Template

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

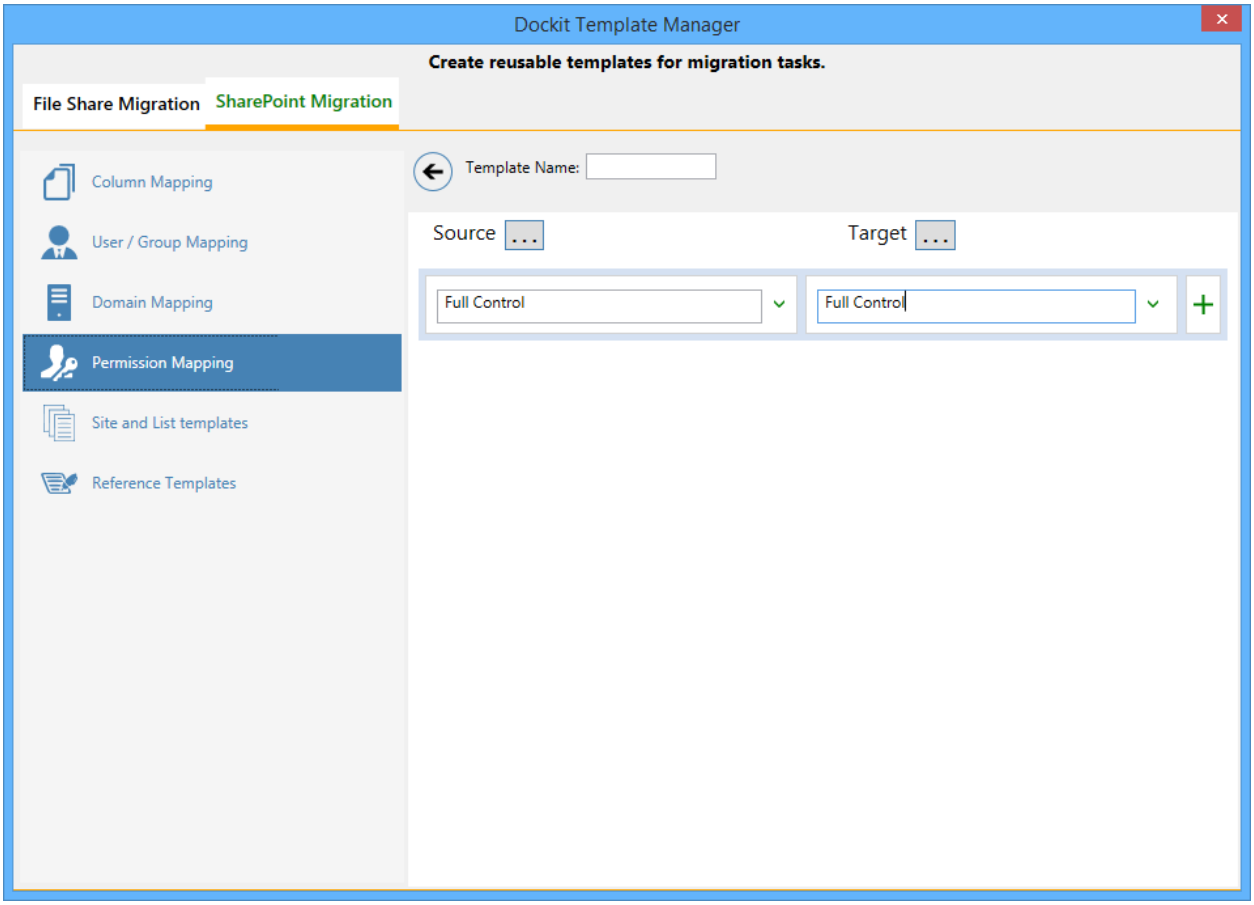
To create a new permission mapping template, Select New from the Templates Tools pane. The new template will appear and enter a unique name for the template as shown below:



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

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

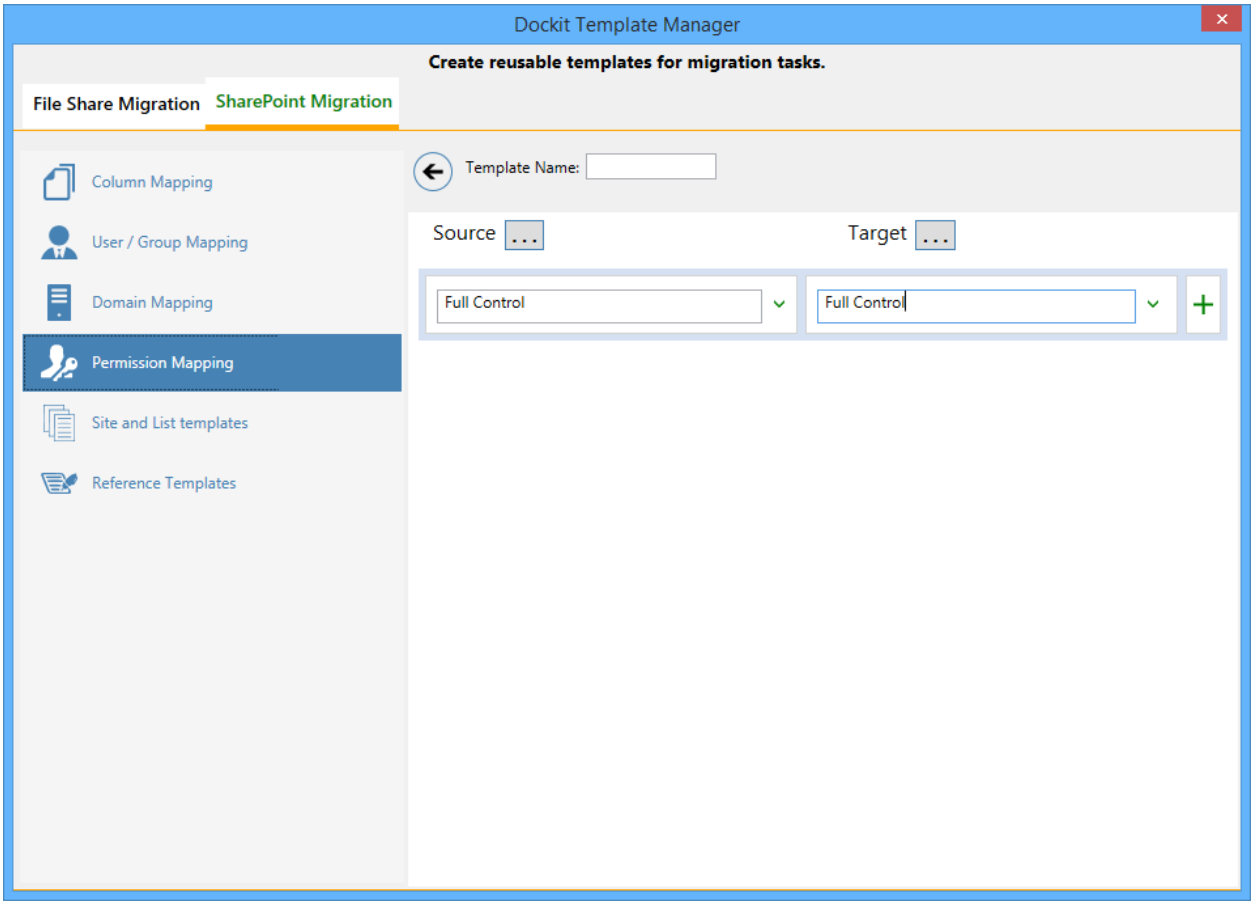
Dockit Permission mapping template enables you to select source permissions and target permissions from the list of default SharePoint permission levels as shown below:



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.

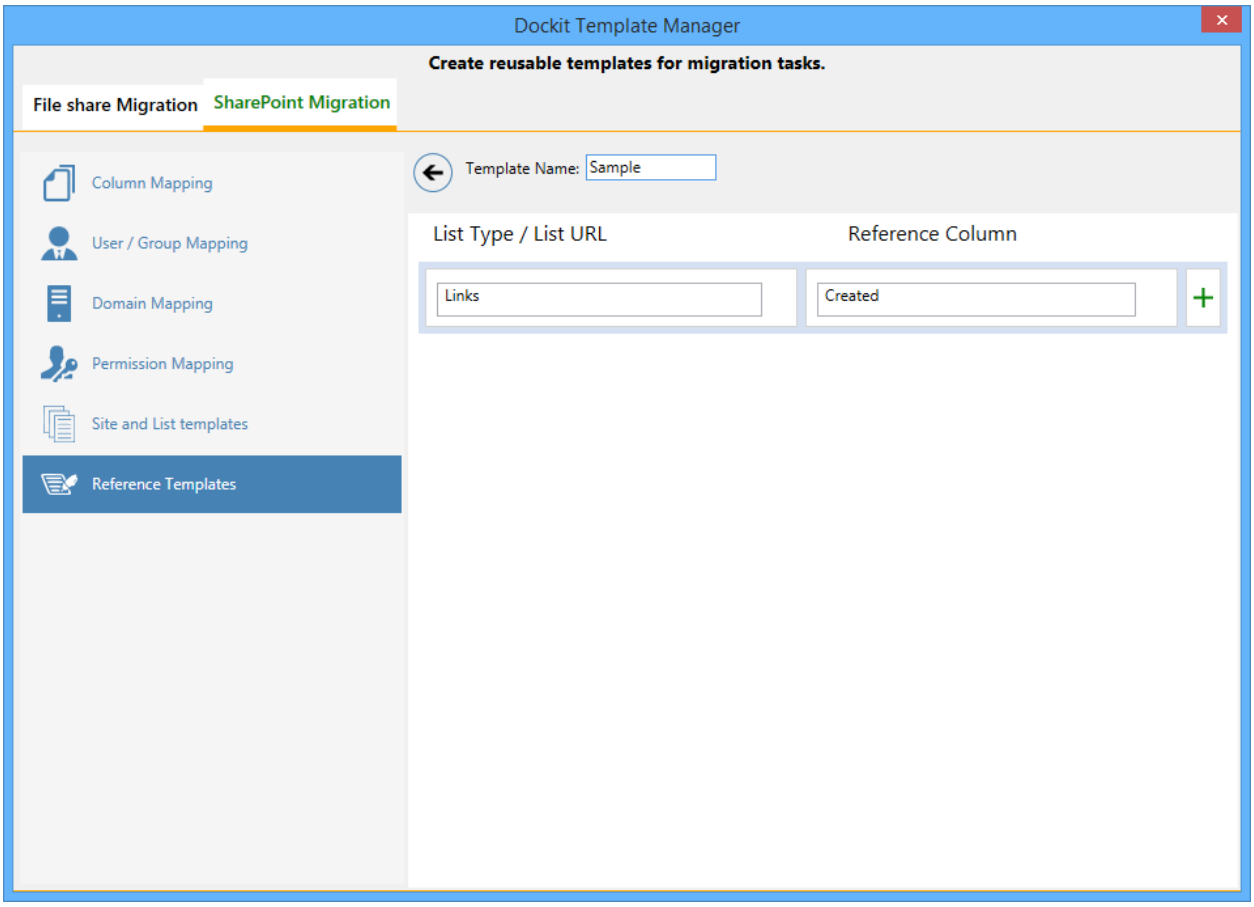
You also have the option to enter the permission levels(s) in the respective textboxes and finally click + button to map the corresponding values. Once you click + button, selected permissions are mapped and the mapped data is displayed in the permissions mapping pane as shown below:


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

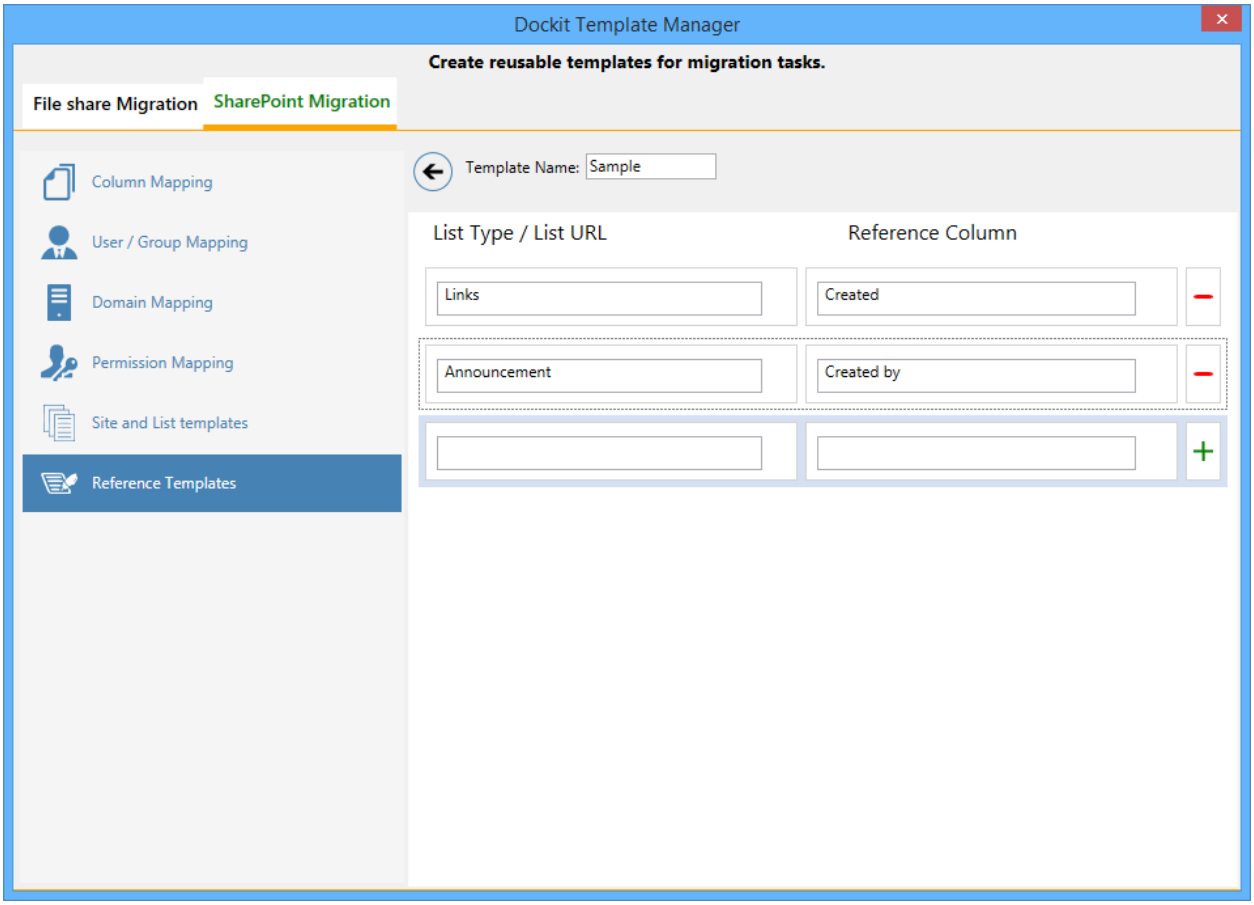
SharePoint Migration – Reference Mapping Template

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:



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 tasks.
File share Migration
SharePoint Migration
Column Mapping
User / Group Mapping
Domain Mapping
Permission Mapping
Site and List templates
Reference Templates
Template Name: Sample
List Type / List URL
Reference Column
Links
Created
Announcement
Created by

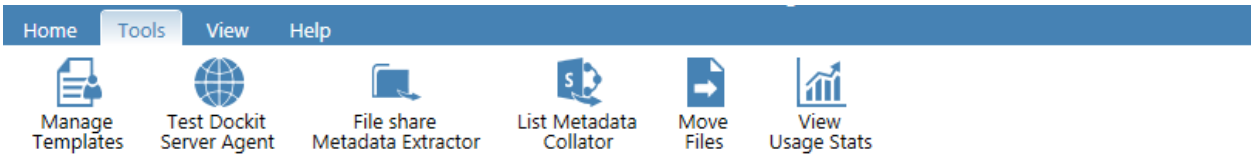
Dockit Tools

- Manage Templates
- Test Dockit Server Agent
- Metadata Extractor
- List Metadata Collator

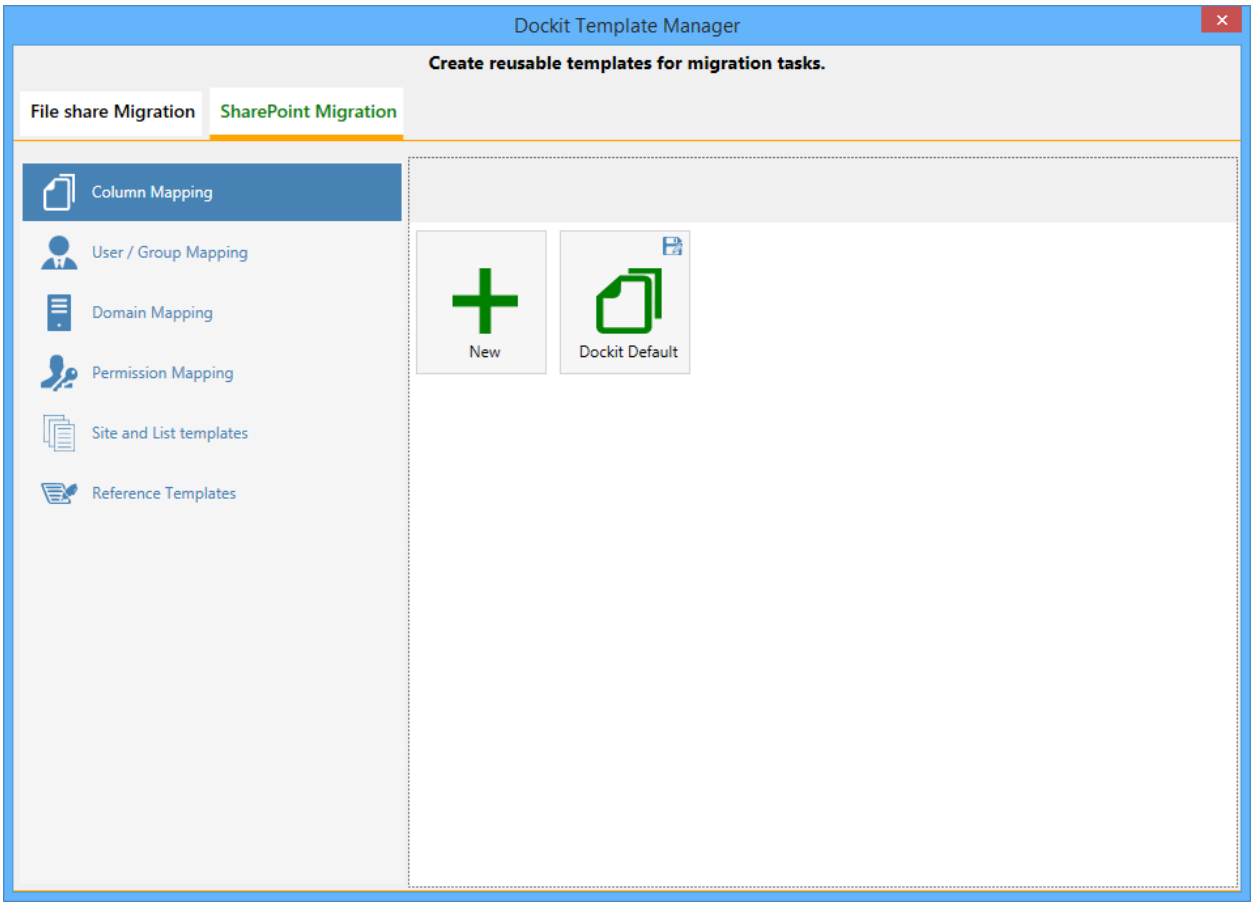
Dockit Template Manager

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:



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

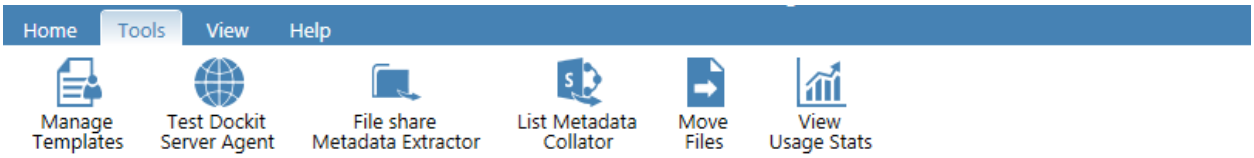
See the following sections for more information

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

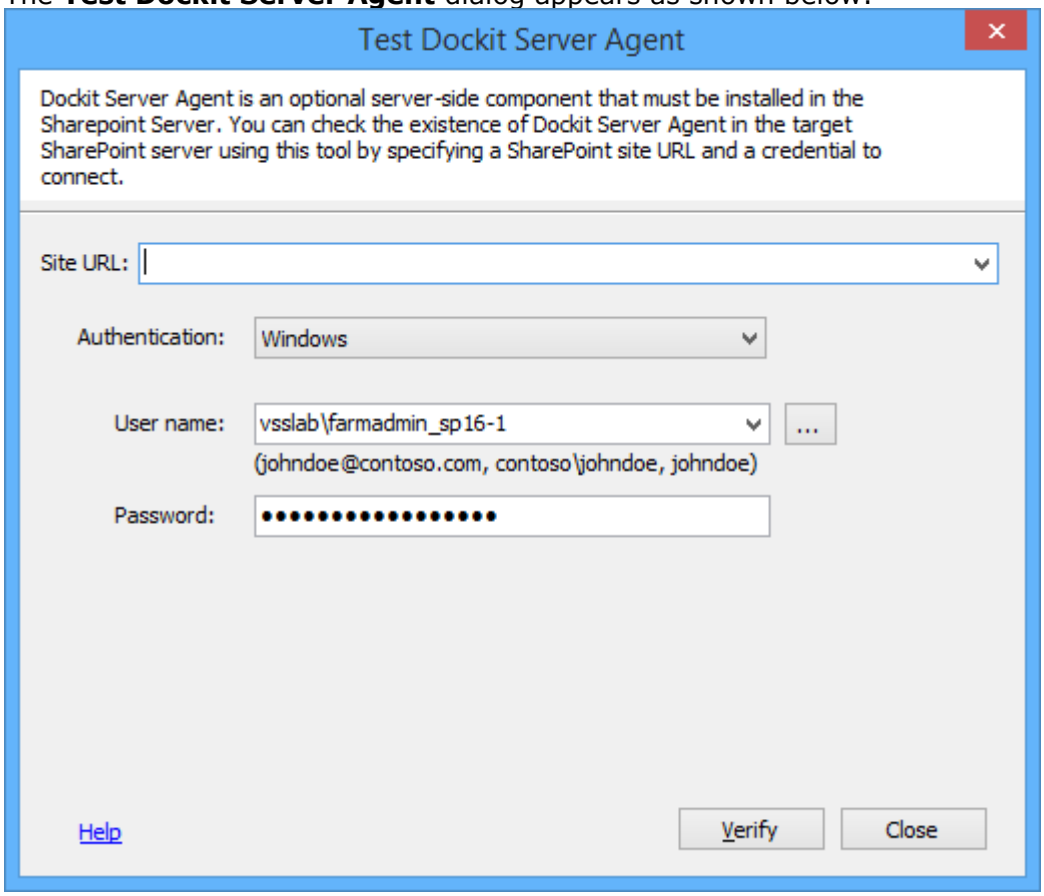
Test Dockit Server Agent

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:



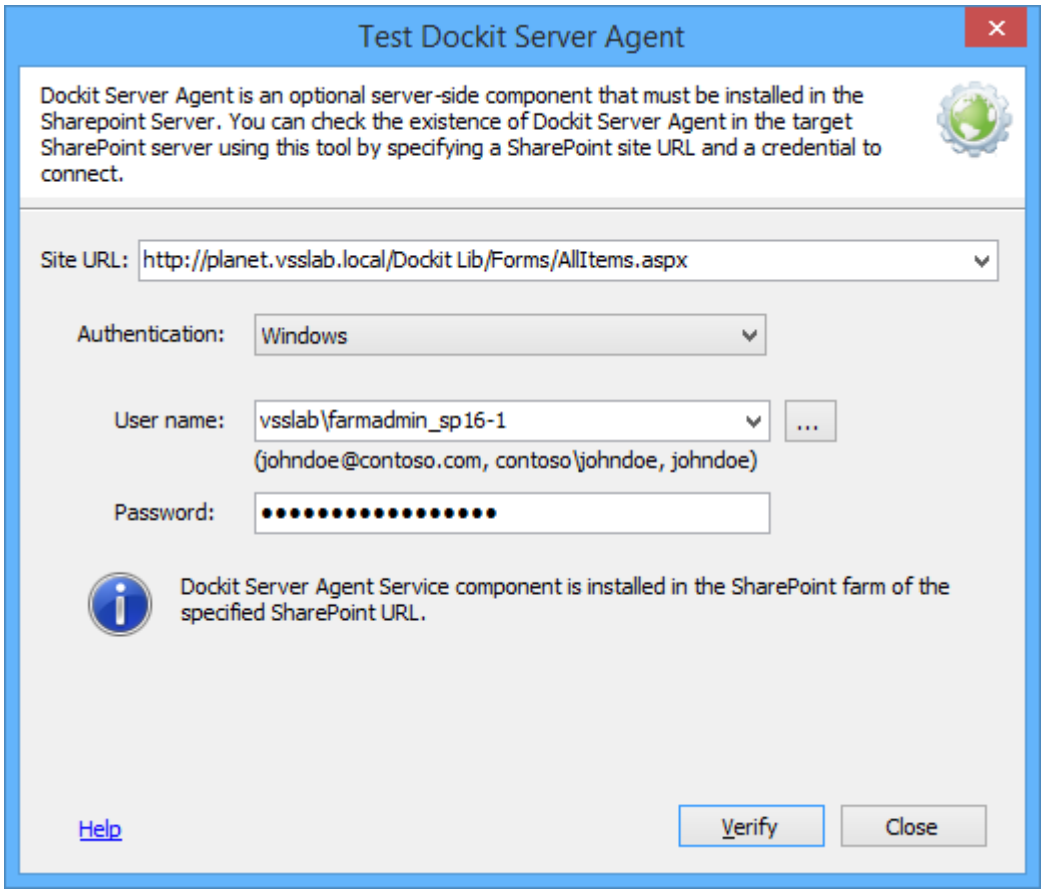
2. The **Test Dockit Server Agent** dialog appears as shown below:



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

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

5. Click **Verify** button to test the existence of **Dockit Server Agent** 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:



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 front-end web servers or application servers in the target SharePoint farm and re-install the version of **Dockit Server Agent** component that corresponds with Dockit client application version (bundled with client application).

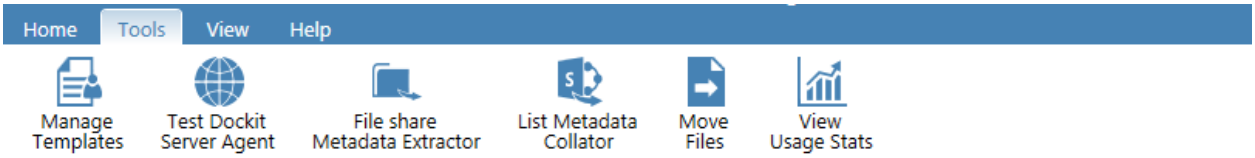
This icon implies that **Dockit Server Agent** component is not installed in the target SharePoint farm. Install **Dockit Server Agent** component on all front-end web servers or application servers in the target SharePoint farm using the appropriate **Dockit Server Agent** setup bundled with Dockit client application.

File share Metadata Extractor

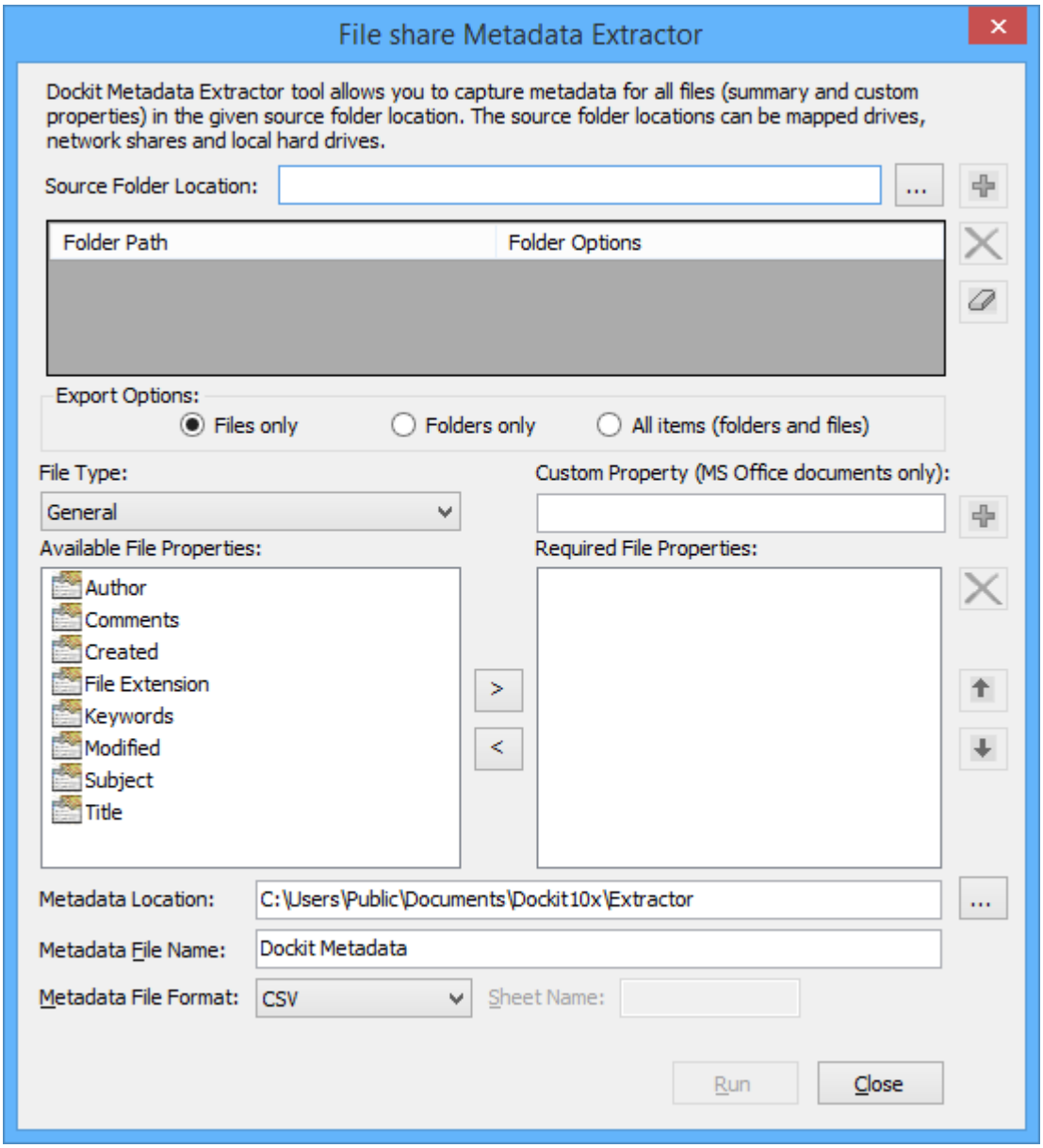
Dockit File share Metadata Extractor tool helps you generate an external metadata file with basic set of properties (Summary & Custom properties available in the file) in any of the Dockit supported file formats (say, CSV, TXT, Excel). Dockit Metadata Extractor tool extracts the metadata associated with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

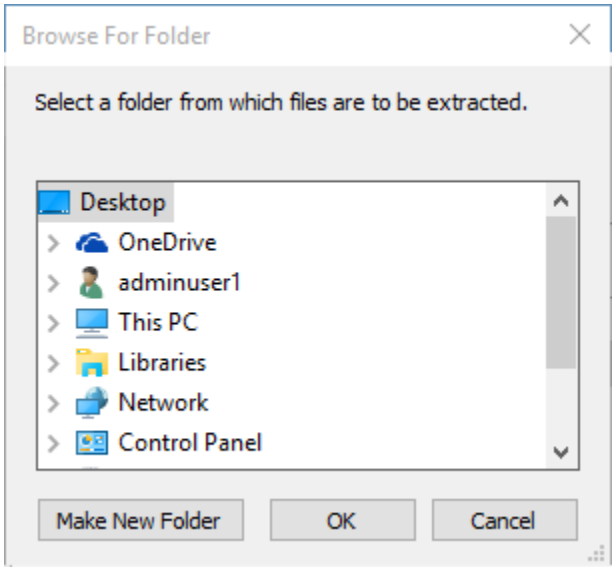


2. The **File share Metadata Extractor** dialog appears as shown below:



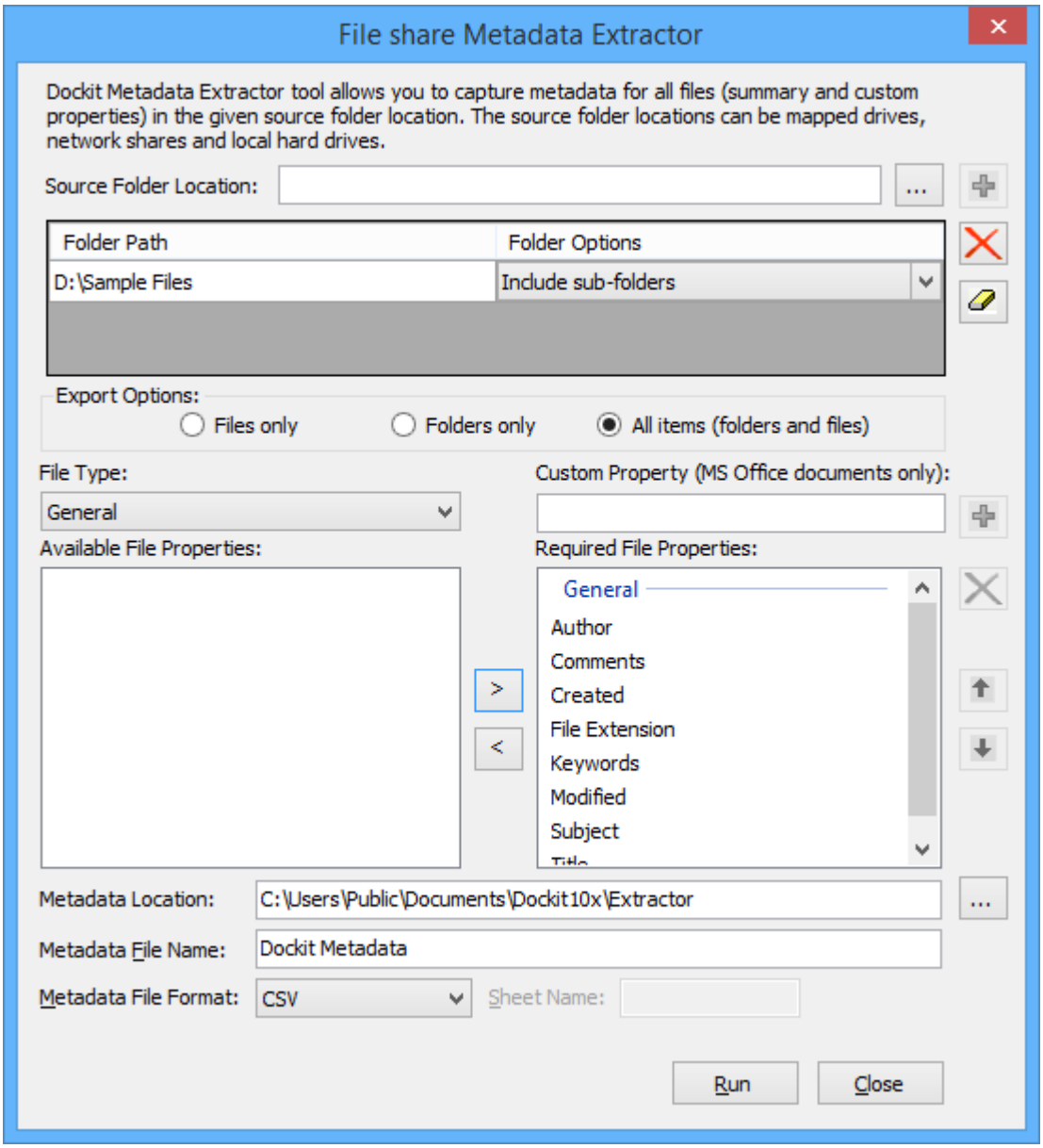
3. Specify a valid file system folder location in the **Source Folder Location** textbox. You can specify a Mapped Network location / Network Shares / local hard disk drive location in the textbox. Click **Browse** button to select the required folder using **Browse For Folder** dialog.

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

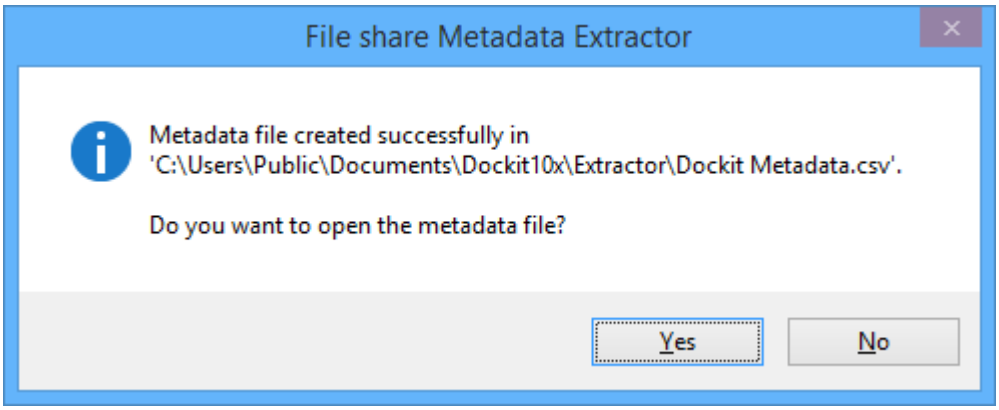


Upon selecting required source folder, click **OK** to add it for extraction.

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



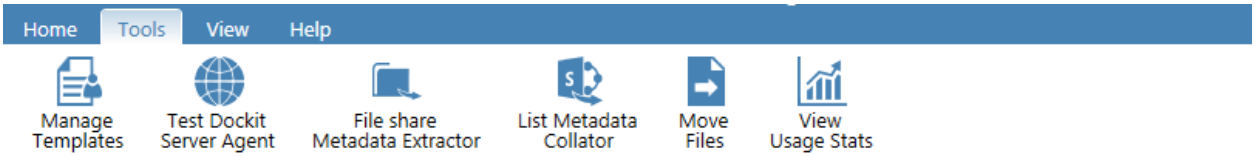
5. Click **Run** to commence extraction process. Once File share Metadata Extractor completes its job, it enables you to view the metadata file right away as below.



List Metadata Collator

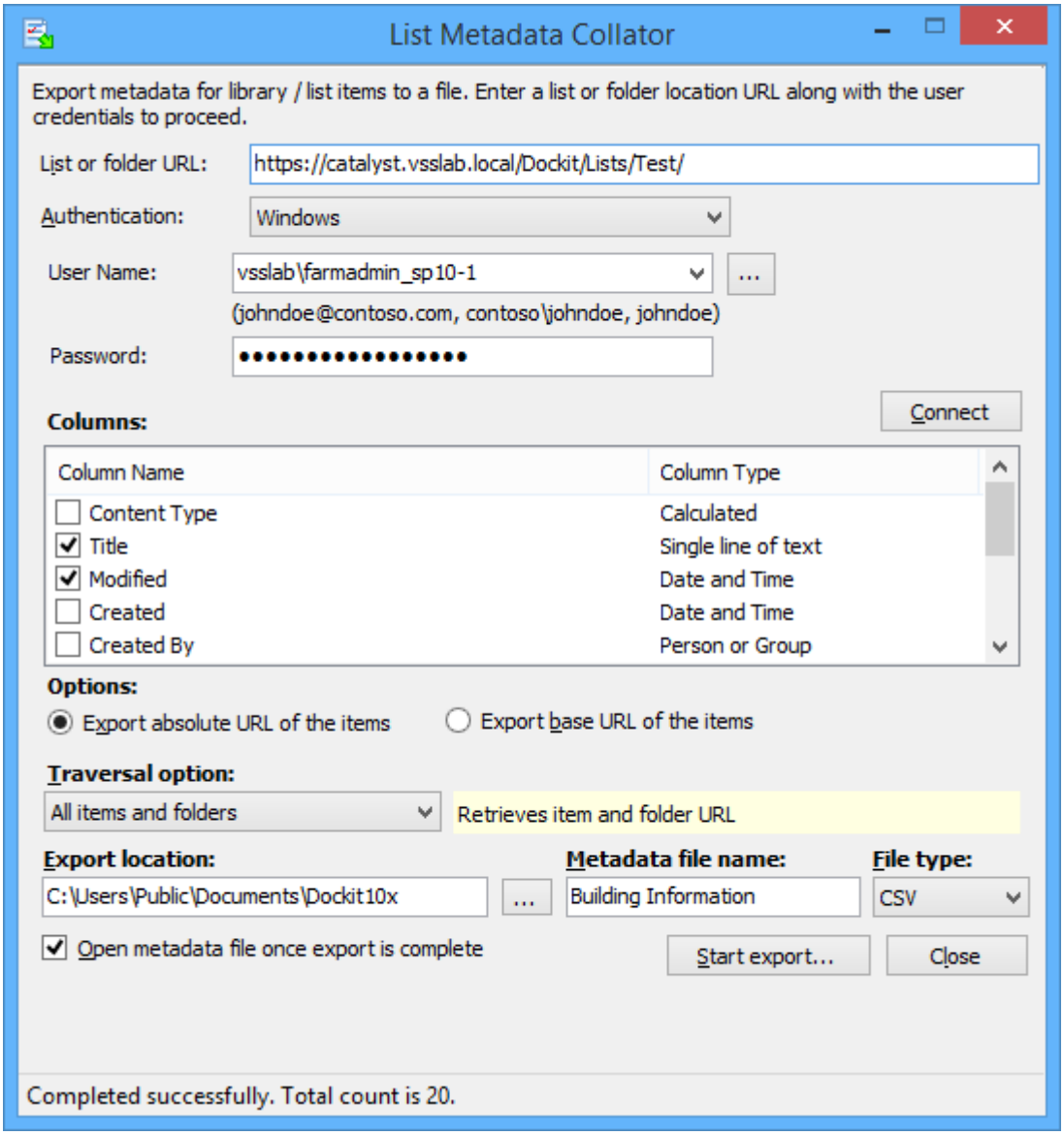
The Dockit List Metadata Collator tool helps you generate the list items' URL for a given SharePoint List along with the associated metadata (SharePoint column values) and exports the metadata file to a CSV file format.

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



s

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



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

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

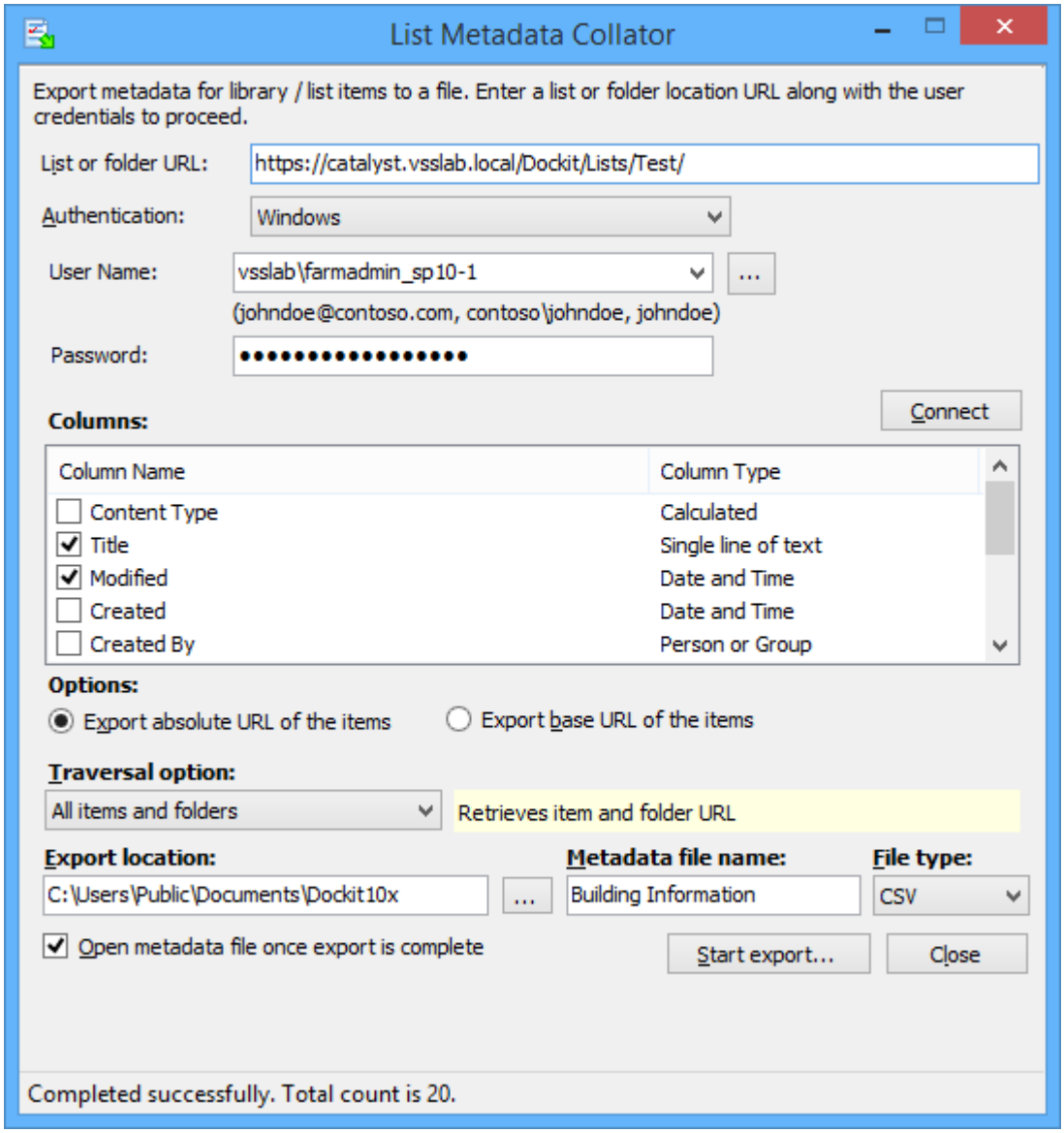
    a) **Use the following credential to connect to SharePoint** - Connect to SharePoint URL using the user context stored in the user profile (OR) enter the user name in any ONE of the following formats: **<DOMAIN NAME>\<USER NAME>, UserName@DomainName, UserName** and its corresponding password. Dockit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

depending on configuration in the target SharePoint site. Click Connect button to proceed.

b) **Use federated authentication (Web Single Sign-on) to connect to SharePoint** - Connect to a SharePoint site (SharePoint On-premise or SharePoint Online) using federated identity configured using ADFS. Also, select this option to connect to Office 365 SharePoint Online configured using federated identity provider.

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

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



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

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

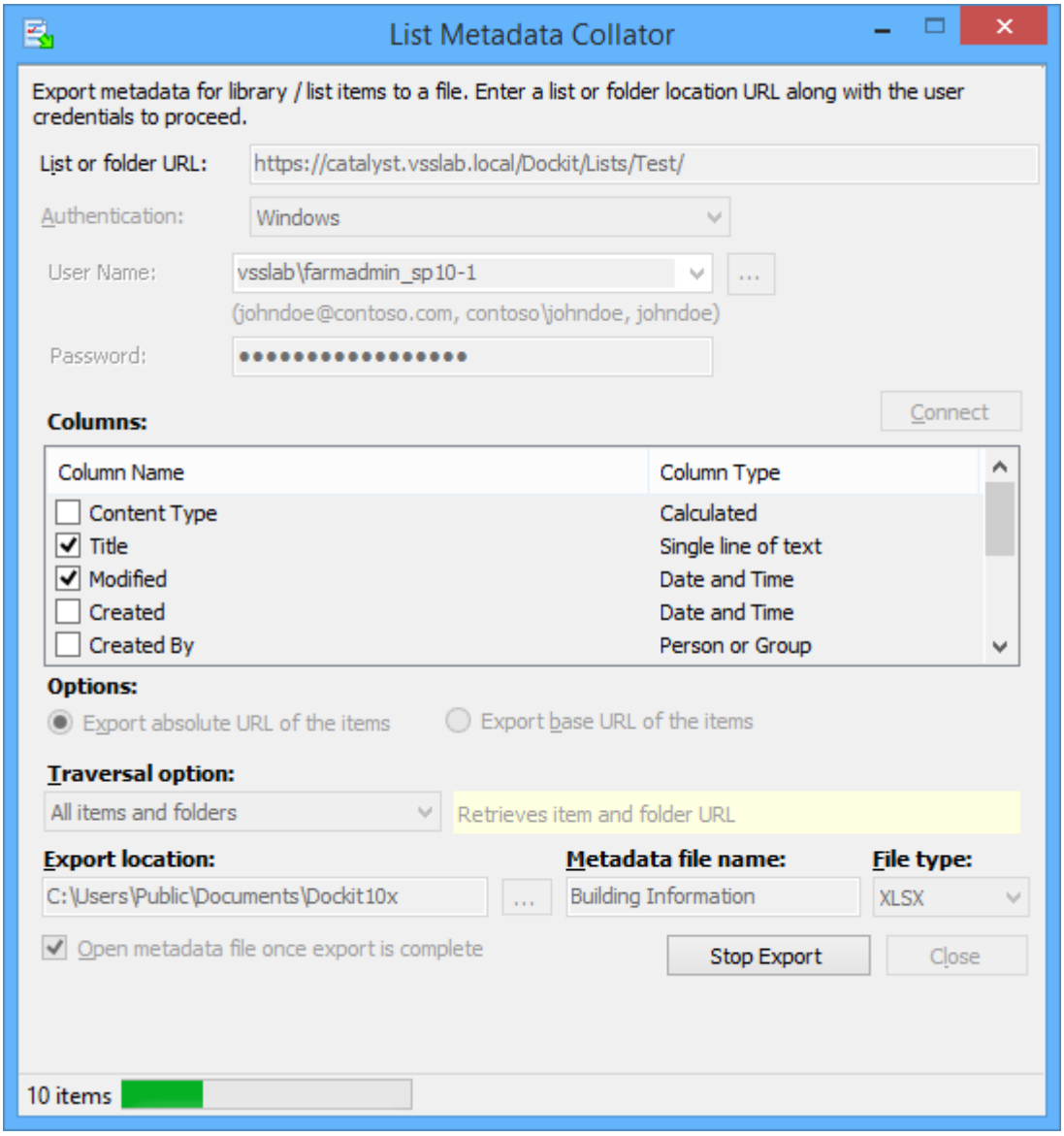
7. **Traversal Options:** Select any one of the list traversal options as given below:

    a) **All items and folders** - Generate the URL list for all items and folders in the specified location.
    b) **All items only** - Generate the URL list for all items only, but not folders.
    c) **All folders only** - Generate the URL list for all folders, but not the items.
    d) **Items in current level** - Generate URL for all items and folders in the current / top level.

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

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

10. Click **Start Export...** button to commence the export process.
11. After clicking **Start Export...** button, a dialog appears as shown below:



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"

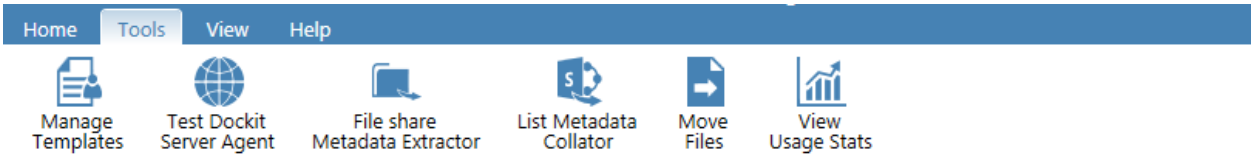
13. Click **Close** button to close the List Metadata Collator dialog**.**

Moving Source Files To Target Location

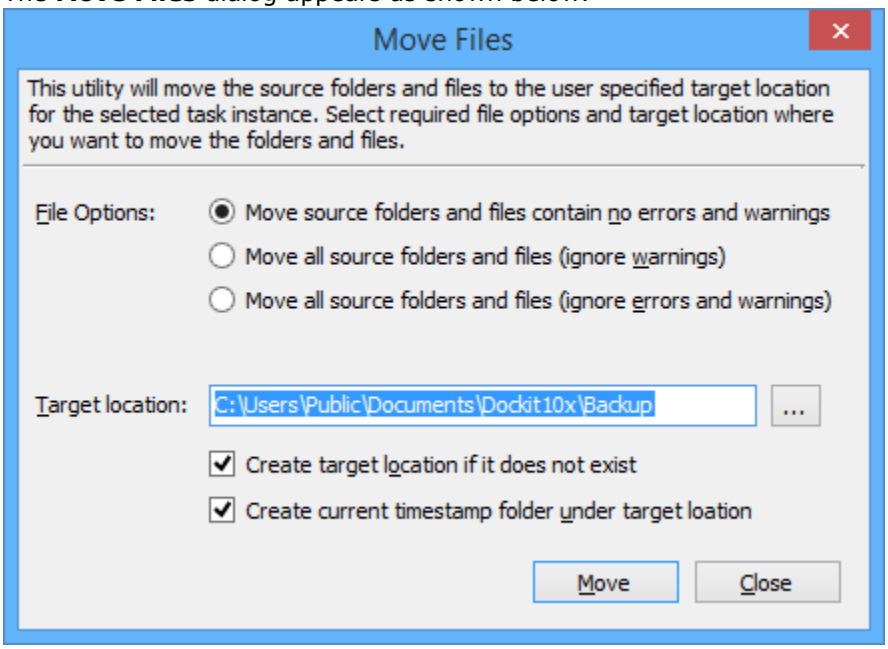
The 'Move Files' tool will help you to move the already imported source files and folders to the specified location. You can filter the files to be moved to the target location by specifying appropriate file options available in the tool.

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

Or Select **Move Files** from **Tools** menu



2. The **Move Files** dialog appears as shown below.



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.

    2. 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.

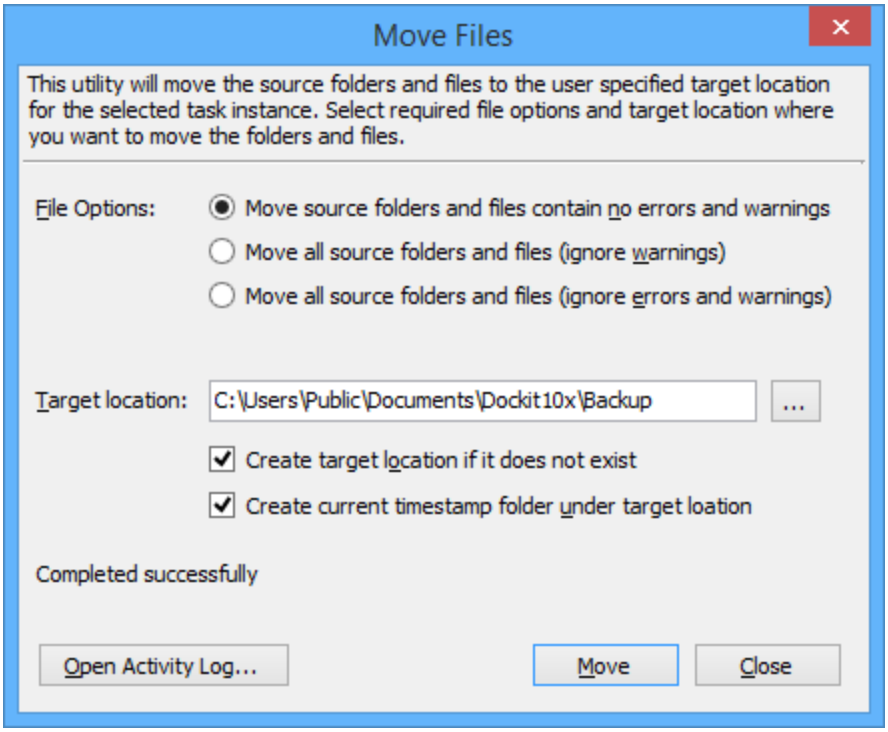
4. Specify a Target Location where the source folders and files are to be moved. You can also click browse ('...') button to launch folder browser dialog.

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.



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

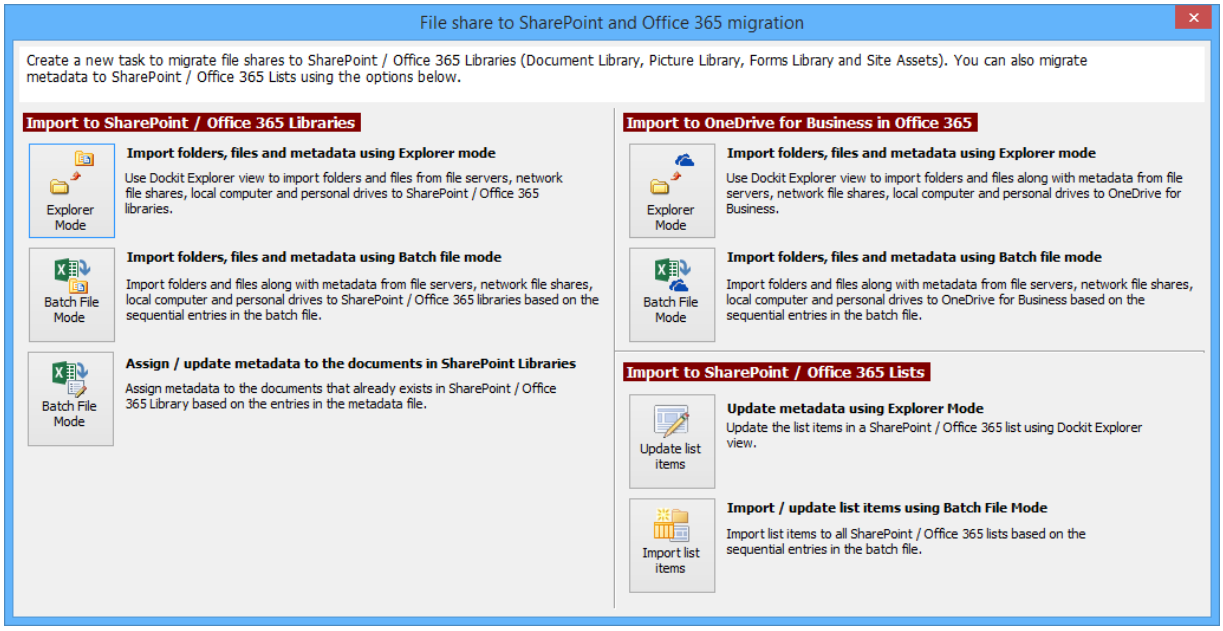
Assign / Update Metadata to the Documents in SharePoint Libraries

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

Lookup (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Stock Details; Accounts; Product Details"
People or Group (Single Value)	User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. Do not use multiple values unless the equivalent column defined in SharePoint can accept multiple values. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\Administrator" "BUILTIN\Administrator" "Backup Owners" "someone@example.com" "John Doe"
People or Group (Multiple value)	User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\User1; BUILTIN\Administrators; Guest Members;Temps"
Hyperlink or Picture	The http URL of any resource or picture can be given to this field.	"http://sharepoint/Shared Documents/My Sample File.doc" "http://sharepoint/Pictures/chart.bmp"
Target Audiences	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 (MOSS / Microsoft SharePoint Server 2010 and above).	SPUsers; Contributors; Designers
Publishing Schedule Start Date (Applicable only for Collaboration Portal / Publishing Portal Site)	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2010 10:50 AM" "1/25/2009"
Publishing Schedule End Date (Applicable only for Collaboration Portal / Publishing Portal Site)	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2009 10:50 AM" "1/25/2010"
Publishing Image (Applicable only for Collaboration Portal / Publishing Portal Site)	The http URL of any picture can be given to this field. Relative URL also can be given to this field.	http://sharepoint/Pictures/chart.bmp "Pictures/chart.bmp"
Publishing Hyperlink (Applicable only for 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)		" NewsArticleImage.jpg"
Publishing HTML (Applicable only for Collaboration Portal / Publishing Portal Site)	HTML content can be given in this field. You can use HTML tags in order to create rich content in the field.	It is sample text
Business Data (BDC) / External Data (BCS) (Applicable only for SharePoint Enterprise Edition)	The BDC / BCS column value along with the filter name can be specified in this field. Dockit will search for the specified column value in the LOB entity using the given filter and assign the corresponding ID (when the BDC / BCS column value match is found) of the LOB record to the BDC / BCS column in SharePoint. Specify this value in filter name: value format. If the filter name contains colon (:) in its name, specify this value in FILTER:filter name, QUERY:value, where FILTER and QUERY are reserved words. Dockit also automatically fills-up the column values associated with the BDC / BCS column during import.	"Company Name:Vyapin" "ID:1000" "Product Name:Dockit Migrator 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:1000AX"
Managed Metadata (Single Value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the	"Continent|North America|Country|United States|States|Alaska" "Alaska"

	specified term value and assign the first matching term value for the corresponding managed metadata column.	
Managed Metadata (Multiple Values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	"Continent|North America|Country|United States|States|Washington;Continent |North America|Country|United States| States|California;Continent |North America|Country|United States| States|Alaska" "Washington;California; Alaska"
Geolocation	Location co-ordinates or name can be given to this field. The co-ordinates value must have latitude and longitude values separated by ':'. The latitude value must be between -90 and +90 and longitude value must be between -180 and +180.	"30:-60" "New York, United States"
Task Outcome	Text or Numeric value can be given to this field. Do not use multiple values for this column type.	"Complete" "4"
Related Items	The http absolute URL of any list item (including file) within the site collection can be given to this field. The values can be of single or multiple. Multiple values should be separated by ';'.	"http://sharepoint/Documents/Sample 1.doc; http://sharepoint/Documents/Sample 2.xlsx" "http://sharepoint/Lists/Custom List/1_.000"

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

- Choice*
- Lookup
- Person or Group

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

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

Sample format of a CSV / TEXT metadata file:

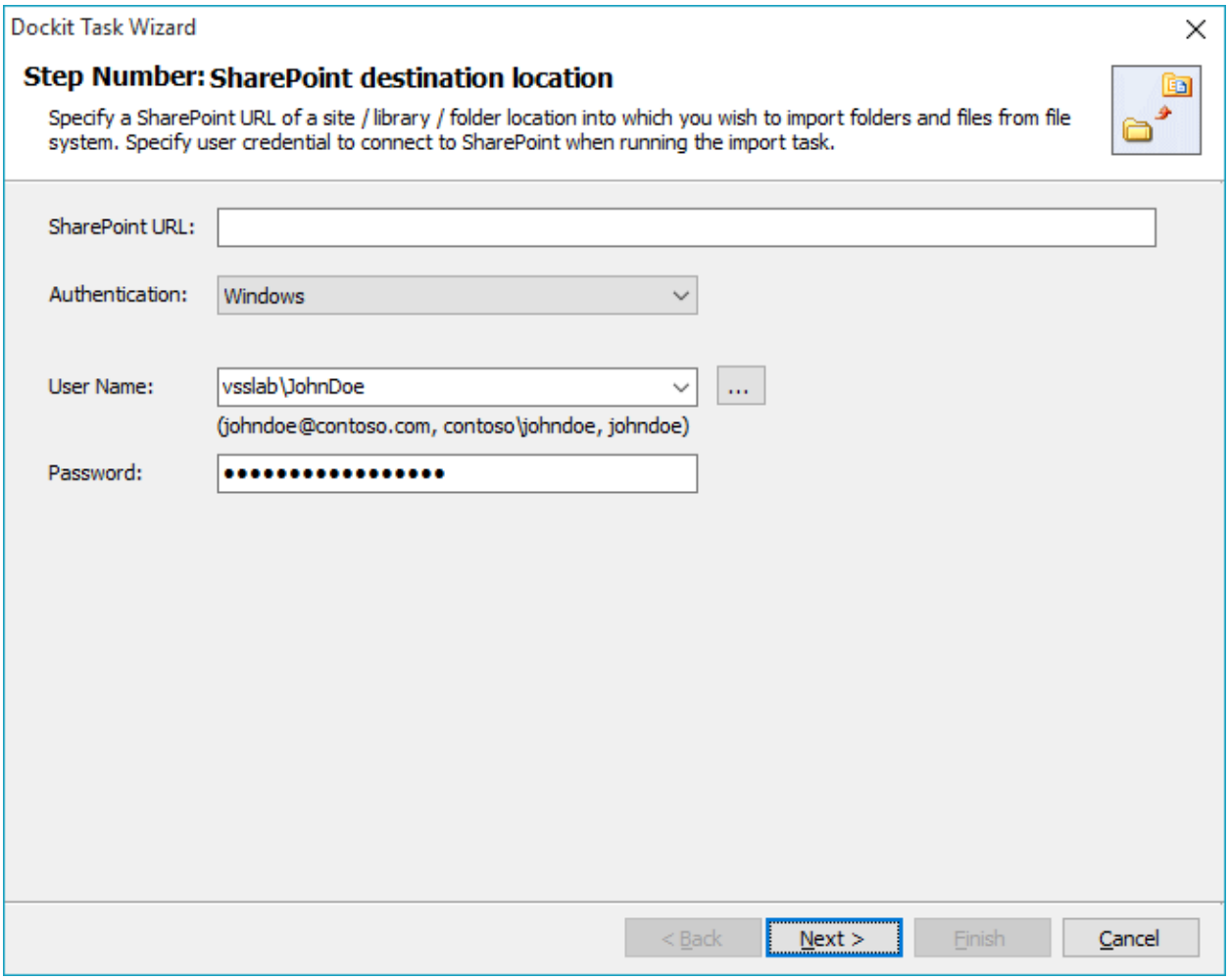
Note: Refer Point #2 for the separator to be used in the metadata file

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

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:



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.

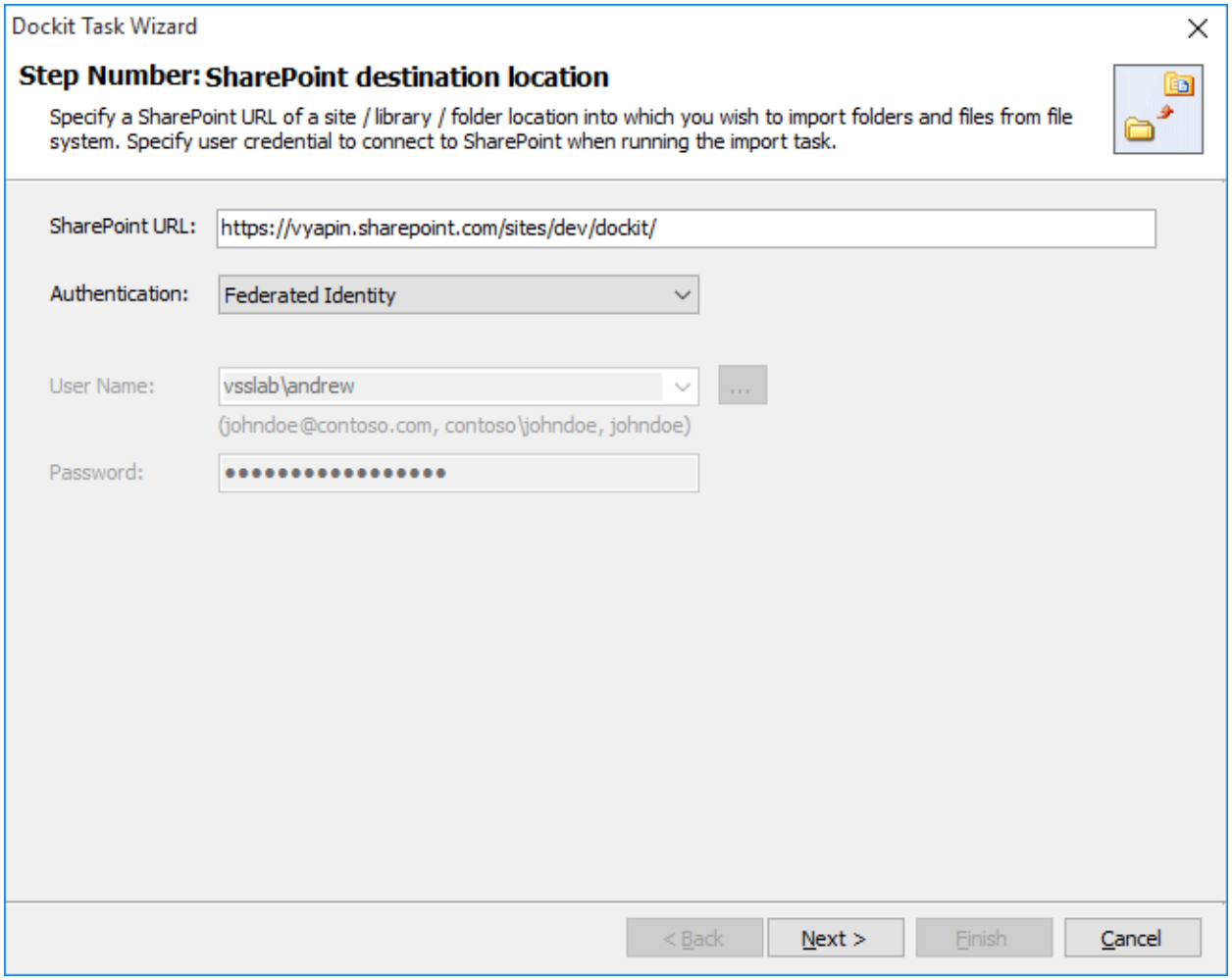
Windows or Forms - Dockit will initiate Windows or Forms authentication using the user account information stored in the user profile or the one entered in the textbox.

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

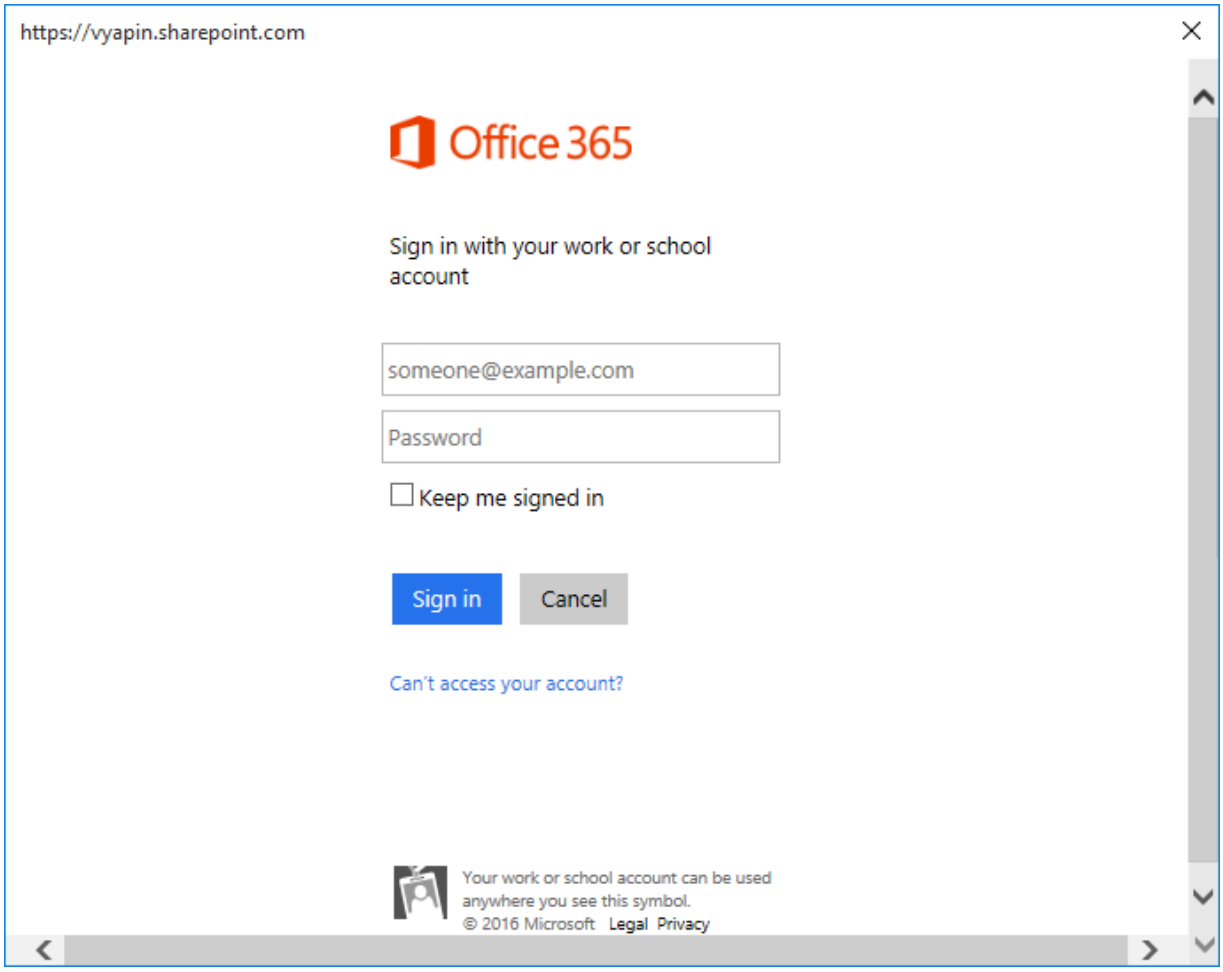
Office 365 Cloud Identity - Connects to a SharePoint Online site in Office 365 using the given cloud identity i.e., Office 365 Online User Credential e.g., johndoe@vyapin.onmicrosoft.com.

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.



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

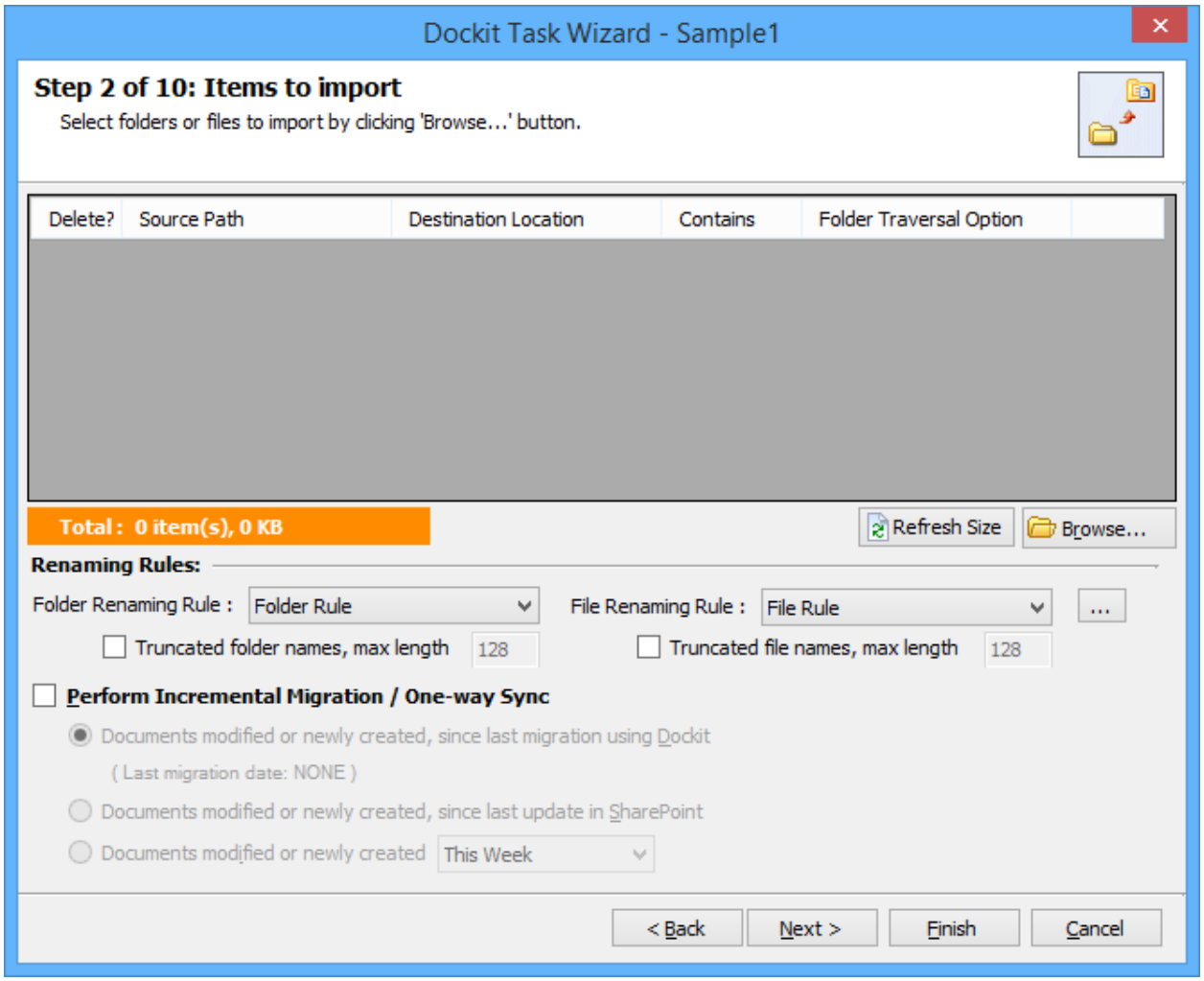


Provide **User ID** and **Password** in the respective textboxes and click Sign in button to proceed.

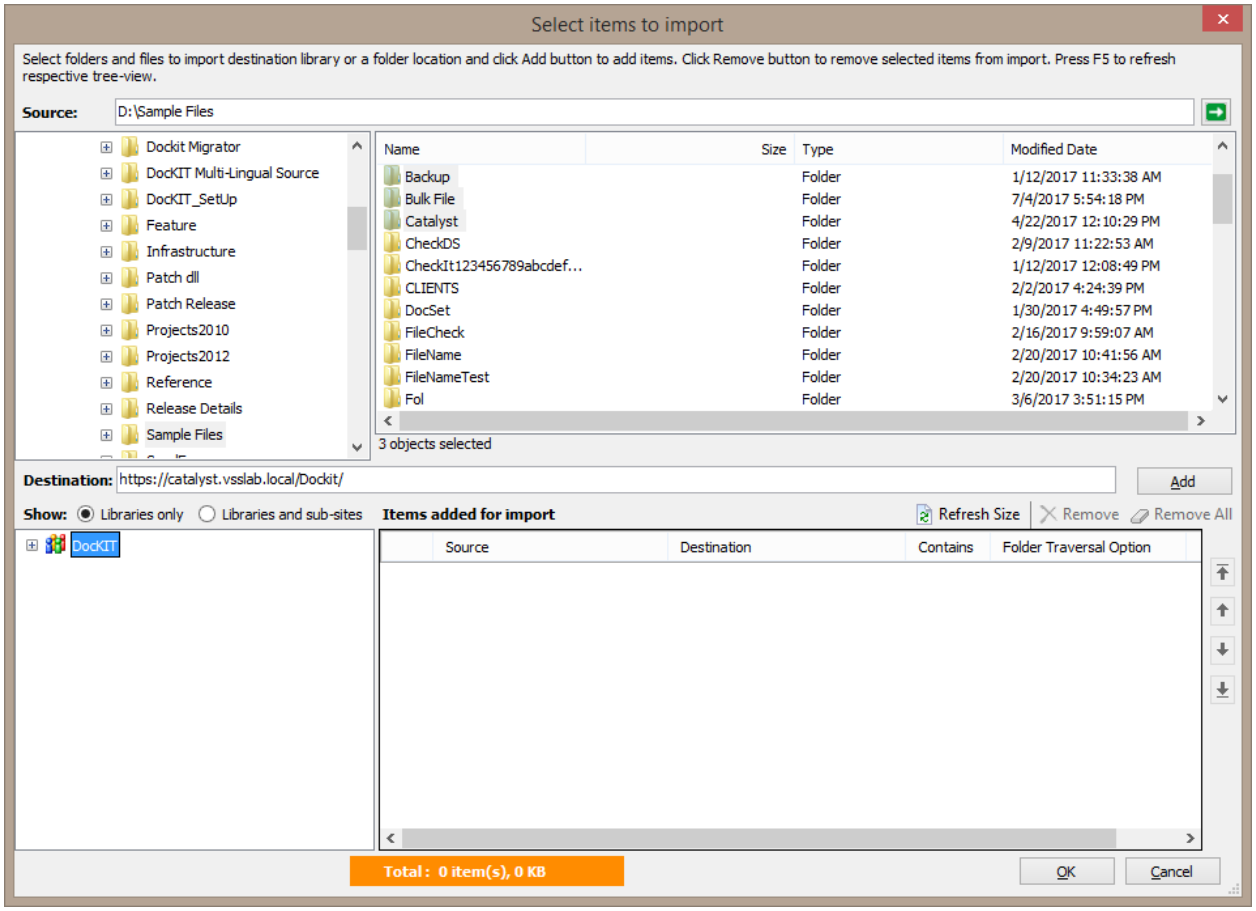
Items to Import

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

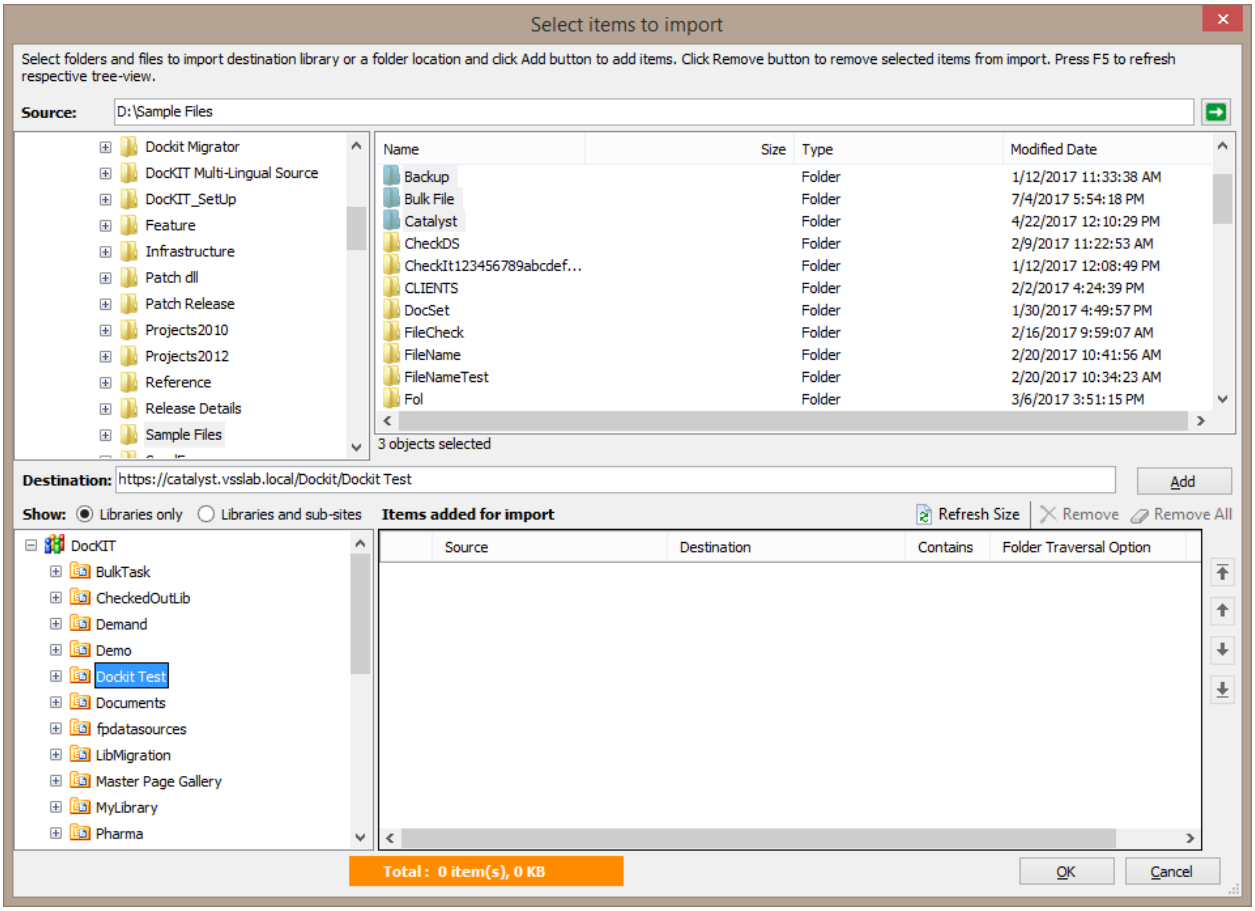
1. The **Items to import** step appears as shown below:



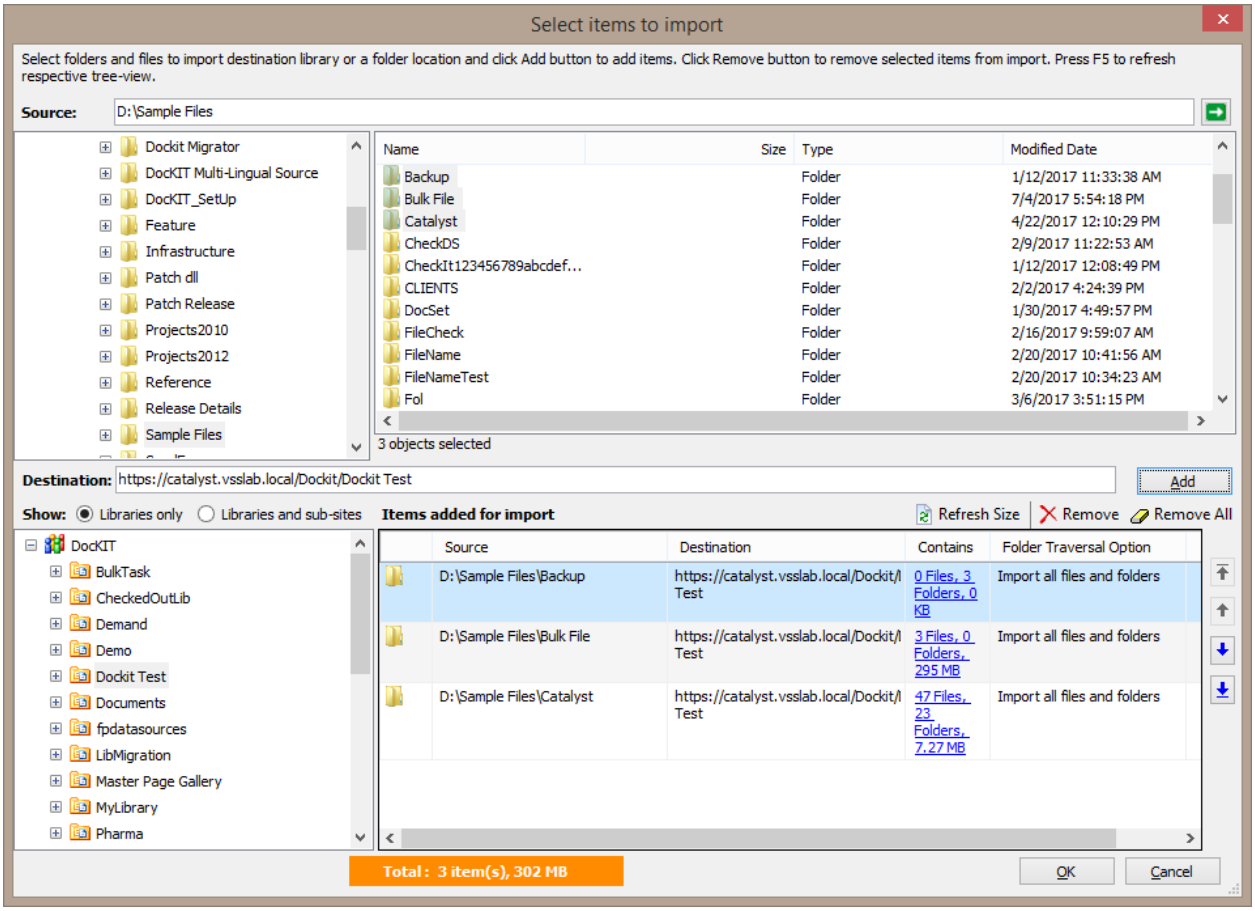
2. Click 'Browse...' button to add and remove the folders and files for import.
3. The **Select items to import** dialog appears as shown below:



4. **Select items to import** dialog contains a textbox (top), tree-view (top-left) and a list-view (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.



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.

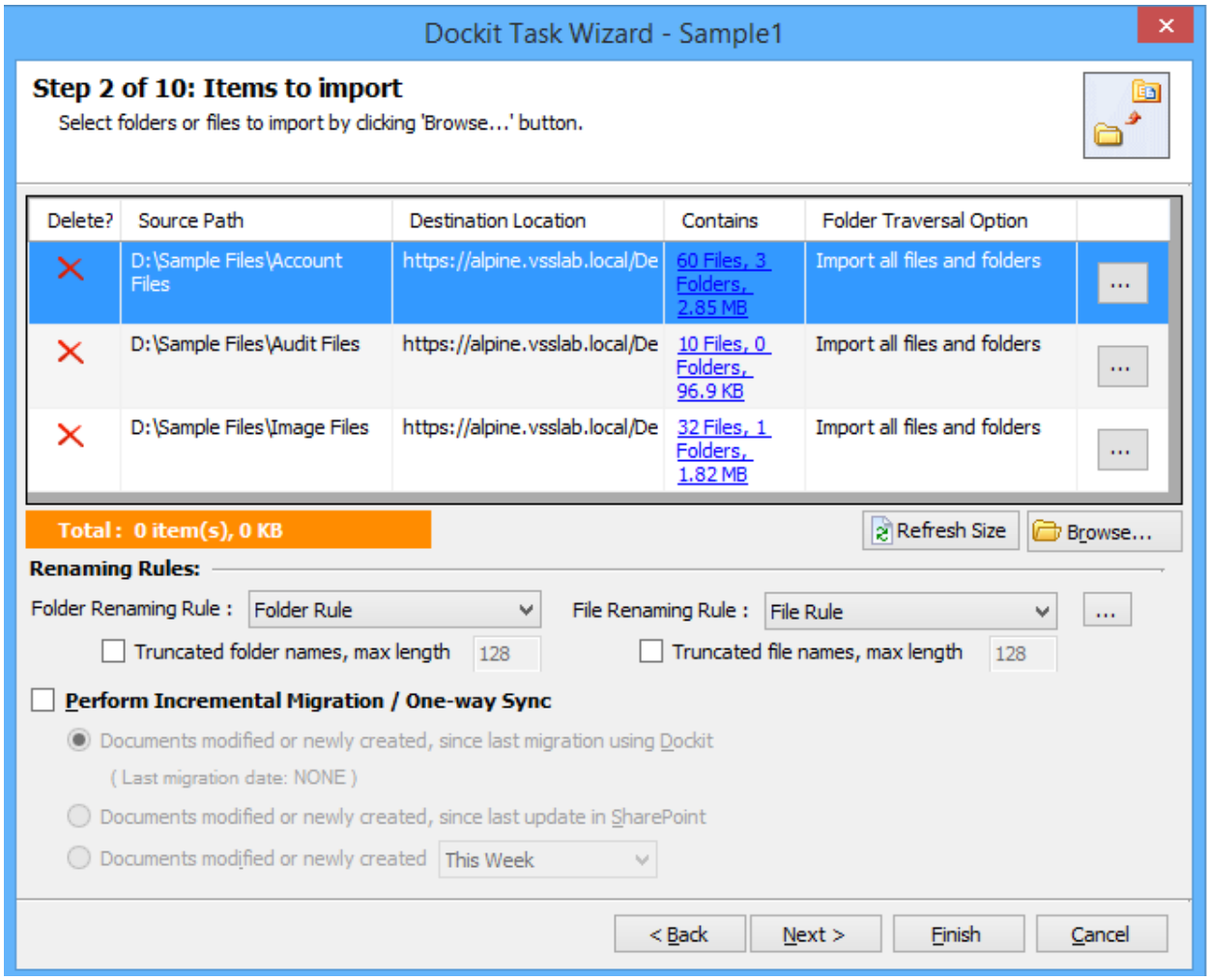
   Importing file versions: You may use this order sequence feature appropriately, when you have to import different file versions (with the same name) in the specified sequence. This feature is extremely powerful when you have different file versions organized in version folder names.

   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 File Settings wizard step to handle file versions correctly.

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

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

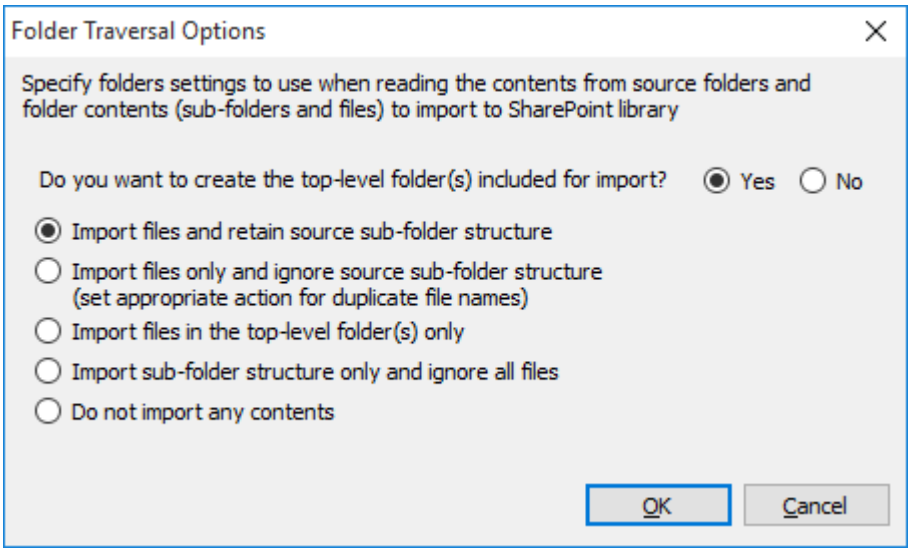
9. Items to import step contains the folders and files added for import as shown below:



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.



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 File Settings step to handle situations where same filenames may be available for more than one file in different source folder hierarchy (sub-folders).
c. **Import files in the top-level folders only** - This option imports files available in the top-level folders only. Dockit will not traverse the sub-folders within the top level folders.
d. **Import sub-folder structure only and ignore all files** - This option creates the sub-folder structure in the destination location and ignores all files that are available within the added folder and sub-folders.
e. **Do not import any contents** - This option does not import any contents (sub-folders and files) from the source folder added for import. This option will be useful when you want to create the top-level folder only and ignore all its contents.

Note: Folder Traversal option is not applicable for file.

11. **Folder Renaming Rule**:

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

12. **File Renaming Rule**:

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

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

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

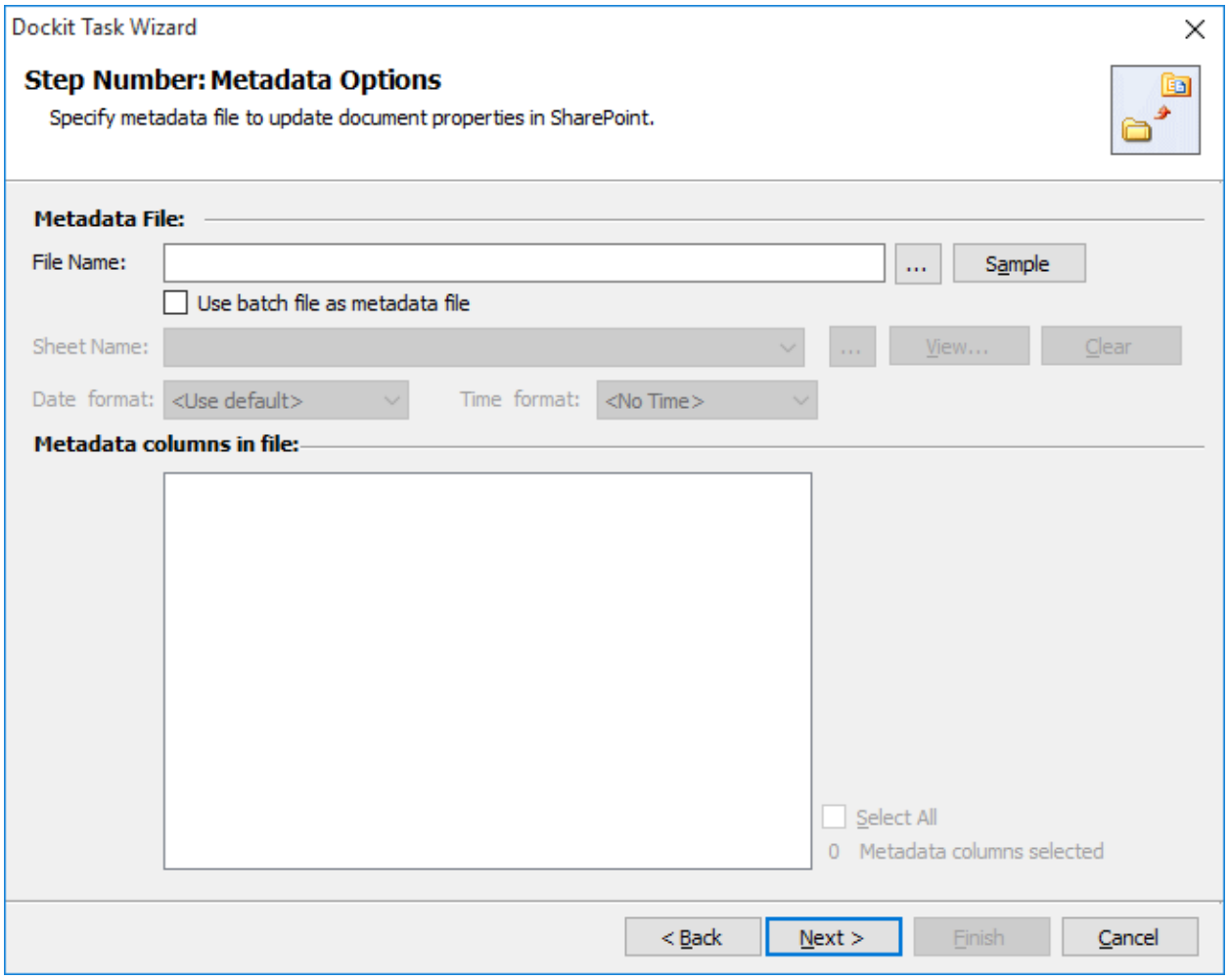
    a. Documents Modified or newly created, since last migration using Dockit
    b. Documents Modified or newly created, since last migration in SharePoint
    c. **Documents Modified or newly created** with specific time durations as follows '**This Week' 'Last 7 days' 'This Month' 'Last Week' 'Last 14 days' 'Last Month' 'Today' 'Yesterday', 'Last N days'**

14. Click **Next** to proceed.

Metadata Options

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

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



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).

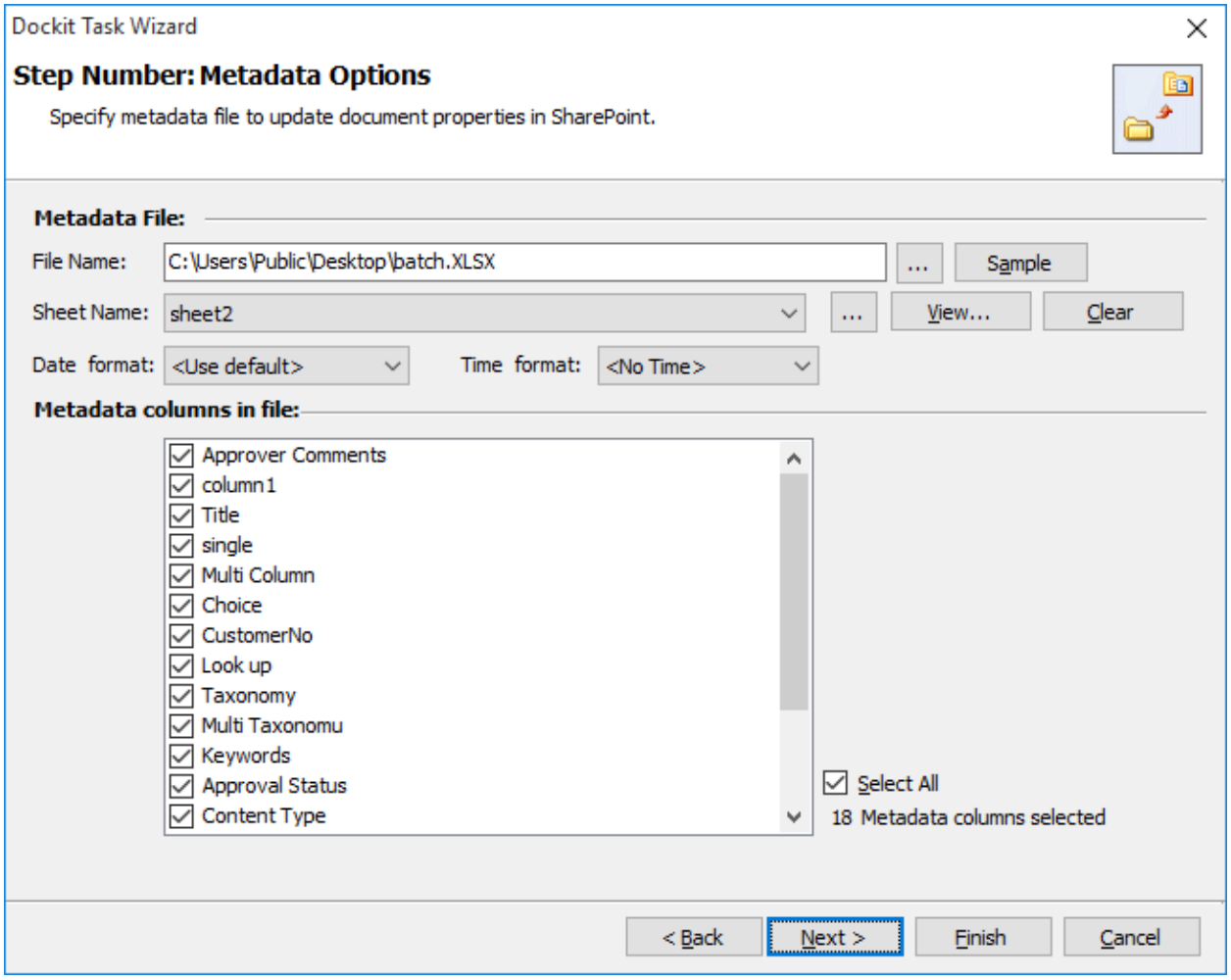
   For more information about how to create external metadata file, click here.

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.

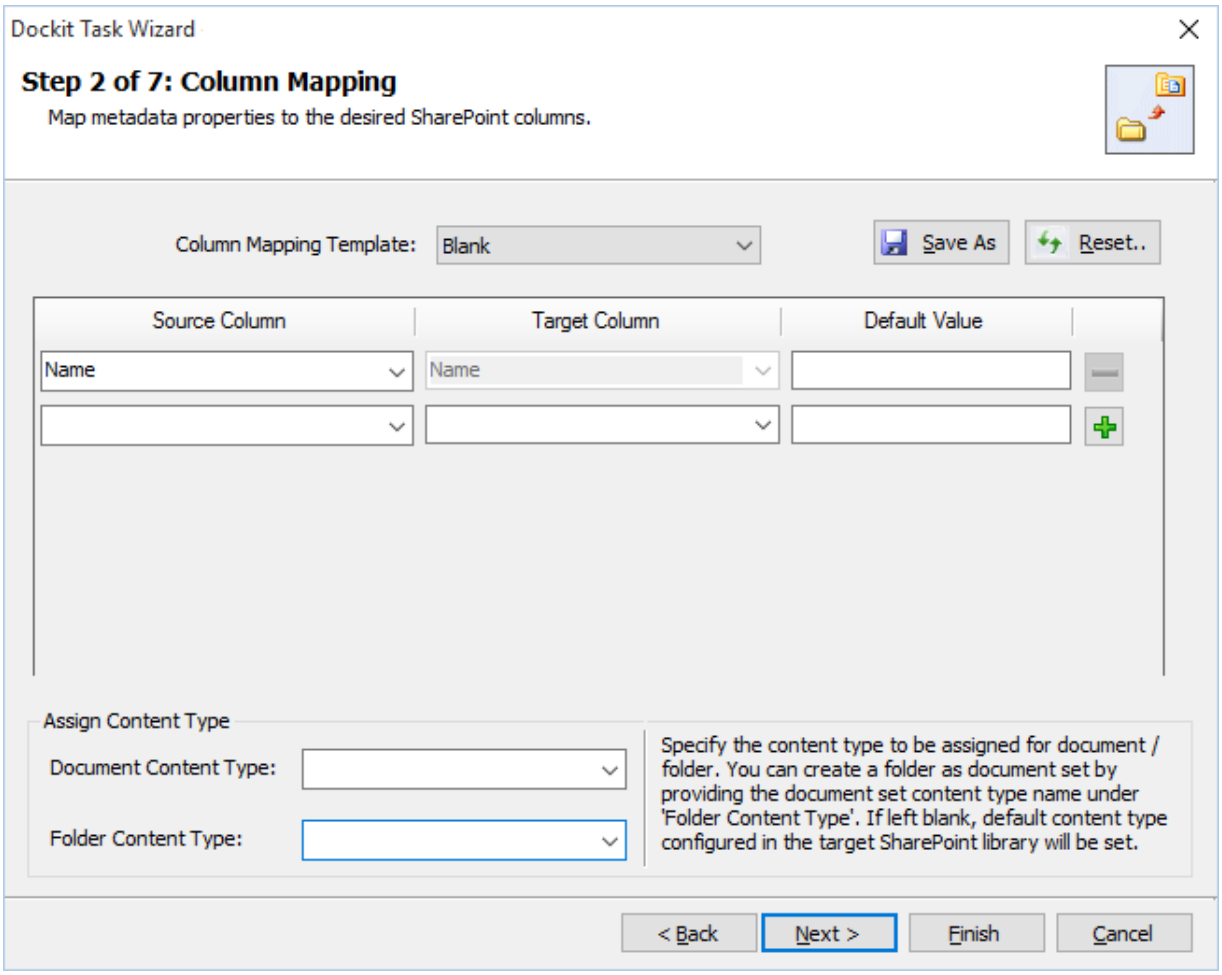


Click Next to proceed.

Column Mapping

To perform column mapping

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



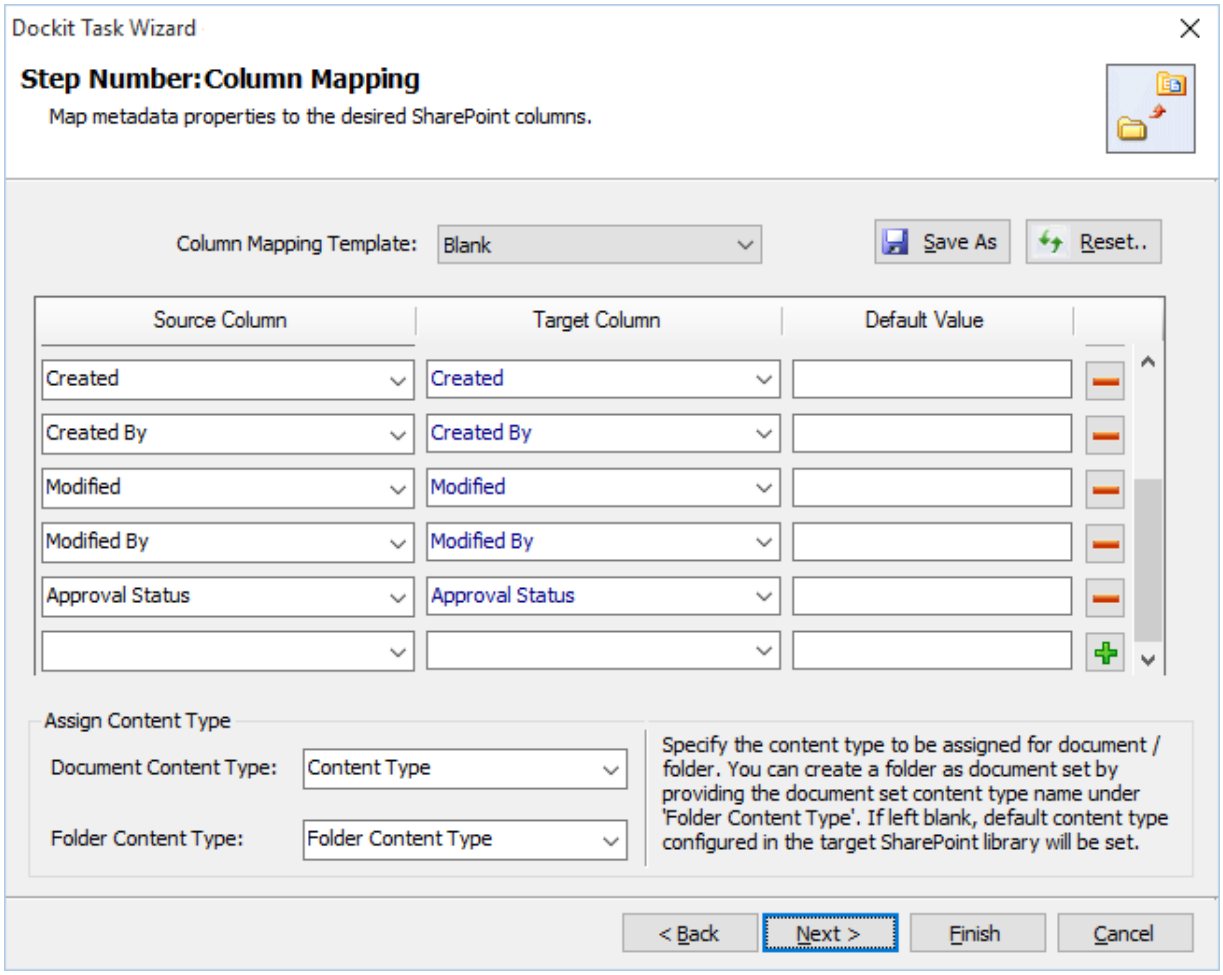
2. **Column Mapping Template**: Select any one of the column mapping templates to use from the list of available template(s). A couple of default templates (**'Blank'** and **'Core File Properties'**) are readily available to ease the mapping configuration.

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.

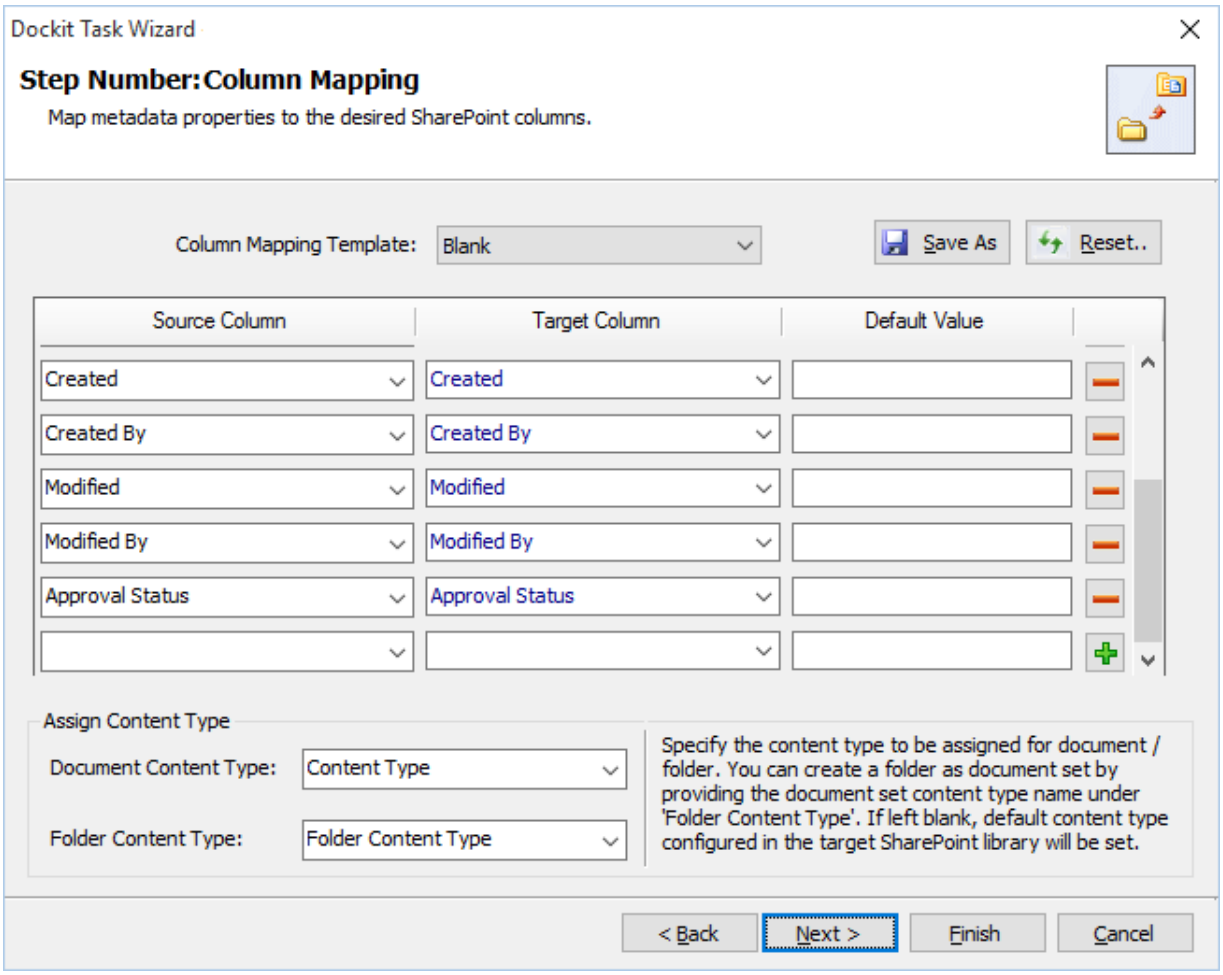
4. **Target Column:** You can specify the target SharePoint Column which needs to map and assign values.

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.



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

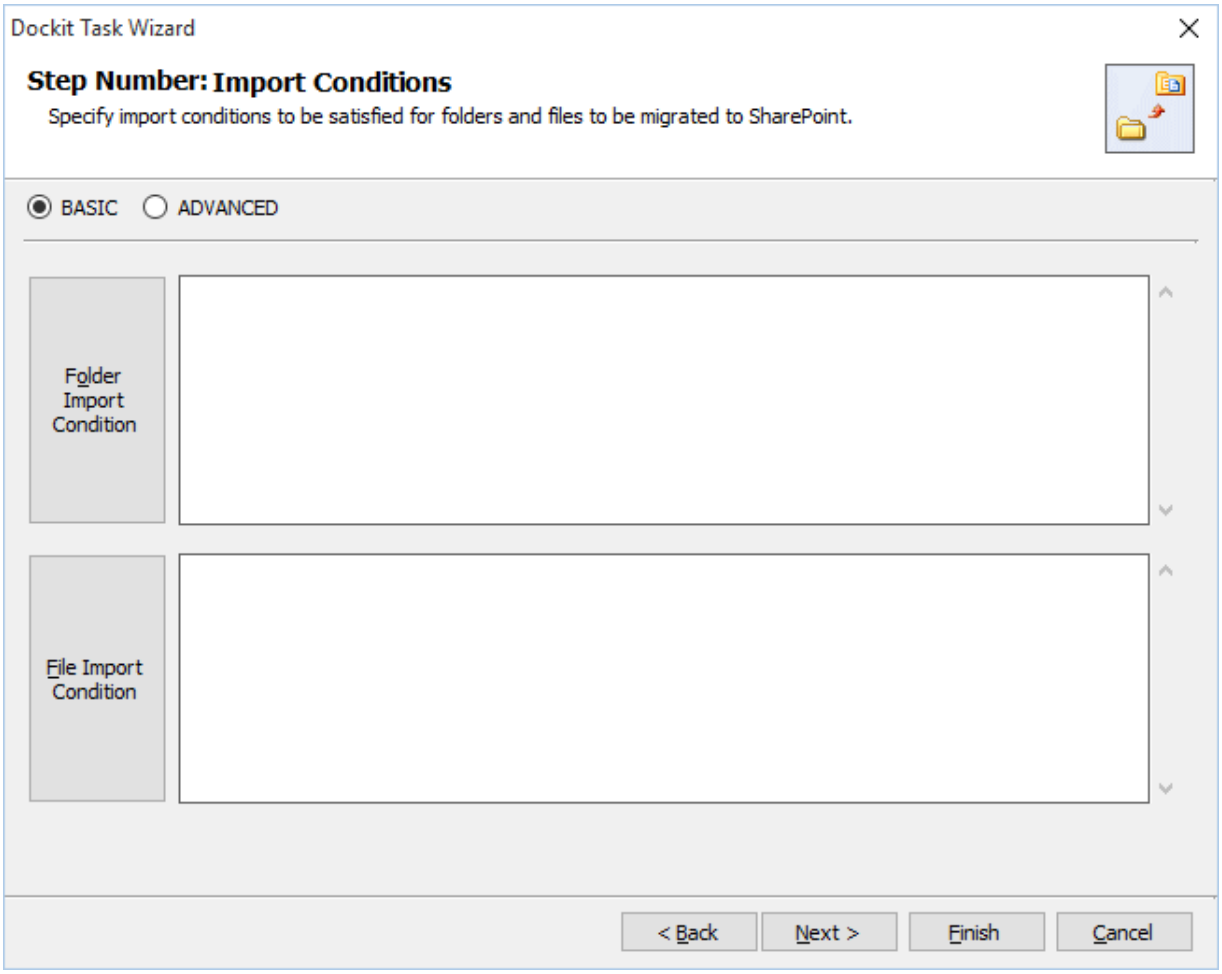


8. Click **Next** to proceed

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.

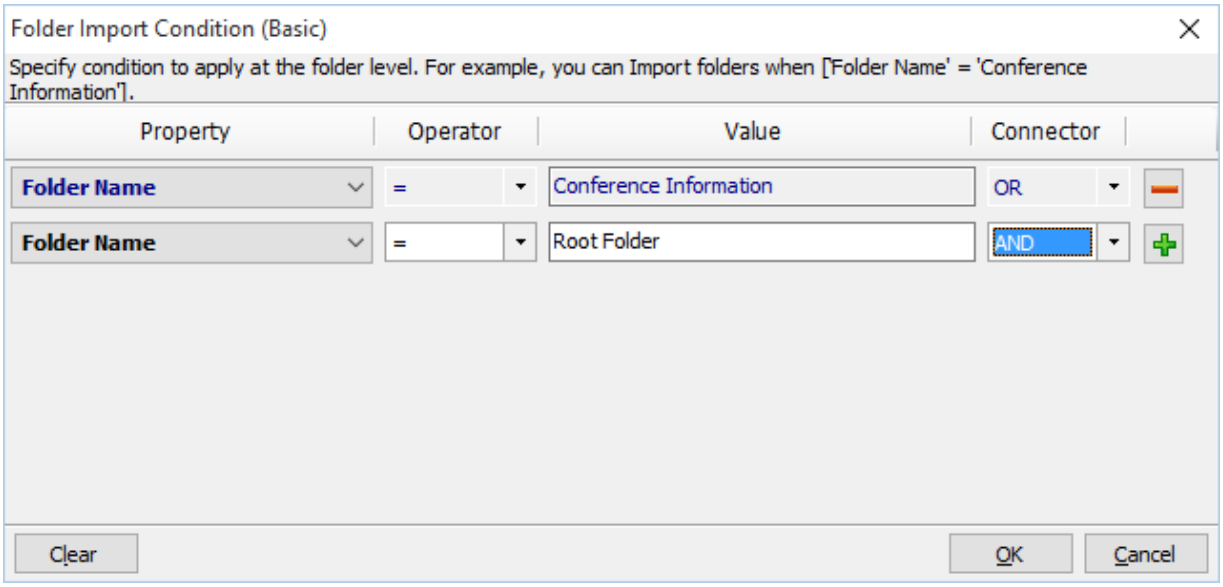
1. The **Import Conditions** step appears as shown below:



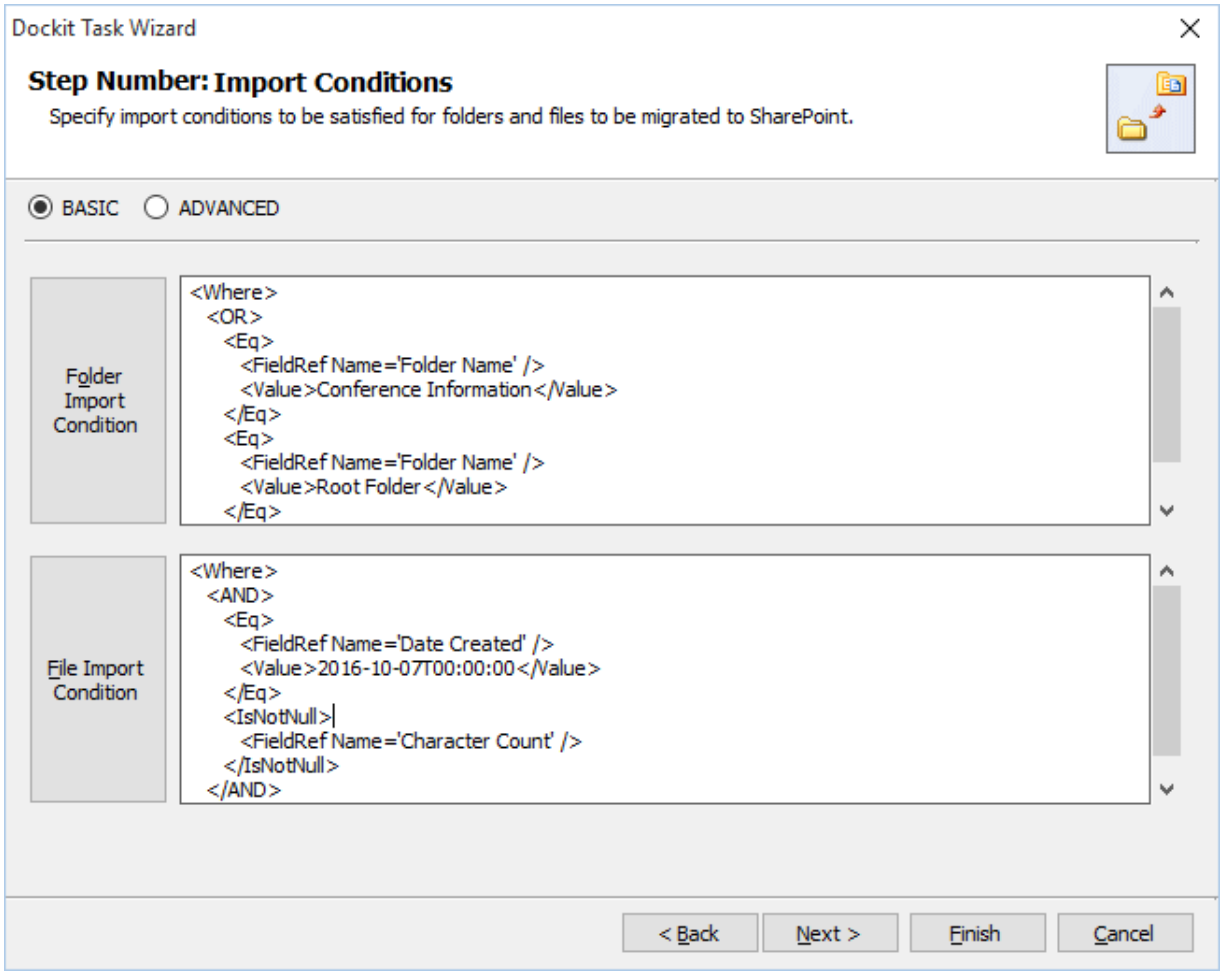
2. Select any one of the following options given below:

   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.

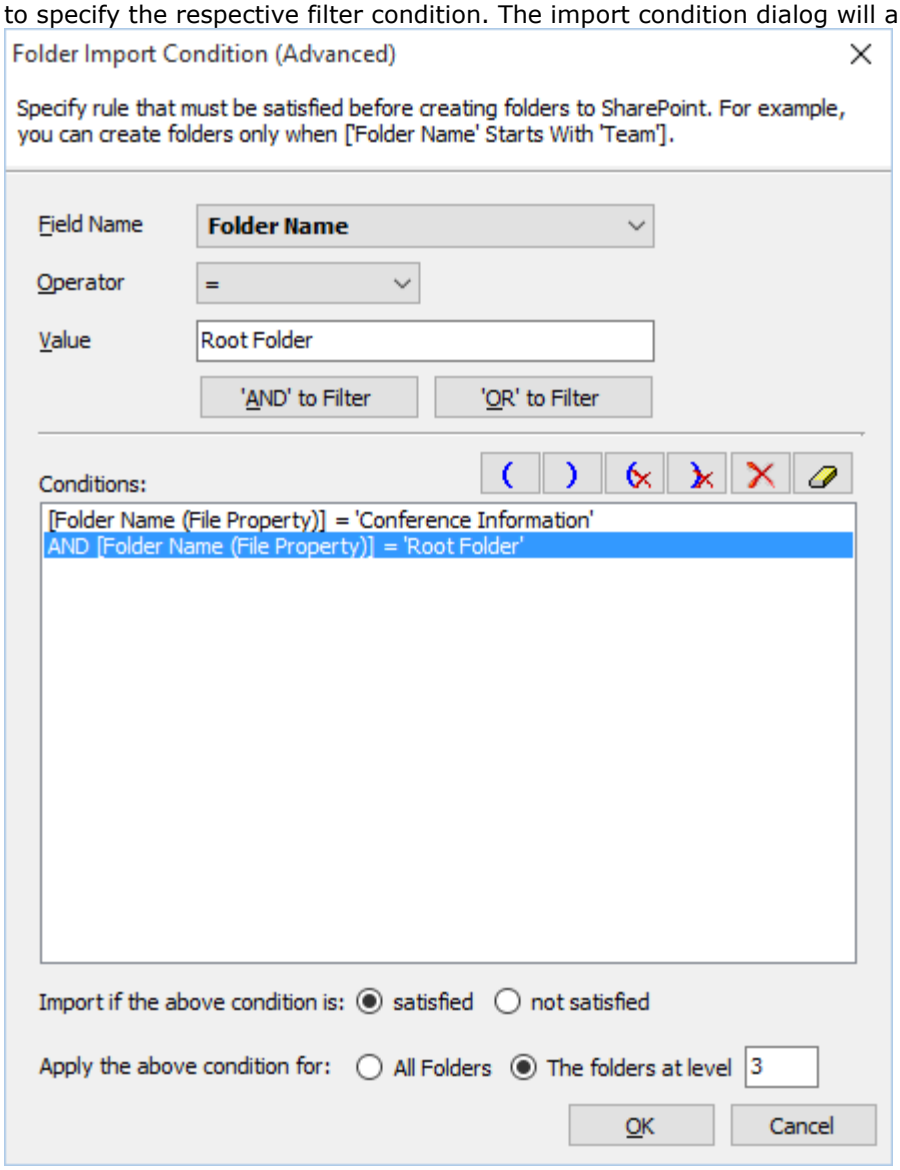
3. Once you select **BASIC** and click 'Folder Level Condition...' button or 'File Level Condition…' button to specify the respective filter condition. The import condition dialog will appear as shown below:



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



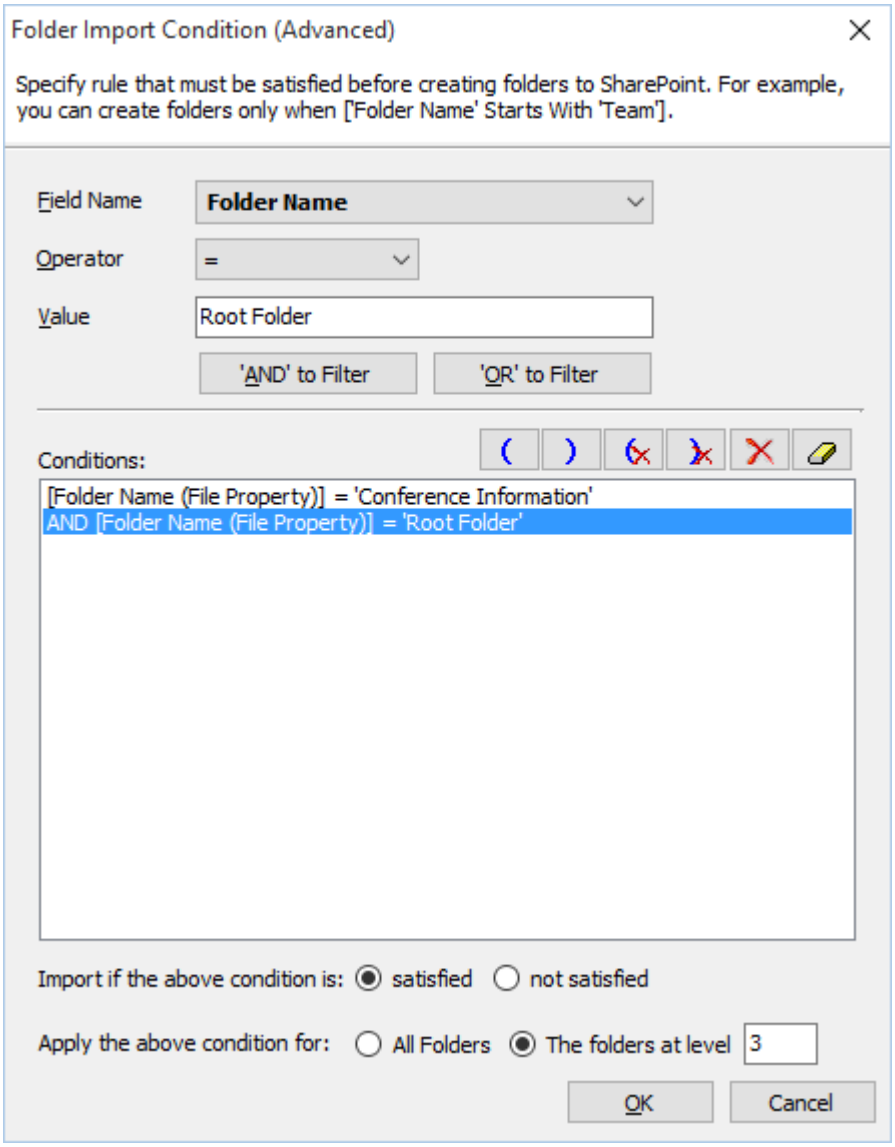
5. Once you select **ADVANCED** and click 'File Level Condition...' button or 'Folder Condition…' button to specify the respective filter condition. The import condition dialog will appear as shown below:



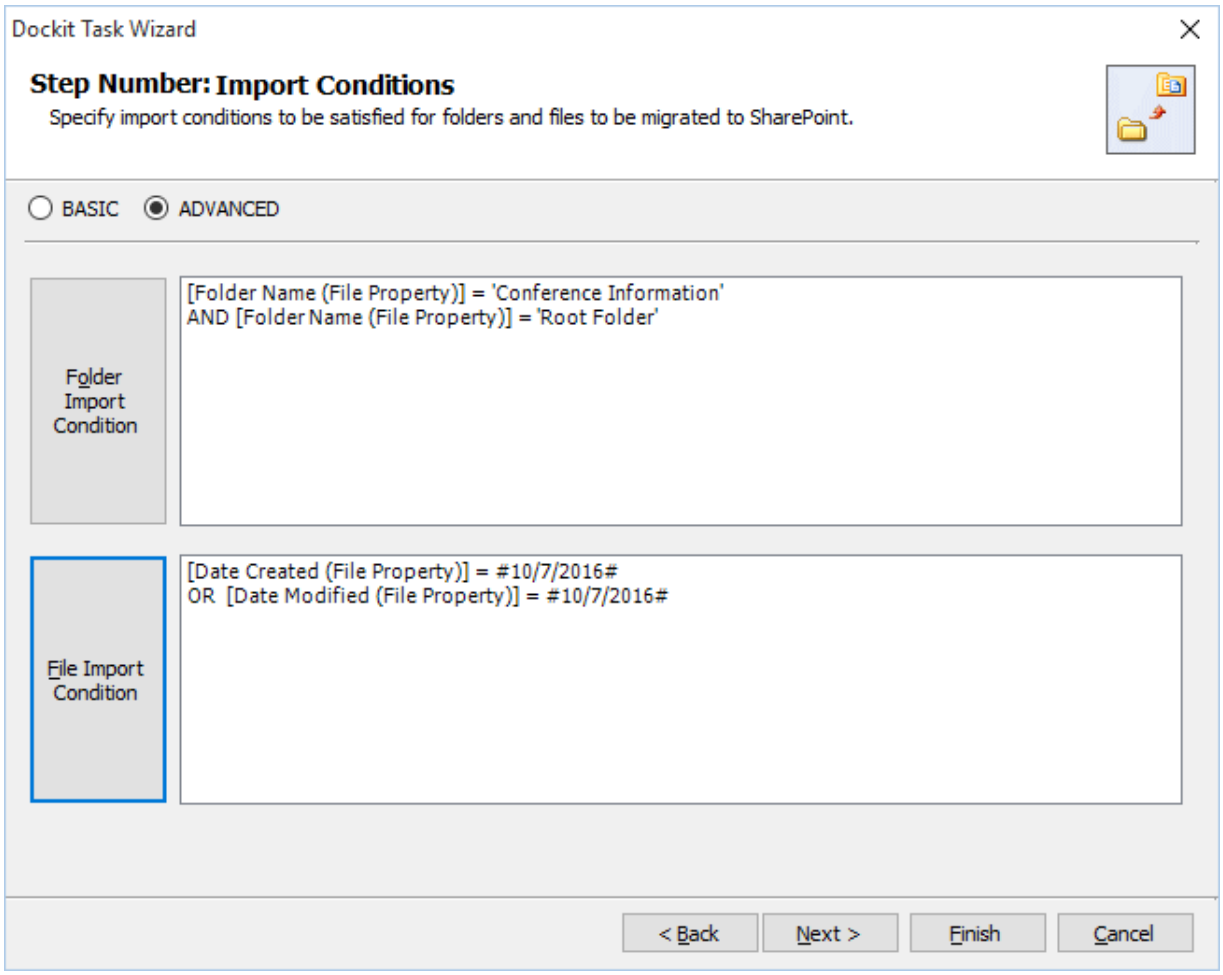
6. You can specify the import conditions by selecting the Field Name and by specifying a corresponding value with the required operator. You can use mathematical operators such as >, =, >= etc. to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')'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



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

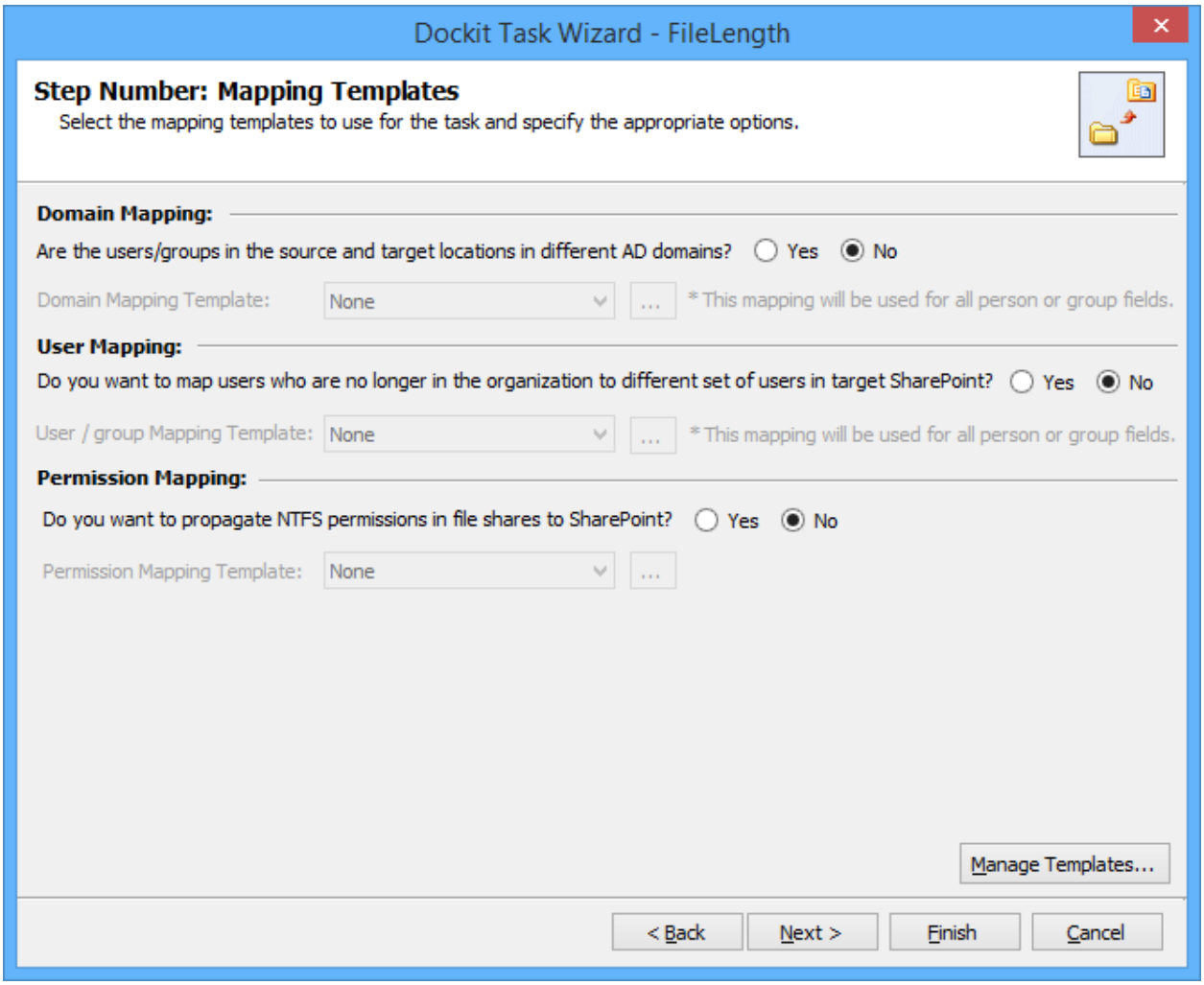


9. Click **Next** to proceed.

Mapping Templates

To specify the mapping templates to use for the task:

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



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:**

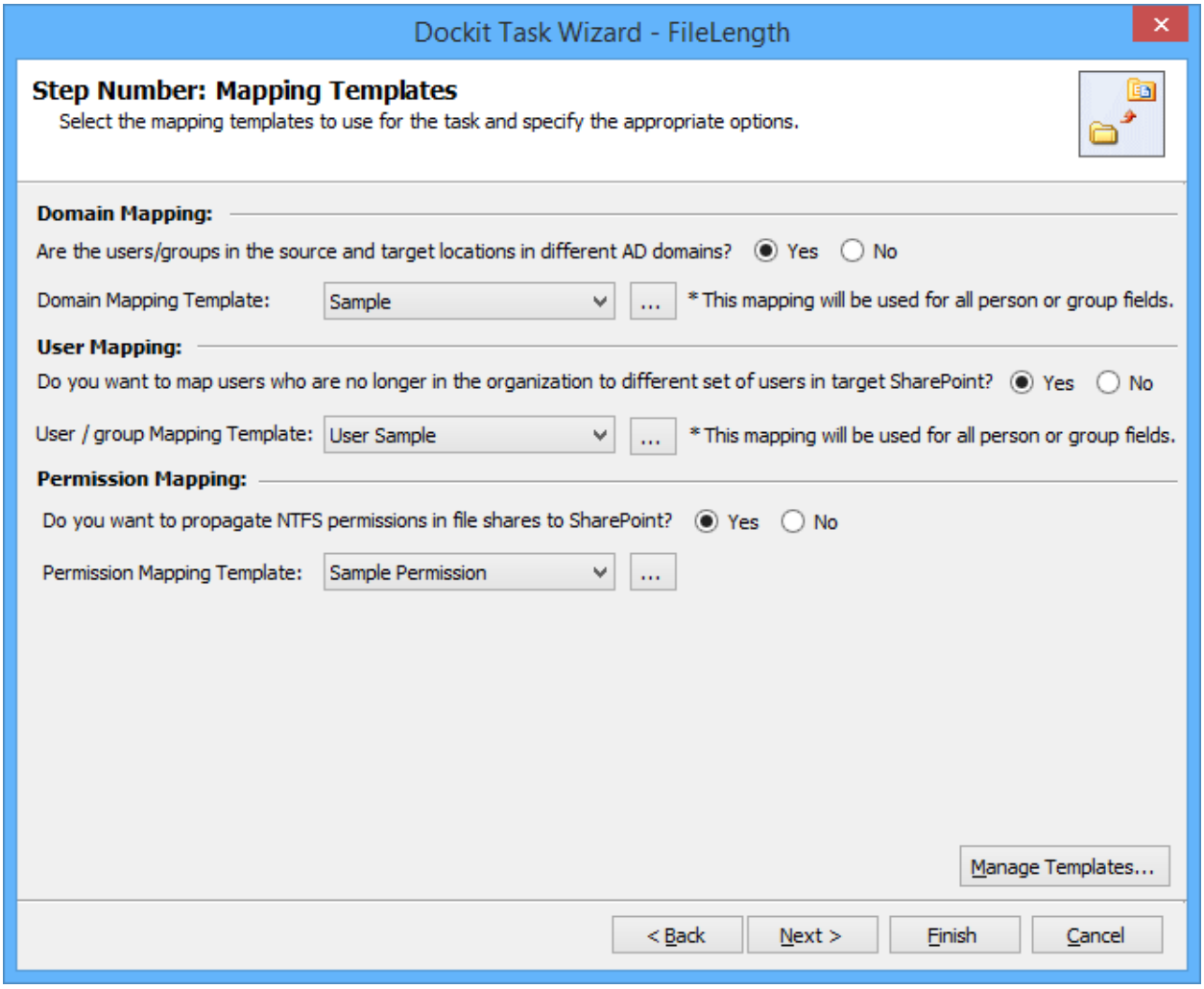
   Do you want to propagate NTFS permissions in file shares to SharePoint? (Yes/No)

   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.

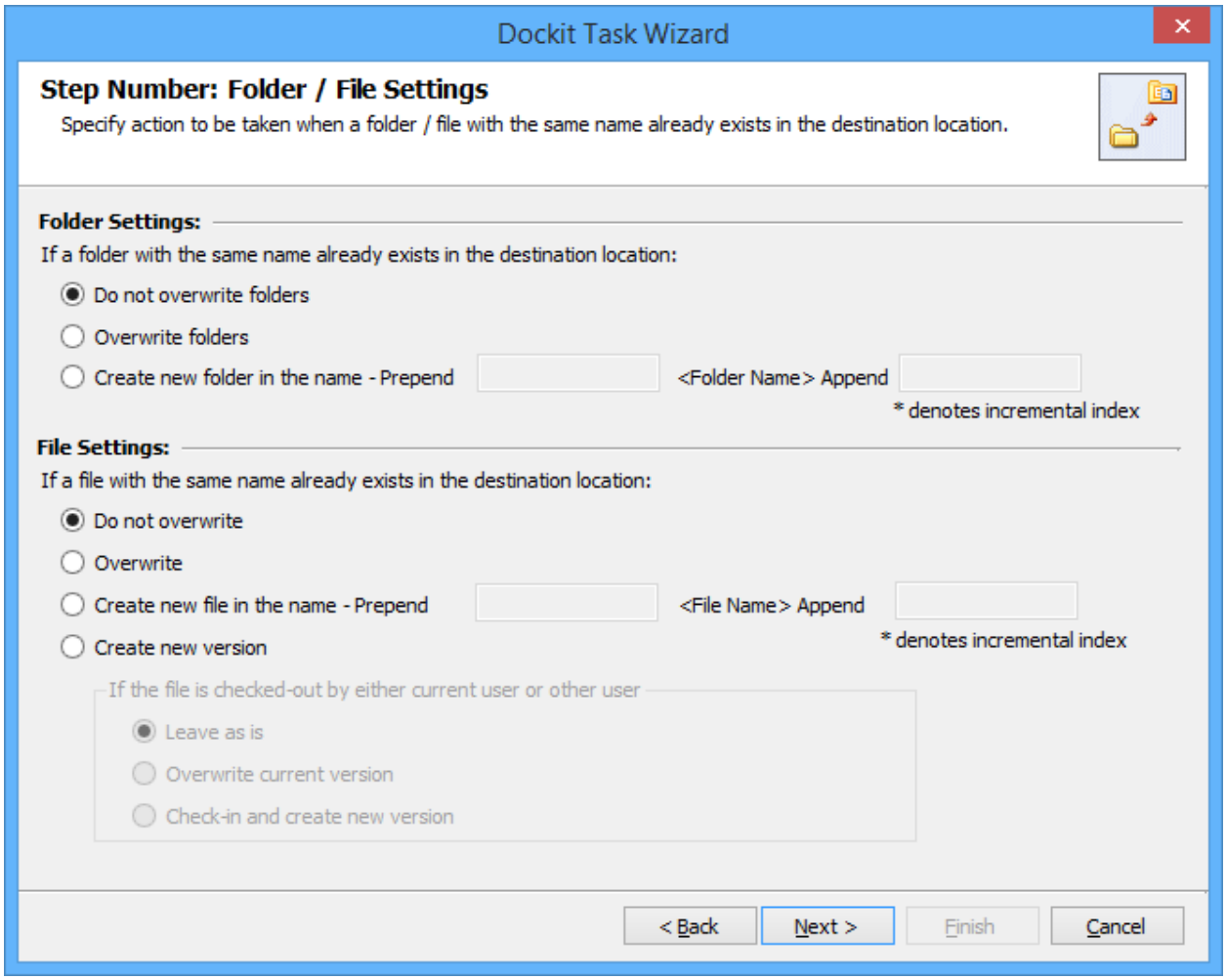


6. Click Next to proceed.

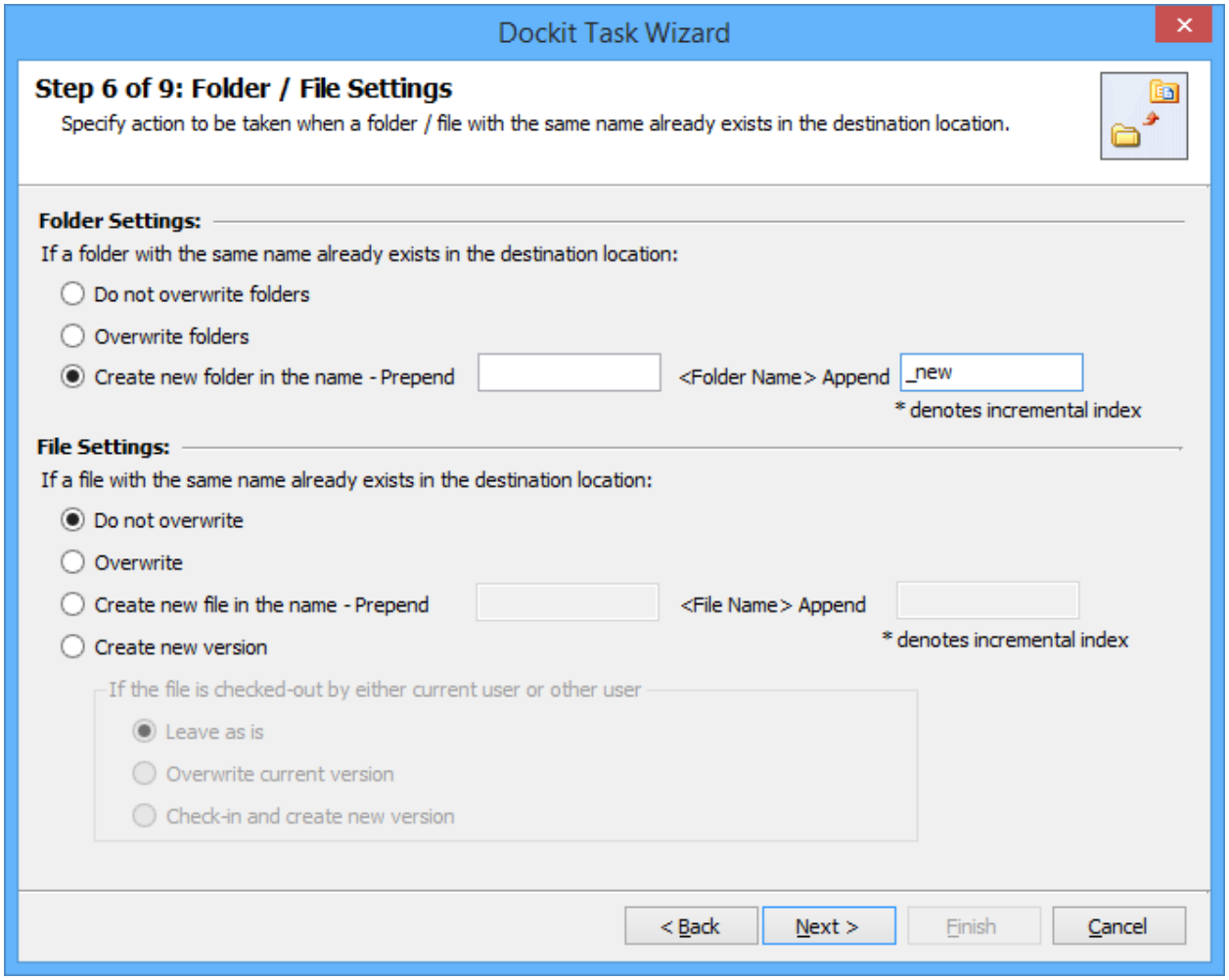
Folder / File Settings

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

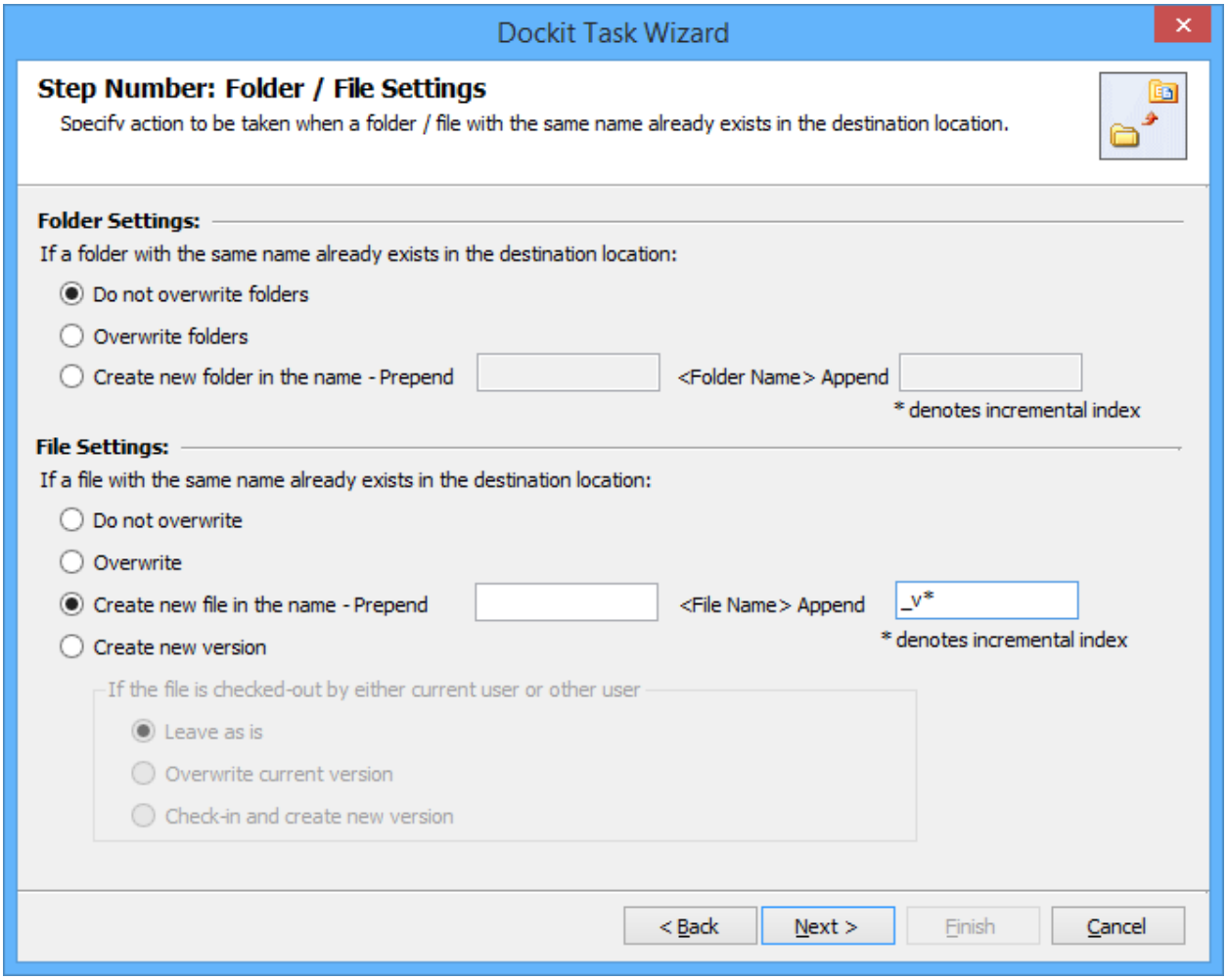
1. The **Folder / File Settings** step appears as shown below:



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.



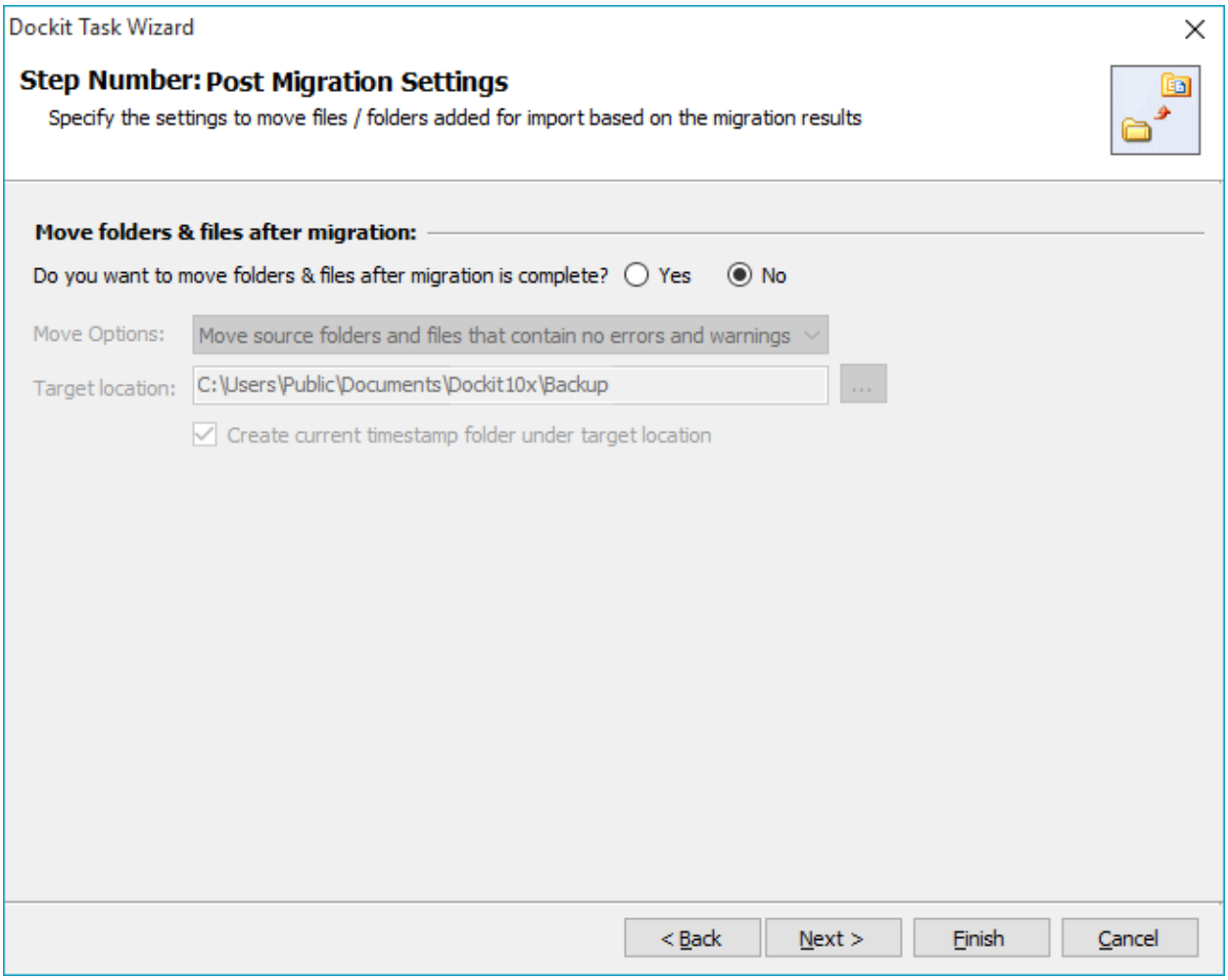
3. Select any one of the following options given below:
    a. **Do not overwrite** - Skips the file without overwriting.
    b. **Overwrite file** - Deletes the file from the destination location (along with its version history) and imports the source file.
    c. **Create as new file** - Creates a 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.



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**.

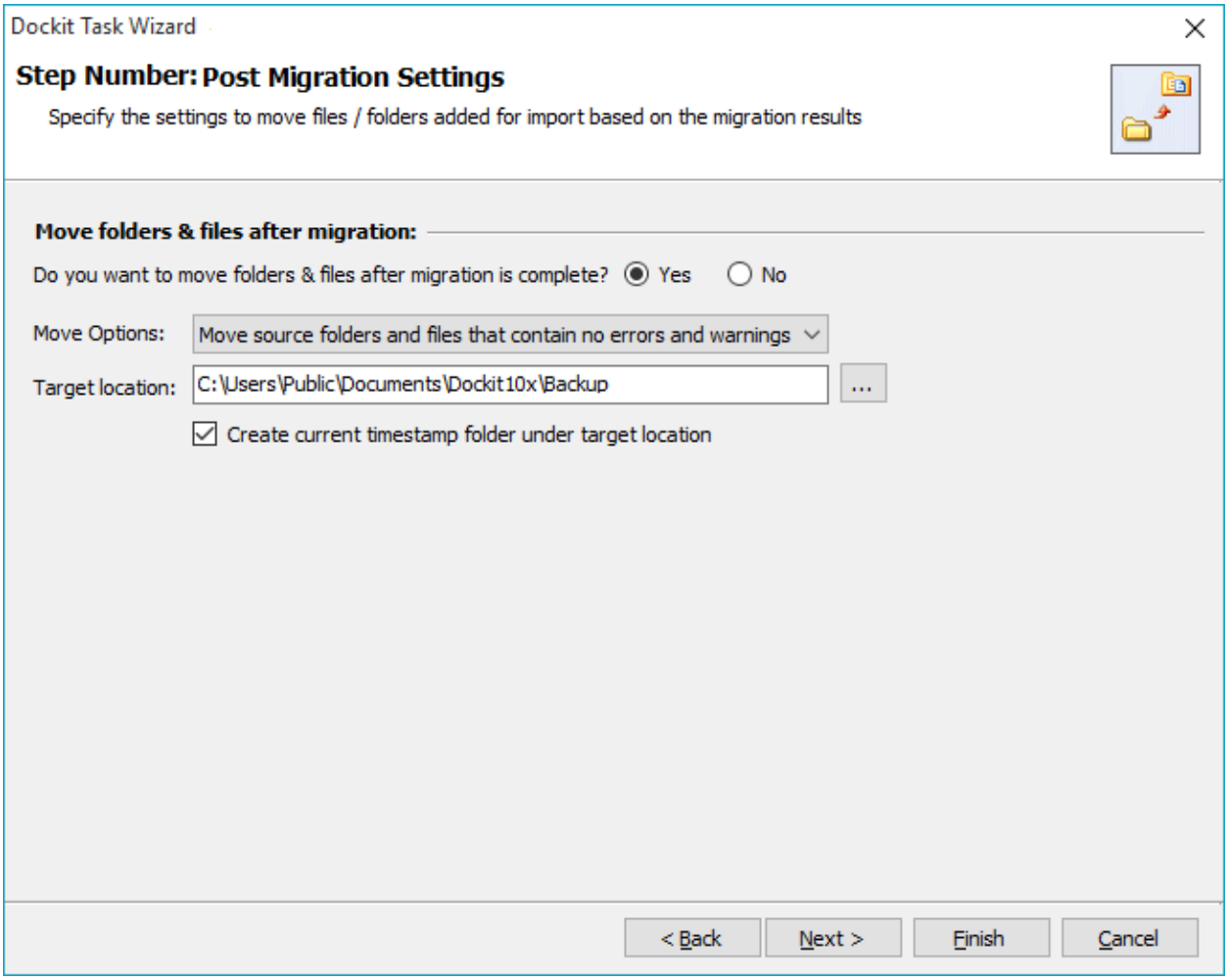


2. Select a **Move option** from the list below:

    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.

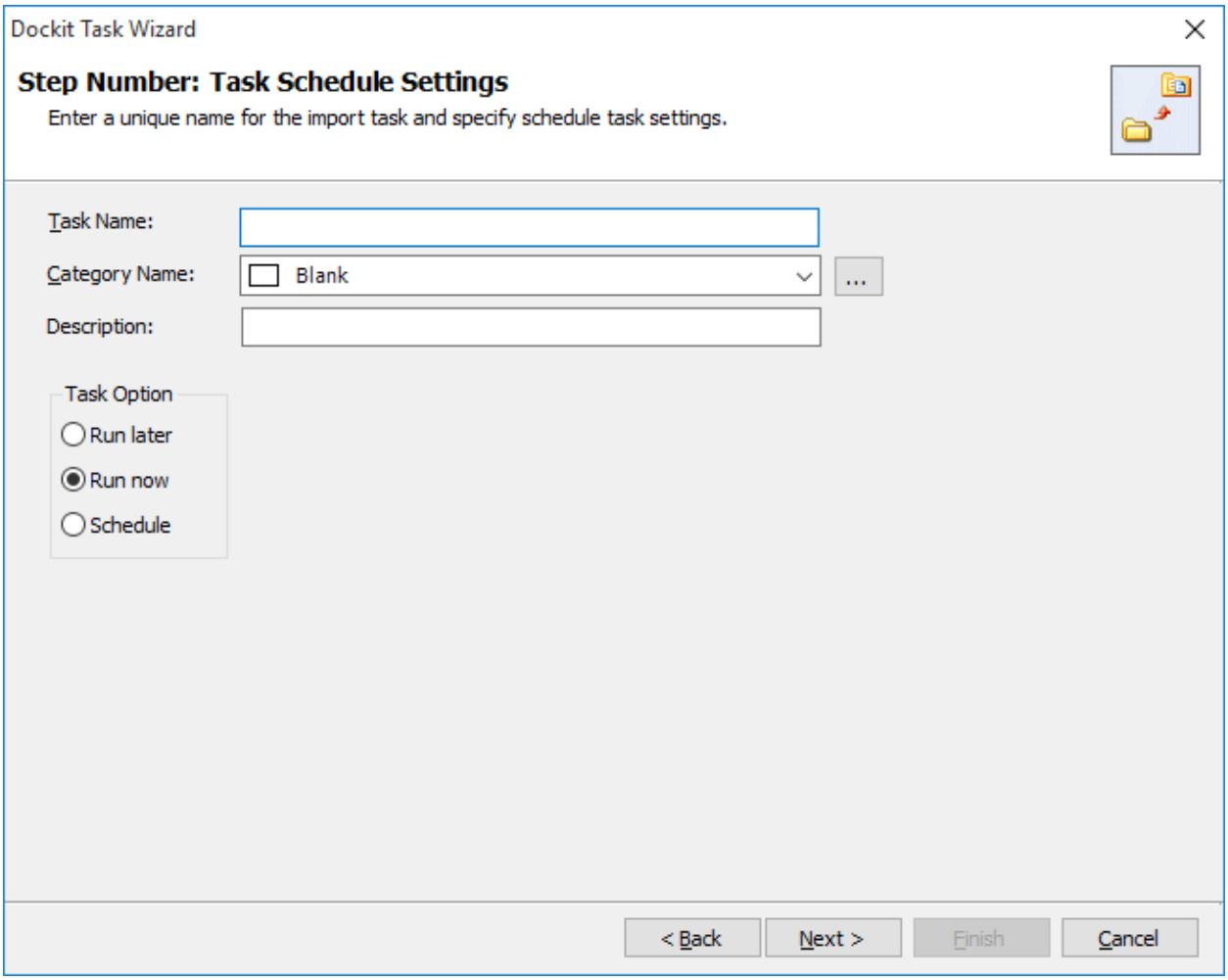


3. Specify a **Target Location** where the source folders and files are to be moved. You can also click browse (...) button to launch folder browser. You must ensure that the user who invokes the move operation has sufficient permissions to delete folders and files in the source location and to re-create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



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.

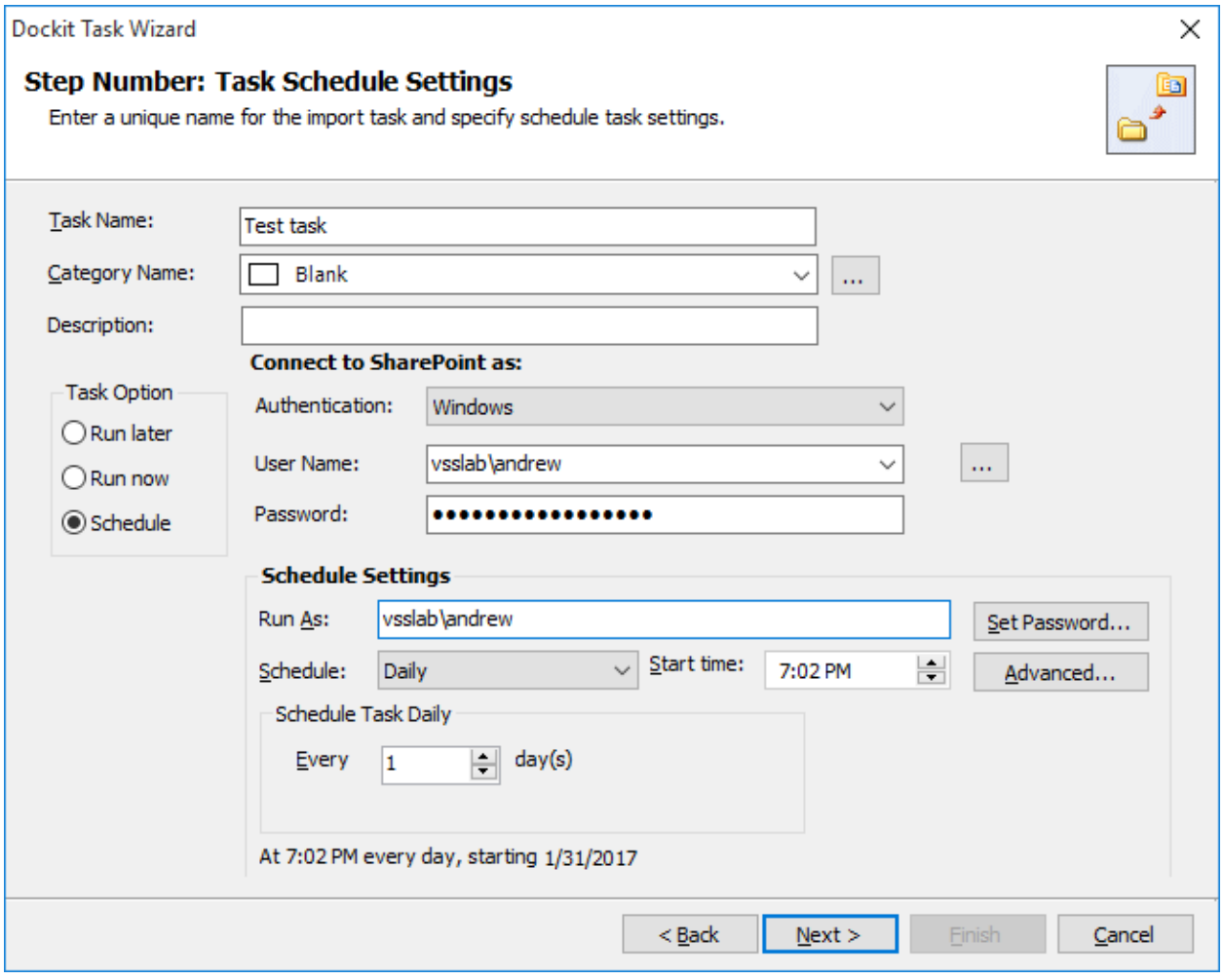
4. Select one of the following options to connect to the target SharePoint site:

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.

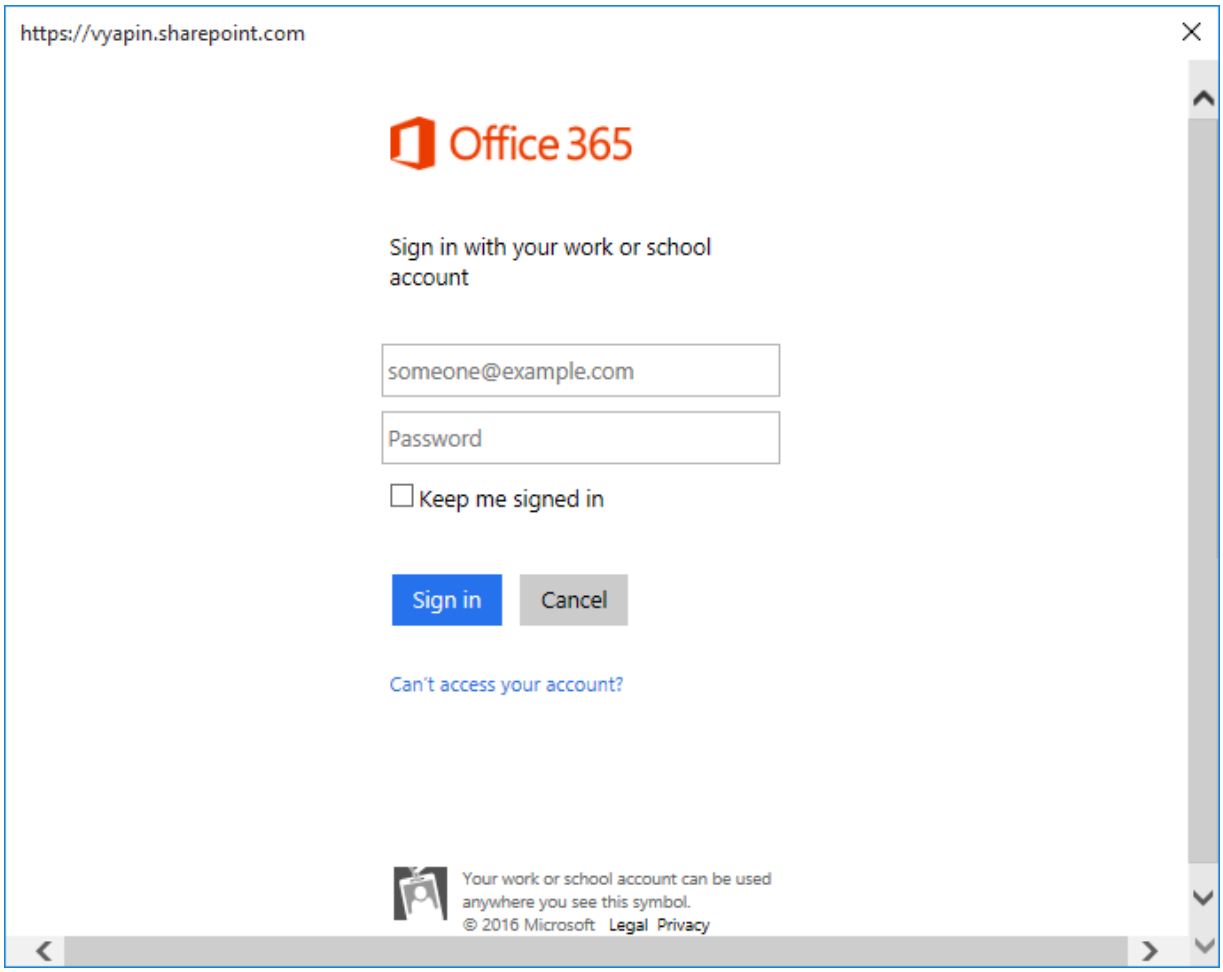
c. **Use 'Run As' user context given below** – This option will be available if you choose **Schedule** task option. Dockit will use the user account specified in the scheduled **Run As** user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint 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.



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).



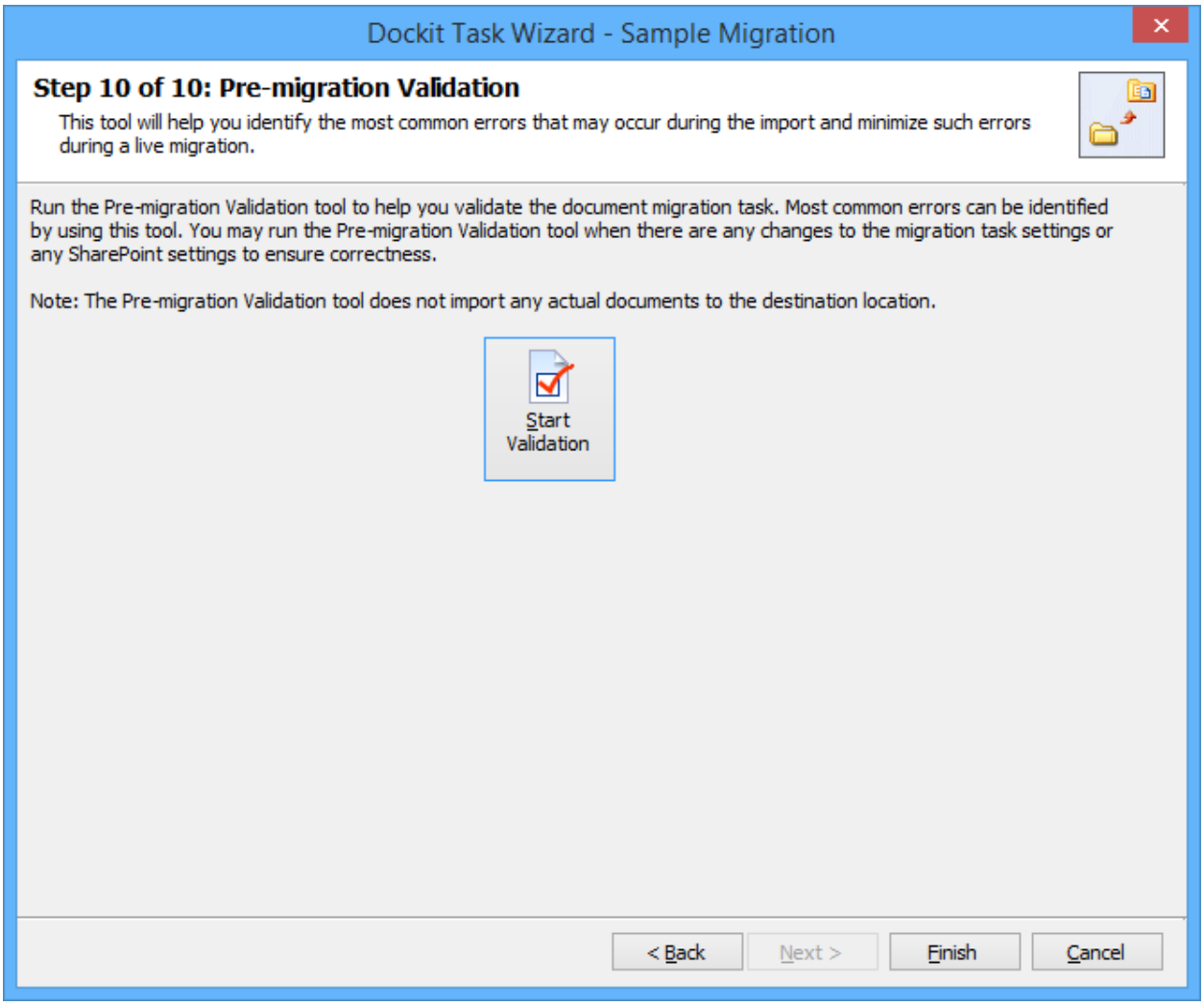
Provide username and password in the respective textboxes and click **Sign in** button to proceed.

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

Pre-migration Validation

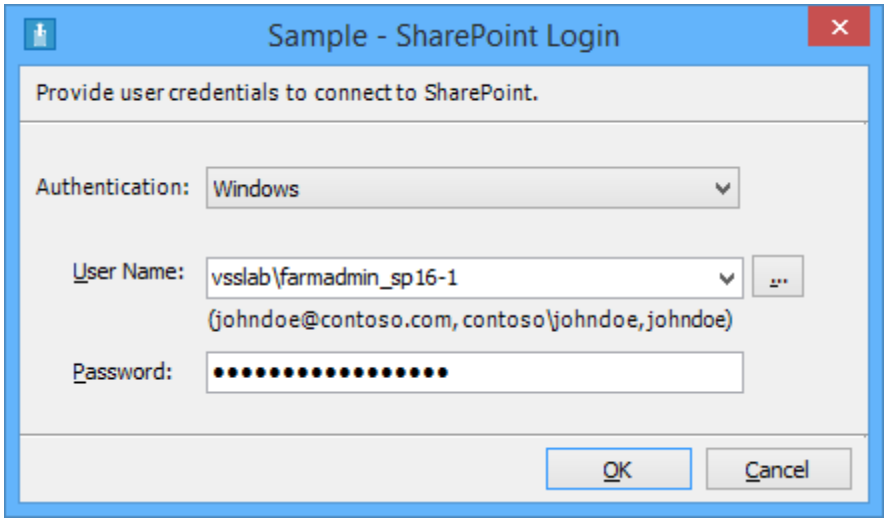
Pre-migration Validation tool helps you validate the exact steps performed by Dockit during the import process. This tool does not import any files to the destination location. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there are any changes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

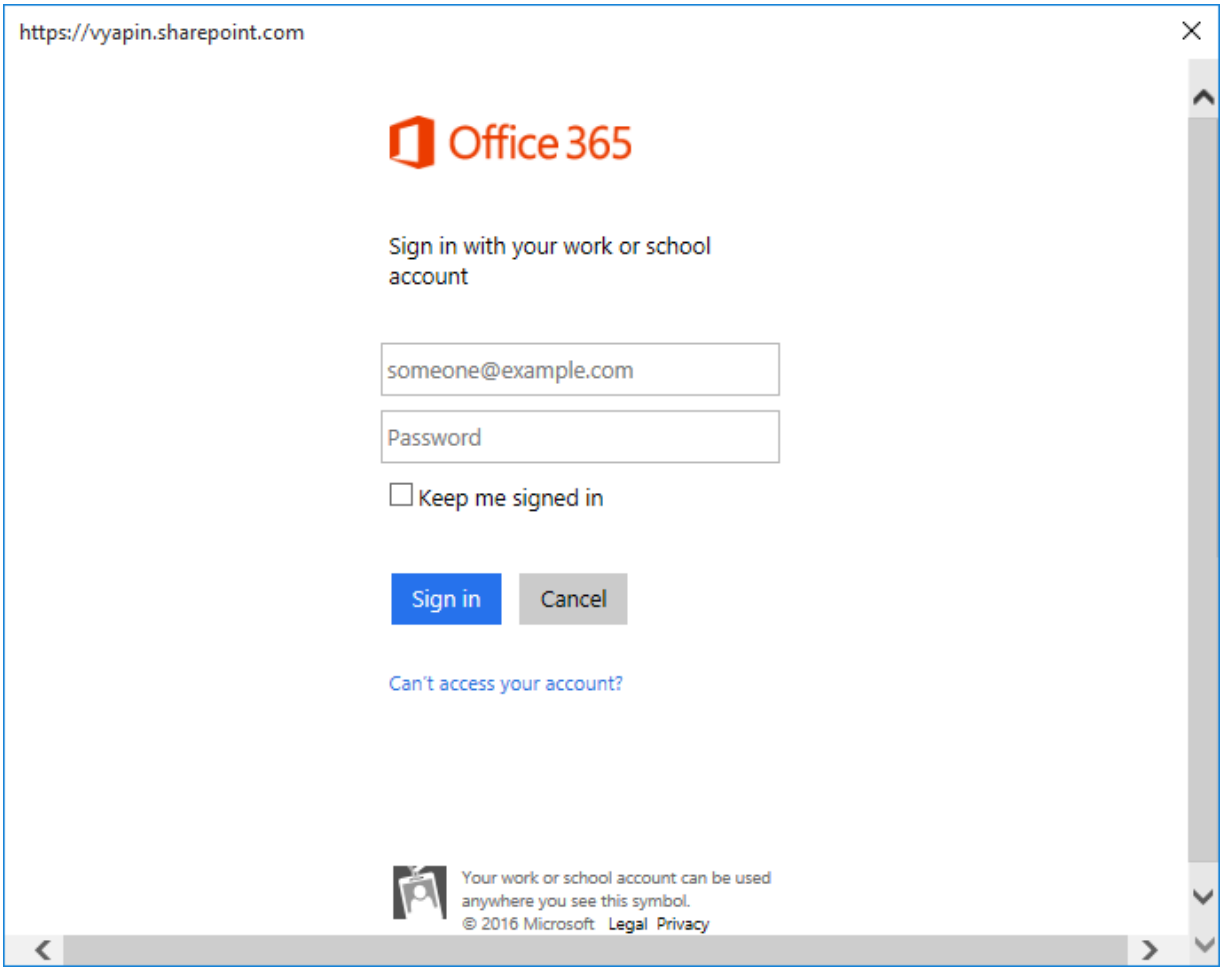


2. Click **Start Validation** button to invoke the Pre-migration Validation tool.

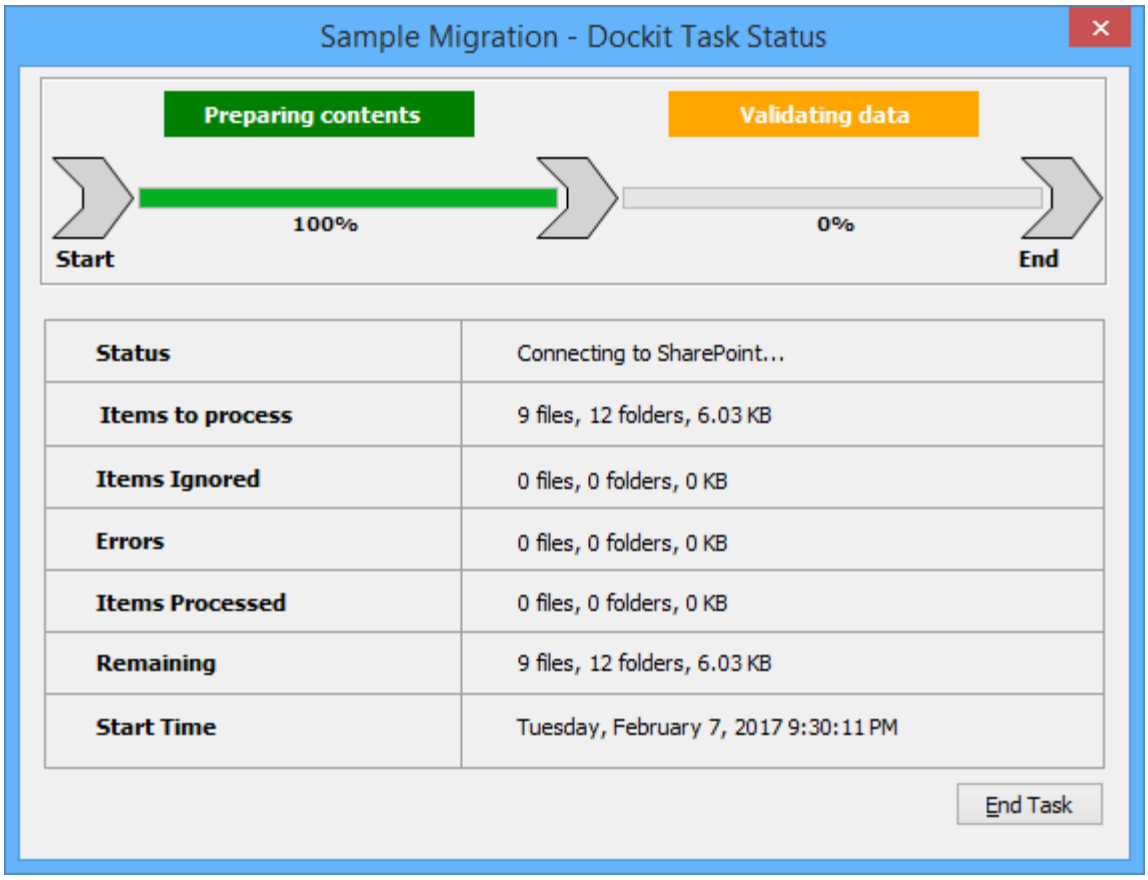
3. The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.



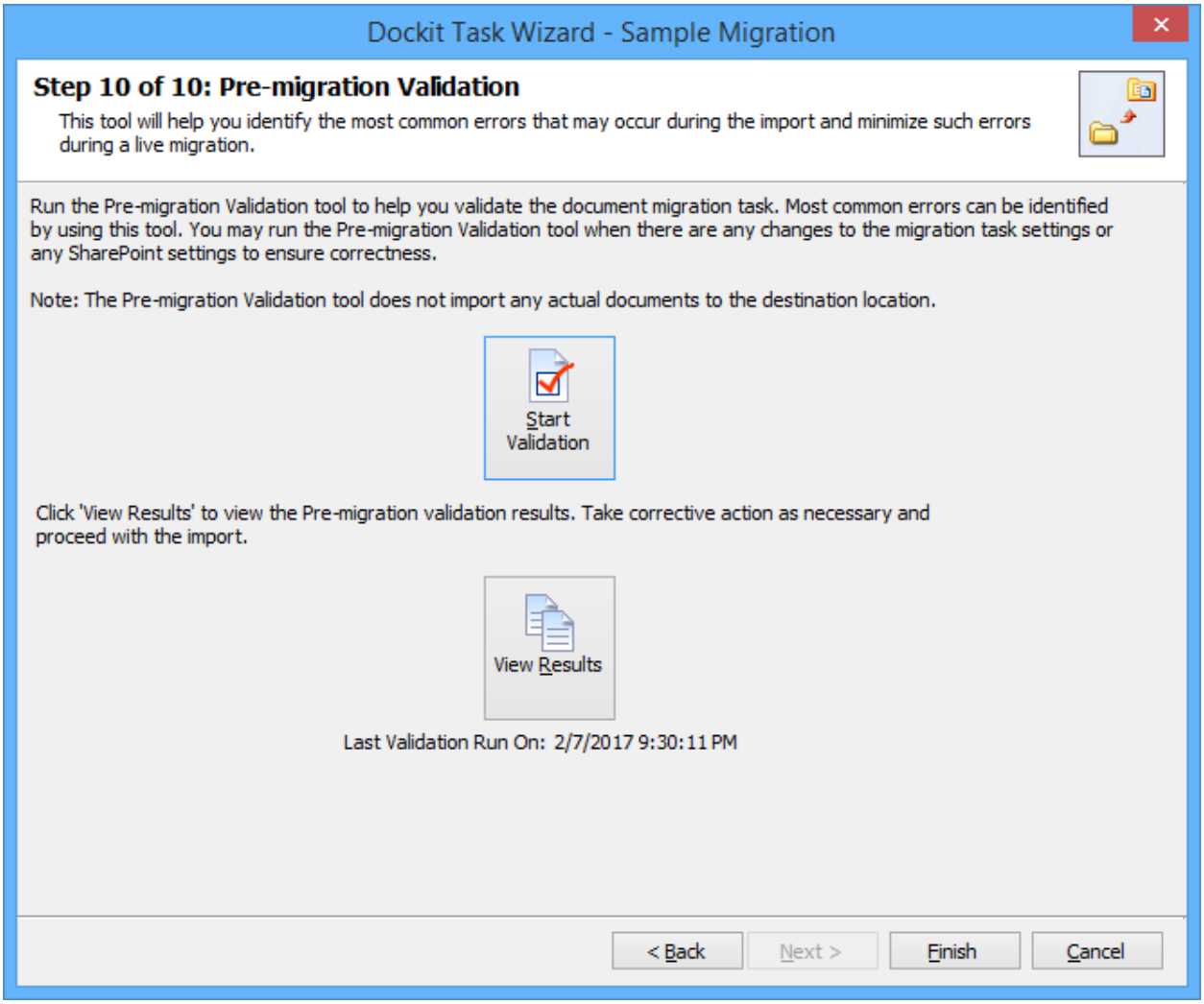
For **Federated authentication (Web Single Sign-on)** credential based import task. The Web Login Dialog to connect to SharePoint will appear as shown below:



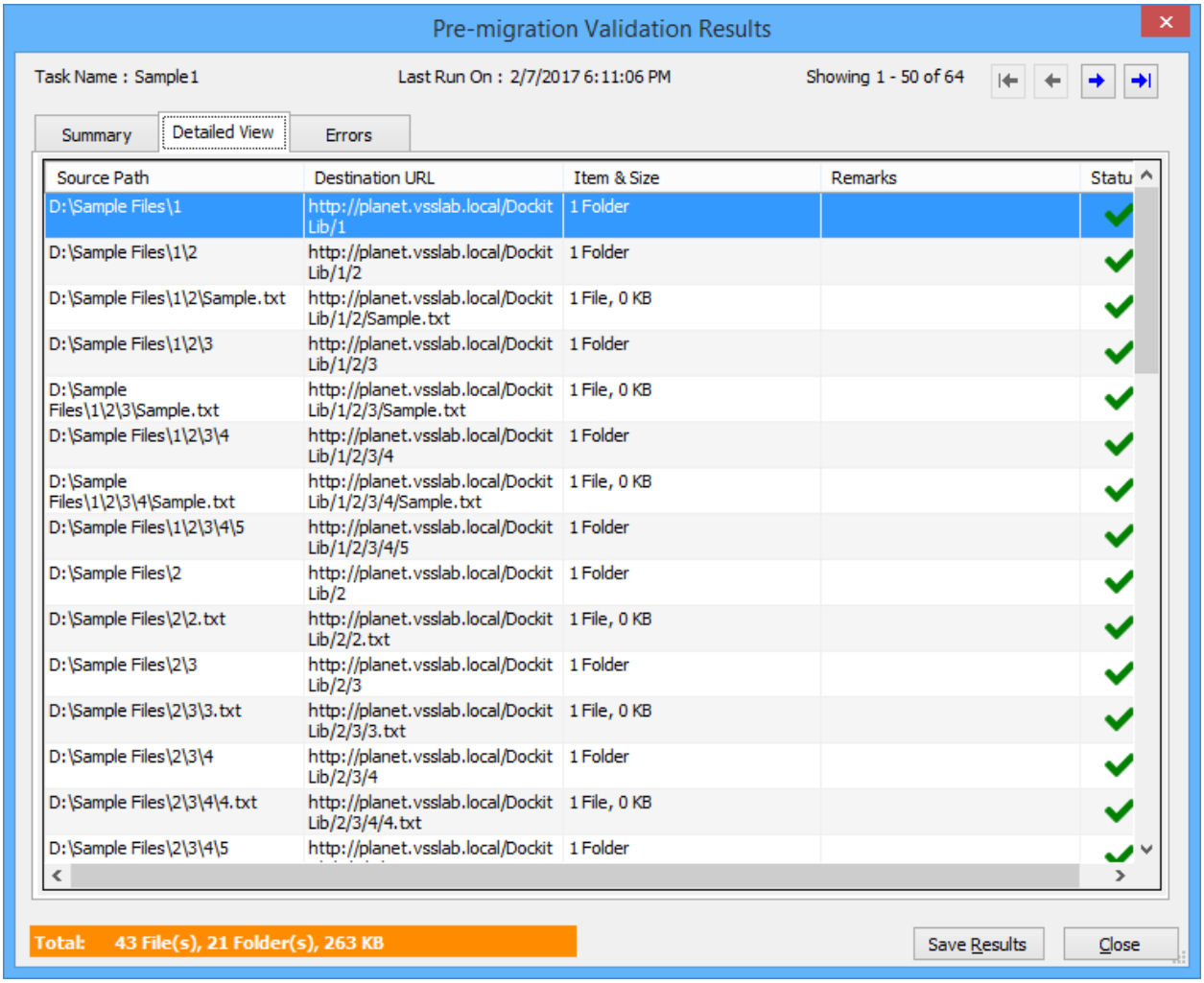
4. You will notice a task progress bar in a new window as shown below.



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.



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



- Refers the items that succeeded during pre-validation.

- 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
    - Managed Metadata - Checks for the term that matches the given value
    - User / Group - Check whether the user / group available in target location
    - Choice - Check whether the given value available under choice list

Limitations of Pre-migration Validation tool

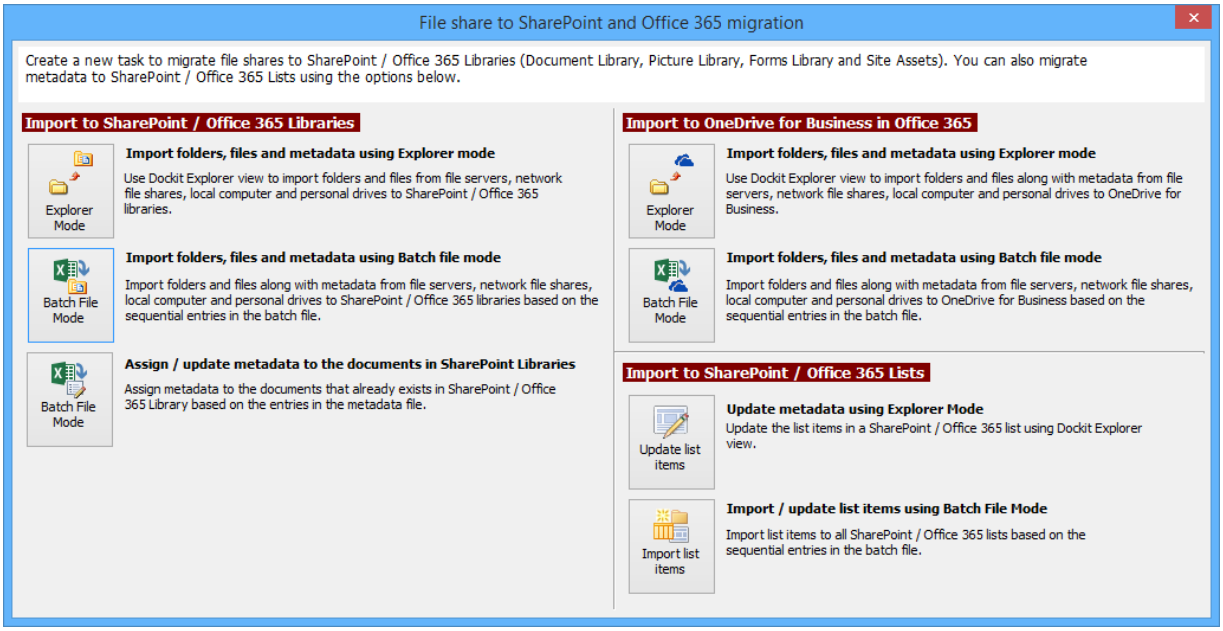
The Pre-migration validation check and the actual import results may vary in certain circumstances. The Pre-migration Validation Tool does not perform a few checks as the checks may either slowdown the validation process or a few errors will occur only when performing an actual live transfer. Please 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 Pre-migration 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 Metadata Options
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 documents/folder1	folder2/folder3

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

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

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

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

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

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

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

Sample format of a CSV / TEXT batch file:

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

“Path”,“Destination Path“,”New Folder”

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

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

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

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

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

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

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

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

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

Metadata File Structure

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

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

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

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

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

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

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

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

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

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

SharePoint Data Type	Remarks	Example
Yes/No	If any other value appears in the metadata file, other than Yes/No, default value will be assigned.	"Yes" "No"
Text	The text length should not exceed 255 characters.	"This is sample text"
Multi-line Text	The text length should not exceed 255 characters (preferred).	"This is sample text\nThis is sample for multi-line text"
Date and Time	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2009 10:50 AM" "1/25/2010"
Number	The fixed or floating number can be given to this field. The value should not exceed the numeric boundary.	"10" "3.41"
Currency	The fixed or floating number can be given to this field. Do not use any currency symbol ($) with this field value. The value should not exceed the currency boundary.	"100" "10000" "1500.67"
Choice (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values.	"Male" "15"
Choice (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'.	"Windows 7; Windows Vista; Windows 2003; Windows XP"
Lookup (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Windows 7"

Lookup (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Stock Details; Accounts; Product Details"
People or Group (Single Value)	User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. Do not use multiple values unless the equivalent column defined in SharePoint can accept multiple values. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\Administrator" "BUILTIN\Administrator" "Backup Owners" "someone@example.com" "John Doe"
People or Group (Multiple value)	User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\User1; BUILTIN\Administrators; Guest Members;Temps"
Hyperlink or Picture	The http URL of any resource or picture can be given to this field.	"http://sharepoint/Shared Documents/My Sample File.doc" "http://sharepoint/Pictures/chart.bmp"
Target Audiences	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 SharePoint Server 2010 and above).	SPUsers; Contributors; Designers
Publishing Schedule Start Date (Applicable only for Collaboration Portal / Publishing Portal Site)	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2010 10:50 AM" "1/25/2009"
Publishing Schedule End Date (Applicable only for Collaboration Portal / Publishing Portal Site)	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2009 10:50 AM" "1/25/2010"
Publishing Image (Applicable only for Collaboration Portal / Publishing Portal Site)	The http URL of any picture can be given to this field. Relative URL also can be given to this field.	http://sharepoint/Pictures/chart.bmp "Pictures/chart.bmp"
Publishing Hyperlink (Applicable only for Collaboration Portal /	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)		" NewsArticleImage.jpg"
Publishing HTML (Applicable only for Collaboration Portal / Publishing Portal Site)	HTML content can be given in this field. You can use HTML tags in order to create rich content in the field.	It is sample text
Business Data (BDC) / External Data (BCS) (Applicable only for SharePoint Enterprise Edition)	The BDC / BCS column value along with the filter name can be specified in this field. Dockit will search for the specified column value in the LOB entity using the given filter and assign the corresponding ID (when the BDC / BCS column value match is found) of the LOB record to the BDC / BCS column in SharePoint. Specify this value in filter name: value format. If the filter name contains colon (:) in its name, specify this value in FILTER:filter name, QUERY:value, where FILTER and QUERY are reserved words. Dockit also automatically fills-up the column values associated with the BDC / BCS column during import.	"Company Name:Vyapin" "ID:1000" "Product Name:Dockit Migrator 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:1000AX"
Managed Metadata (Single Value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the	"Continent|North America|Country|United States|States|Alaska" "Alaska"

	specified term value and assign the first matching term value for the corresponding managed metadata column.	
Managed Metadata (Multiple Values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	"Continent|North America|Country|United States|States|Washington;Continent |North America|Country|United States| States|California;Continent |North America|Country|United States| States|Alaska" "Washington;California; Alaska"
Geolocation	Location co-ordinates or name can be given to this field. The co-ordinates value must have latitude and longitude values separated by ':'. The latitude value must be between -90 and +90 and longitude value must be between -180 and +180.	"30:-60" "New York, United States"
Task Outcome	Text or Numeric value can be given to this field. Do not use multiple values for this column type.	"Complete" "4"
Related Items	The http absolute URL of any list item (including file) within the site collection can be given to this field. The values can be of single or multiple. Multiple values should be separated by ';'.	"http://sharepoint/Documents/Sample 1.doc; http://sharepoint/Documents/Sample 2.xlsx" "http://sharepoint/Lists/Custom List/1_.000"

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

- Choice*
- Lookup
- Person or Group

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

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

Sample format of a CSV / TEXT metadata file:

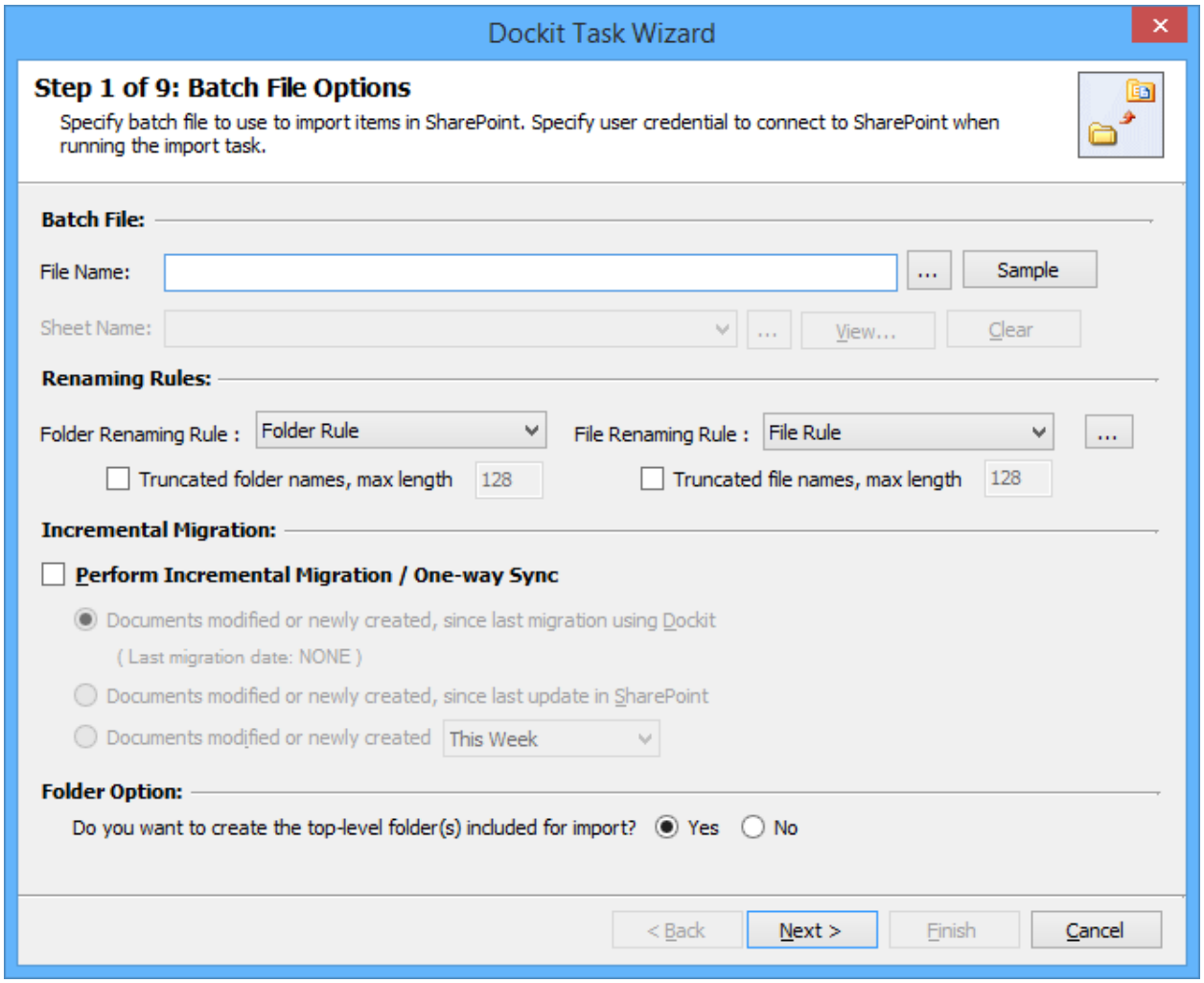
Note: Refer Point #2 for the separator to be used in the metadata file

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

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:



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, click here.

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.

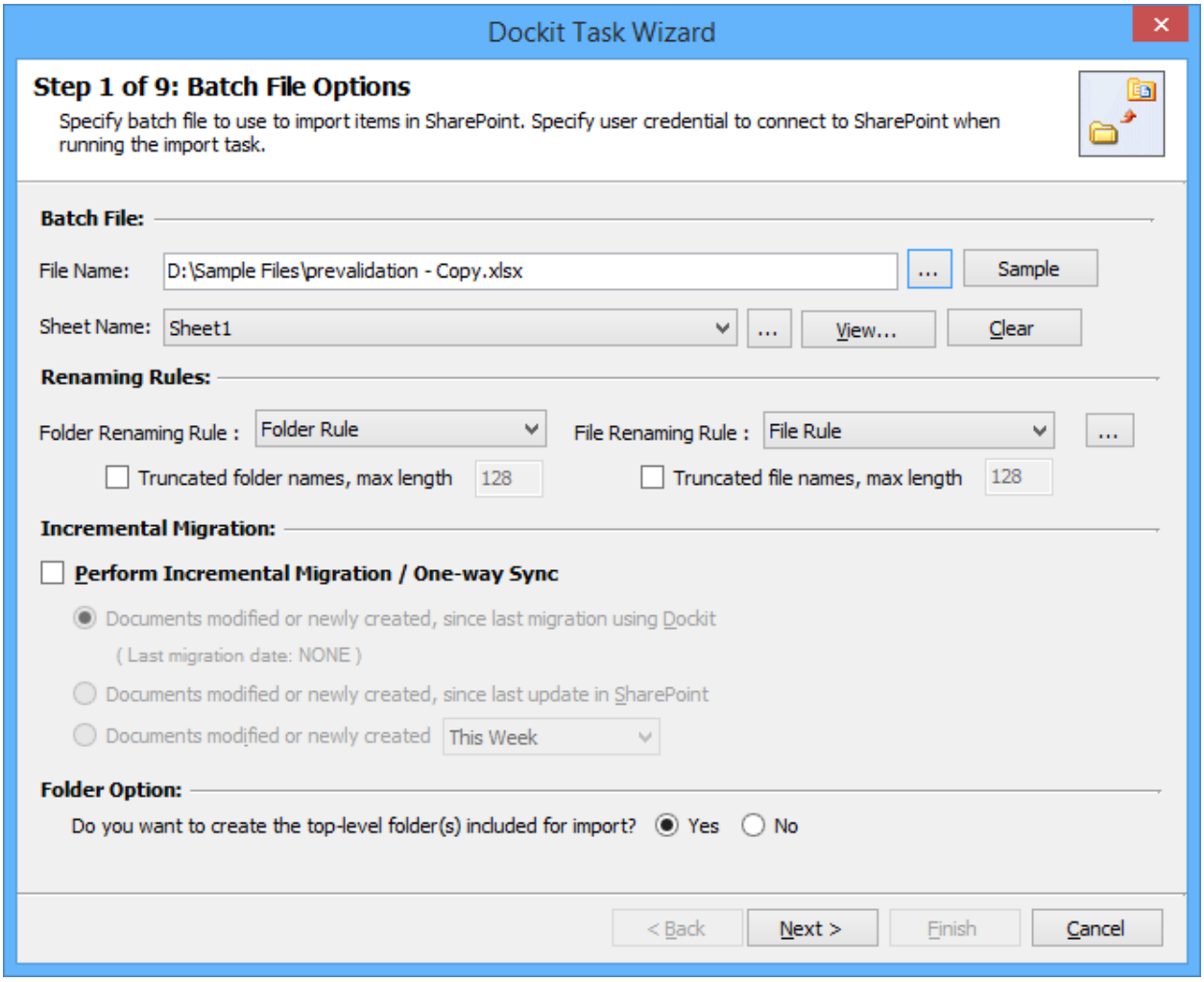
5. **File Renaming Rule:**

   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'**



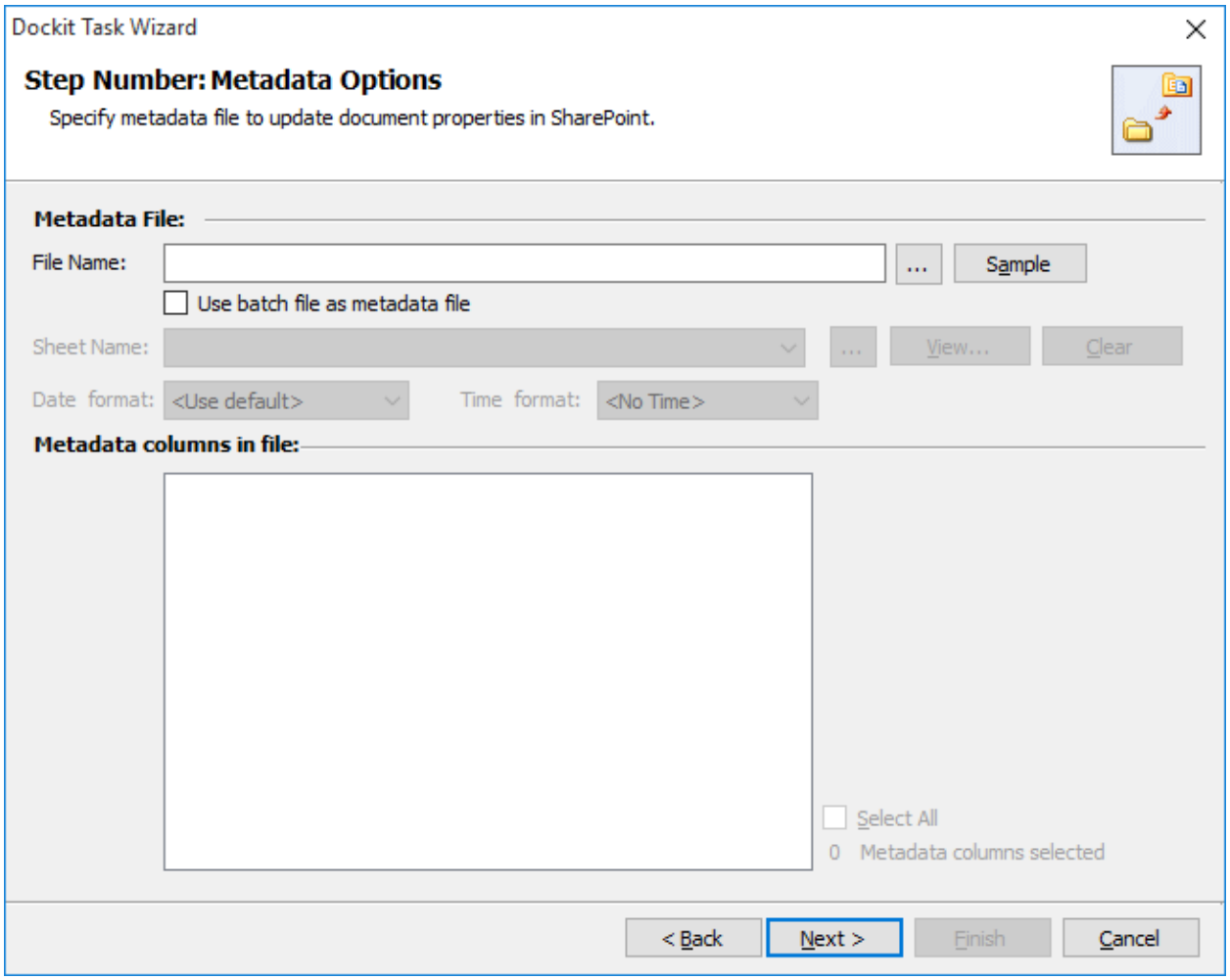
7. The top-level folder is the folder added or specified for import by the user. Dockit will commence the import process from this top-level folder. **Select** the appropriate option to create the top-level folder by selecting the option buttons (Yes/No).

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:



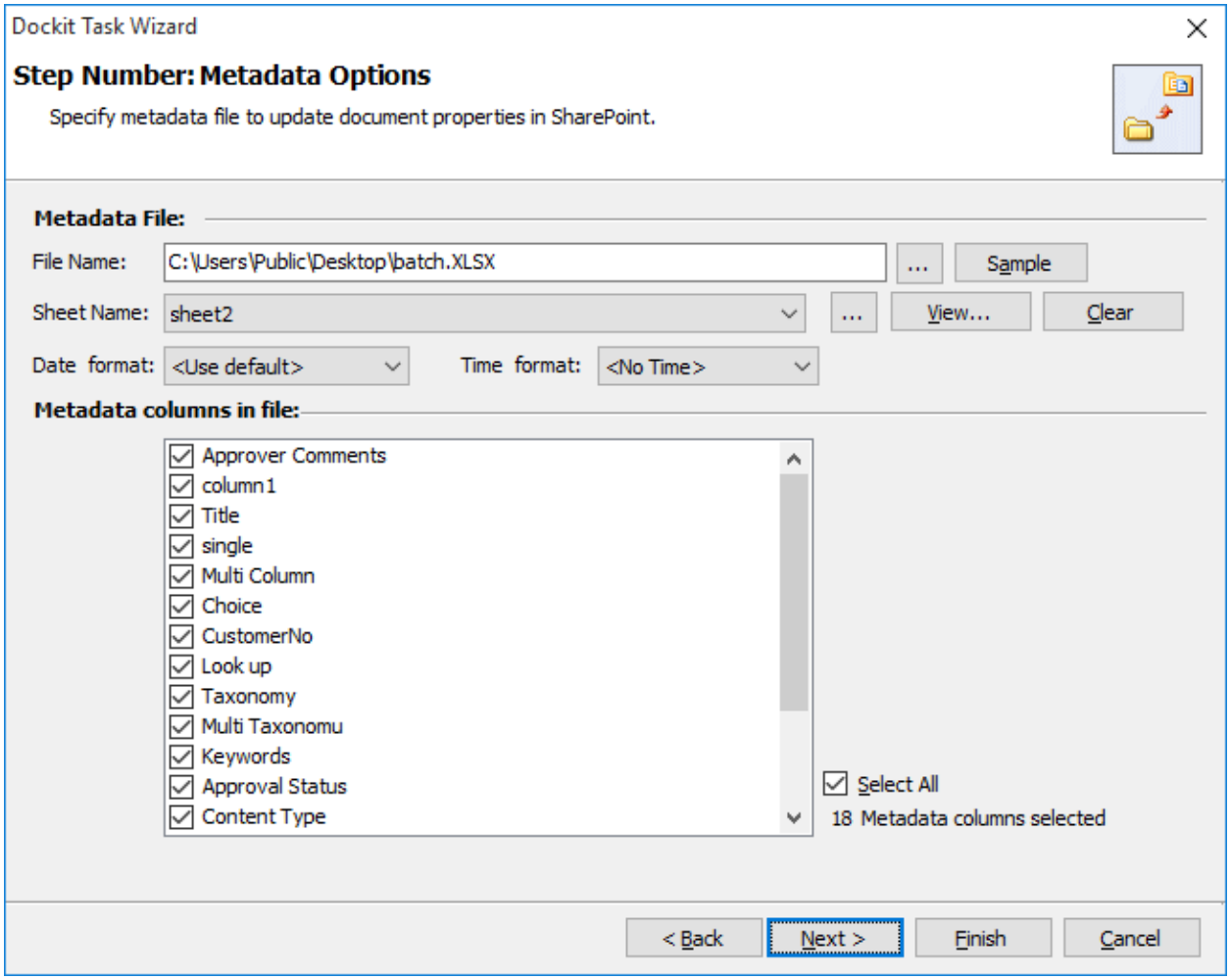
2. *Note: 'Use batch file as metadata file' option only available in 'Batch File Mode'.*

   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.

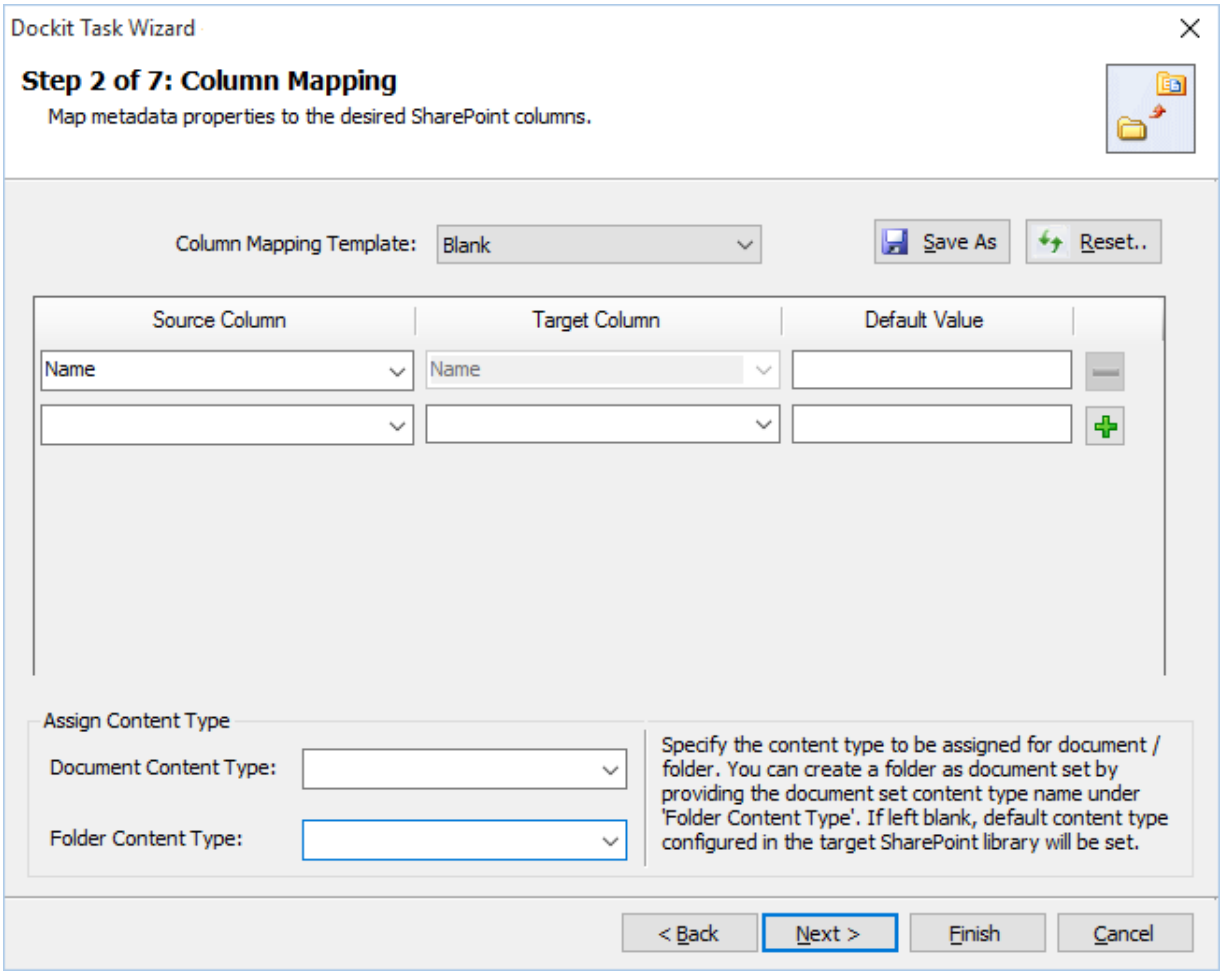


7. Click **Next** to proceed.

Column Mapping

To perform column mapping

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

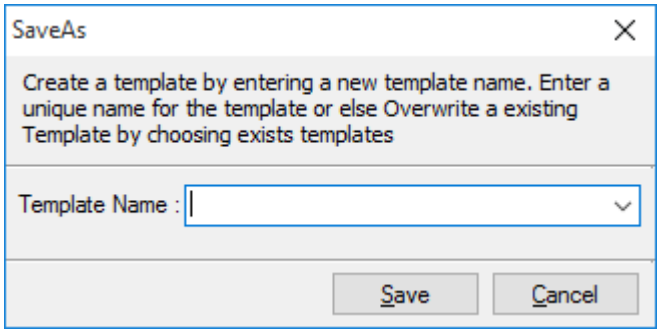


2. **Column Mapping Template:** Select any one of the column mapping templates to use from the list of available template(s). A couple of default templates ('**Blank**' and '**Core File Properties**') are readily available to ease the mapping configuration.

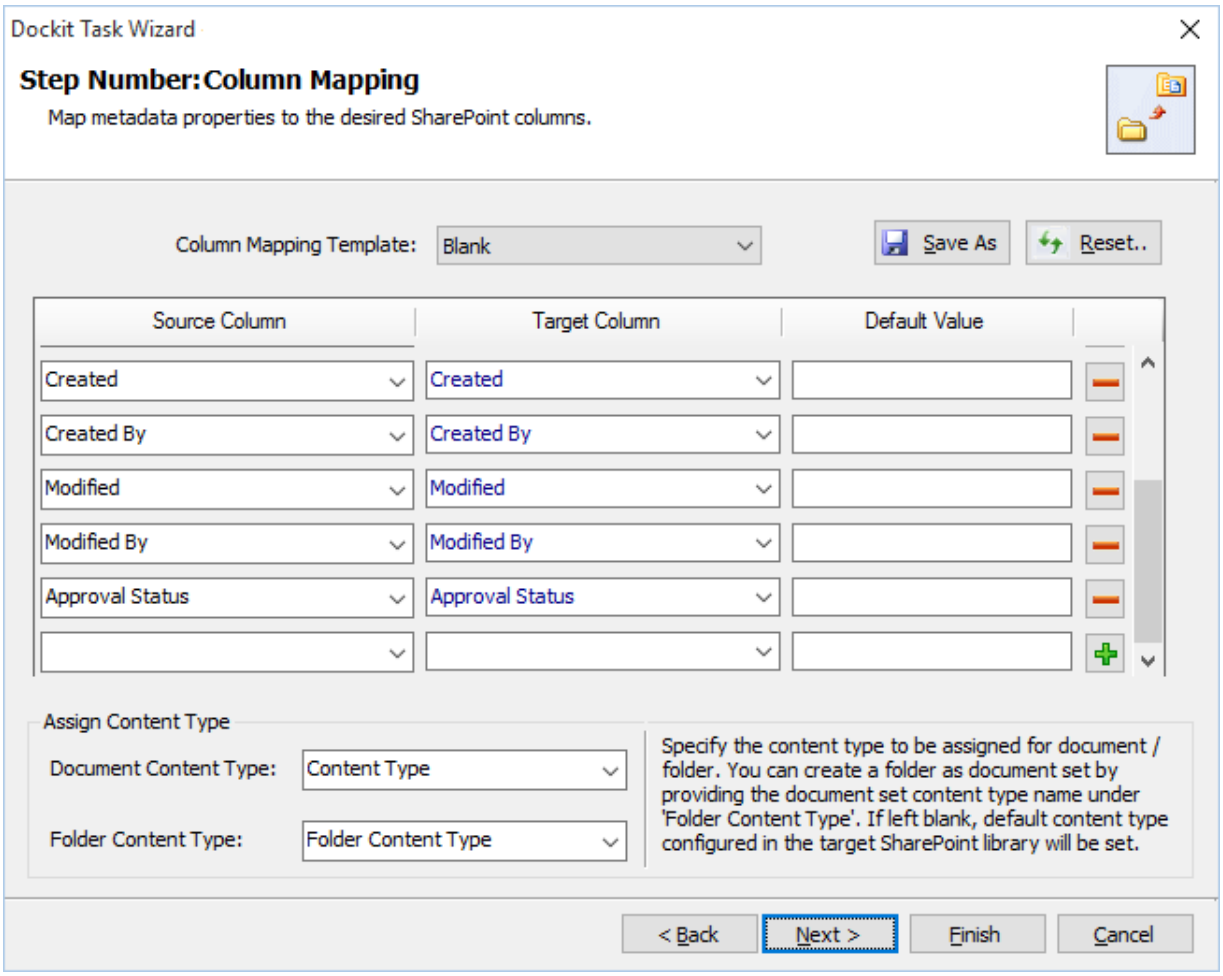
3. **Source Column:** You can specify source column values from **'File properties', 'Metadata File'**, '[Function Builder](#)' and also from **'Other File Properties'** by entering the property name.
4. **Target Column:** You can specify the target SharePoint Column which needs to map and assign values.

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.



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

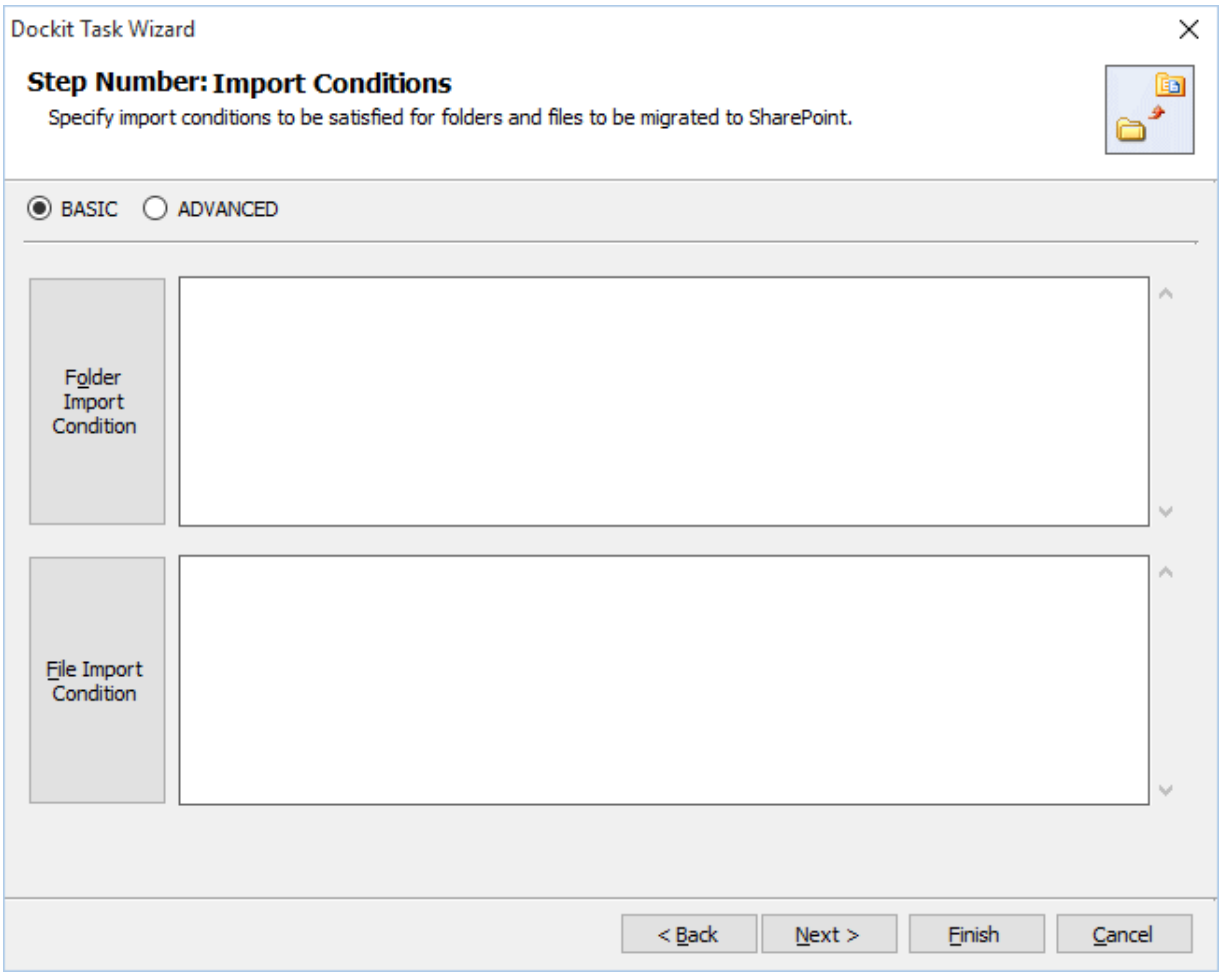


8. Click **Next** to proceed

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.

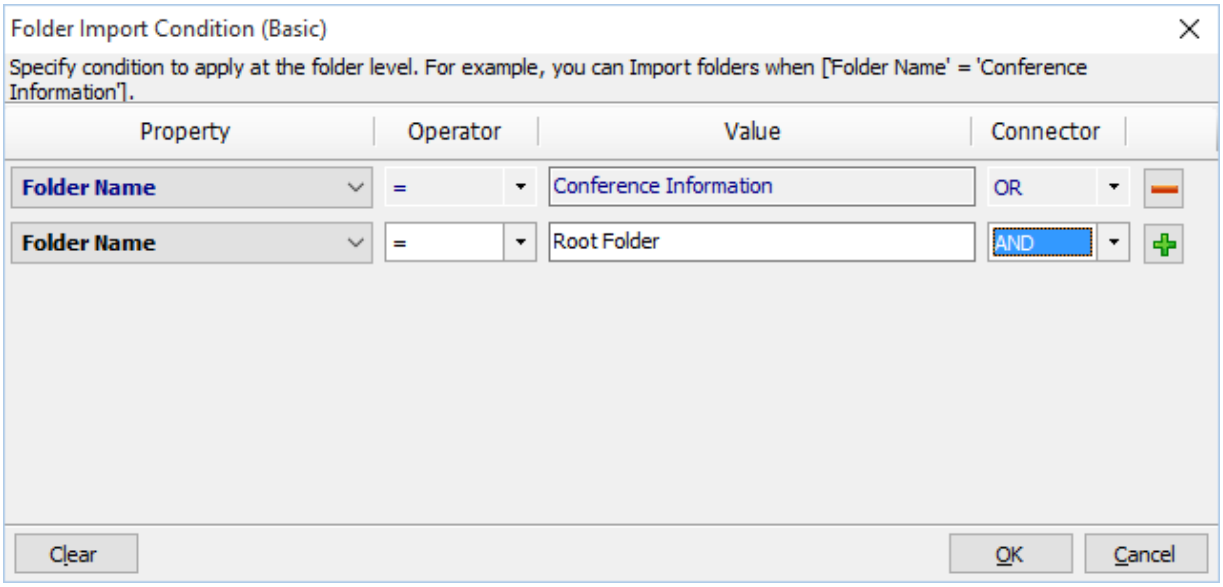
1. The **Import Conditions** step appears as shown below:



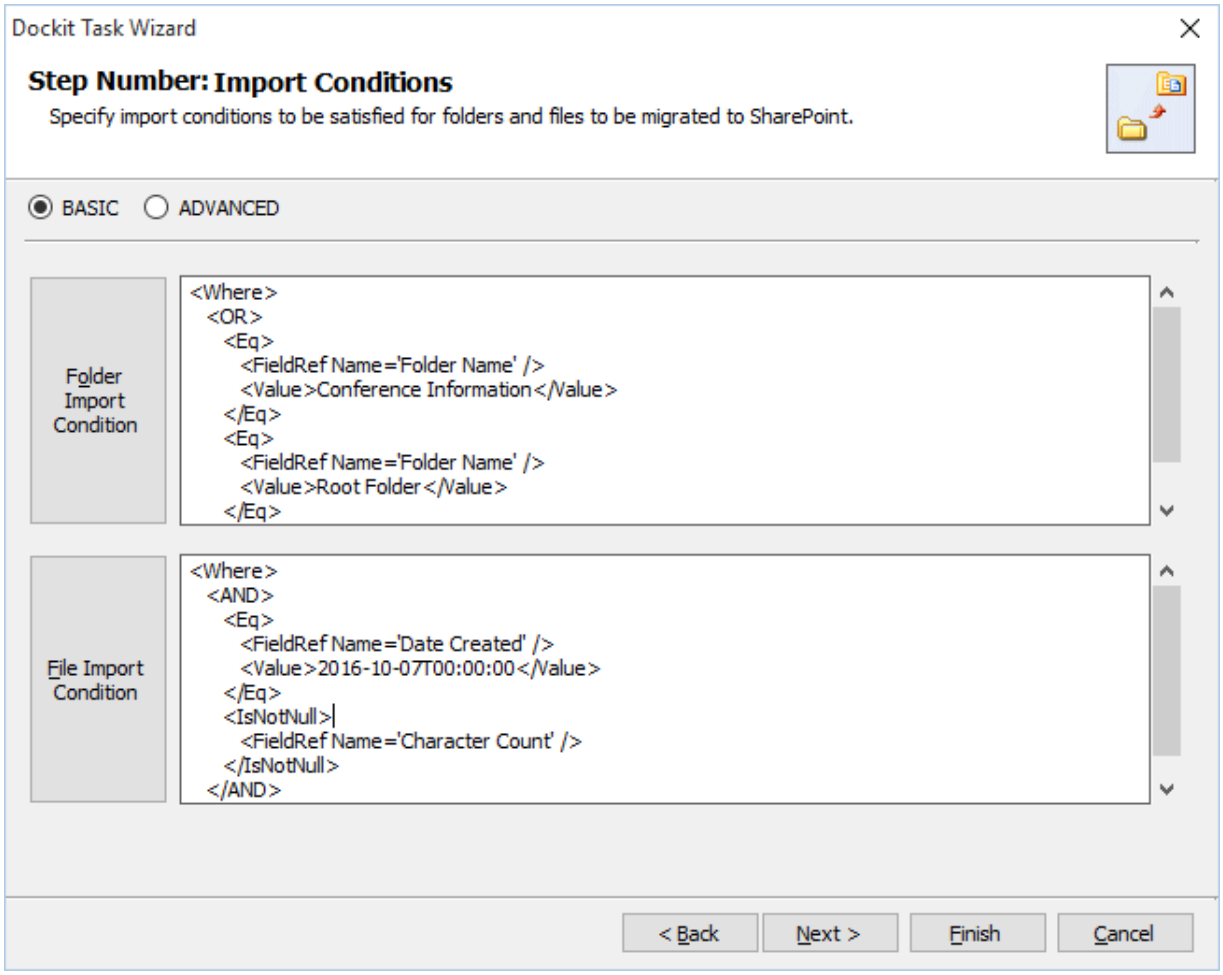
2. Select any one of the following options given below:

   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.

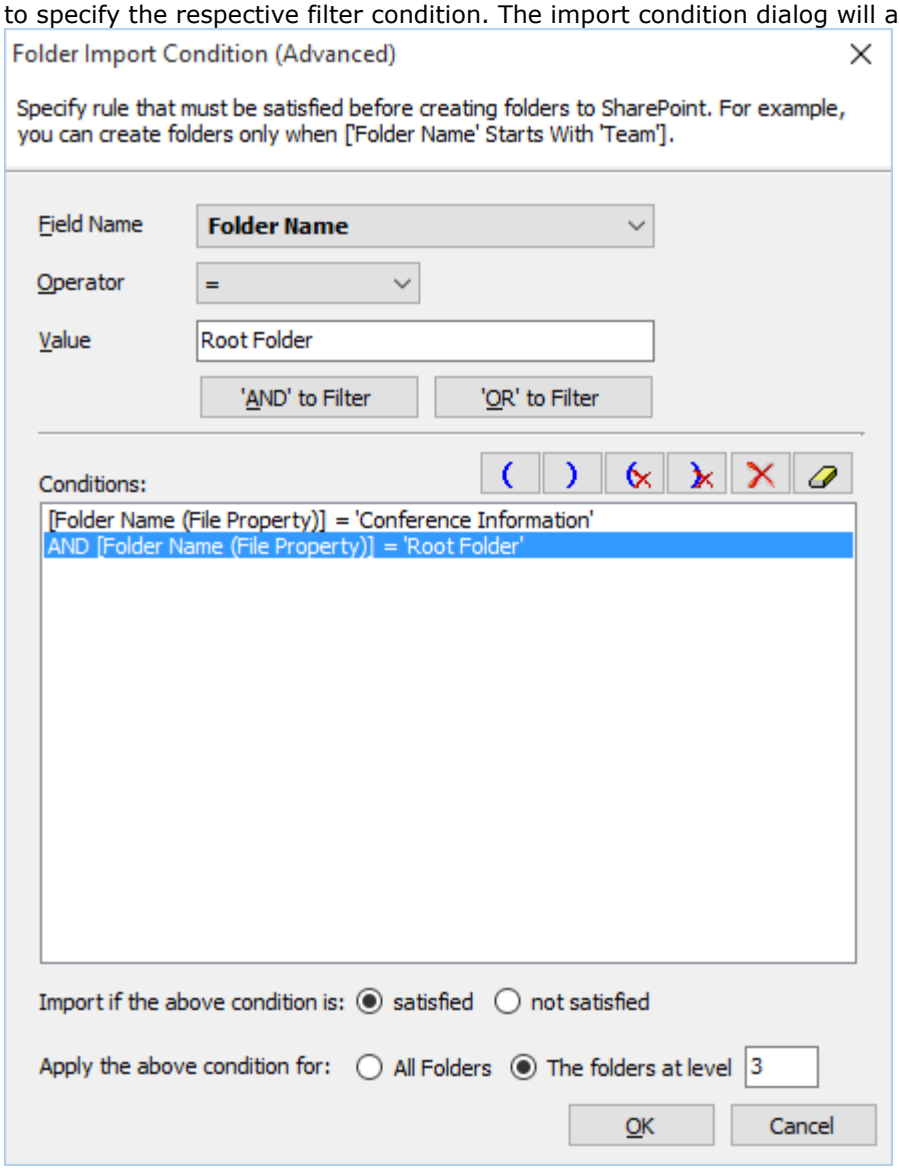
3. Once you select **BASIC** and click 'Folder Level Condition...' button or 'File Level Condition…' button to specify the respective filter condition. The import condition dialog will appear as shown below:



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



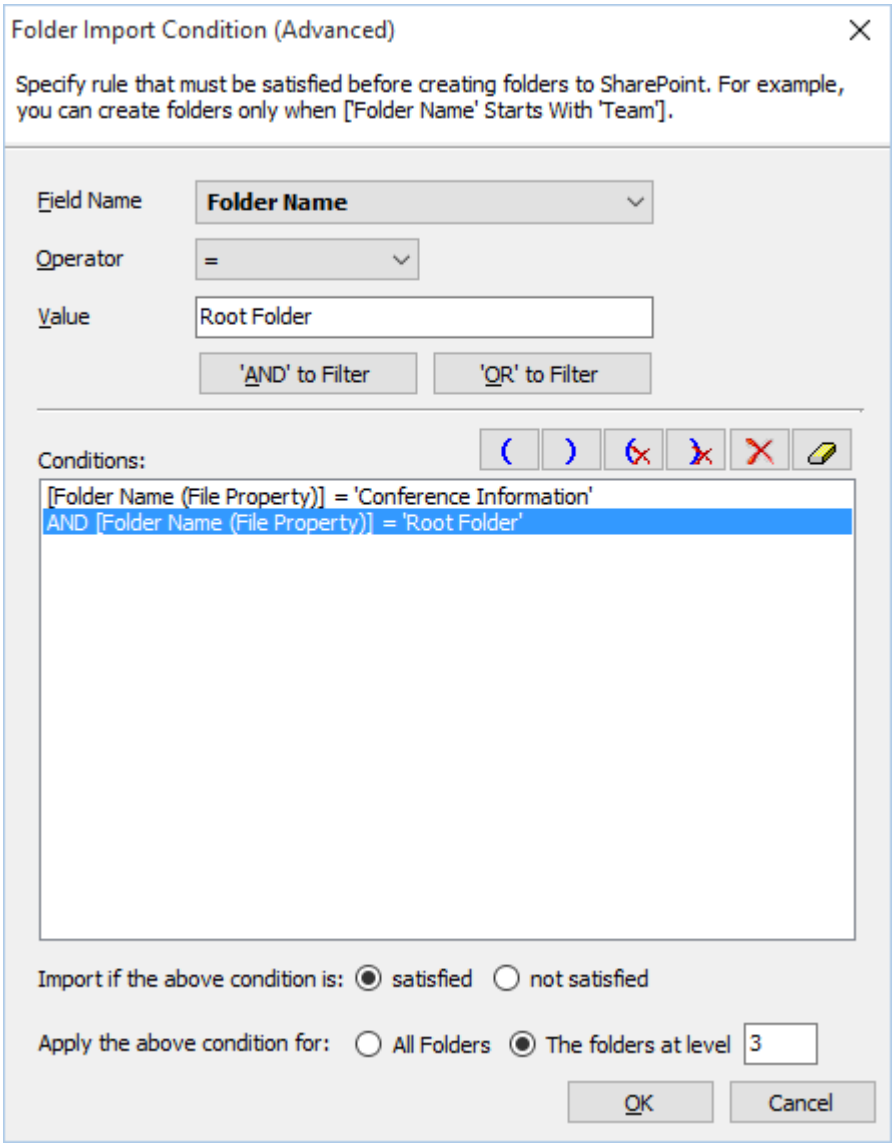
5. Once you select **ADVANCED** and click 'File Level Condition...' button or 'Folder Condition…' button to specify the respective filter condition. The import condition dialog will appear as shown below:



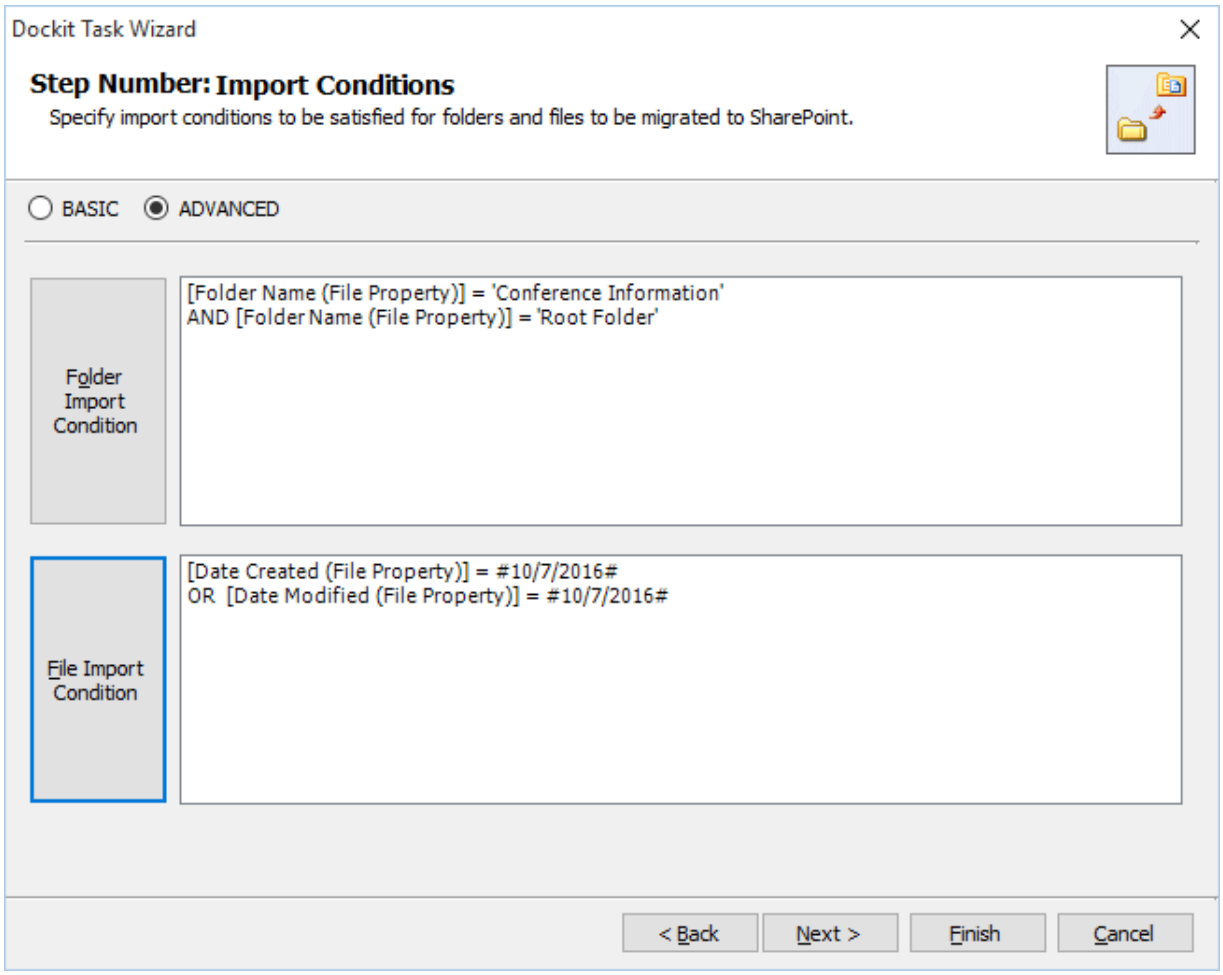
6. You can specify the import conditions by selecting the Field Name and by specifying a corresponding value with the required operator. You can use mathematical operators such as >, =, >= etc. to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')'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



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

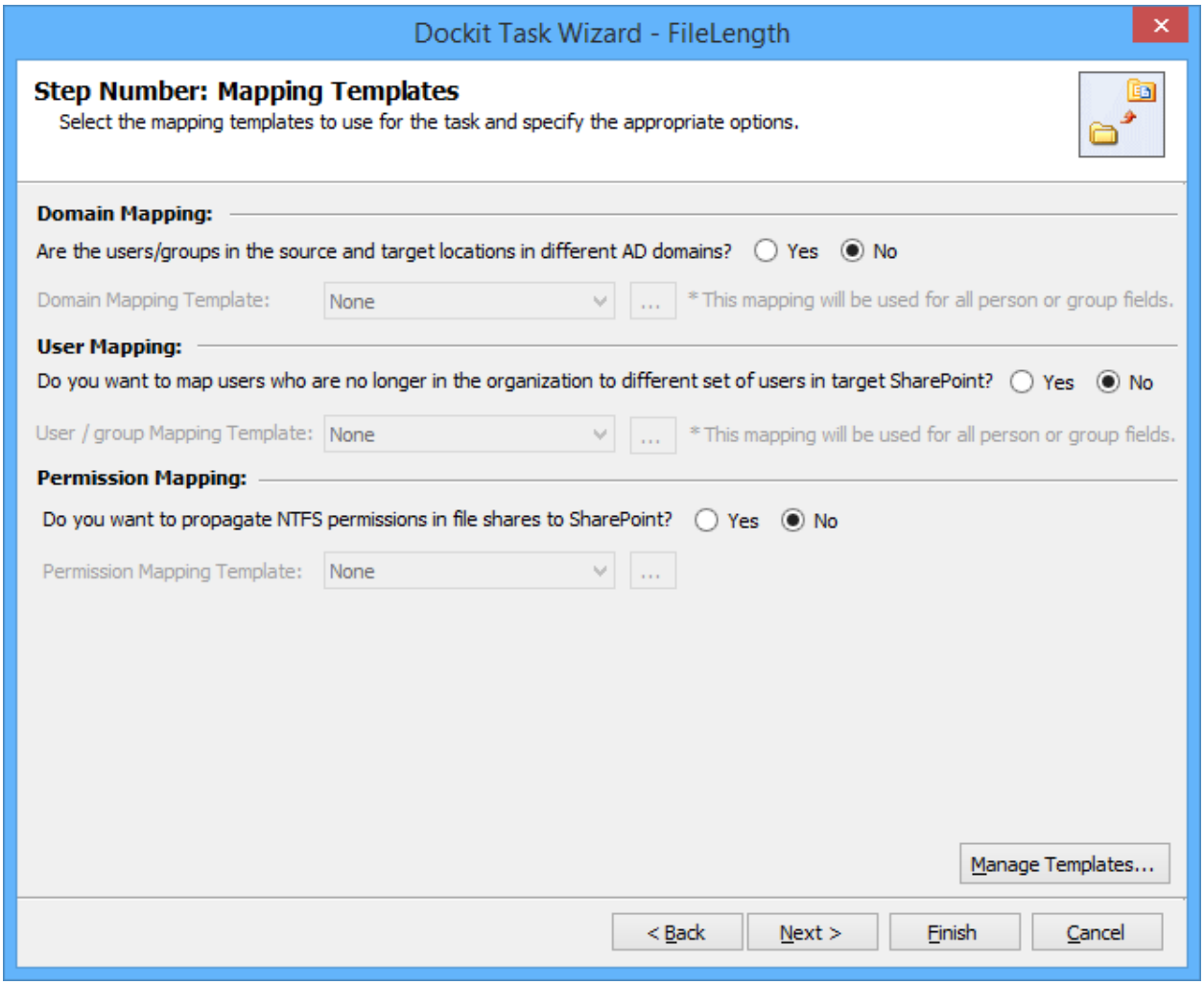


9. Click **Next** to proceed.

Mapping Templates

To specify the mapping templates to use for the task:

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



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:**

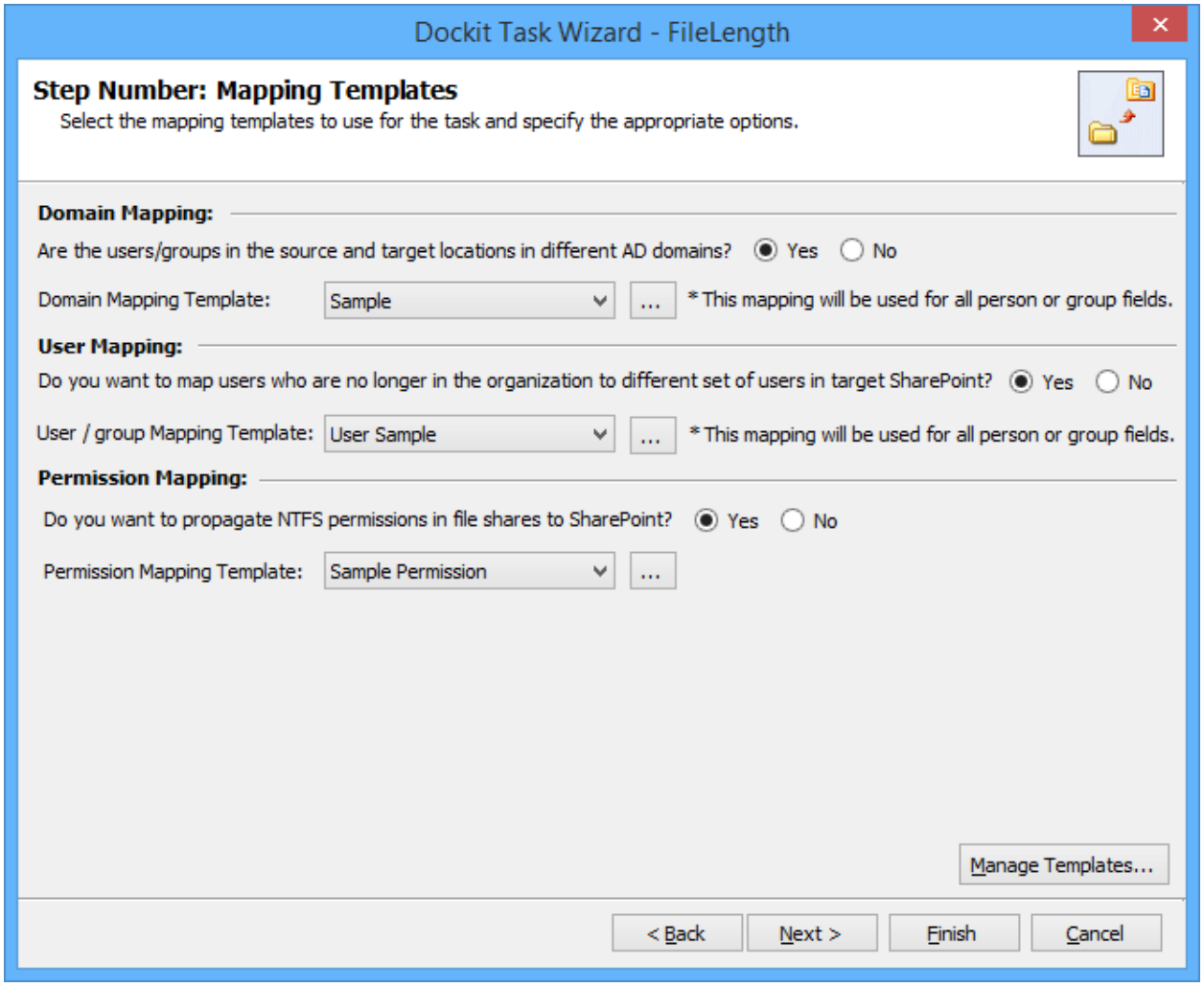
   Do you want to propagate NTFS permissions in file shares to SharePoint? **(Yes/No)**

   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.

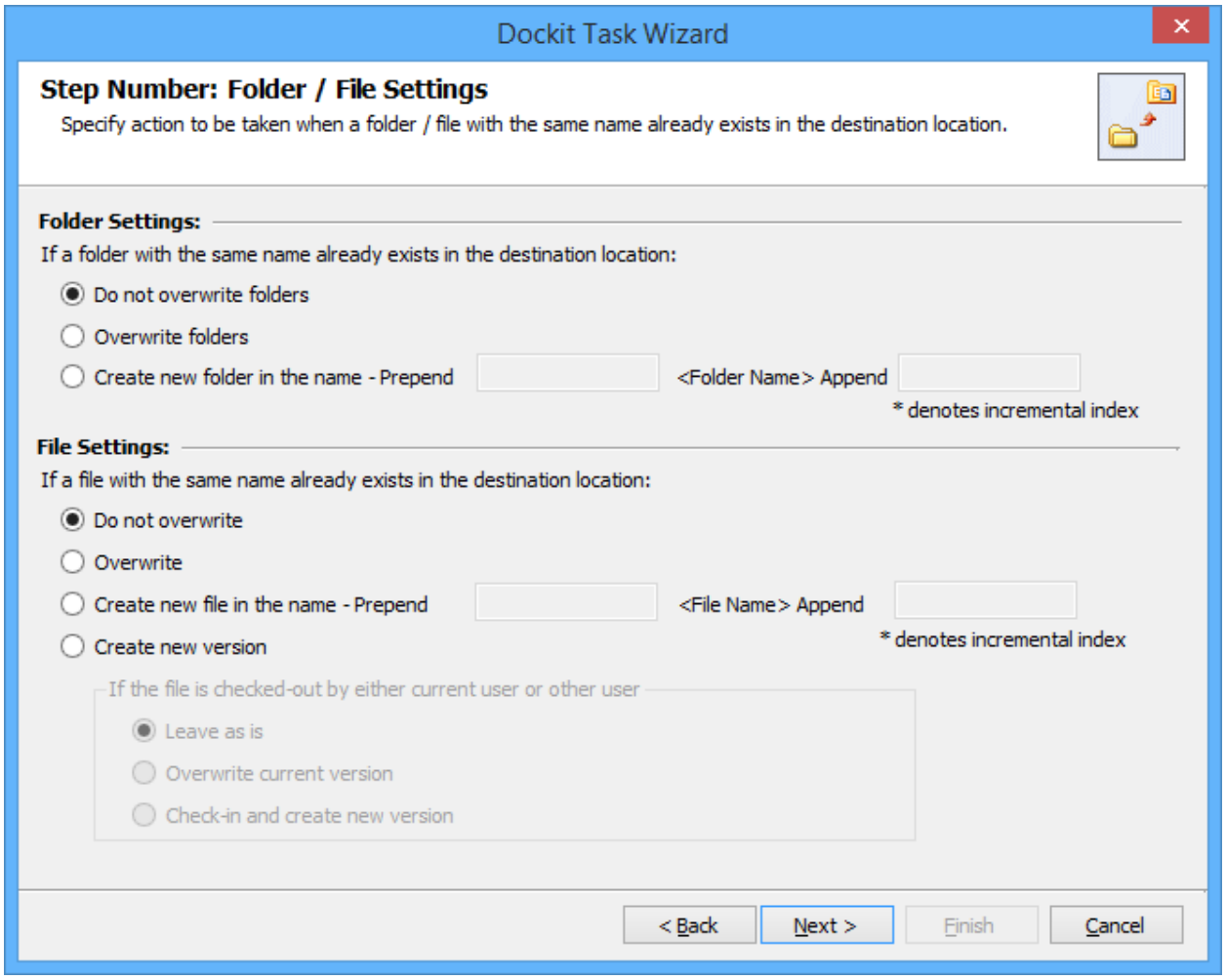


6. Click Next to proceed.

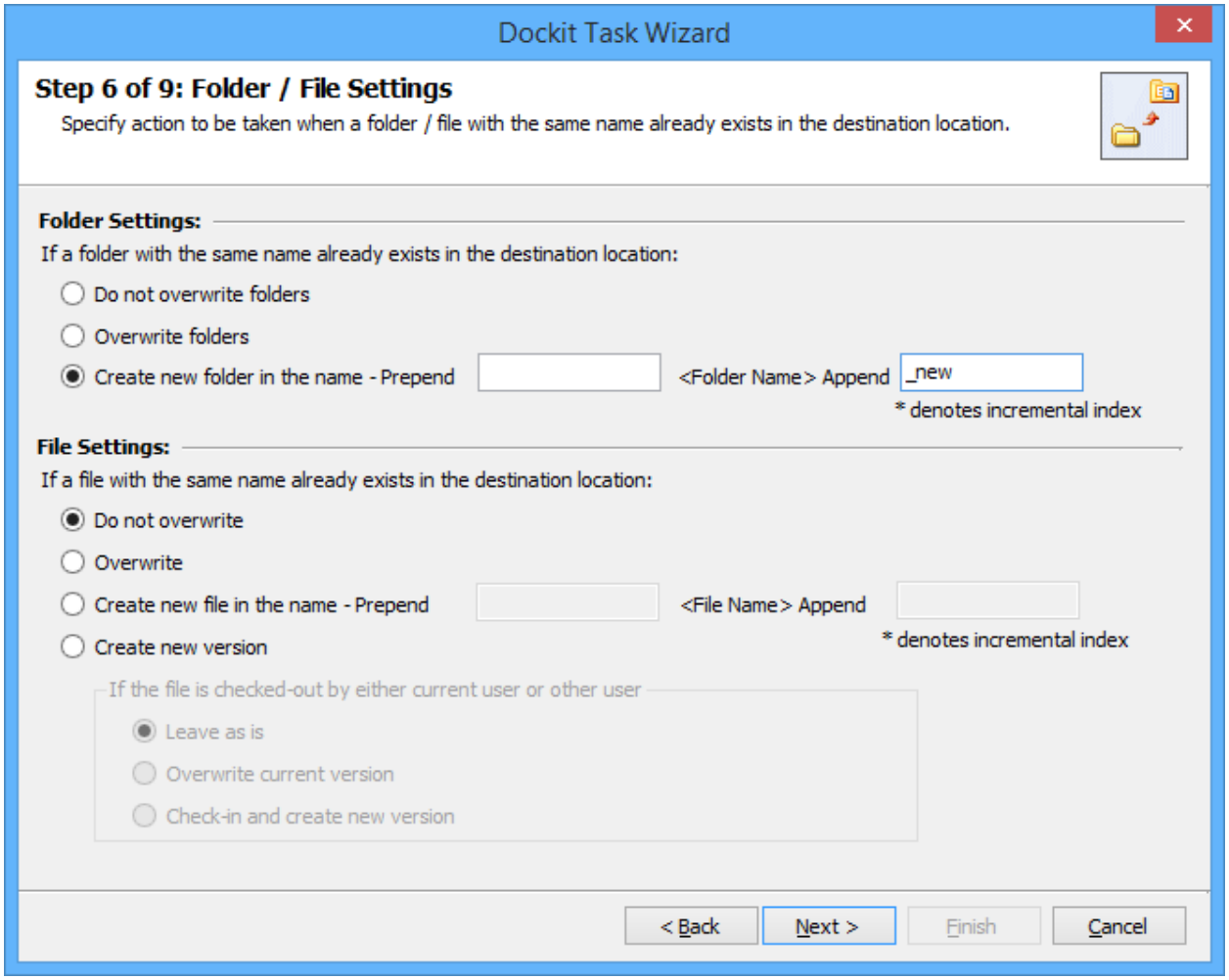
Folder / File Settings

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

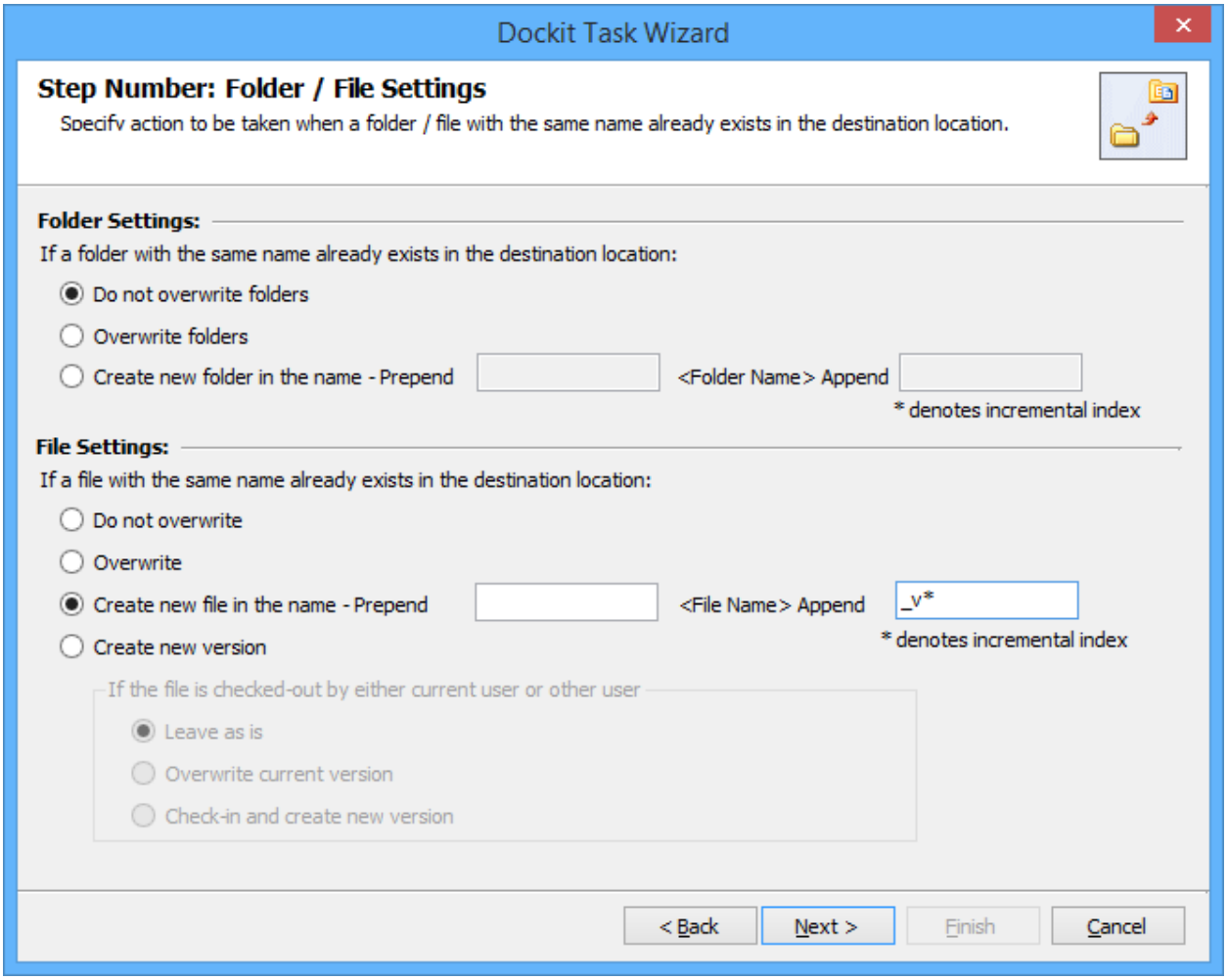
1. The **Folder / File Settings** step appears as shown below:



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.



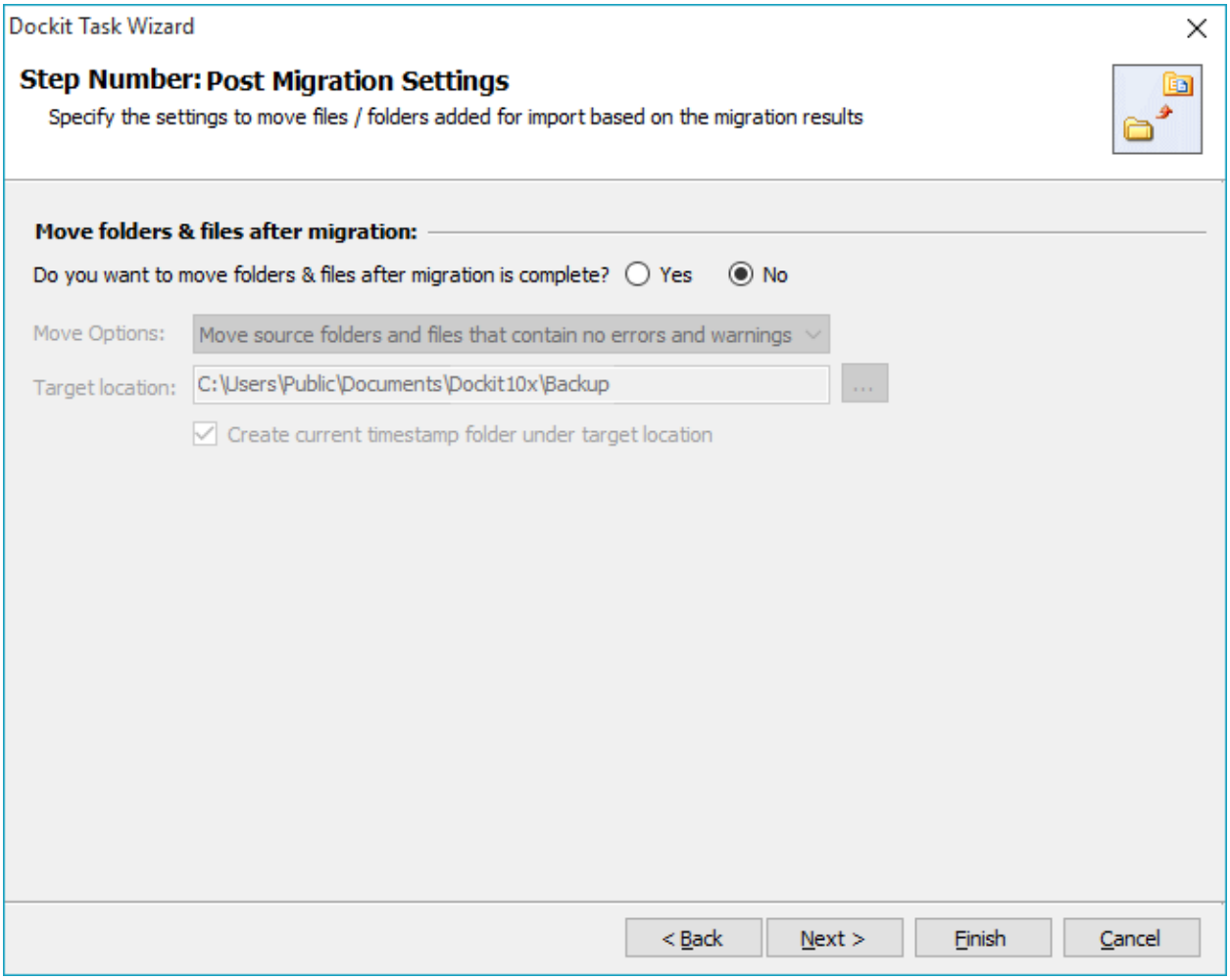
3. Select any one of the following options given below:
    a. **Do not overwrite** - Skips the file without overwriting.
    b. **Overwrite file** - Deletes the file from the destination location (along with its version history) and imports the source file.
    c. **Create as new file** - Creates a 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.



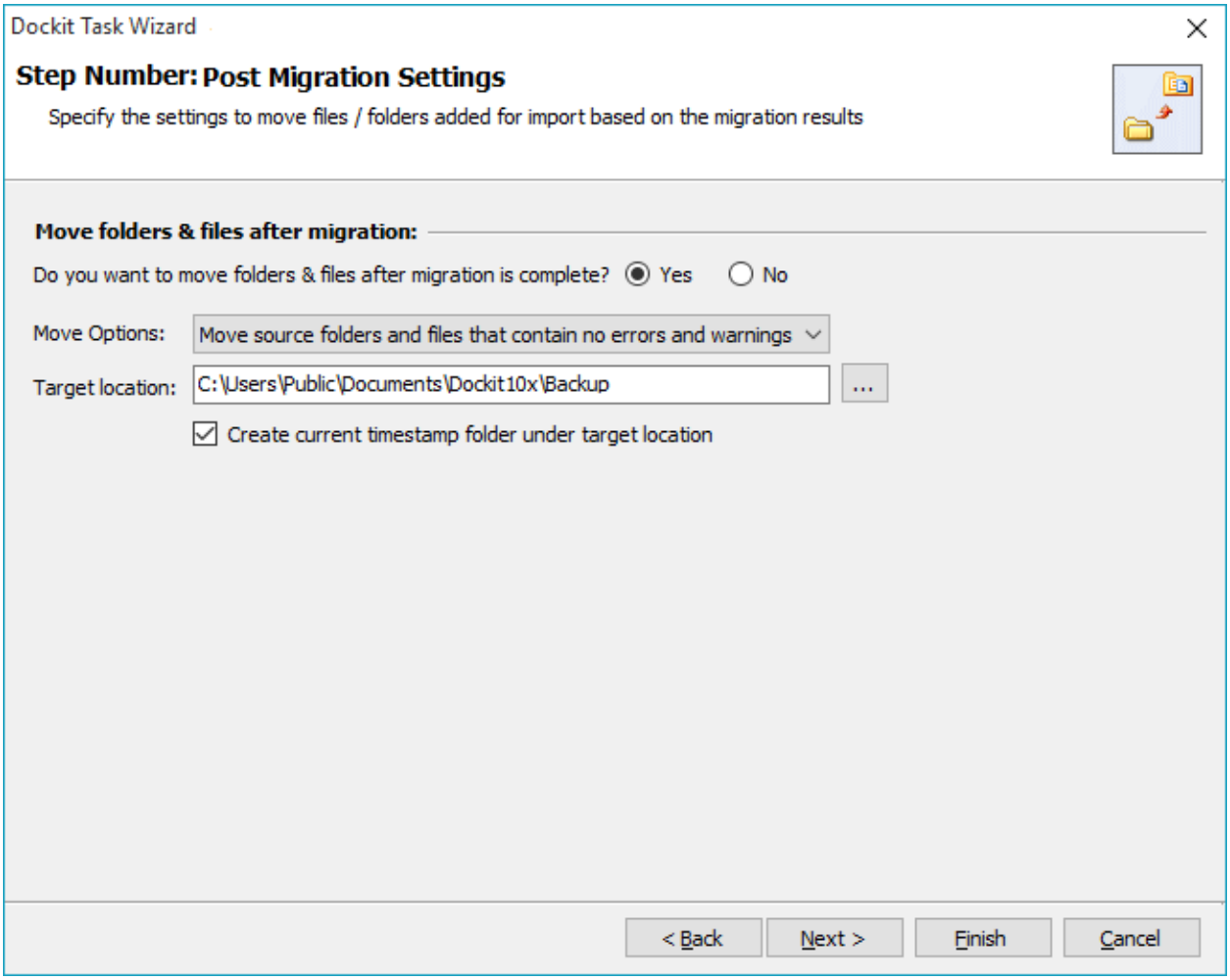
4. Click **Next** to proceed.

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**.



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.

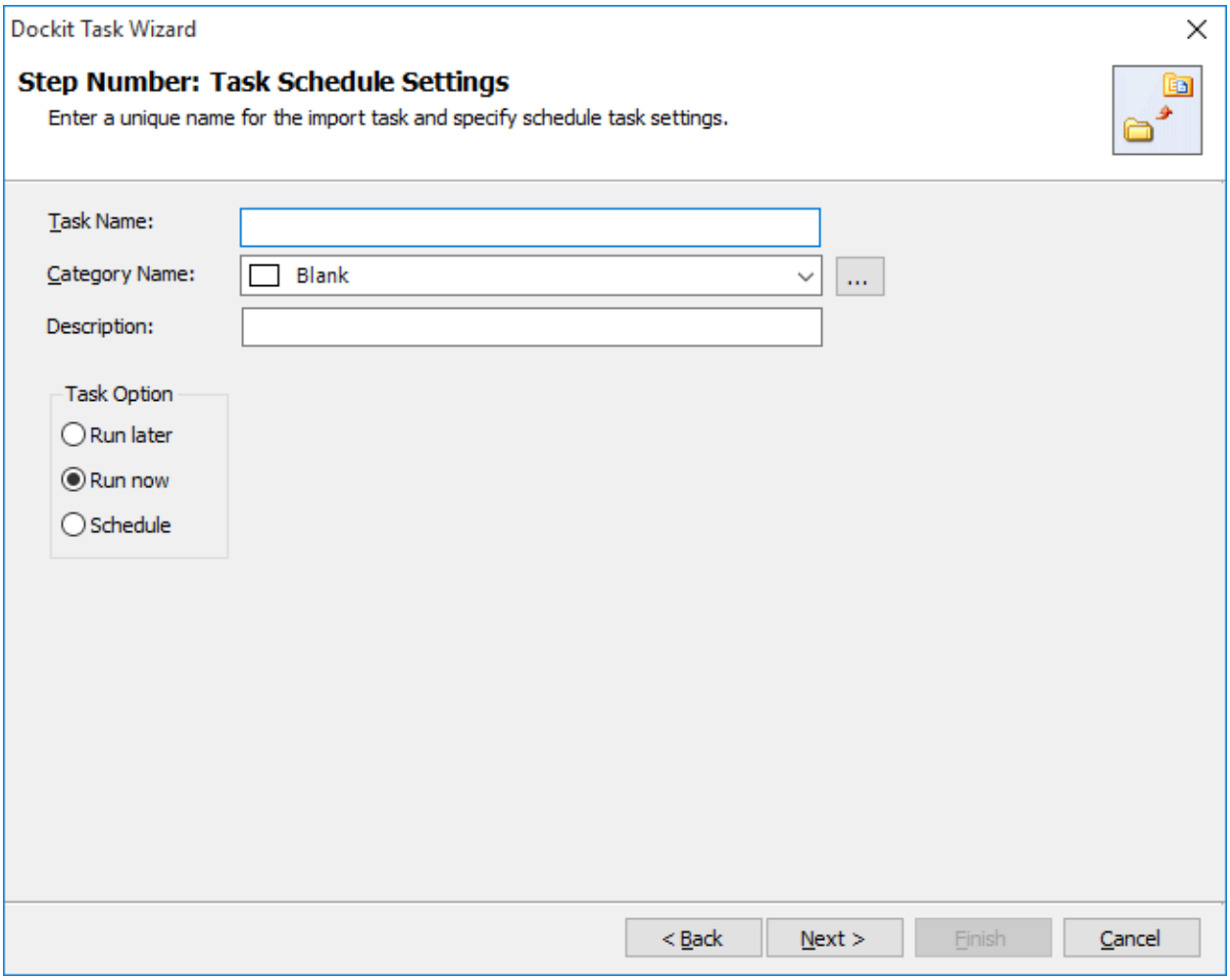


3. Specify a **Target Location** where the source folders and files are to be moved. You can also click browse (**...**) button to launch folder browser. You must ensure that the user who invokes the move operation has sufficient permissions to delete folders and files in the source location and to re-create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



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.

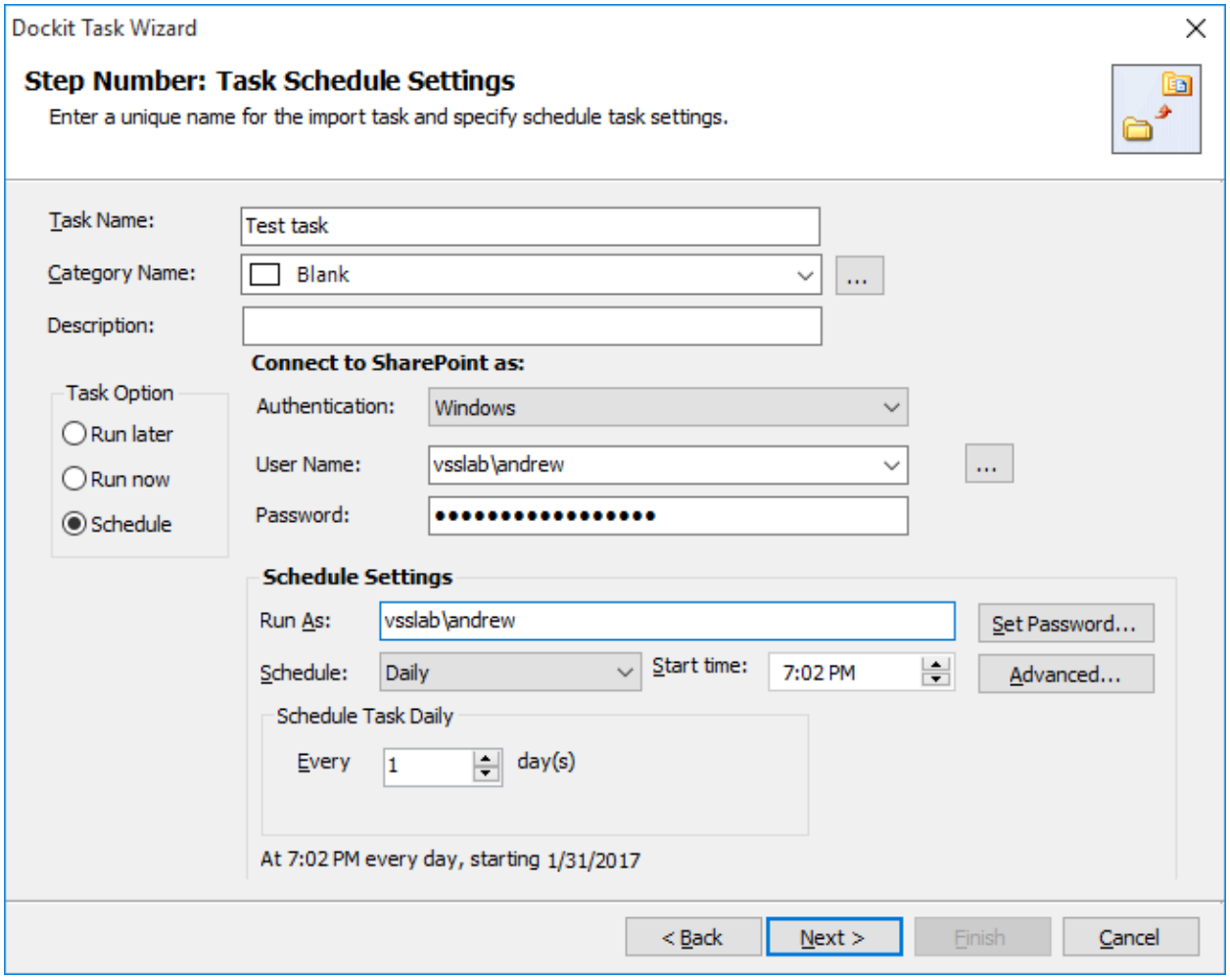
4. Select one of the following options to connect to the target SharePoint site:

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.

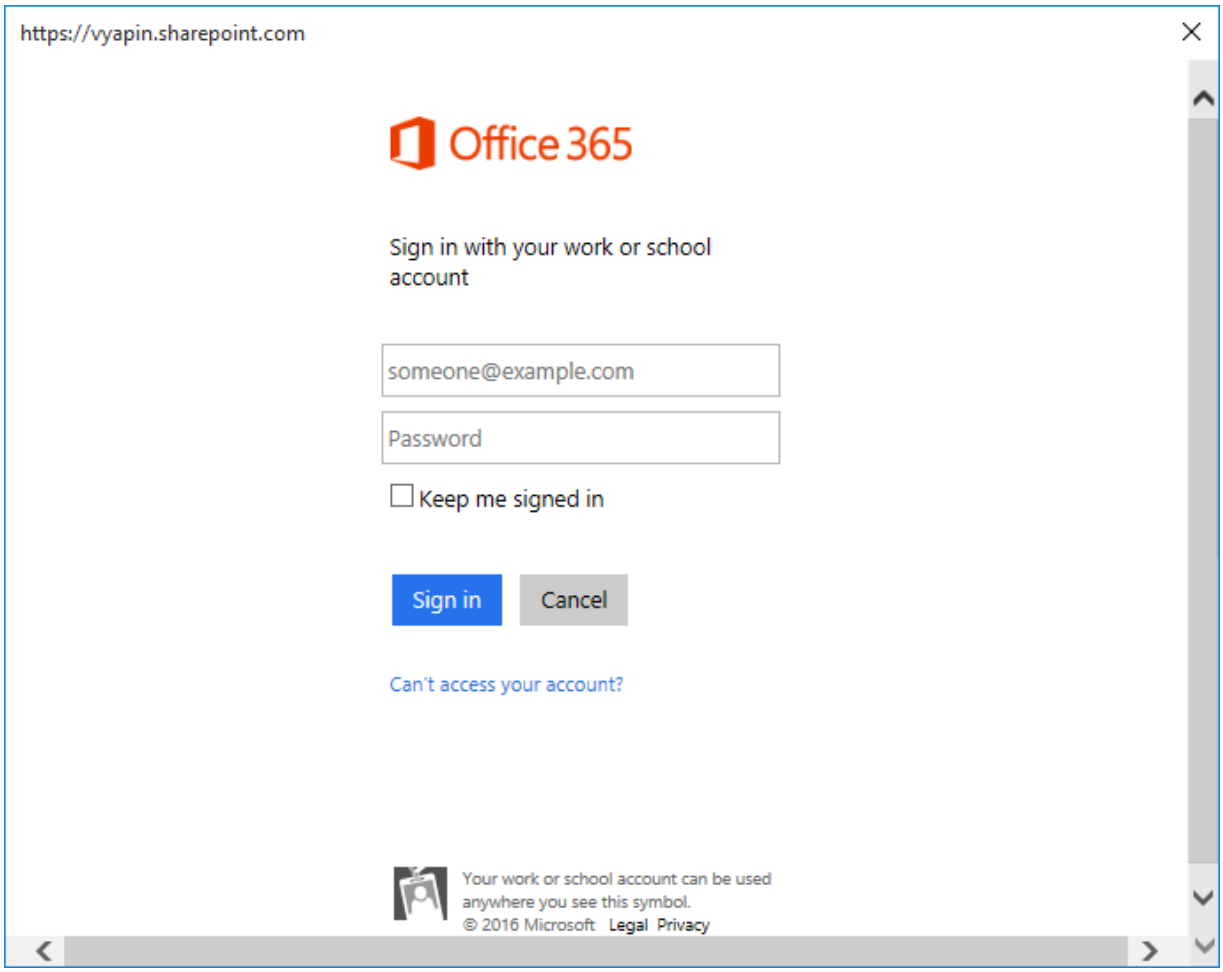
c. **Use 'Run As' user context given below** – This option will be available if you choose **Schedule** task option. Dockit will use the user account specified in the scheduled **Run As** user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint 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.



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).



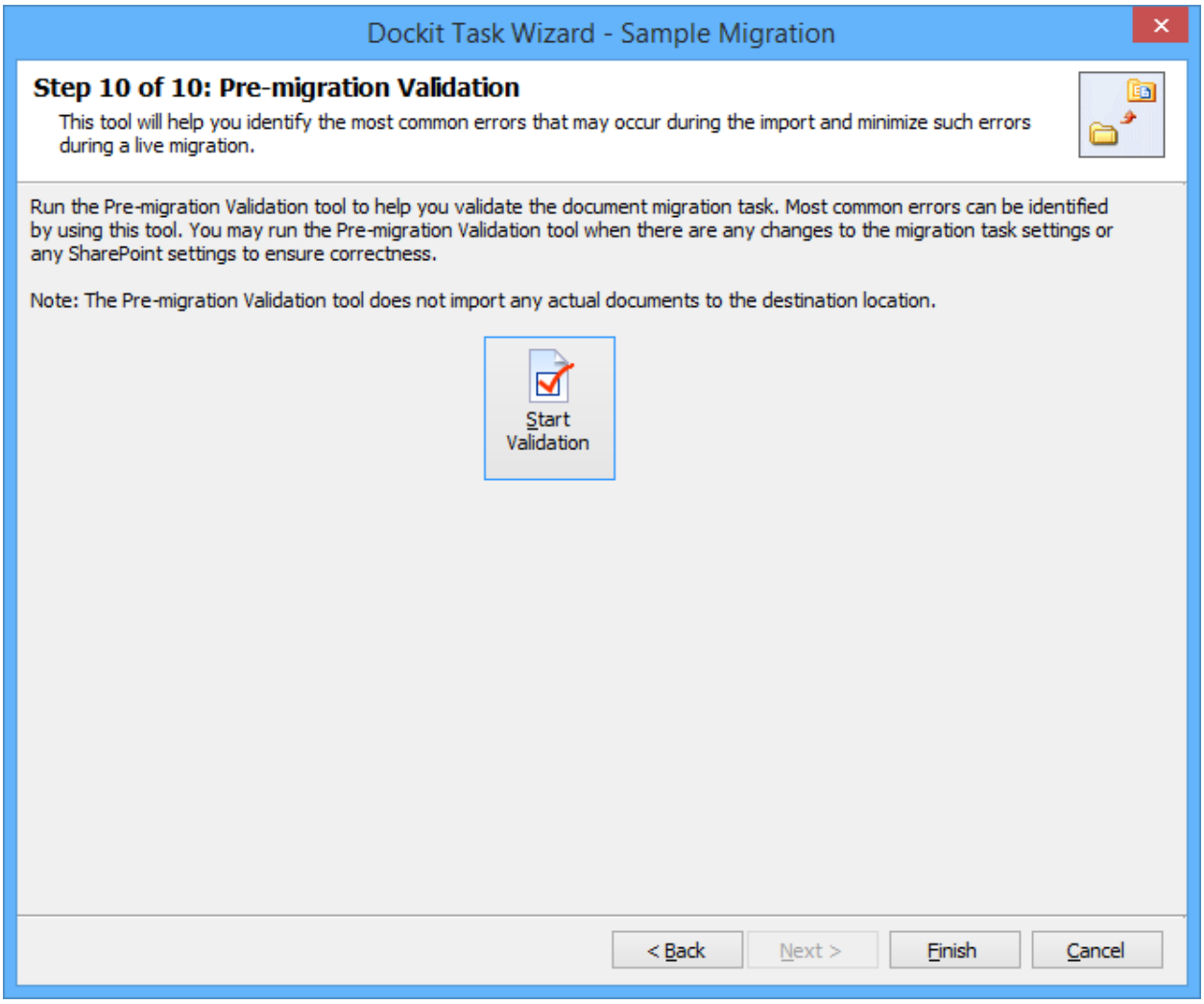
Provide username and password in the respective textboxes and click **Sign in** button to proceed.

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

Pre-migration Validation

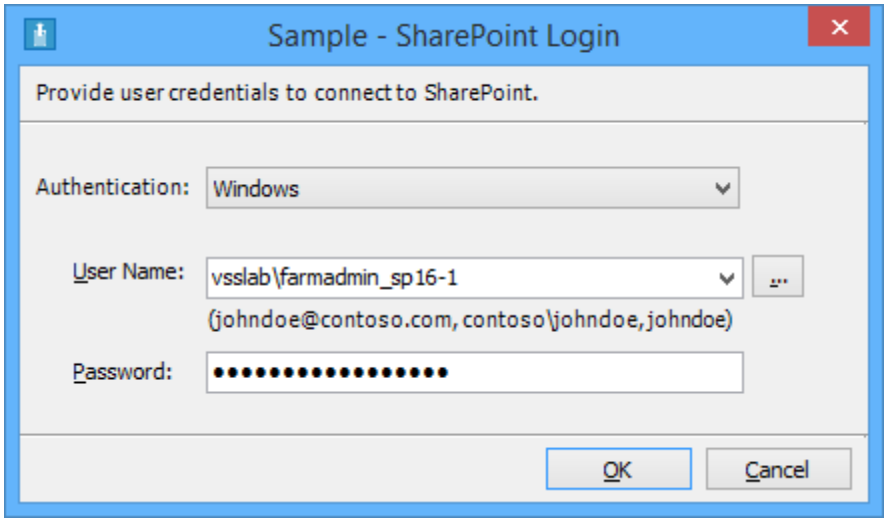
Pre-migration Validation tool helps you validate the exact steps performed by Dockit during the import process. This tool does not import any files to the destination location. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there are any changes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

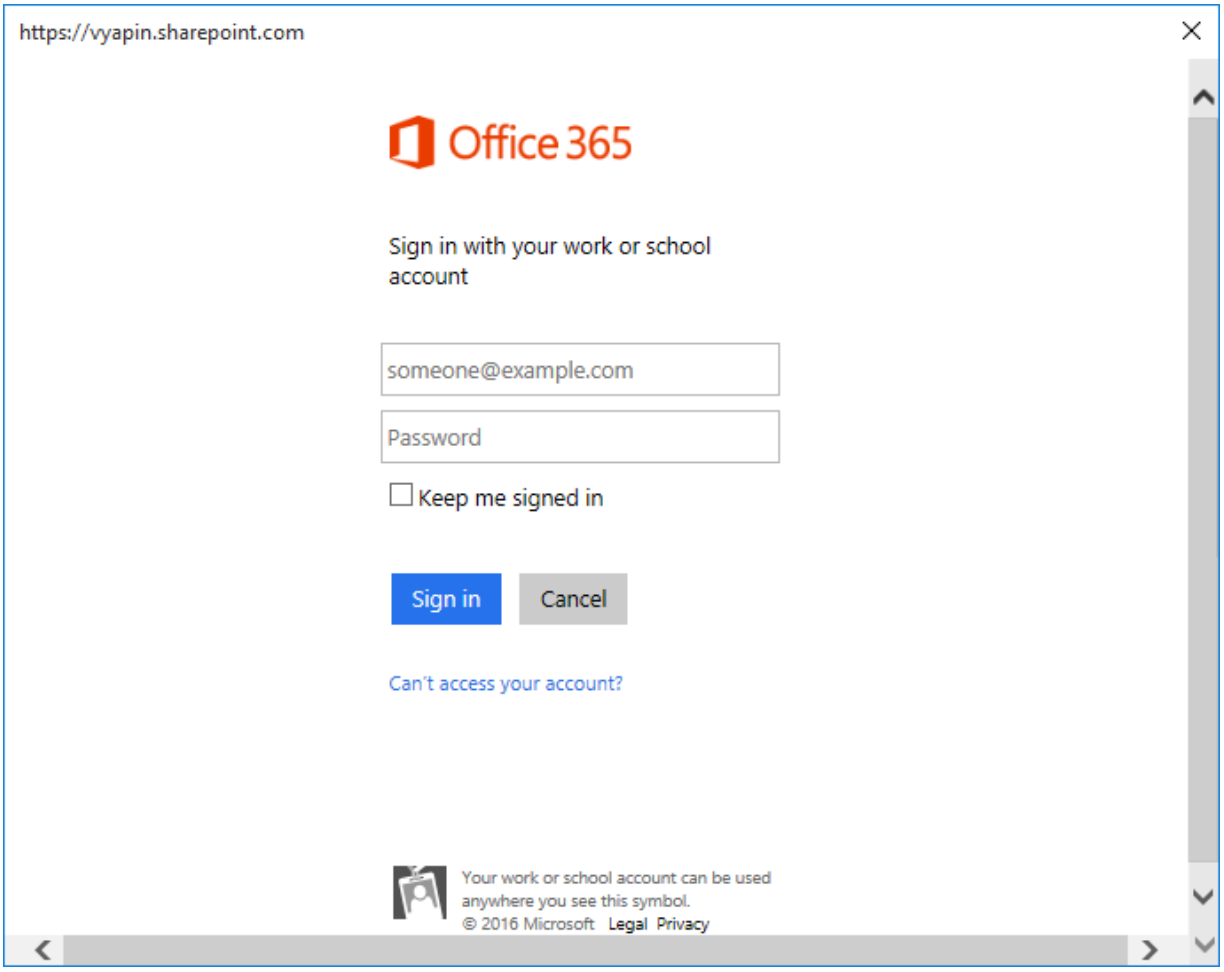


2. Click **Start Validation** button to invoke the Pre-migration Validation tool.

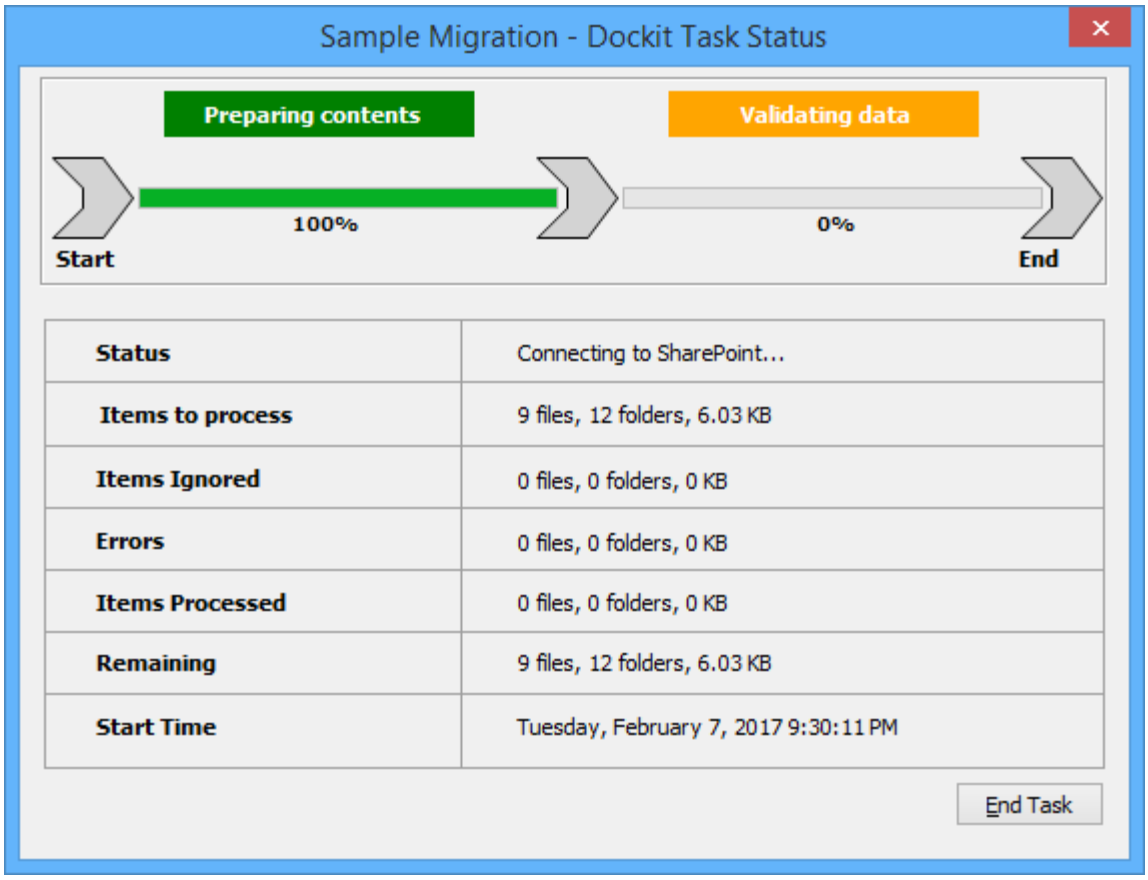
3. The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.



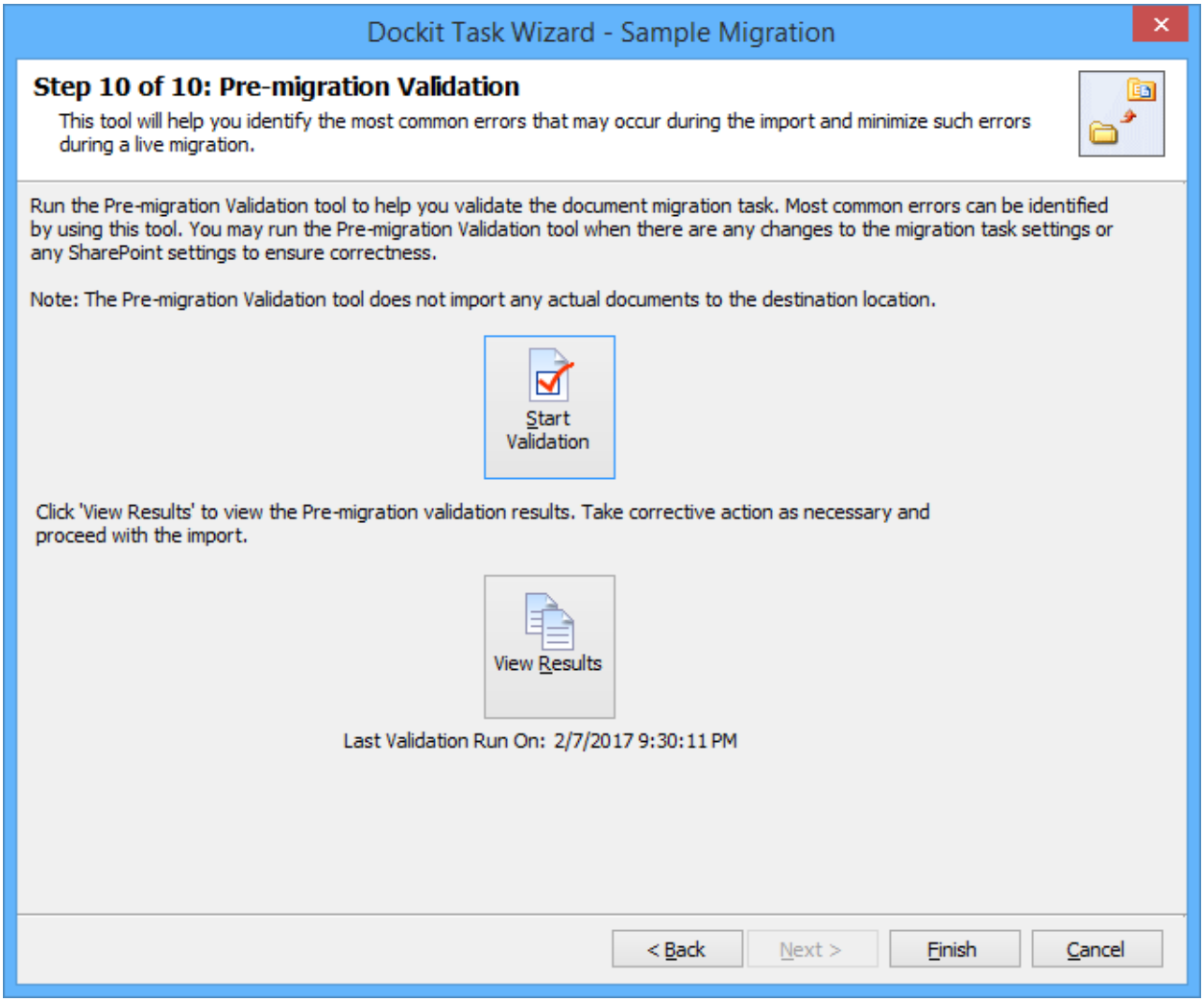
For **Federated authentication (Web Single Sign-on)** credential based import task. The Web Login Dialog to connect to SharePoint will appear as shown below:



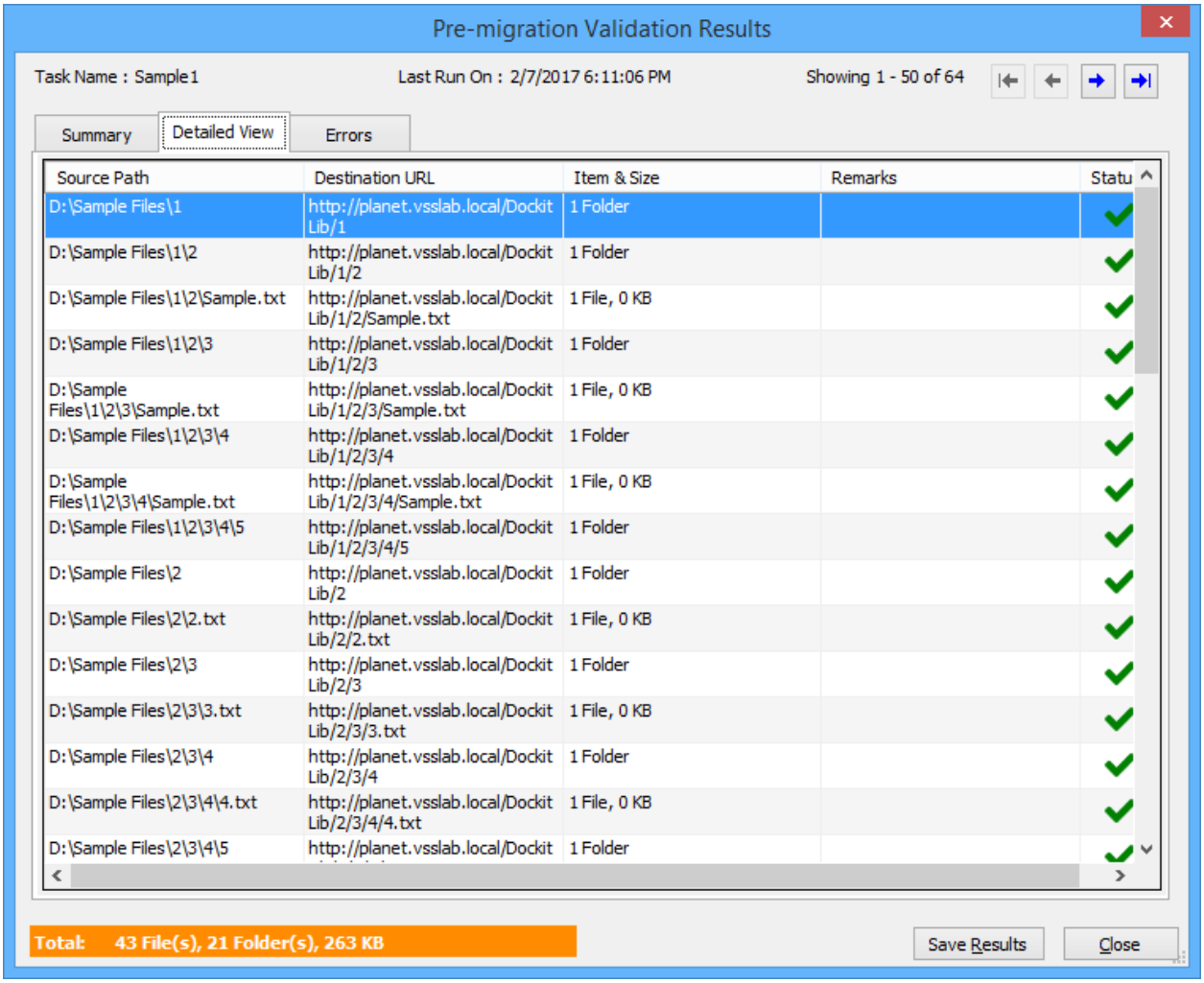
4. You will notice a task progress bar in a new window as shown below.



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.



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



- Refers the items that succeeded during pre-validation.
- 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
    - Managed Metadata - Checks for the term that matches the given value
    - User / Group - Check whether the user / group available in target location
    - Choice - Check whether the given value available under choice list

Limitations of Pre-migration Validation tool

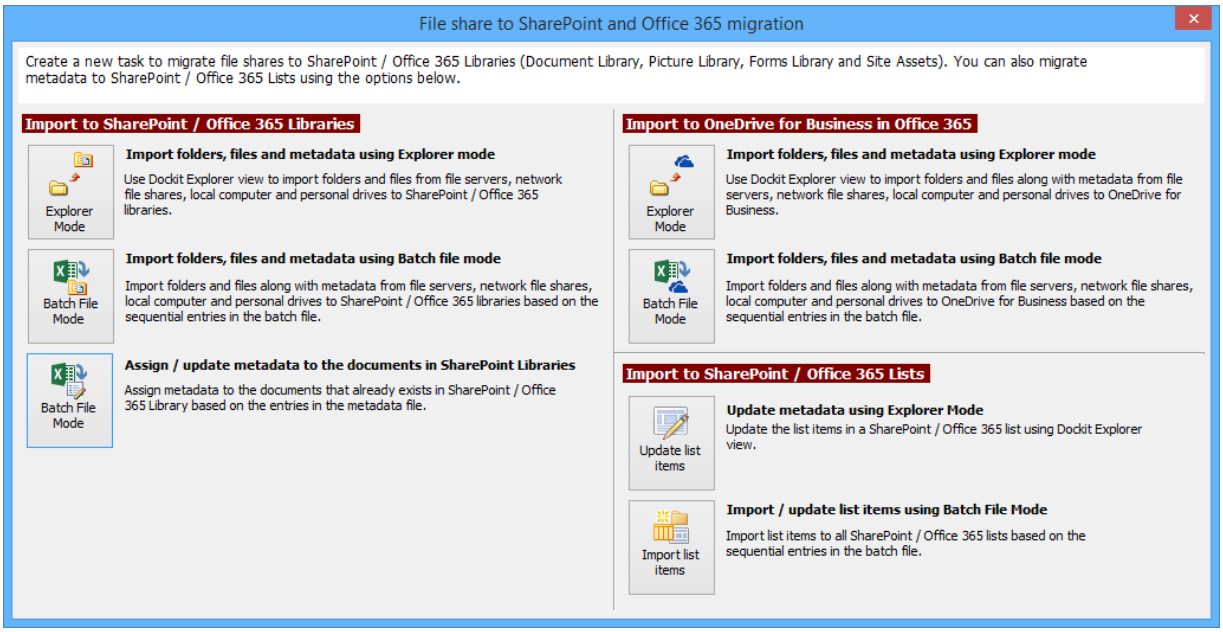
The Pre-migration validation check and the actual import results may vary in certain circumstances. The Pre-migration Validation Tool does not perform a few checks as the checks may either slowdown the validation process or a few errors will occur only when performing an actual live transfer. Please 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 Pre-migration validation process.
l) 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 Column Mapping
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., http://sharepointserver/sample sales documents/sample folder/sample file.xlsx.
4. Use vertical pipeline character (|) as a separator between SharePoint site and Document ID in order to locate documents using their unique Document ID.

   Syntax: Site URL|Document ID

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

   For example:

Destination Path	**Document Author**
http://sharepoint:9000|62WZ4WH5D27C-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 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/chart.bmp"
Target Audiences (Multiple value)	Global Audience name, Security / Distribution Group name and SharePoint Group name can be given to this field. Global Audience and Security /	"All site users; Admins; Viewers; Administrators; SPUsers; Contributors; Designers

(Applicable only for a MOSS / Microsoft SharePoint Server 2010 and above library)	Distribution Group should be crawled and stored in User Profile Store of SSP / Services. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the respective group list and assign the ID of the matching group name to the Target Audiences column of the imported file, only if the group name exists. Moreover, in order to assign the values that belong either to Global Audience or Security / Distribution Group require Dockit Server Agent to be installed in the destination SharePoint server (MOSS / Microsoft SharePoint Server 2010 and above).	
Publishing Schedule Start Date (Applicable only for Collaboration Portal / Publishing Portal Site)	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2010 10:50 AM" "1/25/2009"
Publishing Schedule End Date (Applicable only for Collaboration Portal / Publishing Portal Site)	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2009 10:50 AM" "1/25/2010"
Publishing Image (Applicable only for Collaboration Portal / Publishing Portal Site)	The http URL of any picture can be given to this field. Relative URL also can be given to this field.	http://sharepoint/Pictures/chart.bmp "Pictures/chart.bmp"
Publishing Hyperlink (Applicable only for Collaboration Portal / Publishing Portal Site)	The http URL of any resource can be given to this field. Relative URL also can be given to this field.	http://sharepoint/Documents/Sample File.doc "/Documents/Sample File.doc" "<a href='/sites/collaborationportal/PublishingImages/New

		sArticleImage.jpg'> NewsArticleImage.jpg"
Publishing HTML (Applicable only for Collaboration Portal / Publishing Portal Site)	HTML content can be given in this field. You can use HTML tags in order to create rich content in the field.	It is sample text
Business Data (BDC) / External Data (BCS) (Applicable only for SharePoint Enterprise Edition)	The BDC / BCS column value along with the filter name can be specified in this field. Dockit will search for the specified column value in the LOB entity using the given filter and assign the corresponding ID (when the BDC / BCS column value match is found) of the LOB record to the BDC / BCS column in SharePoint. Specify this value in filter name: value format. If the filter name contains colon (:) in its name, specify this value in FILTER:filter name, QUERY:value, where FILTER and QUERY are reserved words. Dockit also automatically fills-up the column values associated with the BDC / BCS column during import.	"Company Name:Vyapin" "ID:1000" "Product Name:Dockit Migrator 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:1000AX"
Managed Metadata (Single Value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. 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 specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	"Continent|North America|Country|United States|States|Washington;Continent |North America|Country|United States| States|California;Continent |North America|Country|United States| States|Alaska" "Washington;California; Alaska"
Geolocation	Location co-ordinates or name can be given to this field. The co-ordinates value must have latitude and longitude values separated by ':'. The latitude value must be between -90 and +90 and longitude value must be between -180 and +180.	"30:-60" "New York, United States"
Task Outcome	Text or Numeric value can be given to this field. Do not use multiple values for this column type.	"Complete" "4"
Related Items	The http absolute URL of any list item (including file) within the site collection can be given to this field. The values can be of single or multiple. Multiple values should be separated by ';'.	"http://sharepoint/Documents/Sample 1.doc; http://sharepoint/Documents/Sample 2.xlsx" "http://sharepoint/Lists/Custom List/1_.000"

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

- Choice*
- Lookup
- Person or Group

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

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

Sample format of a CSV / TEXT metadata file:

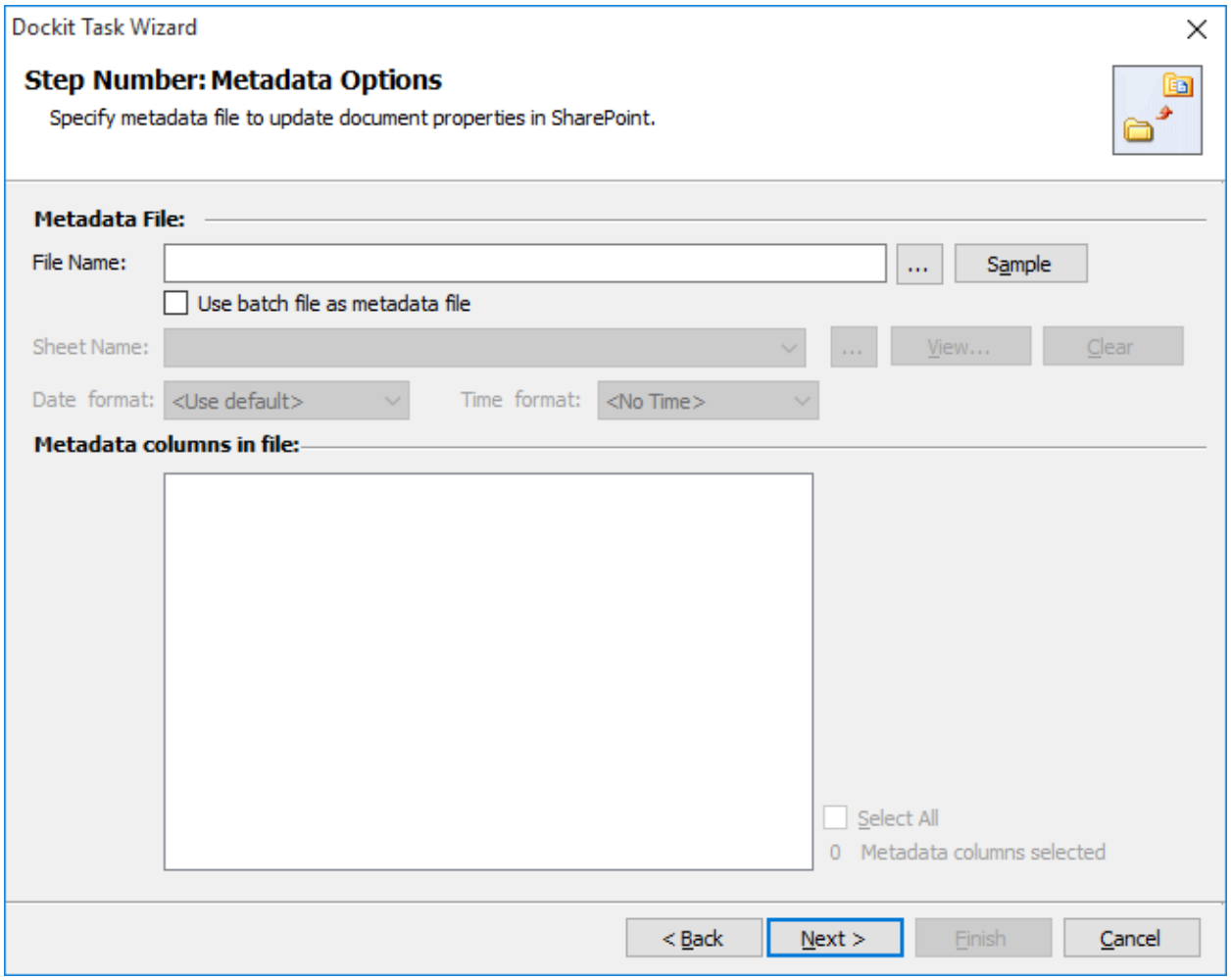
Note: Refer Point #2 for the separator to be used in the metadata file

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

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:



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).

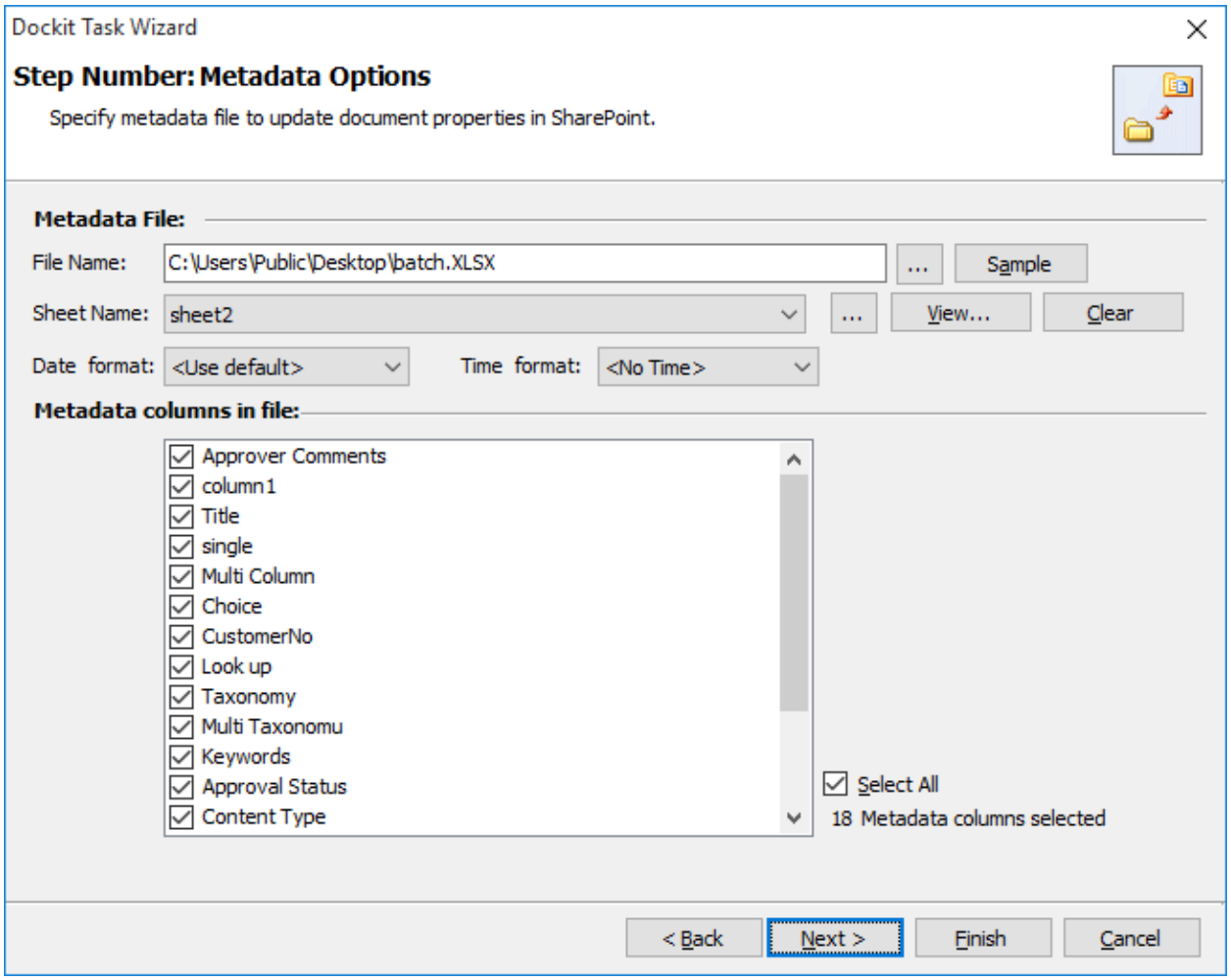
   For more information about how to create external metadata file, click here.

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.

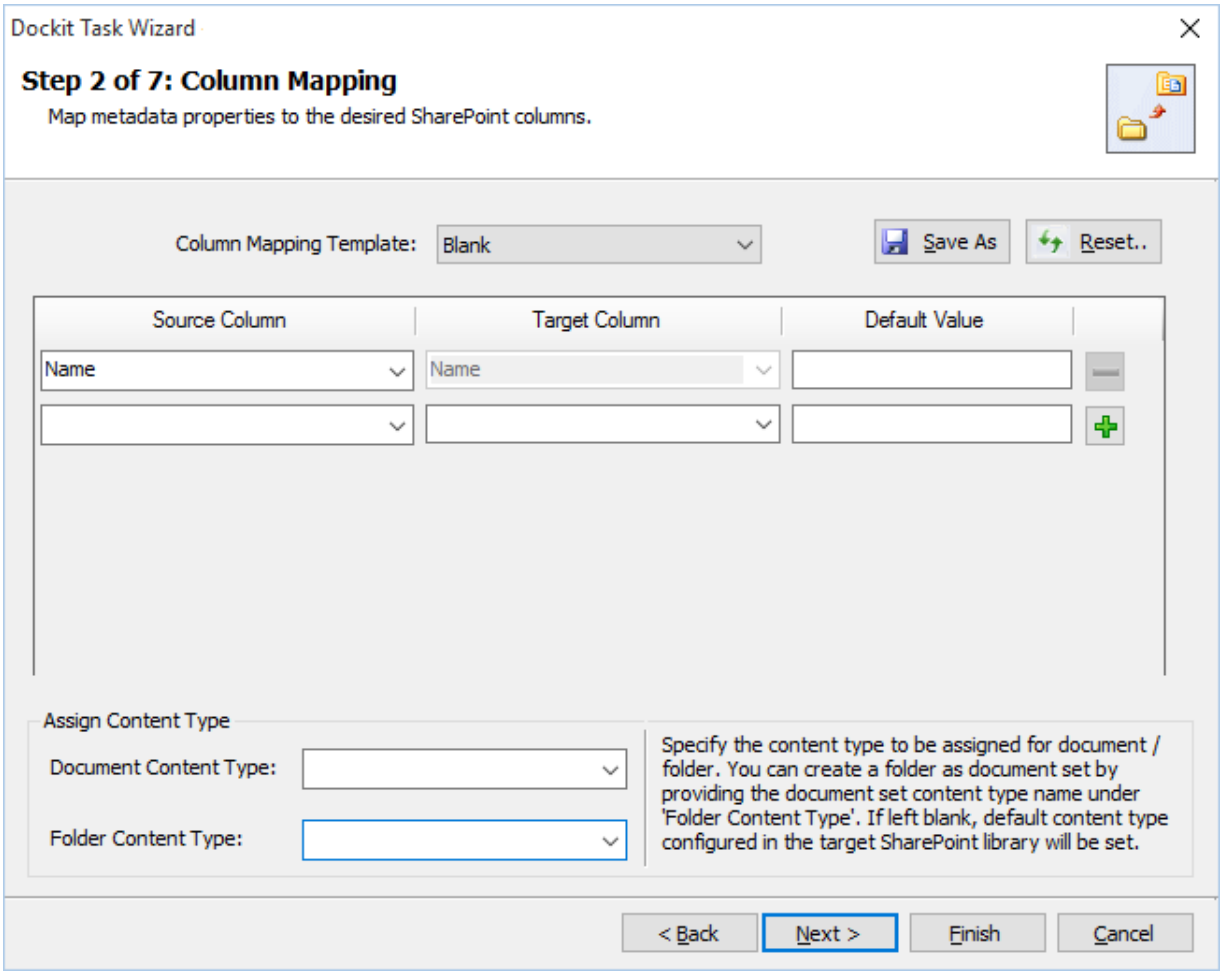


7. Click **Next** to proceed.

Column Mapping

To perform column mapping

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

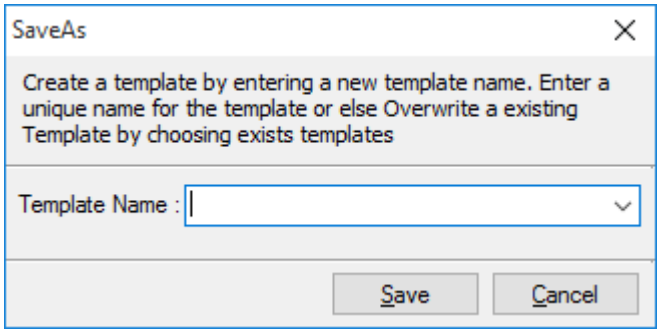


2. **Column Mapping Template:** Select any one of the column mapping templates to use from the list of available template(s). A couple of default templates ('**Blank**' and '**Core File Properties**') are readily available to ease the mapping configuration.

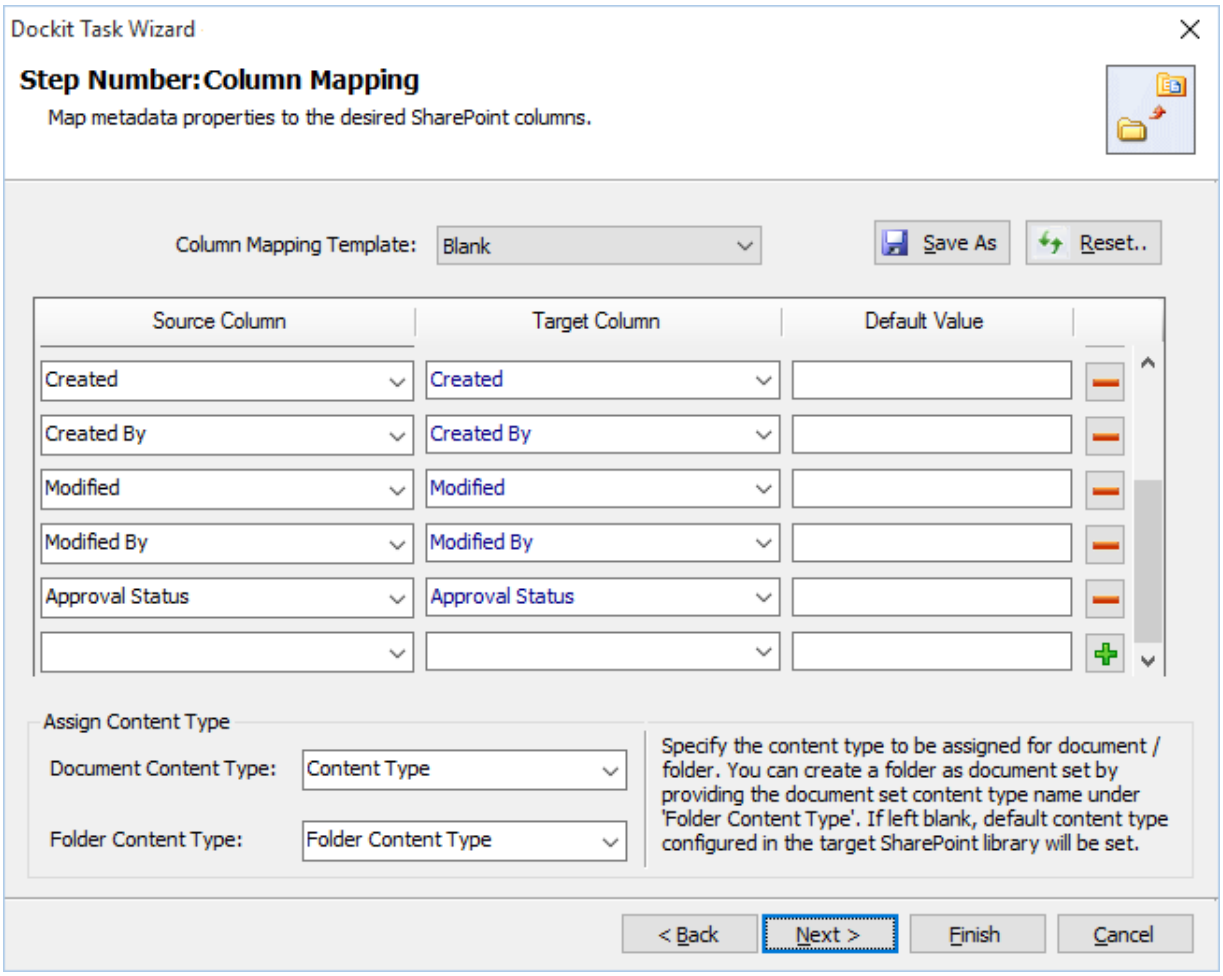
3. **Source Column:** You can specify source column values from **'File properties', 'Metadata File'**, 'Function Builder**'** and also from **'Other File Properties'** by entering the property name.
4. **Target Column:** You can specify the target SharePoint Column which needs to map and assign values.

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.



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

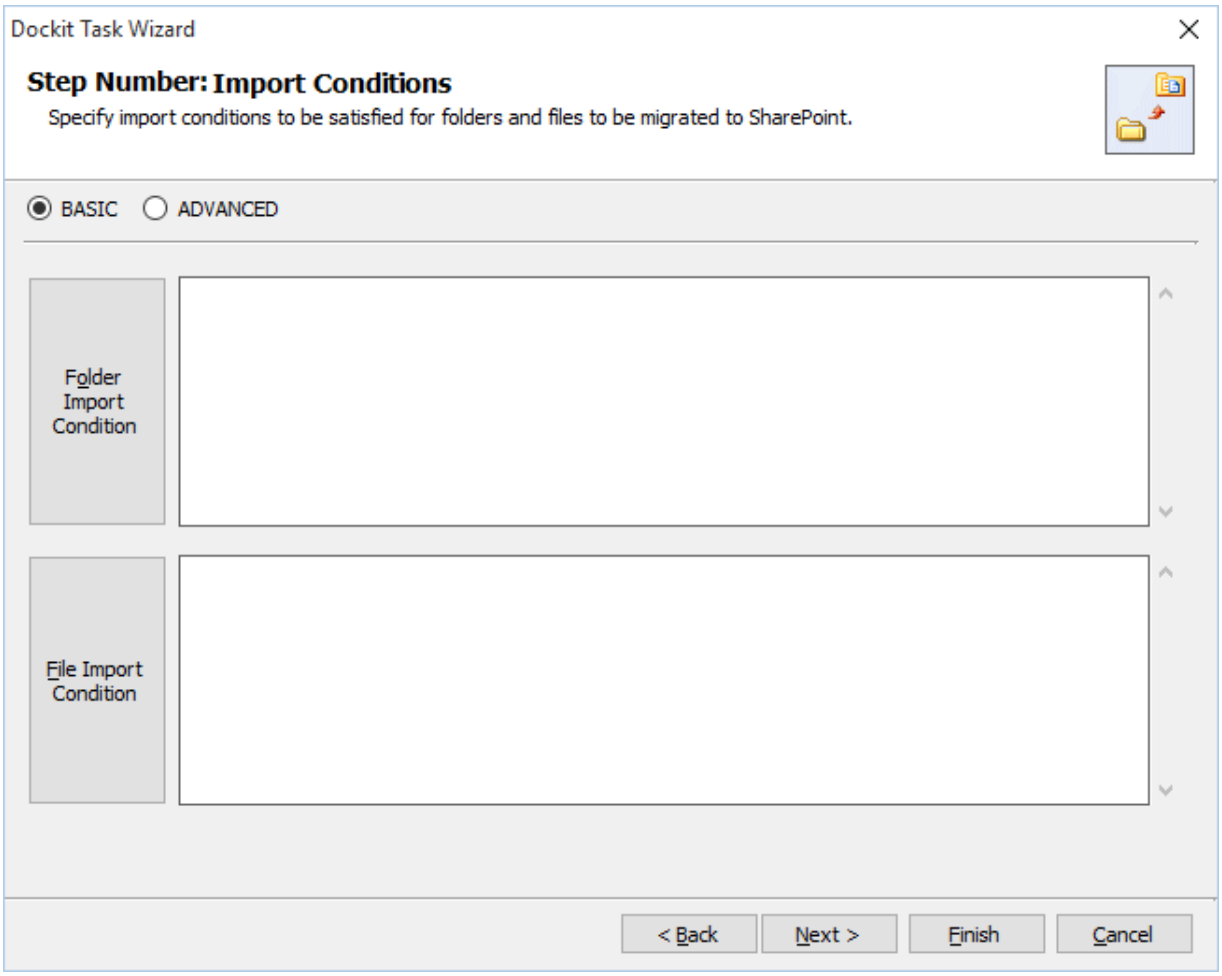


8. Click **Next** to proceed

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.

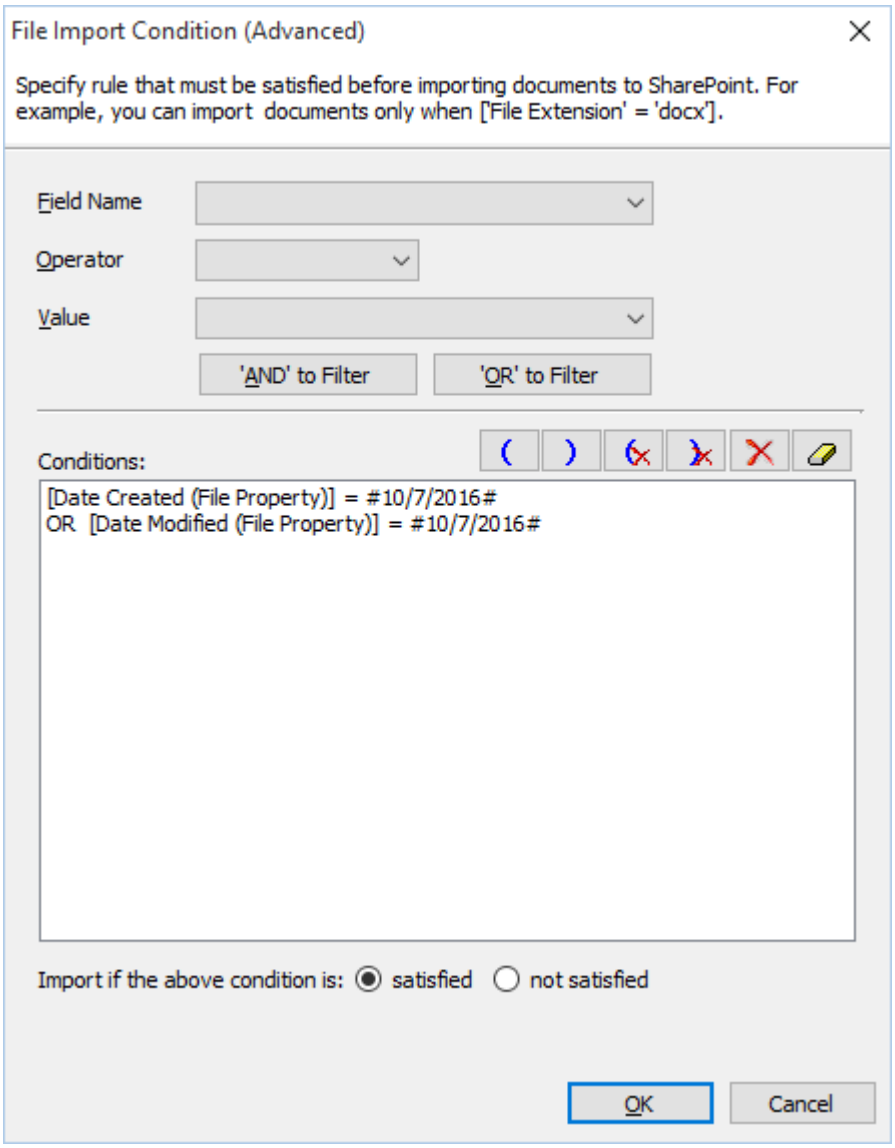
1. The **Import Conditions** step appears as shown below:



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

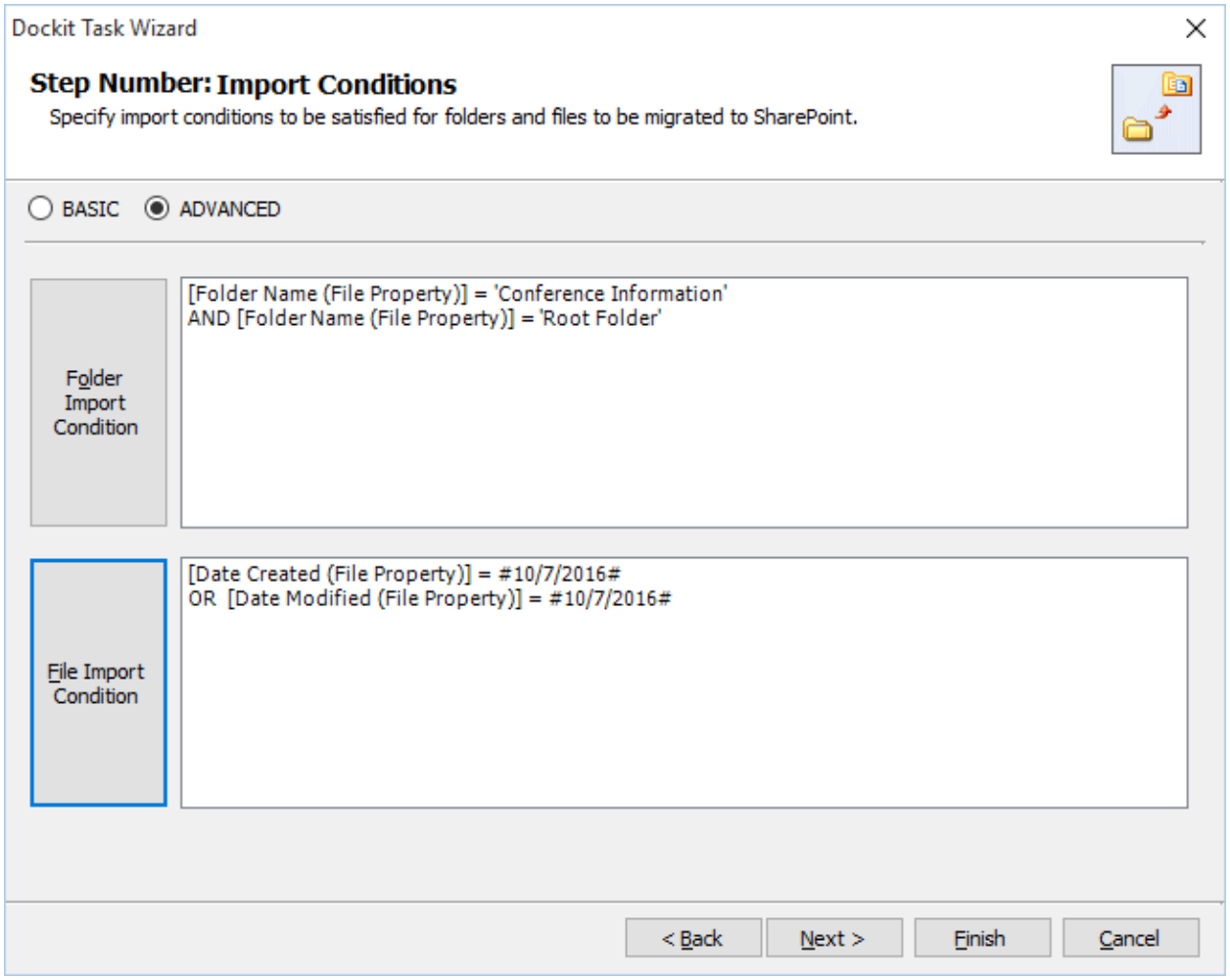
   a. **Do not apply any import conditions** - No conditions will be used to filter folders or files.
   b. **Apply the following import conditions** - The import conditions specified will be used to filter folders / files that are uploaded to SharePoint.

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:



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:

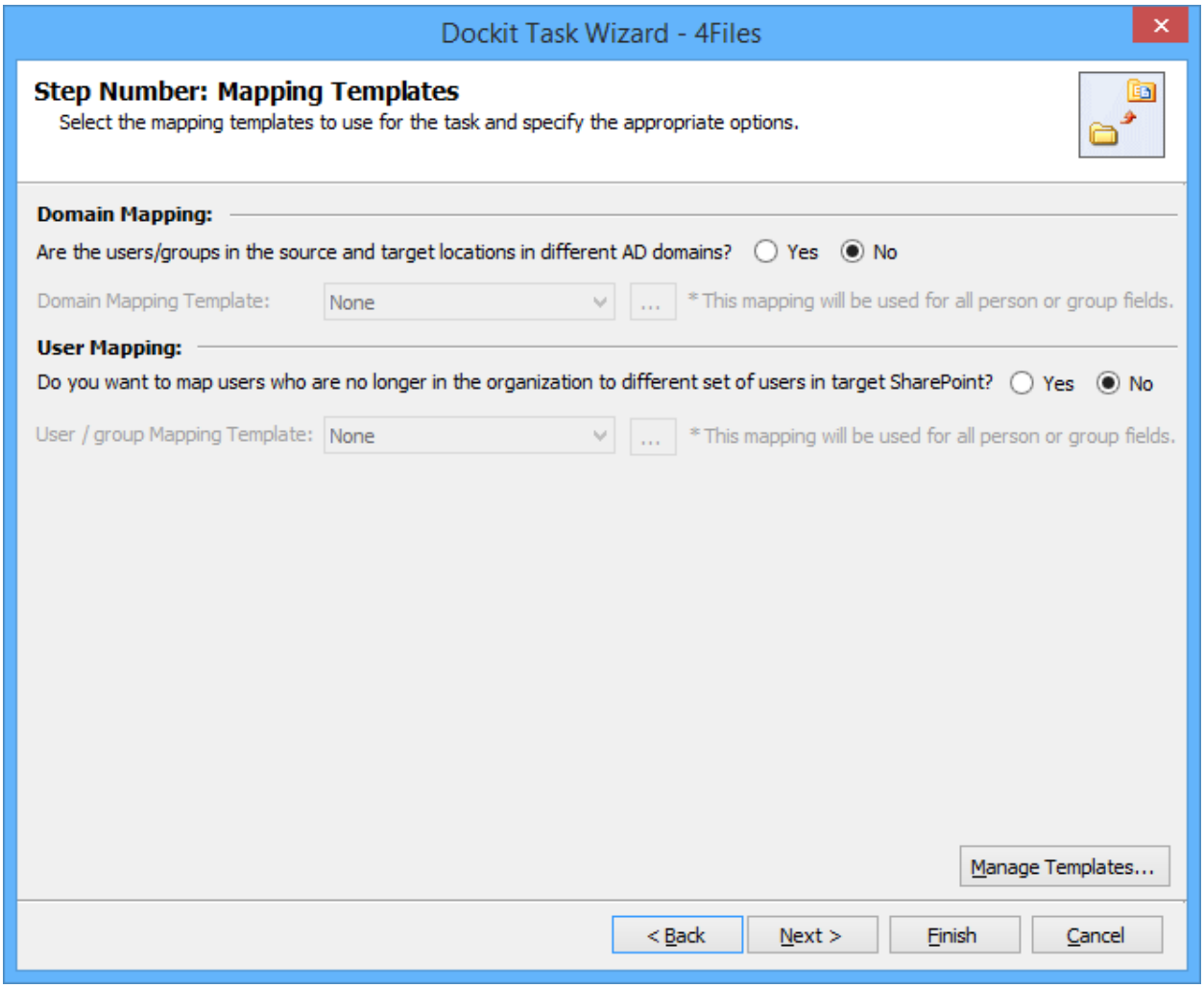


6. Click **Next** to proceed.

Mapping Templates

To specify the mapping templates to use for the task:

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



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.

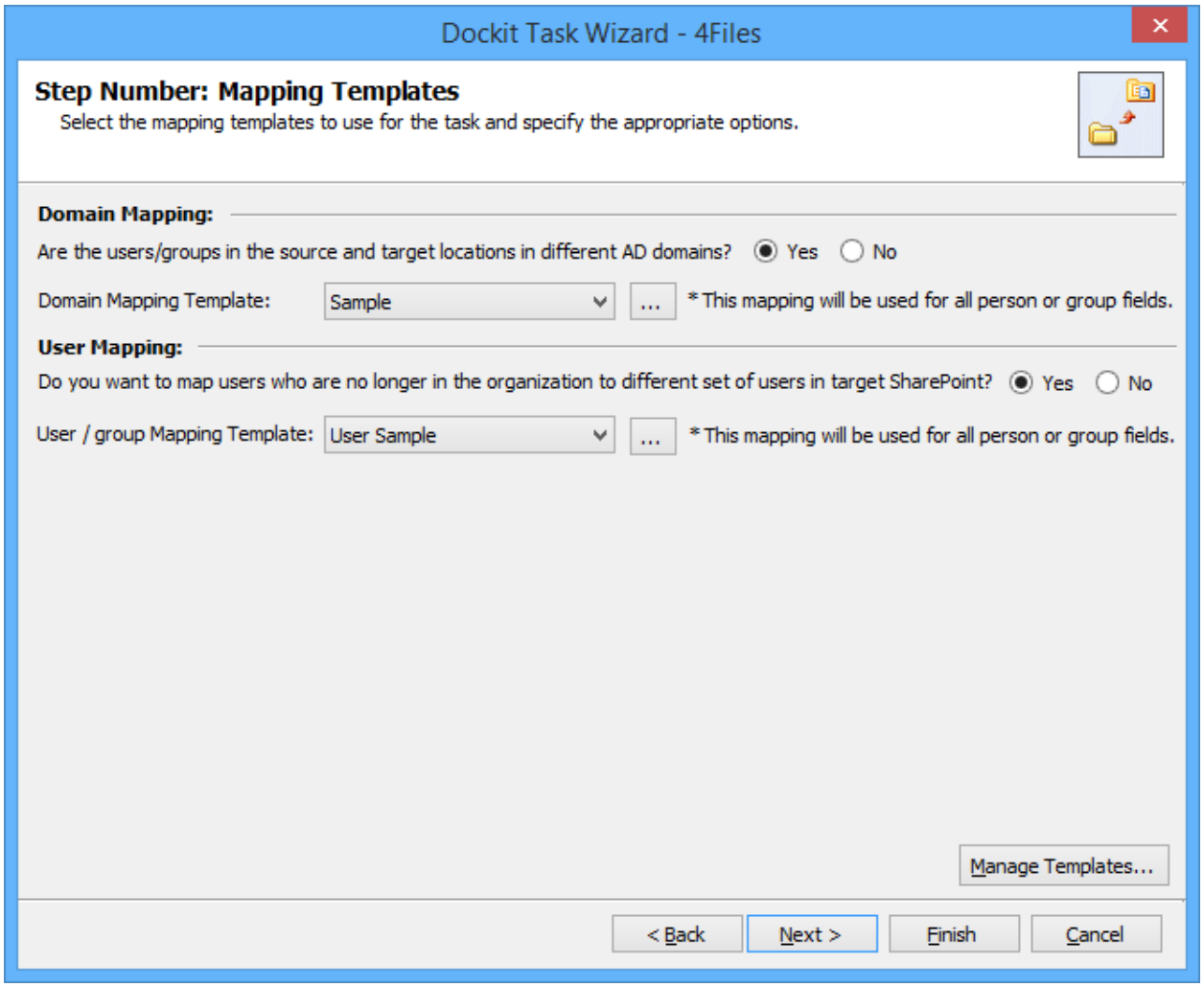
3. **User / Group Mapping Template**:

   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.

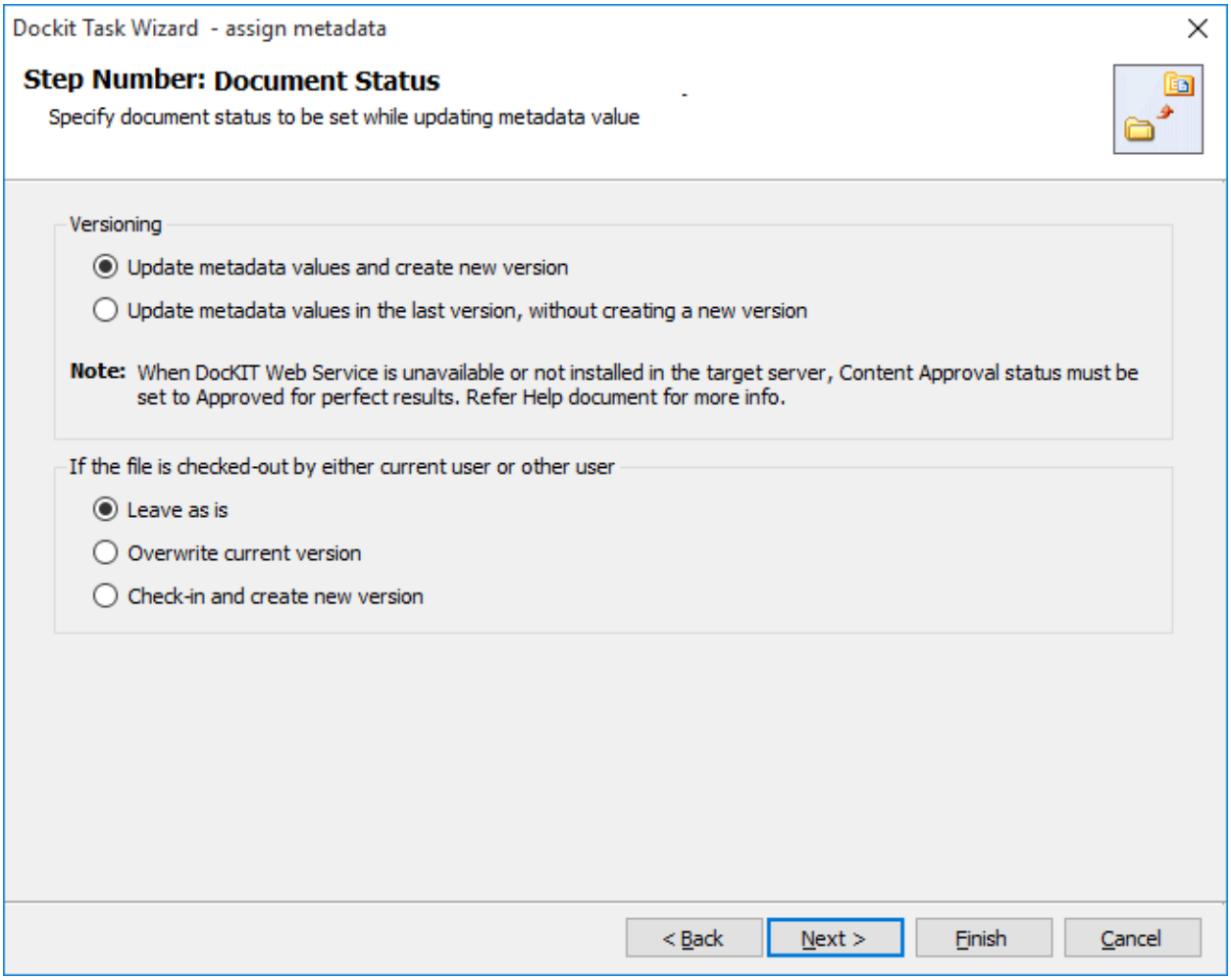


5. Click Next to proceed.

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:



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:

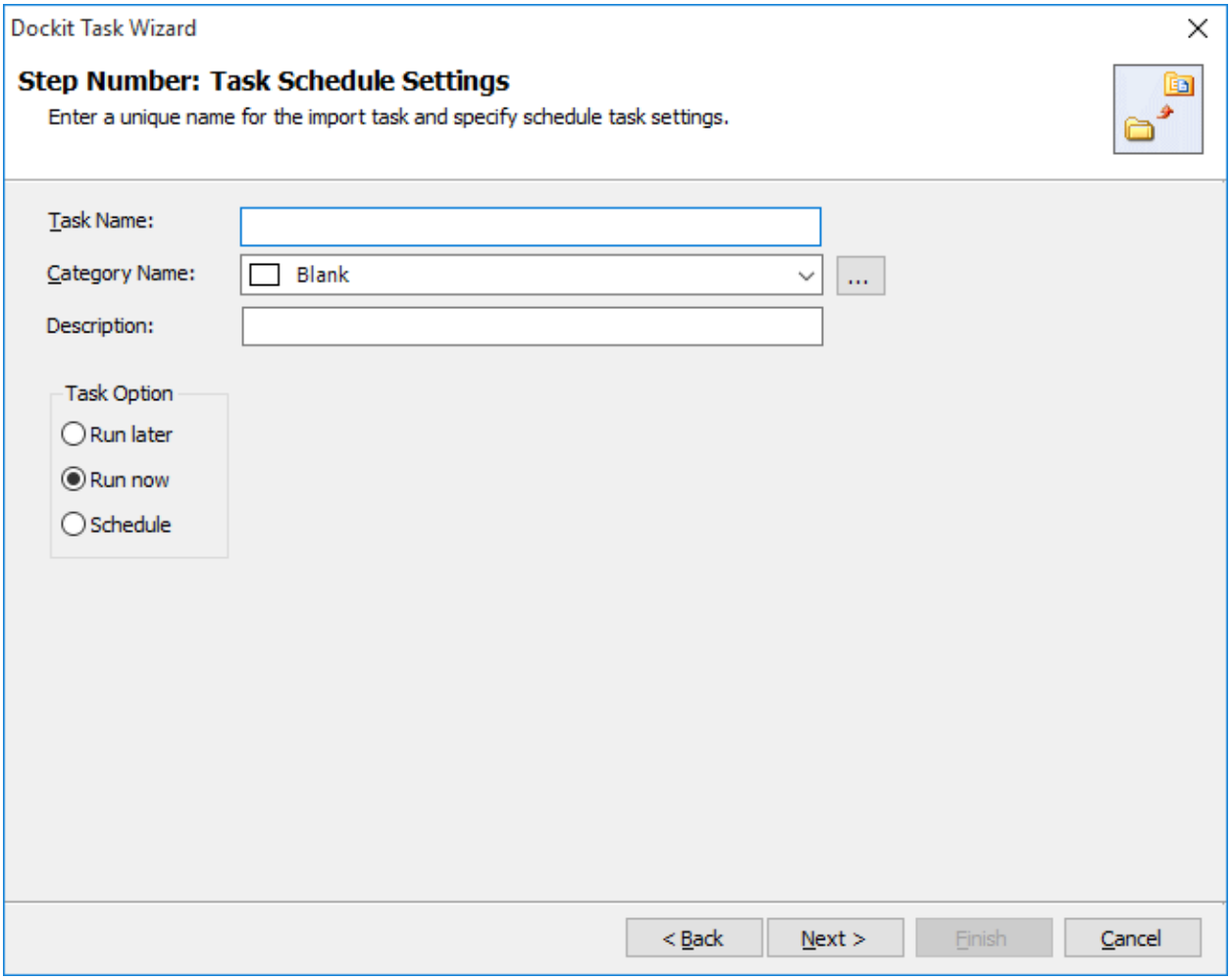
The document versioning results may vary depending on the following factors:

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:



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.

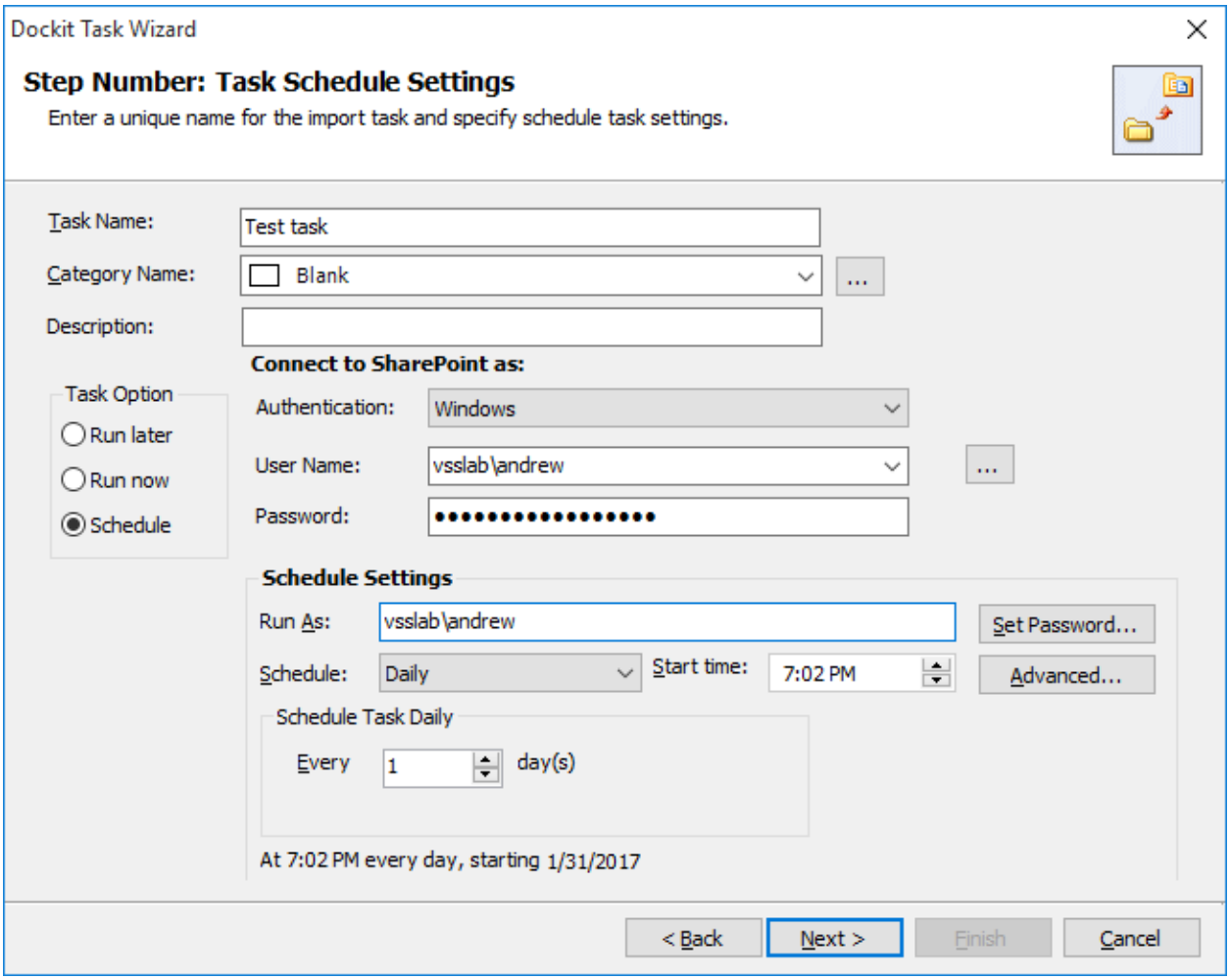
4. Select one of the following options to connect to the target SharePoint site:

    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.

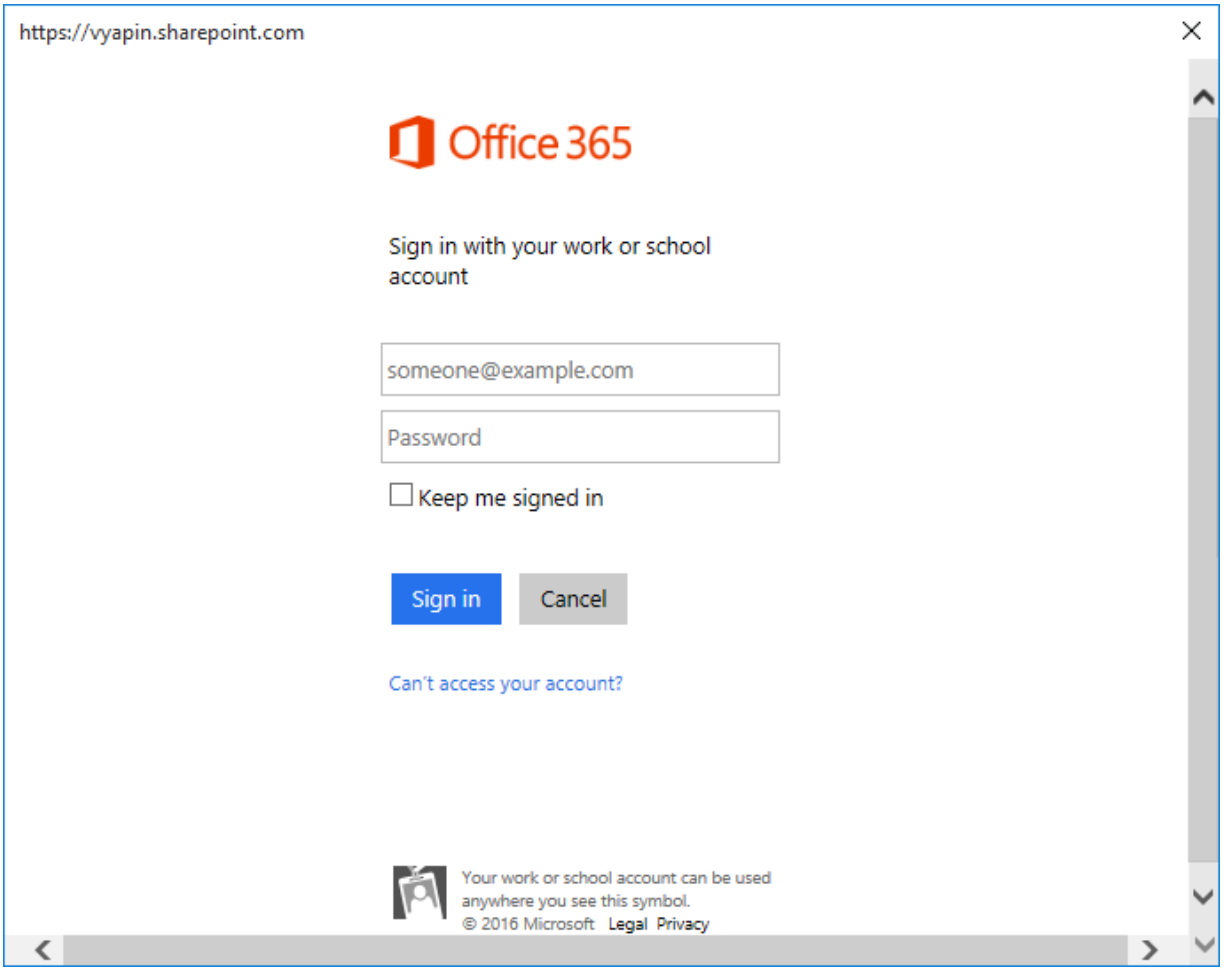
    c. **Use 'Run As' user context given below** – This option will be available if you choose **Schedule** task option. Dockit will use the user account specified in the scheduled **Run As** user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint 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.



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).



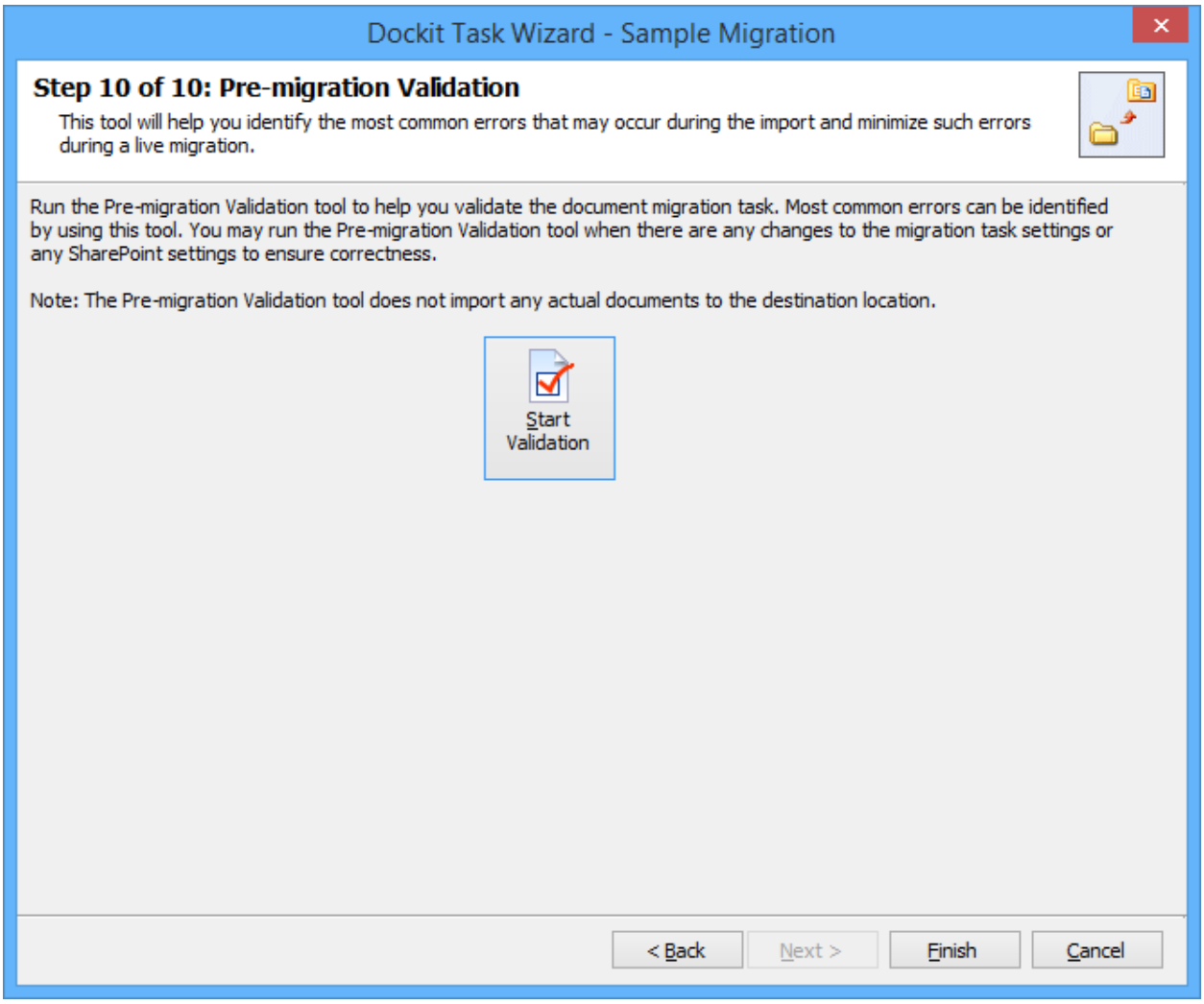
Provide username and password in the respective textboxes and click **Sign in** button to proceed.

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

Pre-Migration Validation

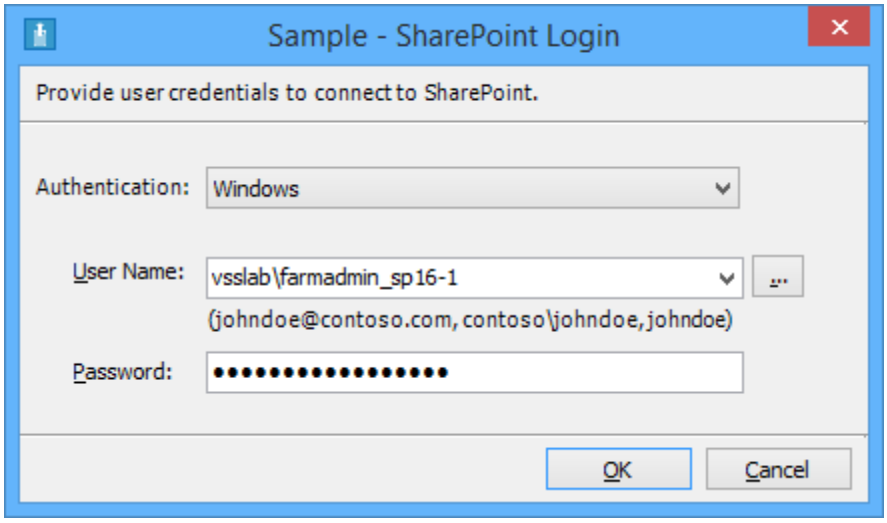
Pre-migration Validation tool helps you validate the exact steps performed by Dockit during the import process. This tool does not import any files to the destination location. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there are any changes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

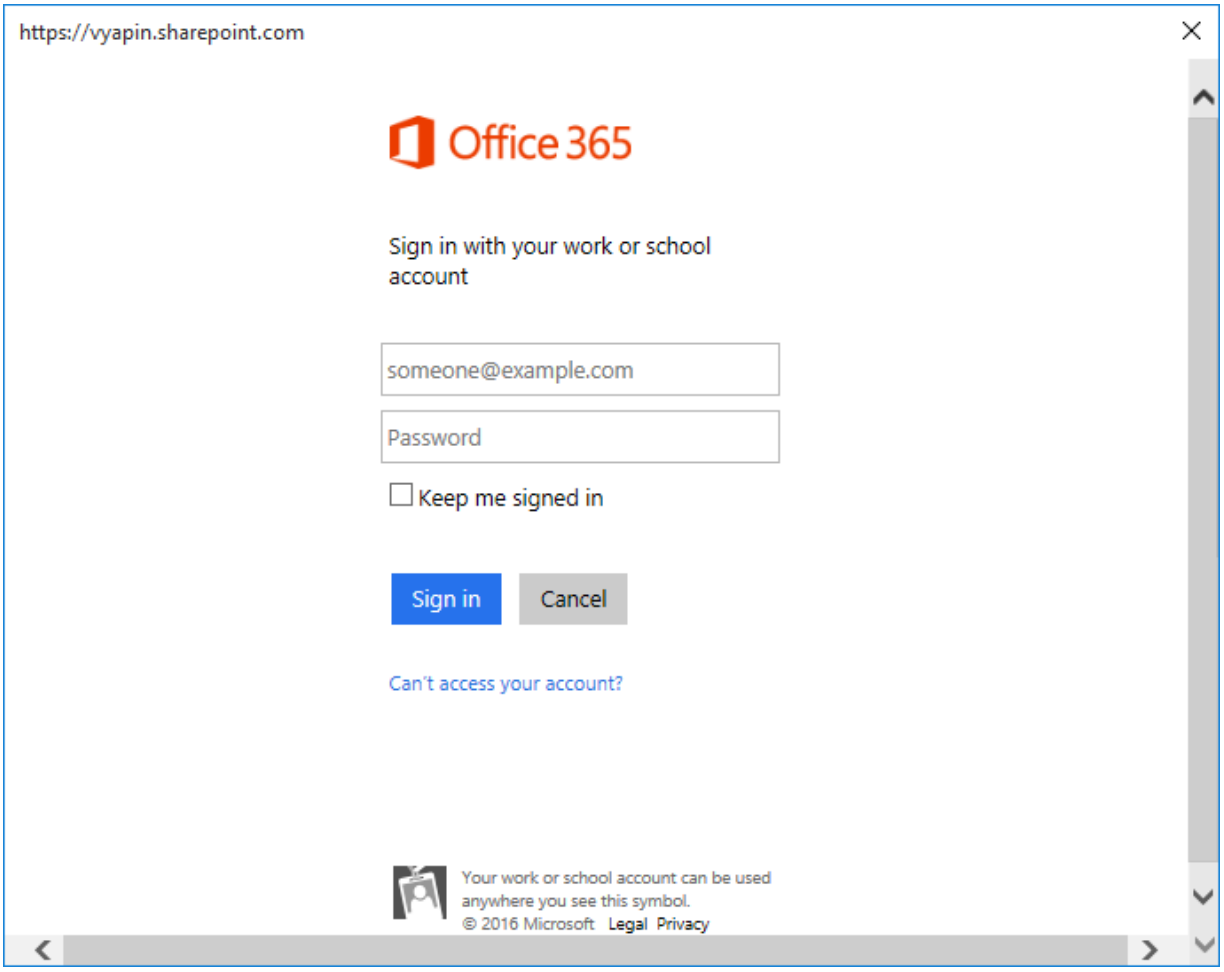


2. Click **Start Validation** button to invoke the Pre-migration Validation tool.

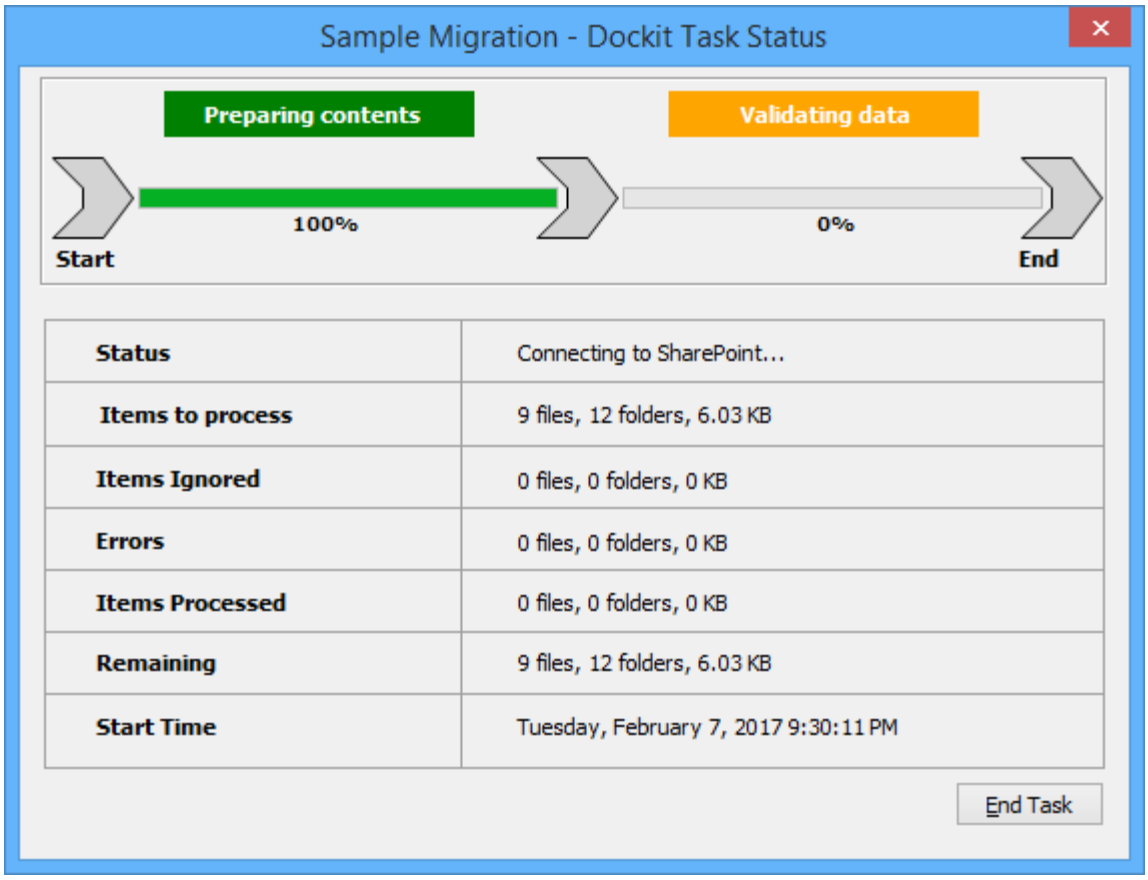
3. The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.



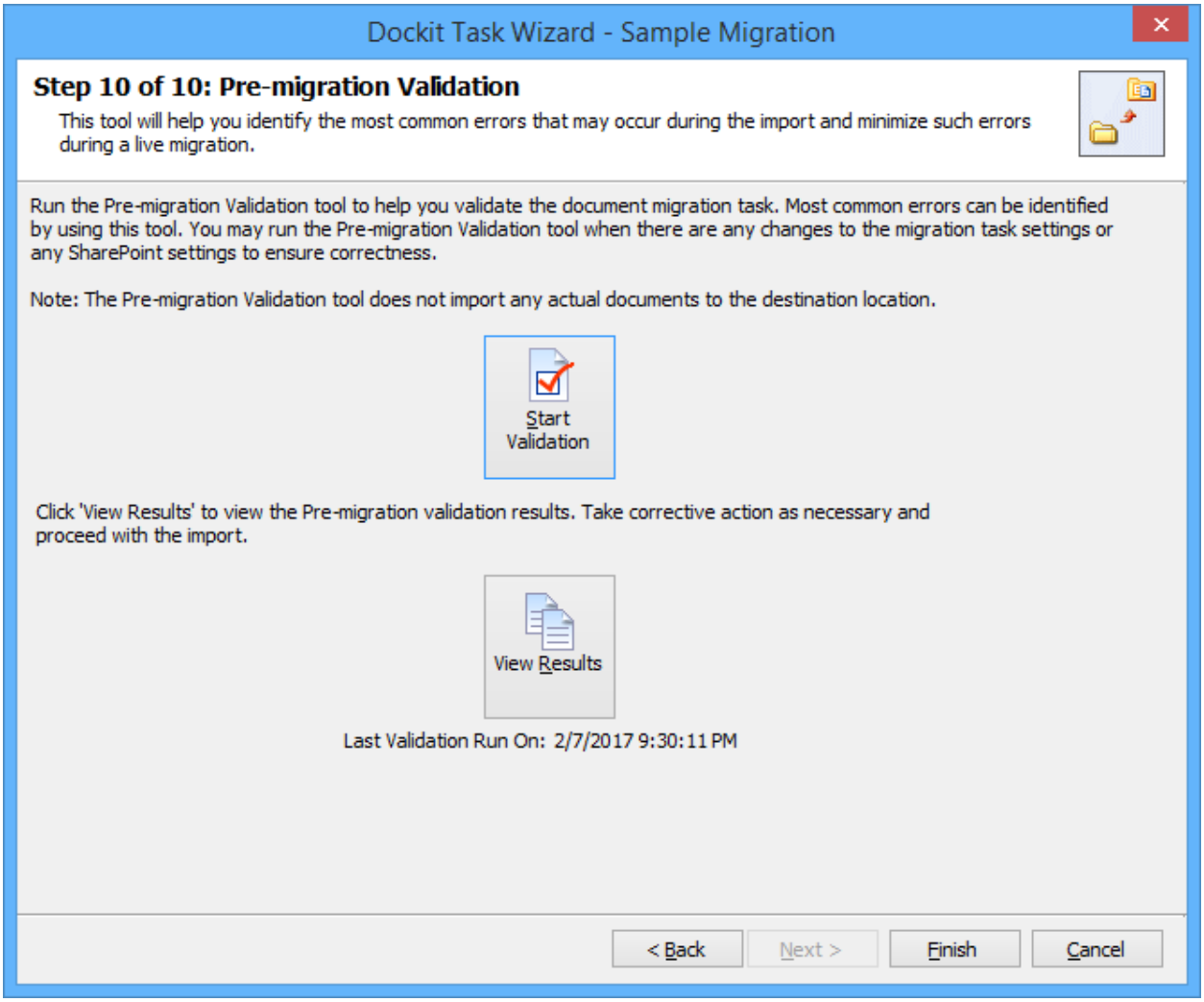
For **Federated authentication (Web Single Sign-on)** credential based import task. The Web Login Dialog to connect to SharePoint will appear as shown below:



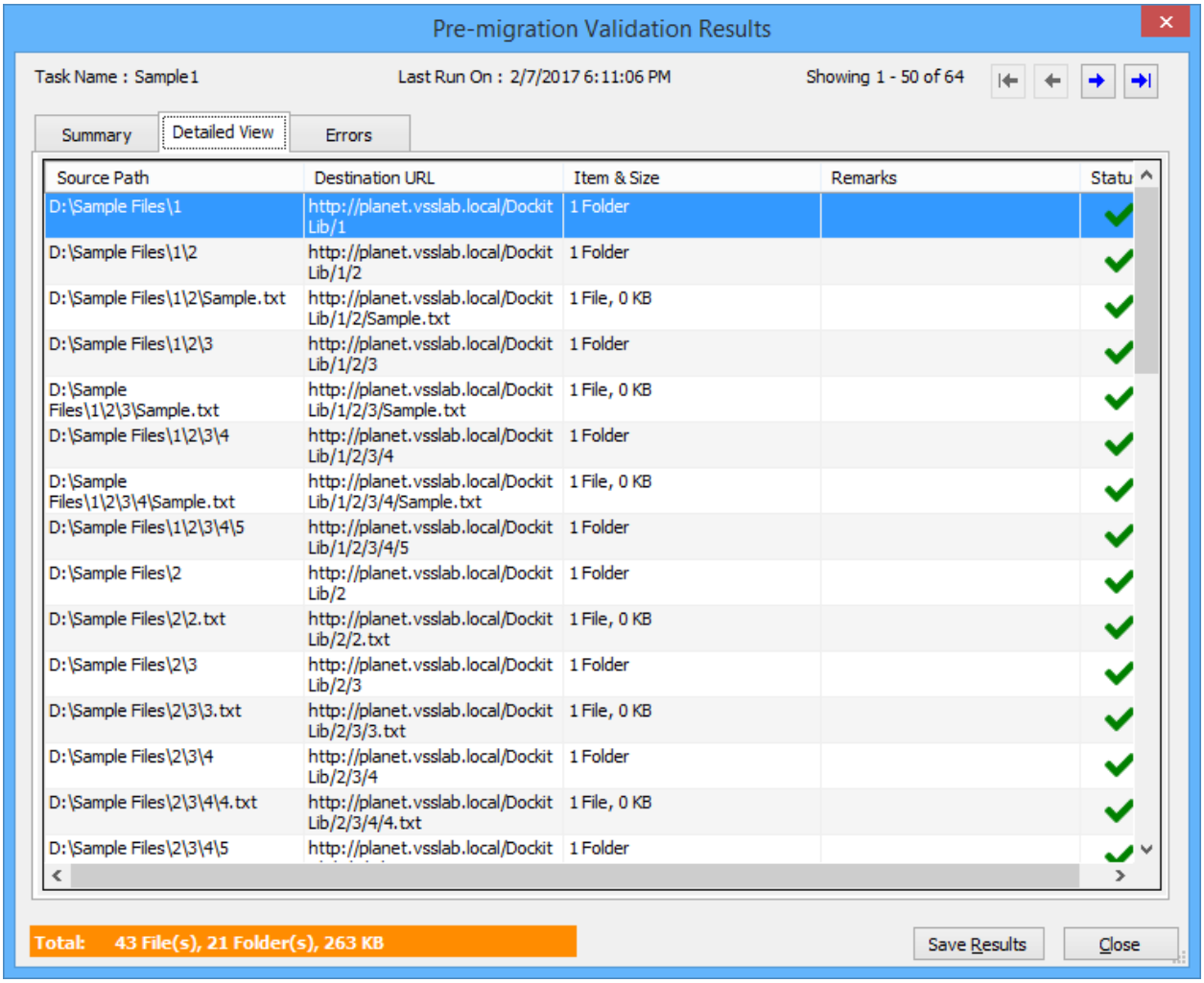
4. You will notice a task progress bar in a new window as shown below.



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.



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



- Refers the items that succeeded during pre-validation.
- 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
    - Managed Metadata - Checks for the term that matches the given value
    - User / Group - Check whether the user / group available in target location
    - 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:

o) 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 Pre-migration 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.

Import to SharePoint / Office 365 Lists

Update metadata using Explorer Mode

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

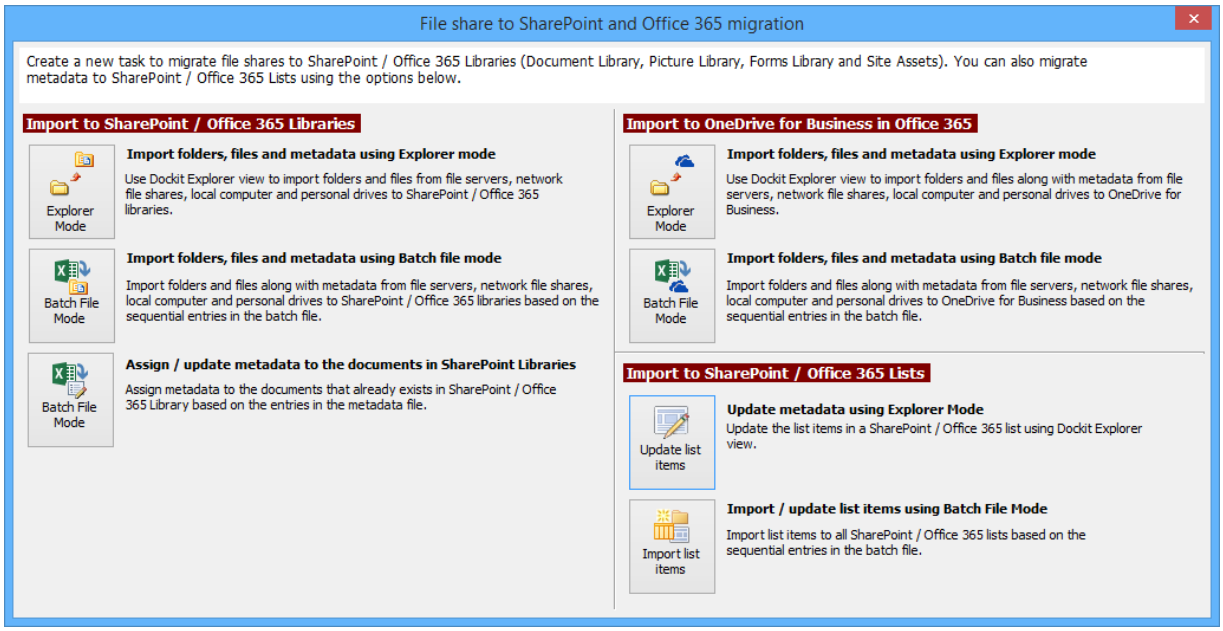
Import / Update lists items using Batch File Mode

- 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.

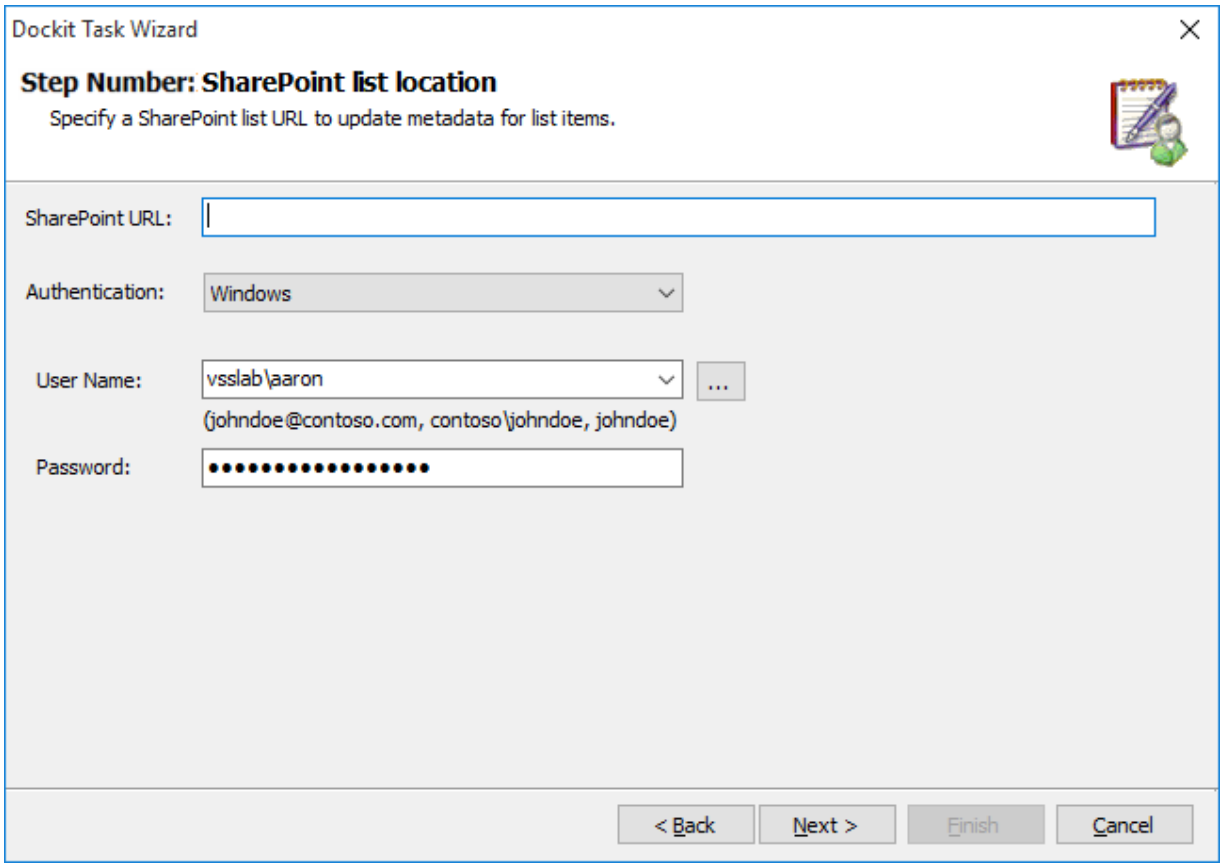


2. Specify the SharePoint list location
3. Select Items to update
4. Specify Task Settings
5. Click **Finish** button to create the task, or click **Back** button to change the task settings.

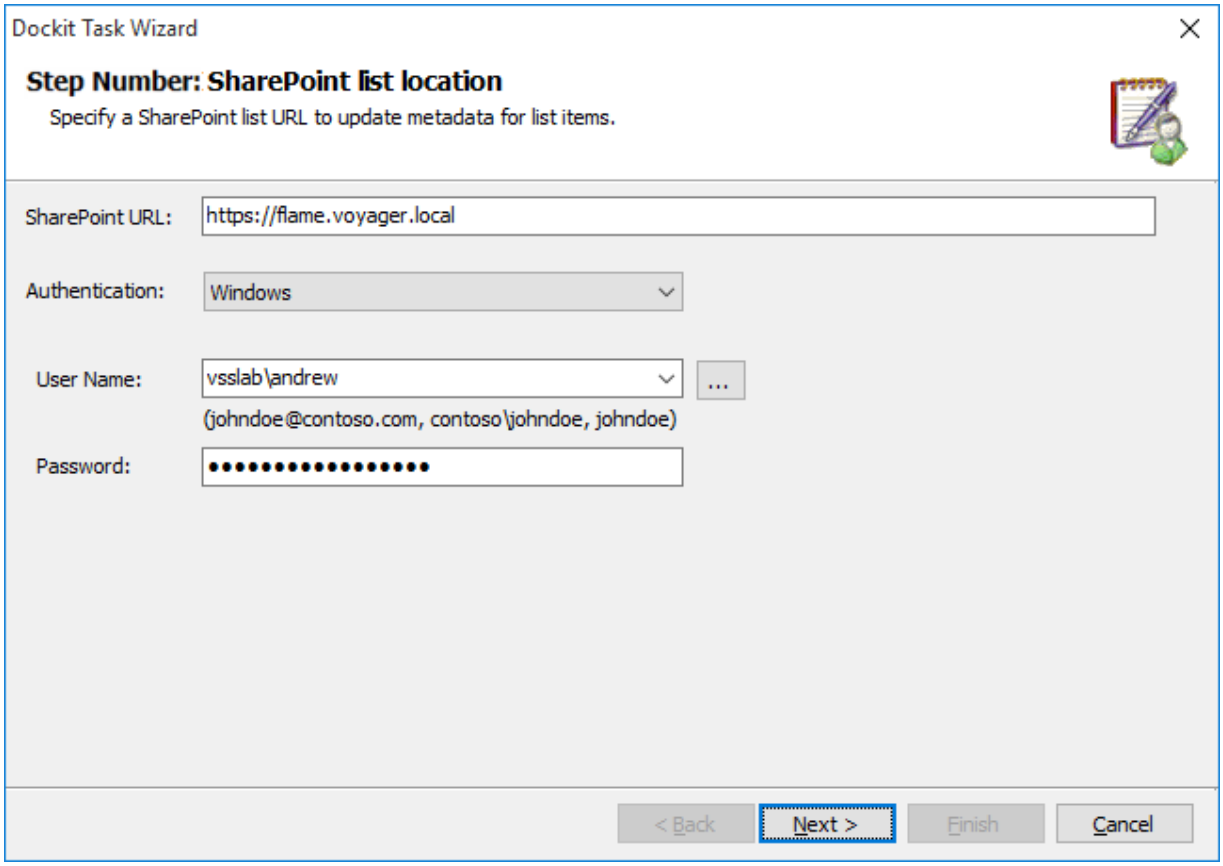
SharePoint List Location

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:



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



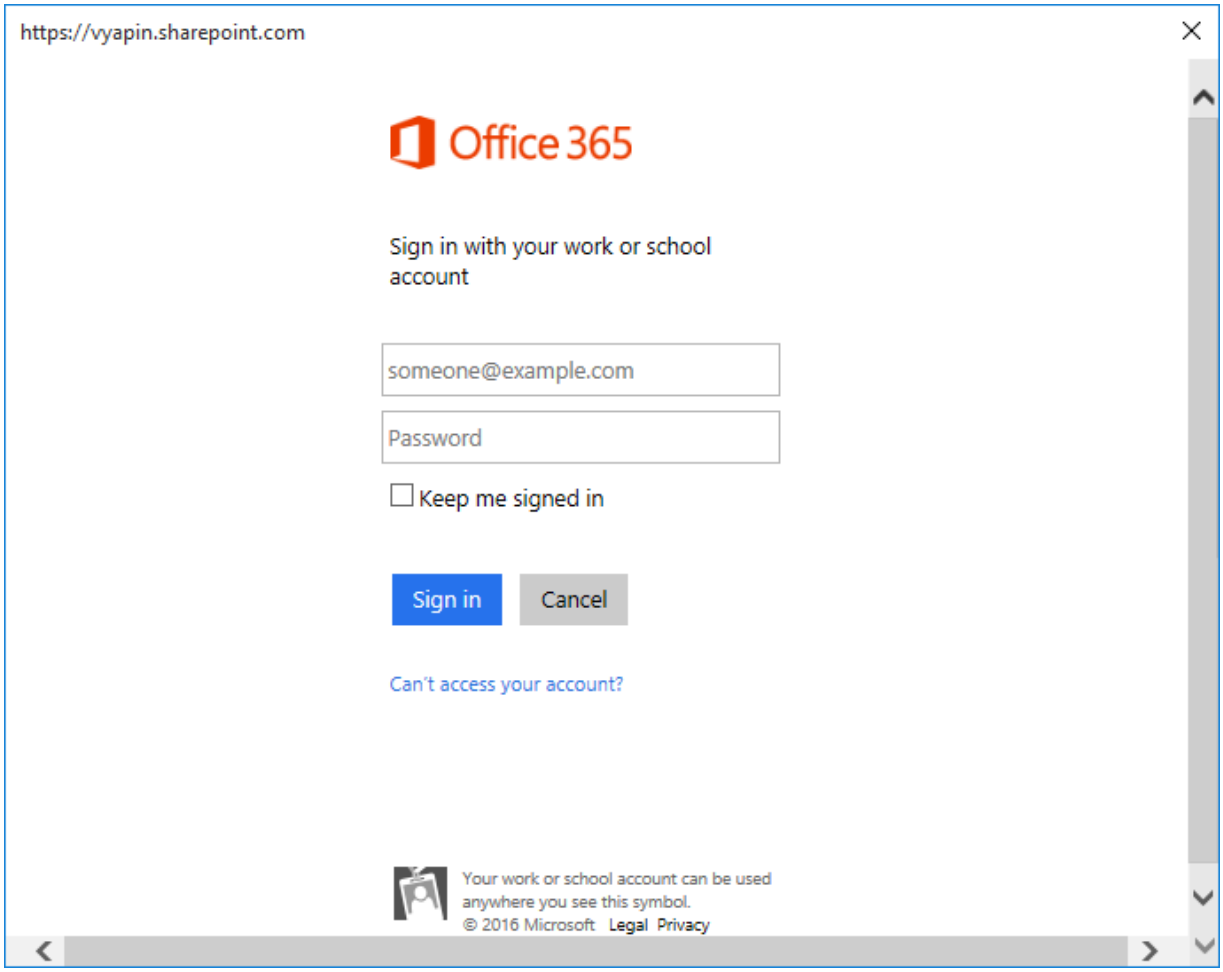
3. Specify the user credentials to connect to the SharePoint URL using the options given below:

    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:

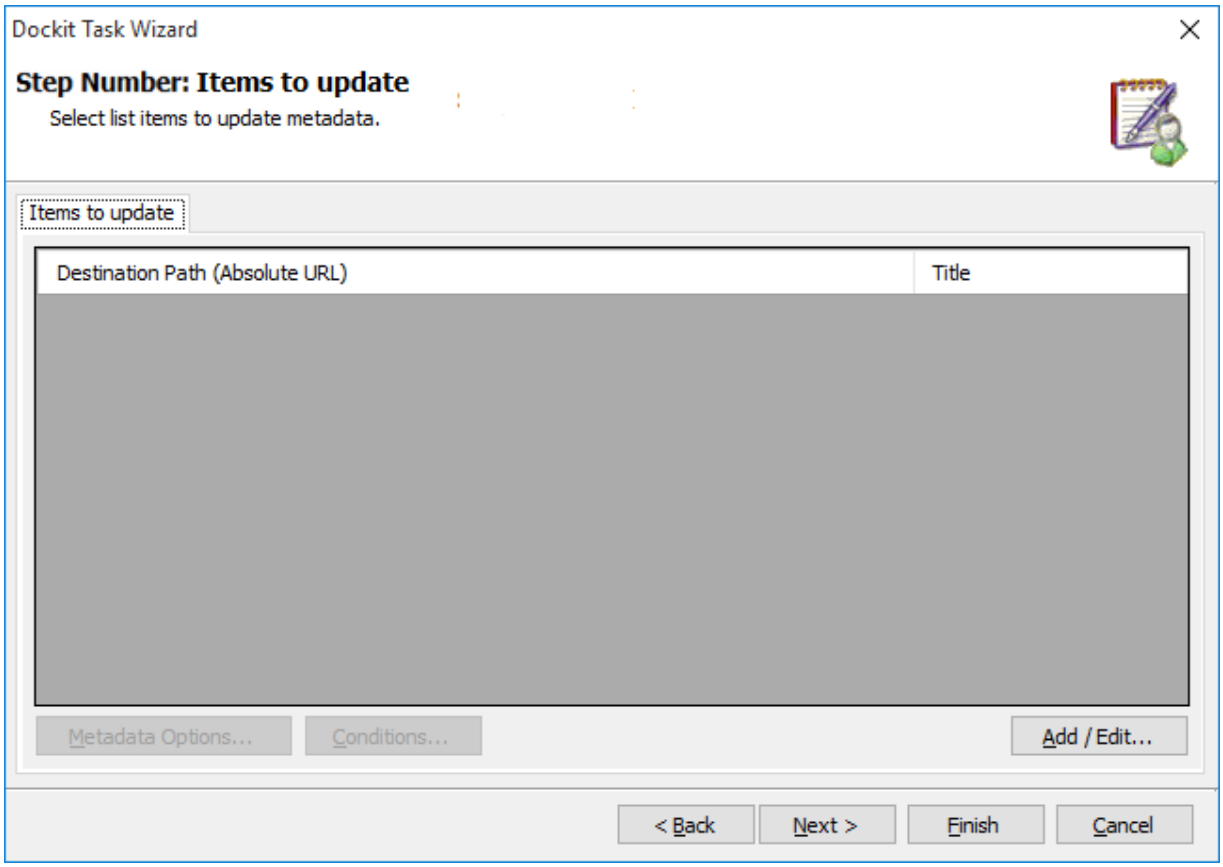


Provide **User ID** and **Password** in the respective textboxes and click **Sign in** button to proceed.

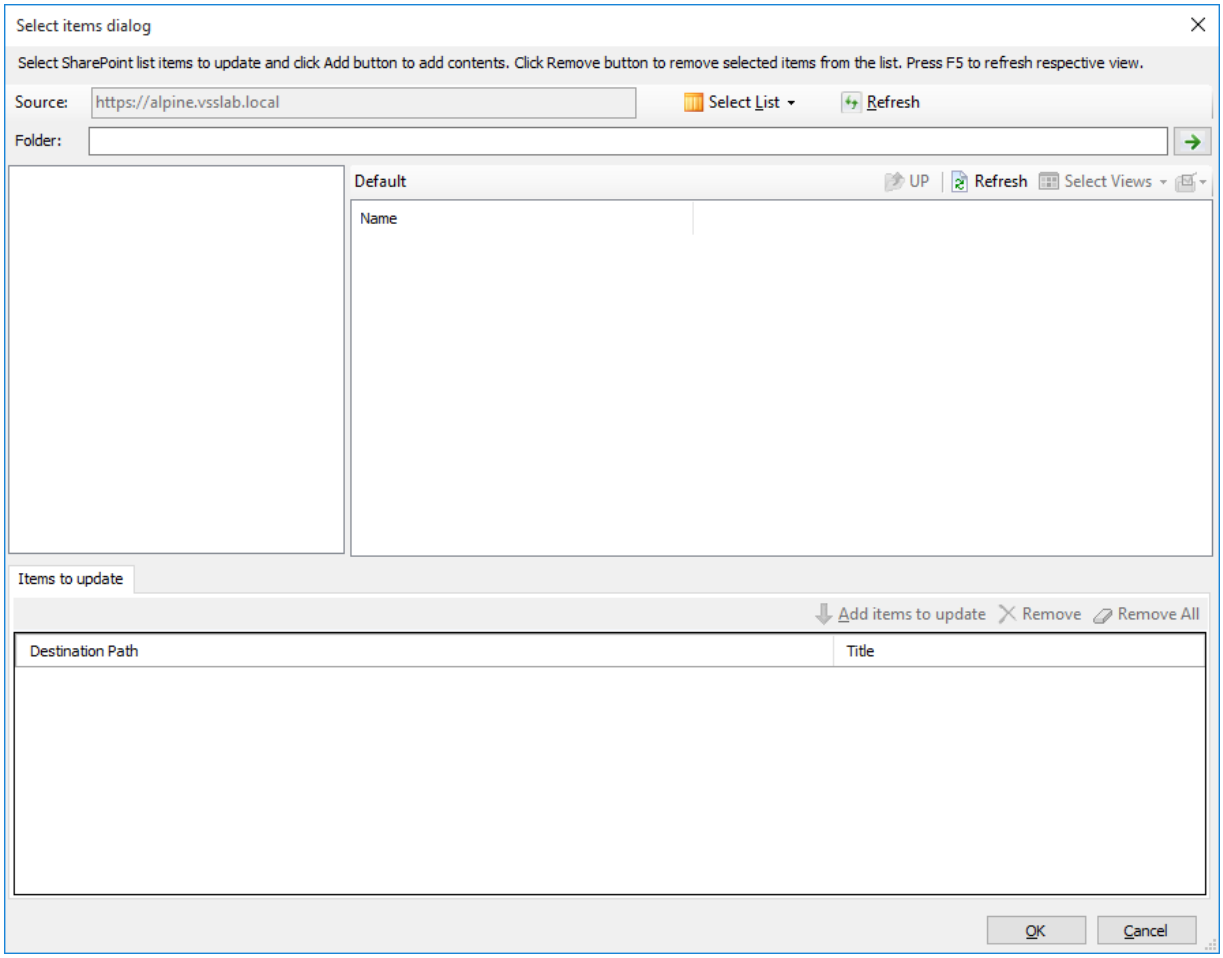
Items to update

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

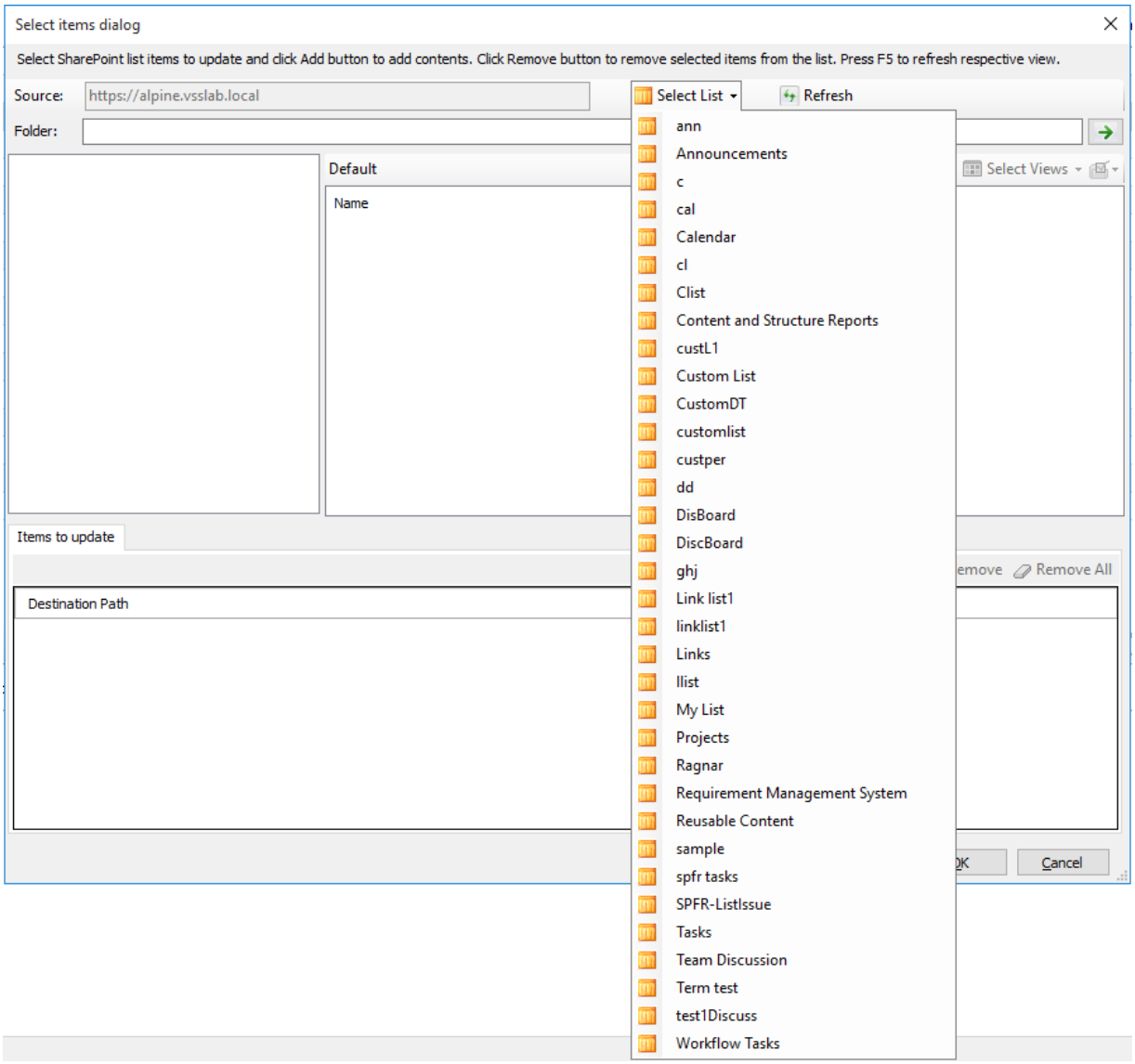
1. Click **Add / Edit...** button in the task wizard to add and/or remove folders and list items.



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

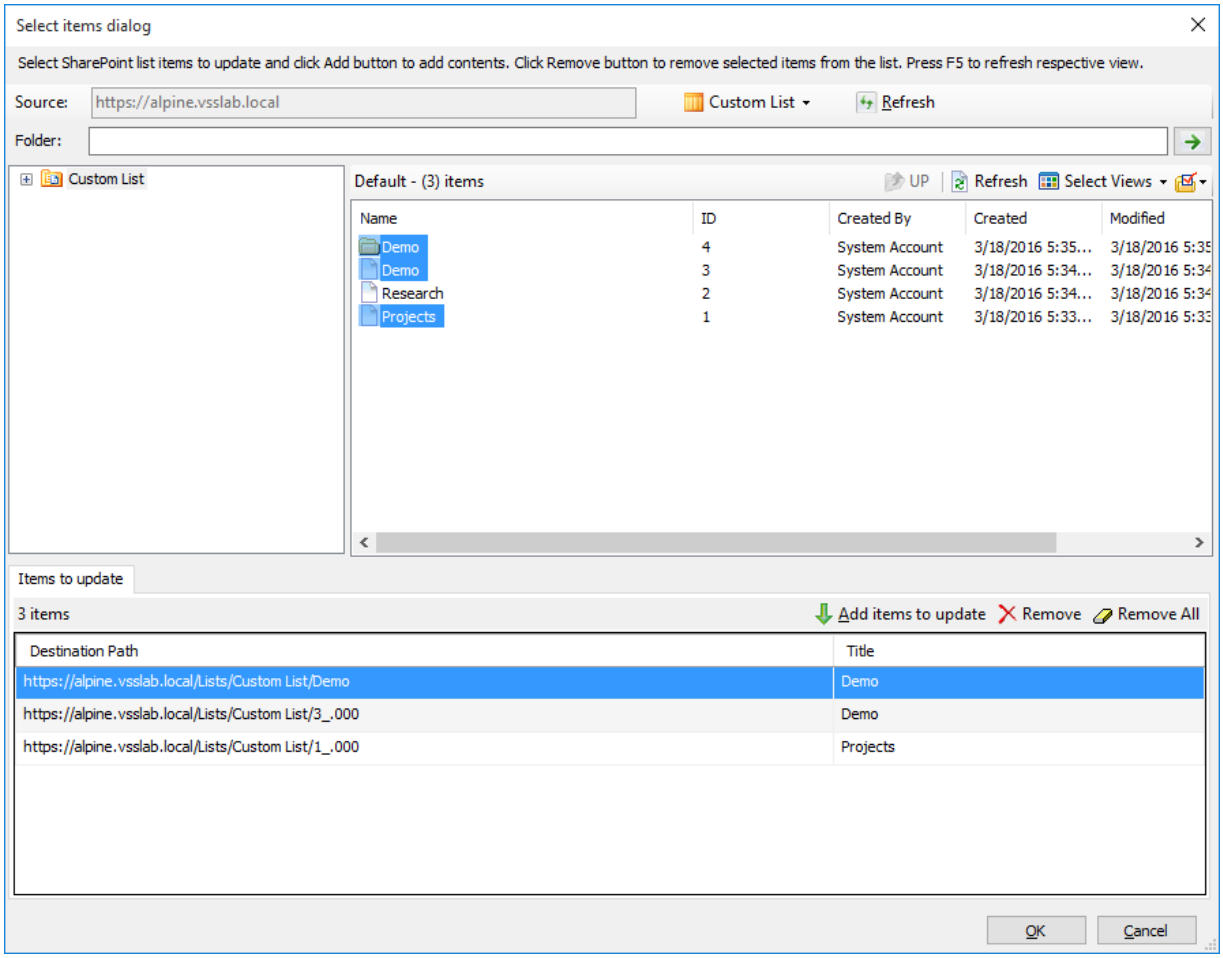


3. Click **Select list** drop down button to select the SharePoint list to work with.

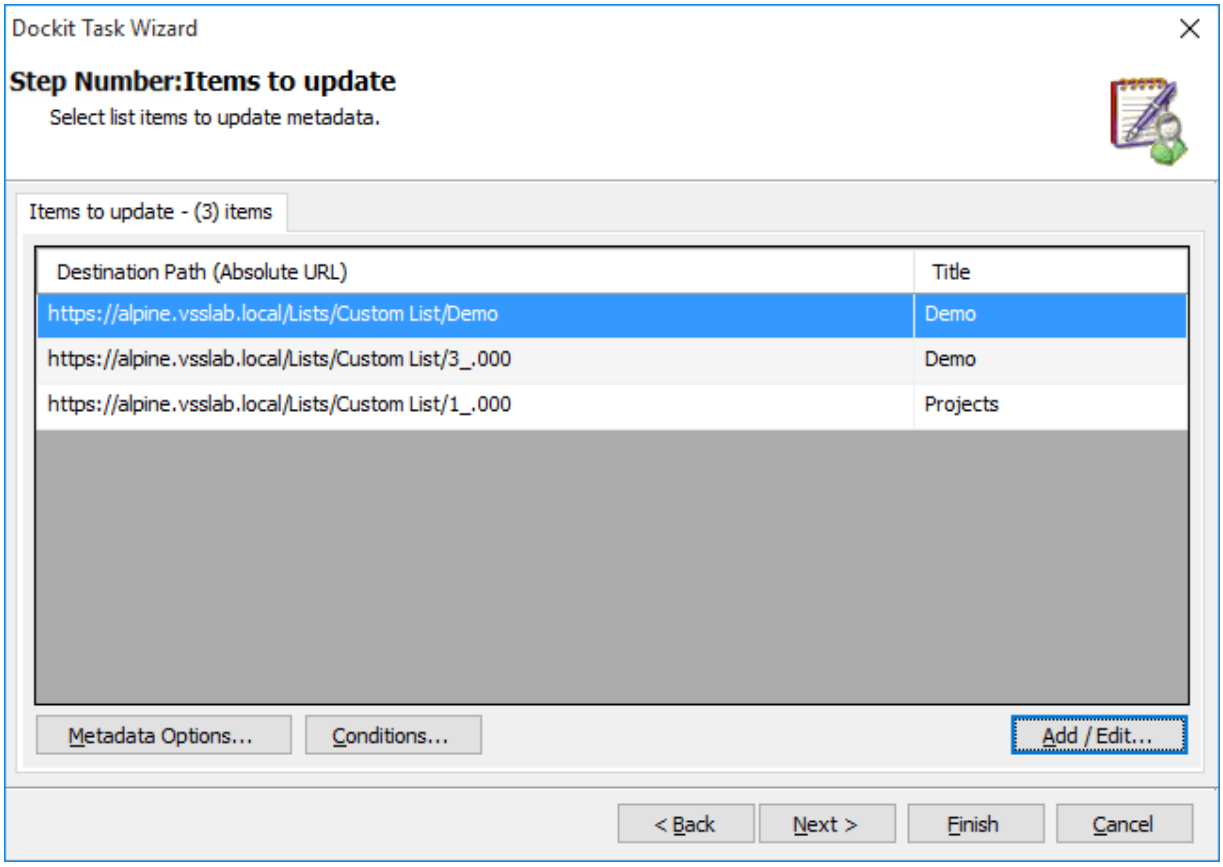


4. **Select items dialog** contains a textbox (top), tree-view (top-left) and a list-view (top-right), which provides explorer view to select folder / item to update or delete. The **Folder** textbox allows you to directly browse the specified folder location in the connected SharePoint list. You must 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:



6. Click Refresh button to reload list names.
7. Click **OK** button to proceed or click **Cancel** to discard the changes.
8. **Items to update or delete** steps contains the folders and list items added for update or delete as shown below:

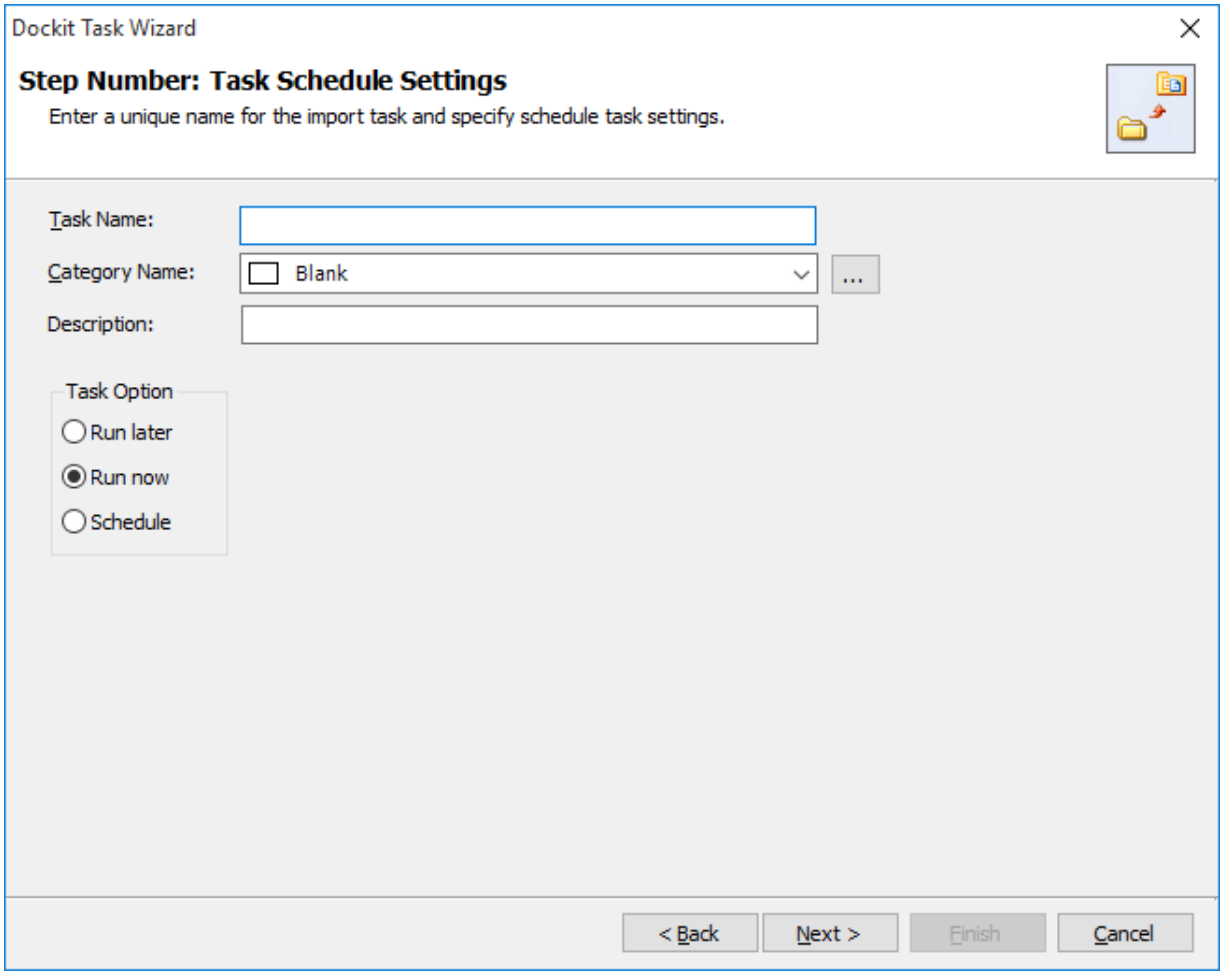


9. Click **Metadata Options...** button to specify the metadata values to update in the SharePoint list.
10. Click **Conditions...** button to define the conditions to use when updating list items in a SharePoint list.
11. Click **Next** to proceed.

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:

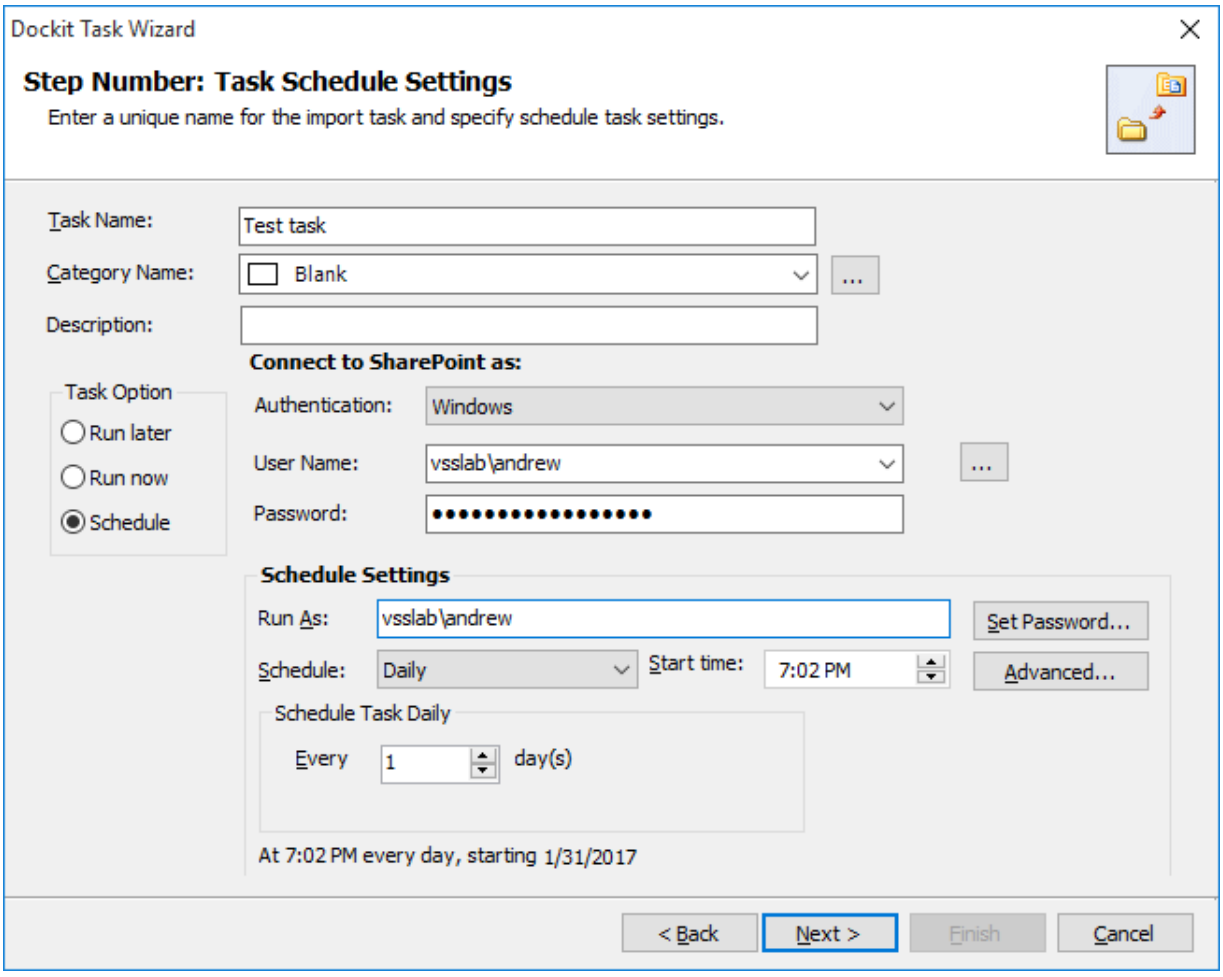


2. Enter a unique task name in **Task Name** textbox.
3. Select a **Task Option** from one of the following options given below:
    a. **Run later -** to run the task later as and when desired
    b. **Run now** - to run the task immediately after clicking Finish button
    c. **Schedule** - To create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

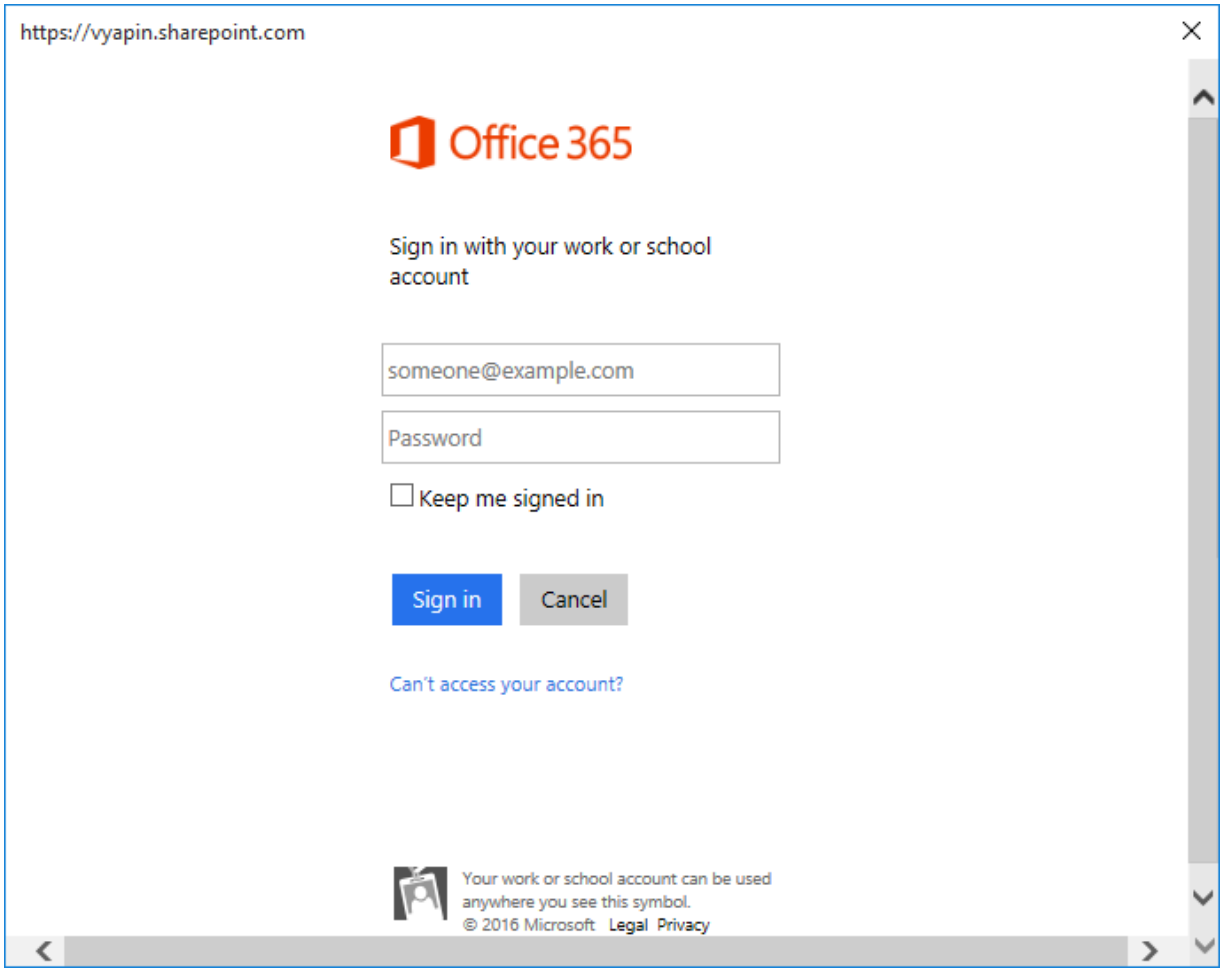
Dockit will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords / Credential Manager applet for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created. Hence, you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



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).



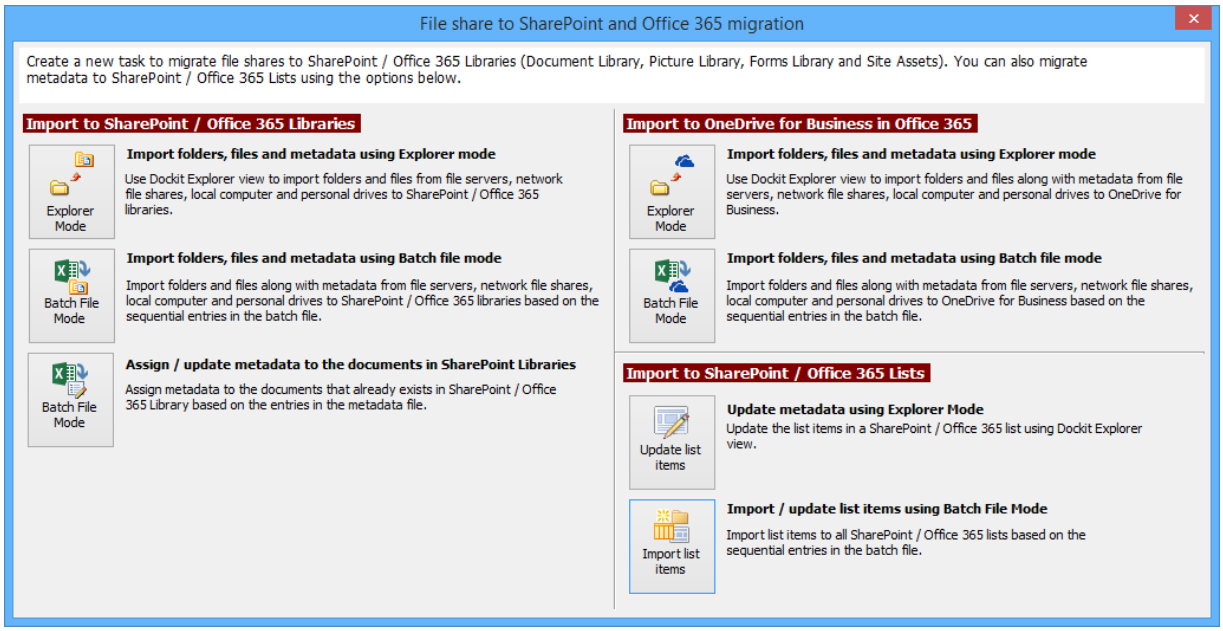
Provide username and password in the respective textboxes and click **Sign in** button to proceed

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

Import list items (Batch File Mode)

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

1. Select **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 Mapping Templates
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 (,), semi-colon (;) etc. The delimiter character used in the batch file should be same as 'Format' string value available in the registry key (HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Jet\4\Engines\Text).

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

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

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

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

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

People or Group (Multiple value)	User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\User1; BUILTIN\Administrators; Guest Members;Temps"
Hyperlink or Picture	The http URL of any resource or picture can be given to this field.	"http://sharepoint/Shared Documents/My Sample File.doc" "http://sharepoint/Pictures/chart.bmp"
Target Audiences (Multiple value) (Applicable only for a MOSS / Microsoft SharePoint Server 2010 and above library)	Global Audience name, Security / Distribution Group name and SharePoint Group name can be given to this field. Global Audience and Security / Distribution Group should be crawled and stored in User Profile Store of SSP / Services. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the respective group list and assign the ID of the matching group name to the Target Audiences column of the imported file, only if the group name exists. Moreover, in order to assign the values that belong either to Global Audience or Security / Distribution Group require Dockit Server Agent to be installed in the destination SharePoint server (MOSS / Microsoft SharePoint Server 2010 and above).	"All site users; Admins; Viewers; Administrators; SPUsers; Contributors; Designers
Publishing Schedule Start Date (Applicable only for Collaboration Portal / Publishing Portal Site)	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2010 10:50 AM" "1/25/2009"

Publishing Schedule End Date (Applicable only for Collaboration Portal / Publishing Portal Site)	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2009 10:50 AM" "1/25/2010"
Publishing Image (Applicable only for Collaboration Portal / Publishing Portal Site)	The http URL of any picture can be given to this field. Relative URL also can be given to this field.	http://sharepoint/Pictures/chart.bmp "Pictures/chart.bmp"
Publishing Hyperlink (Applicable only for Collaboration Portal / Publishing Portal Site)	The http URL of any resource can be given to this field. Relative URL also can be given to this field.	http://sharepoint/Documents/Sample File.doc "/Documents/Sample File.doc" " NewsArticleImage.jpg"
Publishing HTML (Applicable only for Collaboration Portal / Publishing Portal Site)	HTML content can be given in this field. You can use HTML tags in order to create rich content in the field.	It is sample text
Business Data (BDC) / External Data (BCS) (Applicable only for SharePoint Enterprise Edition)	The BDC / BCS column value along with the filter name can be specified in this field. Dockit will search for the specified column value in the LOB entity using the given filter and assign the corresponding ID (when the BDC / BCS column value match is found) of the LOB record to the BDC / BCS column in SharePoint. Specify this value in filter name: value format. If the filter name contains colon (:) in its name, specify this value in FILTER:filter name, QUERY:value, where FILTER and QUERY are reserved words. Dockit also automatically fills-up the column values associated with the BDC / 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:1000AX"
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 specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	"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;Continent |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/Documents/Sample 1.doc; http://sharepoint/Documents/Sample 2.xlsx" "http://sharepoint/Lists/Custom List/1_.000"

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

- Choice*
- Lookup
- Person or Group

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

Multi-Value	**Example**	**Final Result**

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

Sample format of a CSV / TEXT metadata file:

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

"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"

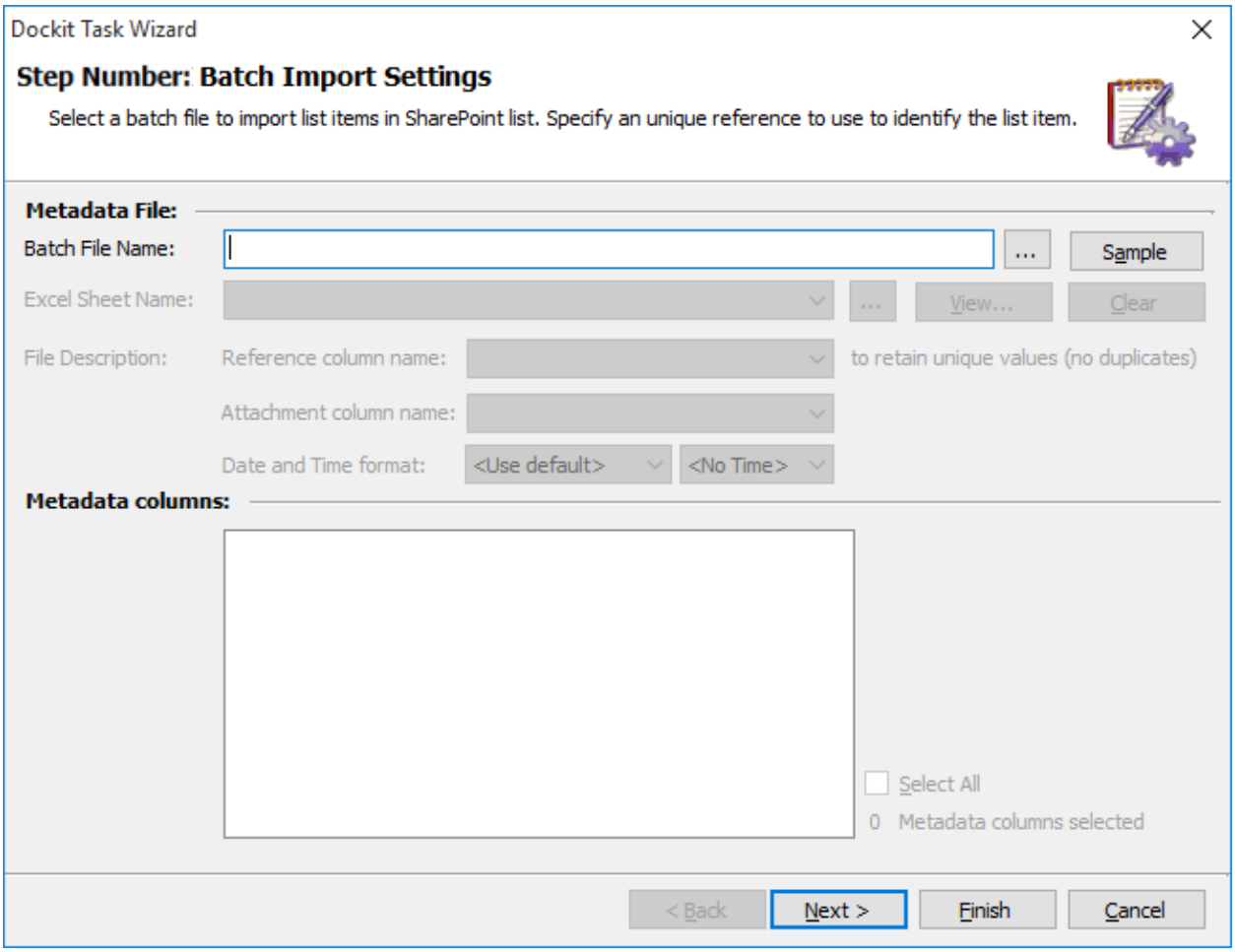
"http://sharepoint/list/Sales List","10_.000","Title10","12/05/2008","Sales Manager","Sales","Delete"

"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:

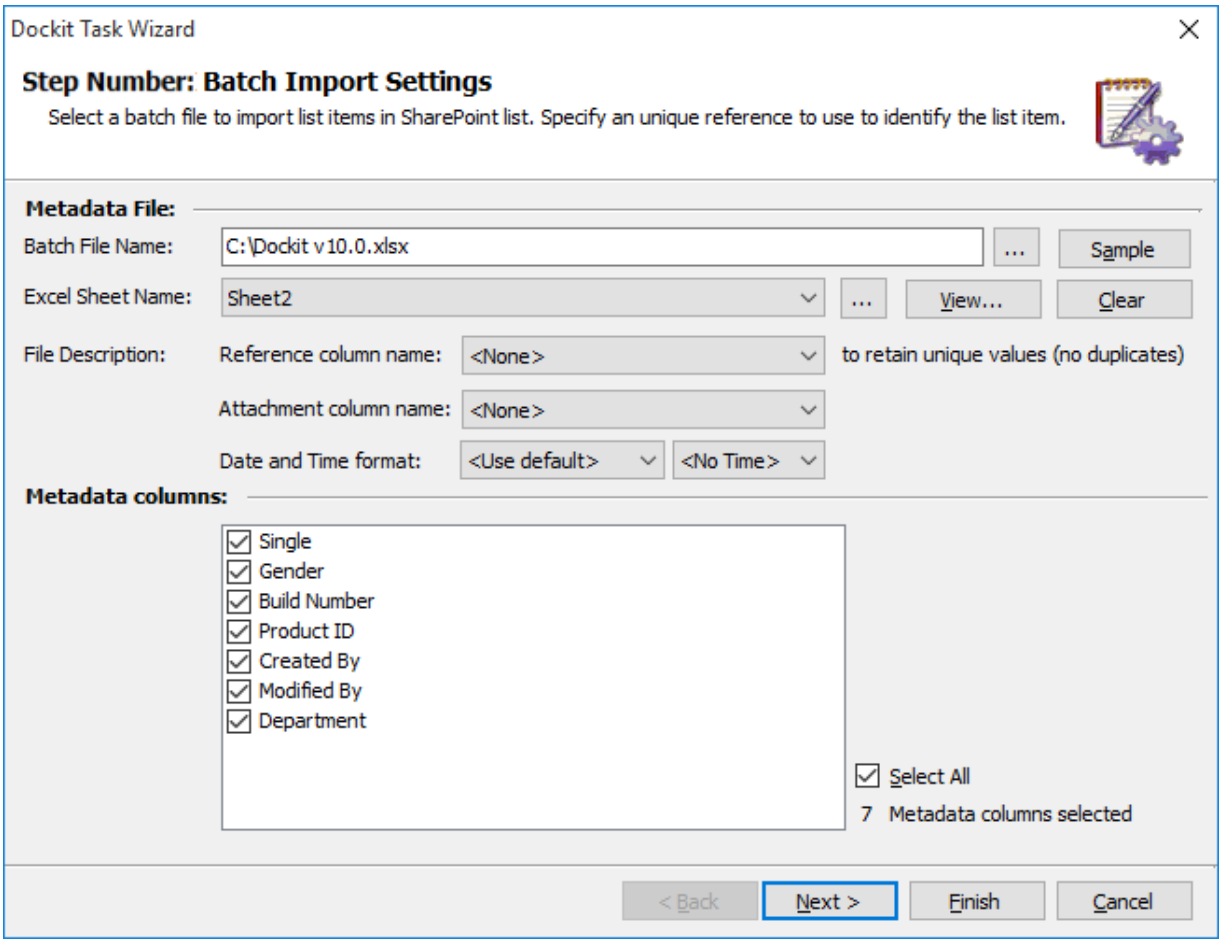


2. **Click (...)** button to specify the Batch File. The Batch File can be created in any one of the following file formats - Comma delimited (CSV), Microsoft Excel (XLSX) or Text file (TXT). The batch file will automatically be extracted once the file name is specified. If you are using a Microsoft 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 Batch File Structure 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 must 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.

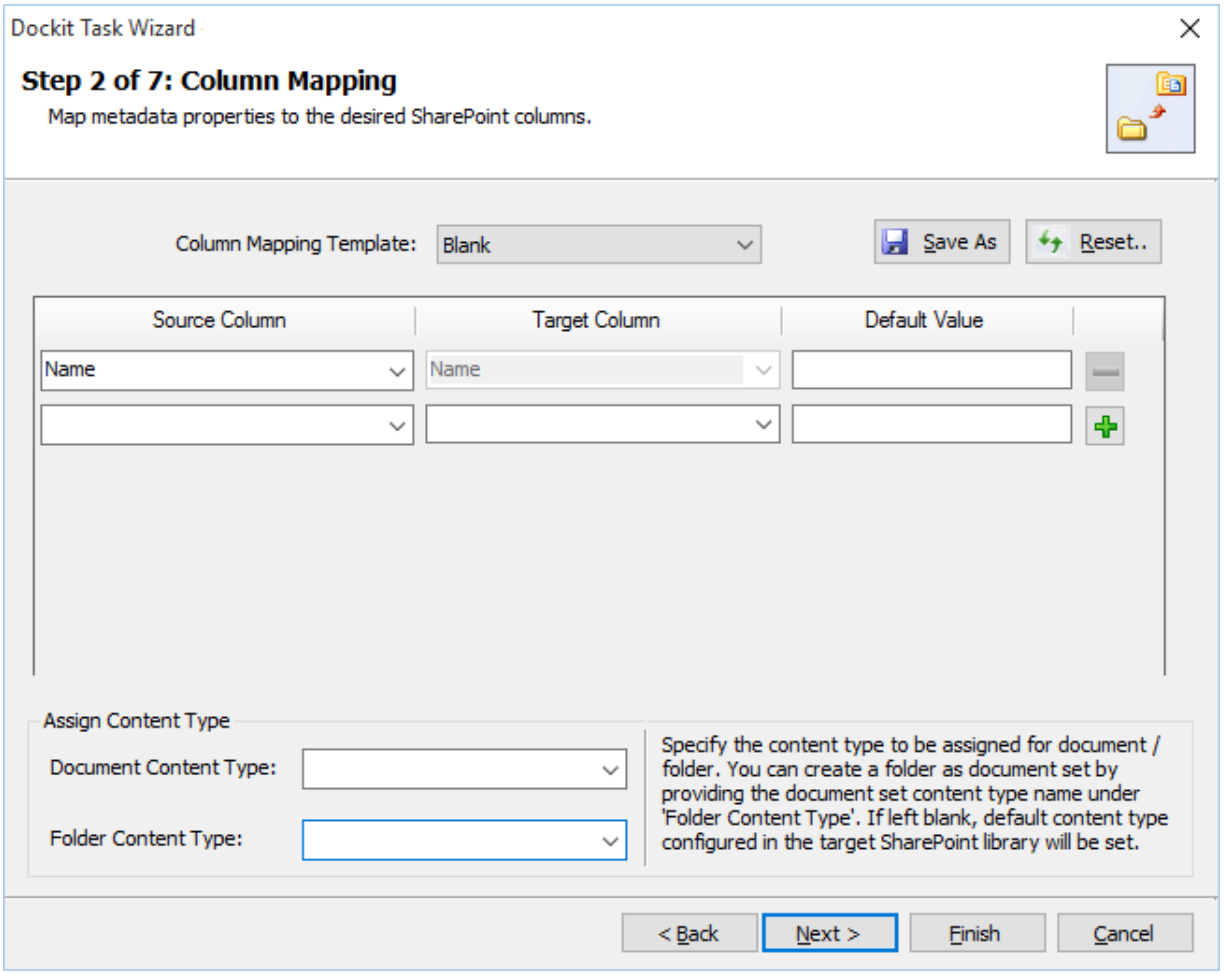


6. Click **Next** to proceed.

Column Mapping

To perform column mapping

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

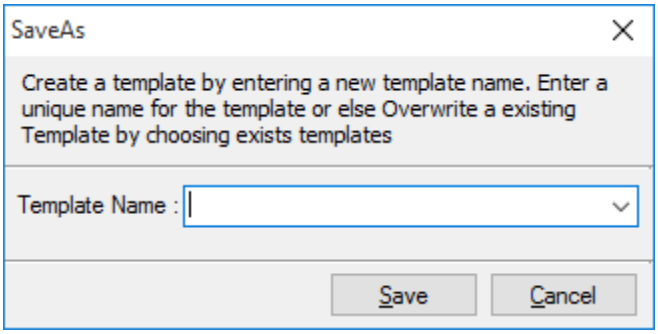


2. **Column Mapping Template:** Select any one of the column mapping templates to use from the list of available template(s). A couple of default templates ('**Blank**' and '**Core File Properties**') are readily available to ease the mapping configuration.

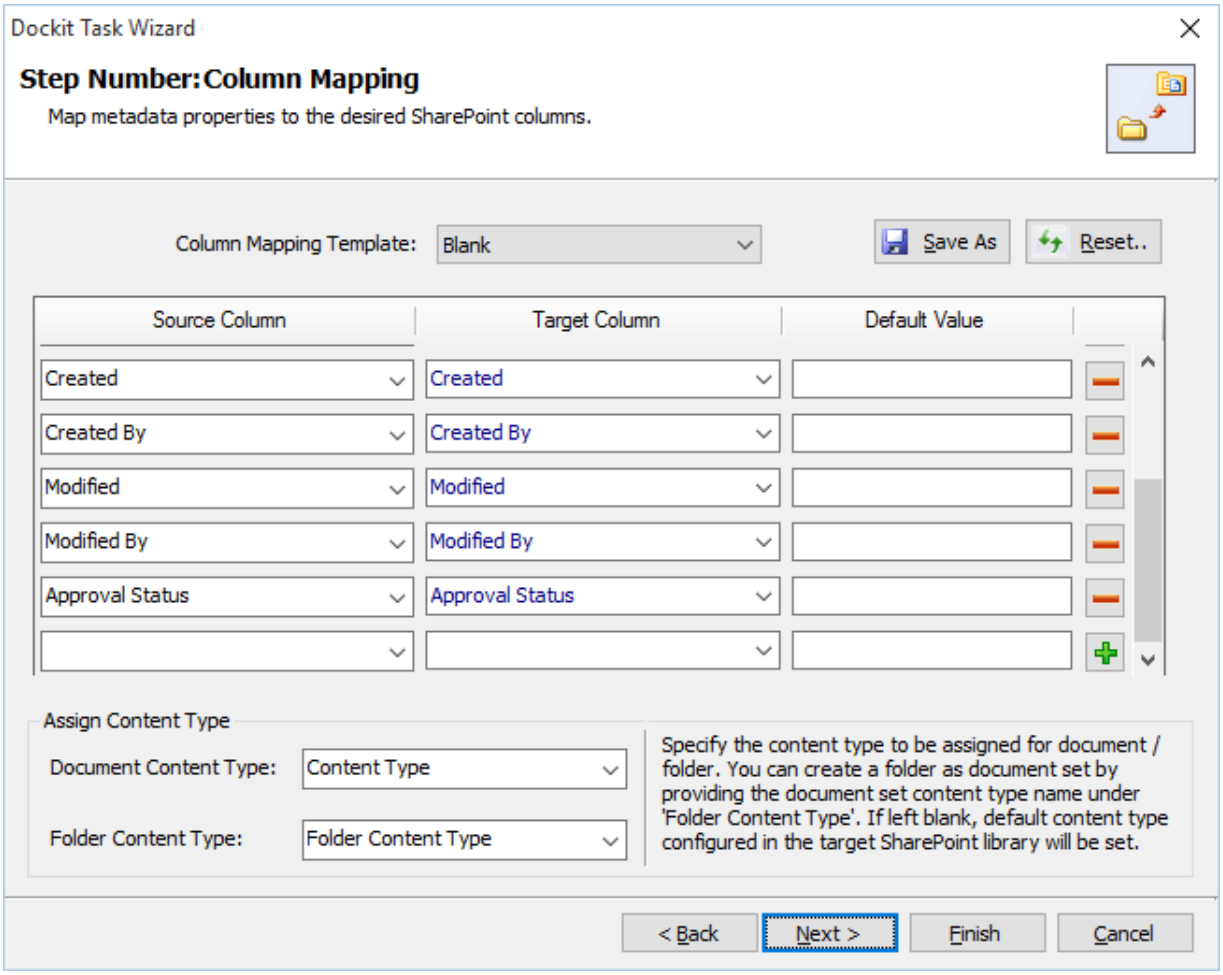
3. **Source Column:** You can specify source column values from **'File properties','Metadata File','Function Builder'** and also from **'Other File Properties'** by entering the property name.
4. **Target Column:** You can specify the target SharePoint Column which needs to map and assign values.

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.



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

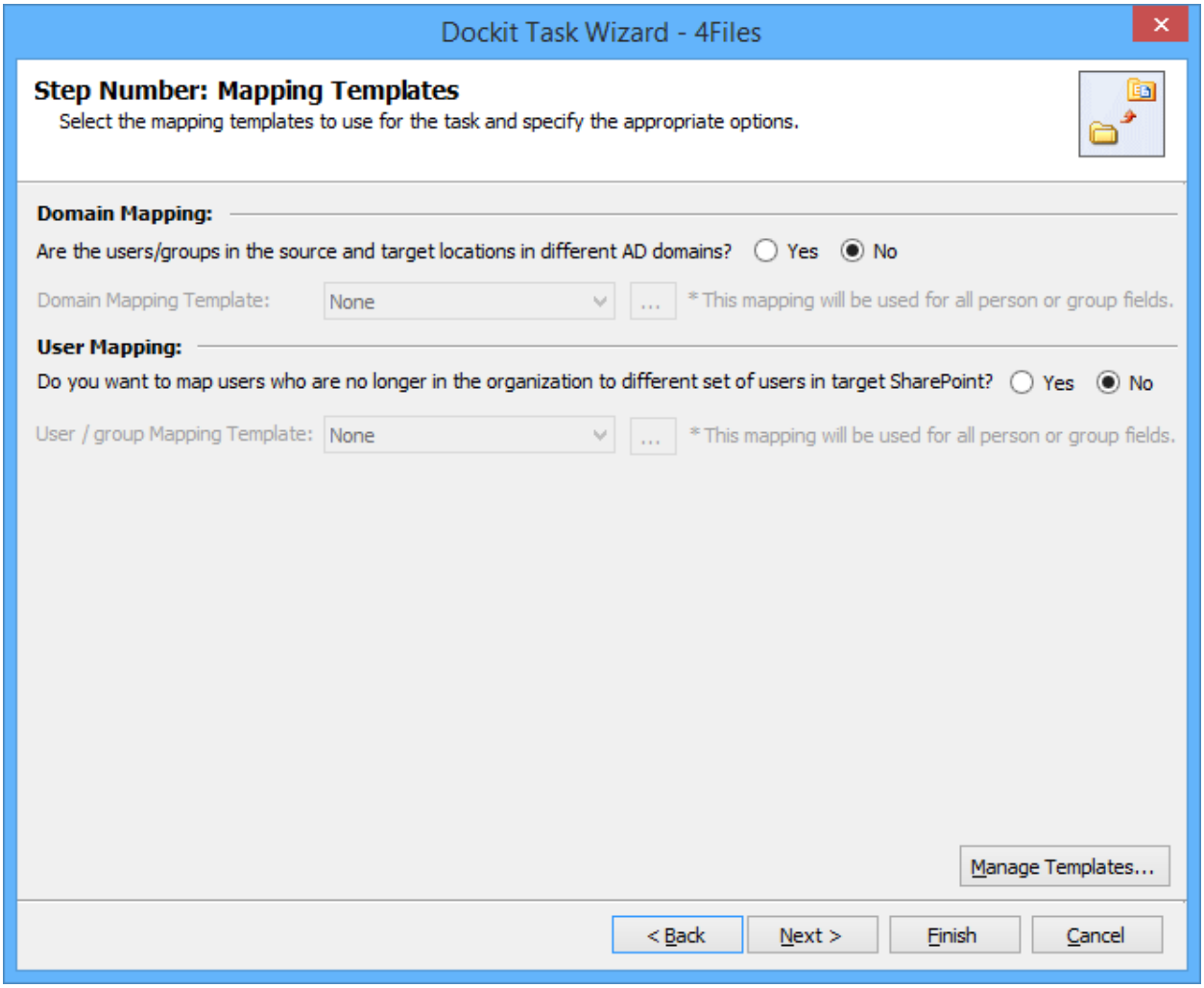


8. Click **Next** to proceed

Mapping Templates

To specify the mapping templates to use for the task:

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



2. **Domain Mapping Template:**

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

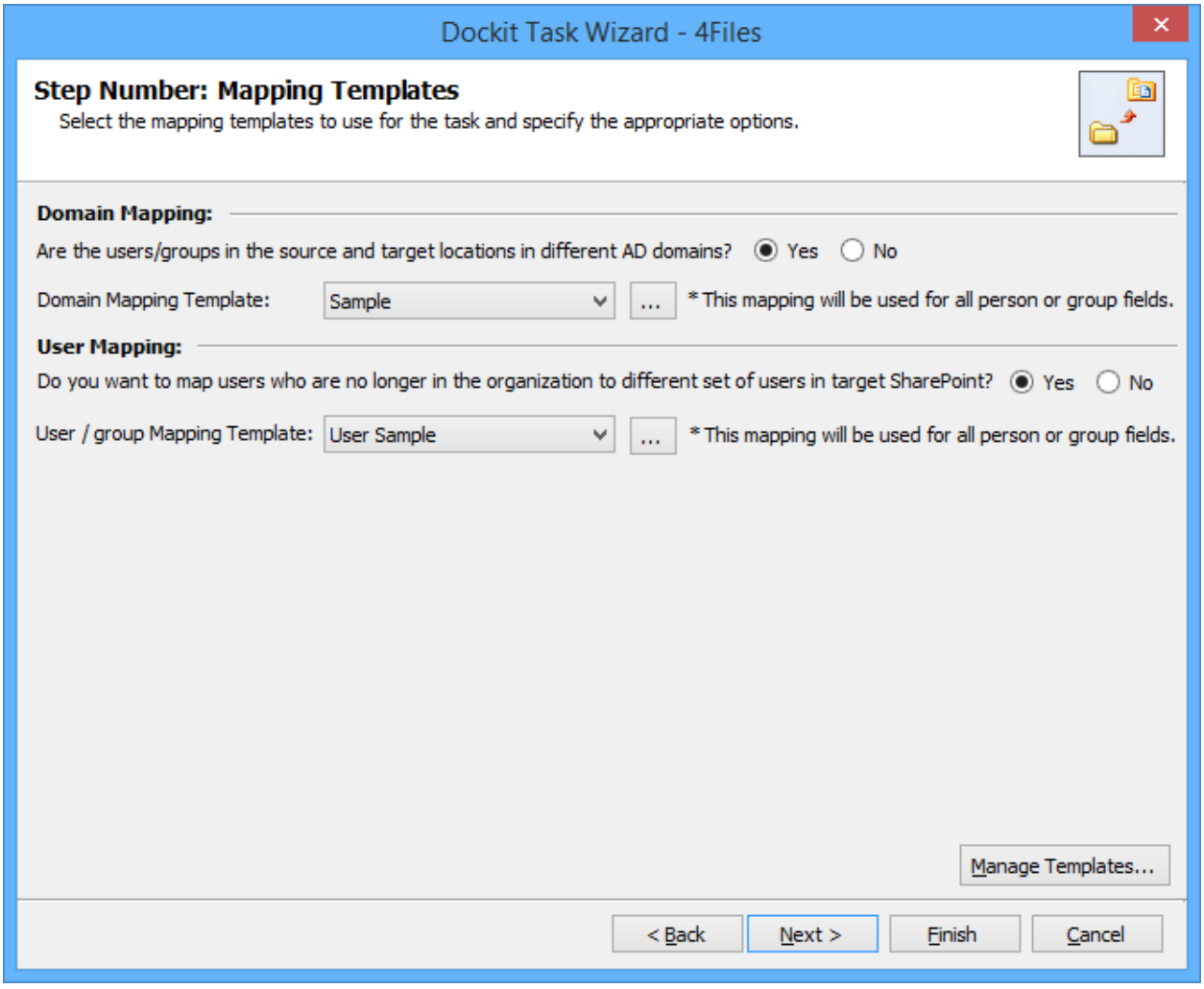
   None represents the default domain mapping template that helps to assign user / group as it is. This mapping is applicable for all the person or group columns to replace unavailable domain name in the user value with the valid domain name and make the user value valid.

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.



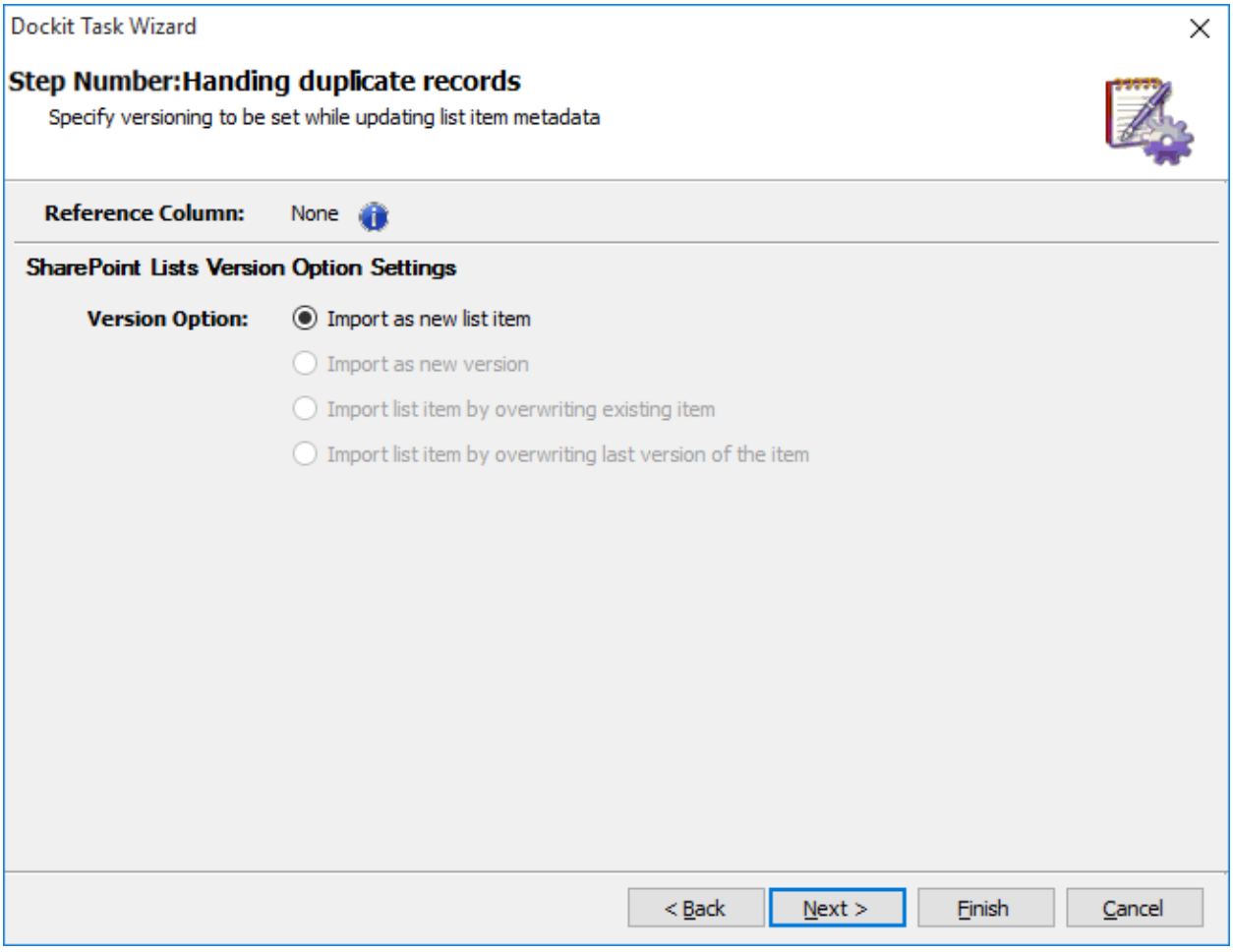
Click **Next** to proceed.

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:



2. The **Reference Column** indicates the metadata column that you have chosen in 'Batch Import Settings' 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.

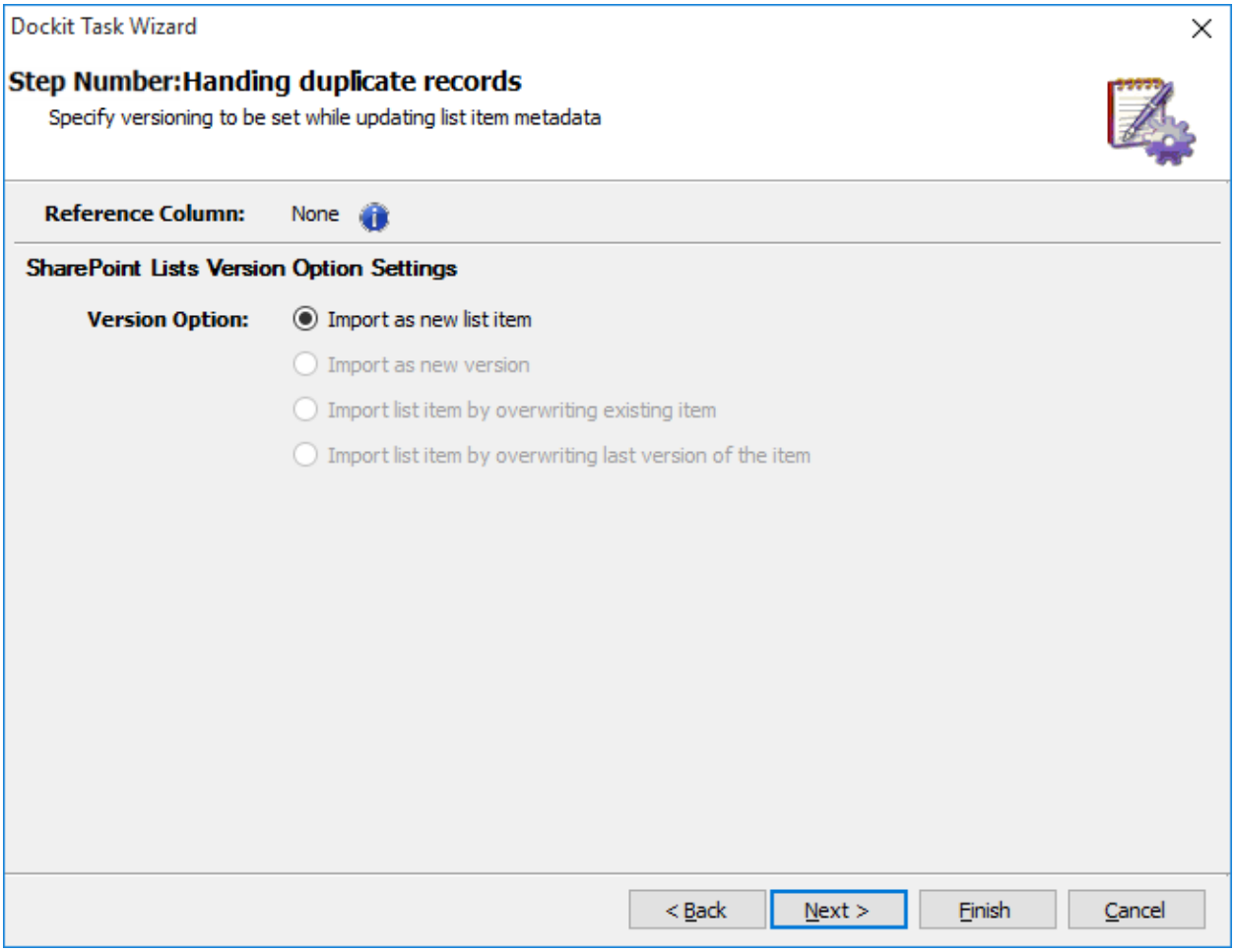
b. **Import as new version** - To update the existing list items in SharePoint. This option requires a Reference Column to be set.
c. **Import list item by overwriting existing item** - To delete the existing list items in SharePoint and create it as new. This option requires a Reference Column to be 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.



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

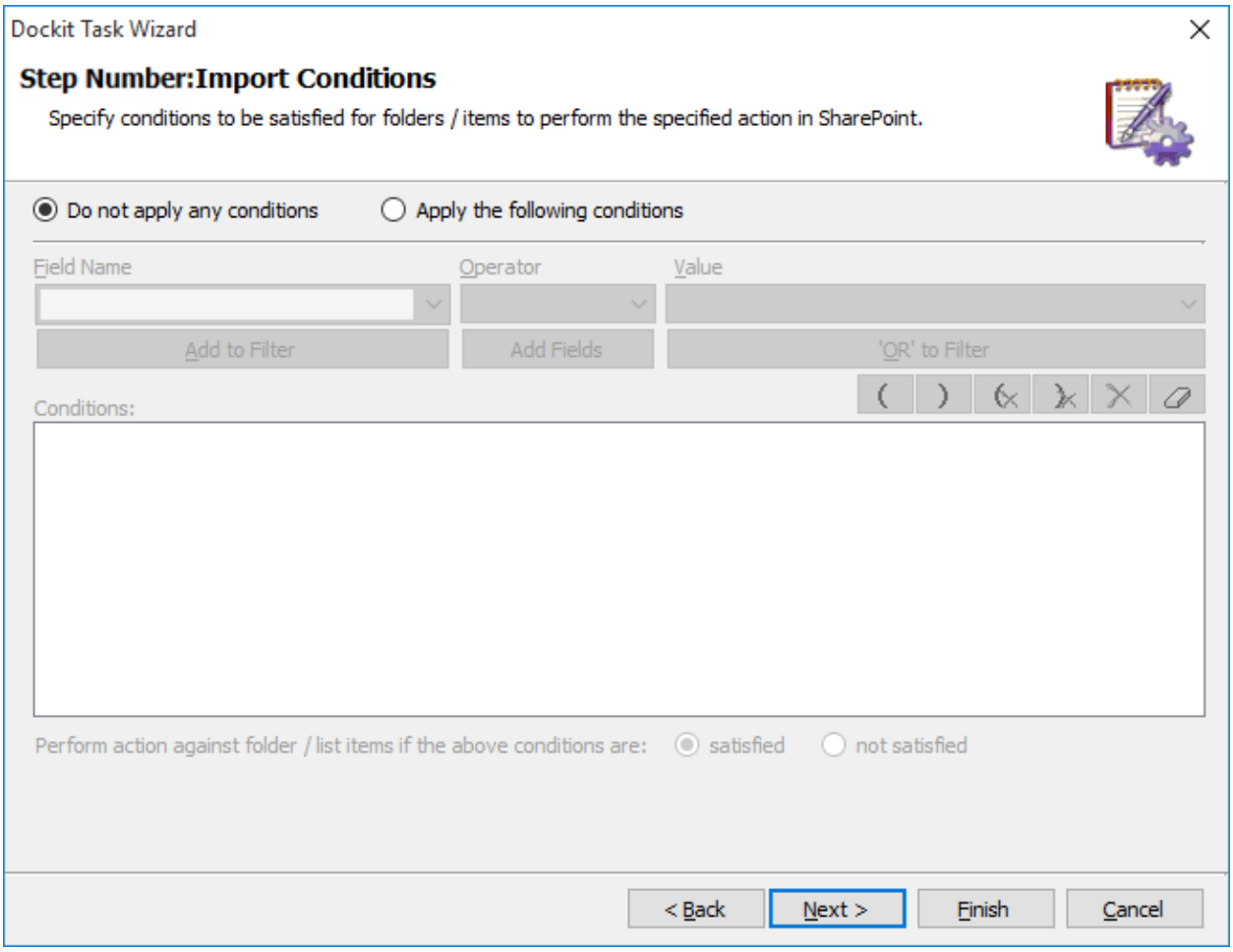
   In SharePoint 2010 / SharePoint 2013 / SharePoint 2016 lists that have Content Approval disabled, SharePoint will create a new version when the Created Date, Modified Date, Created By and Modified By fields are updated in an existing SharePoint list item. Therefore, the list item version numbers may 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.

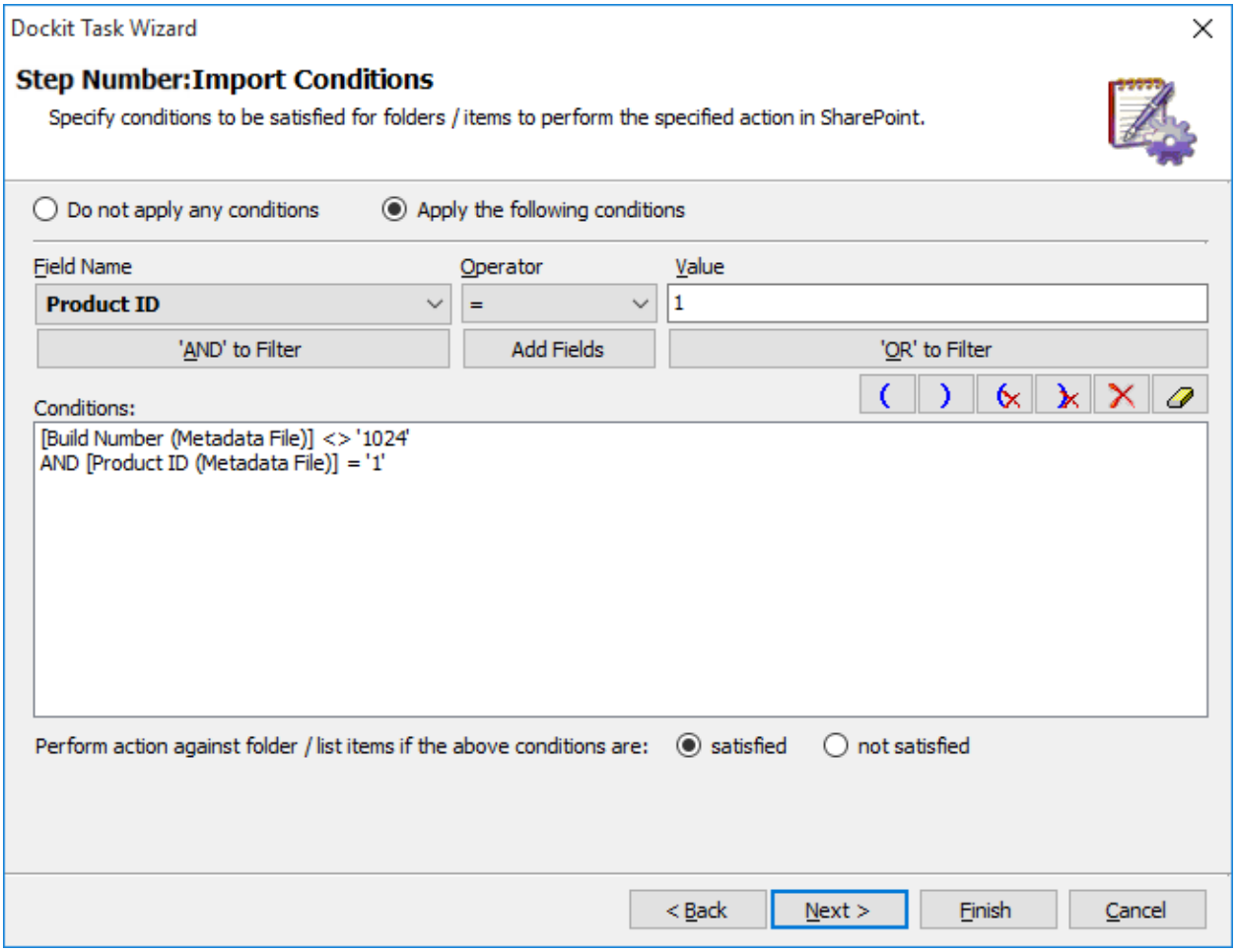
1. The **Import Conditions** step appears as shown below:



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

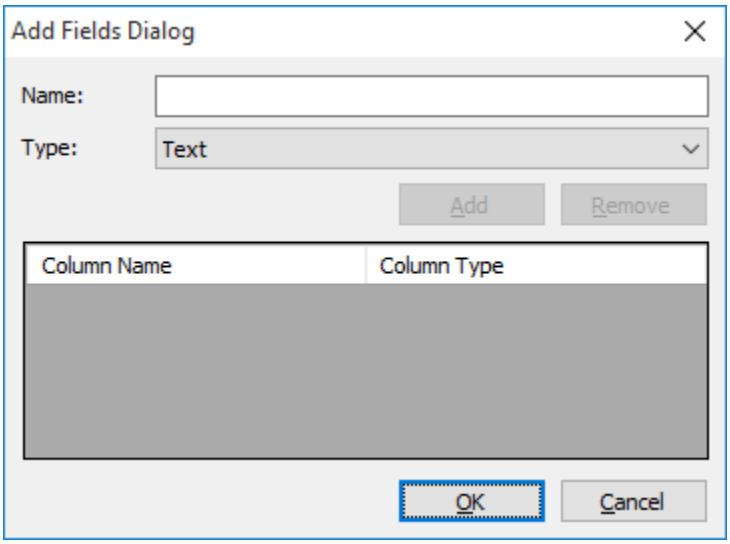
    a. **Do not apply any conditions** - No conditions will be used to filter folders / items.
    b. **Apply the following conditions** - The conditions specified will be used to filter folders / list items taken for update or delete in SharePoint

3. The wizard step appears as shown below:



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:



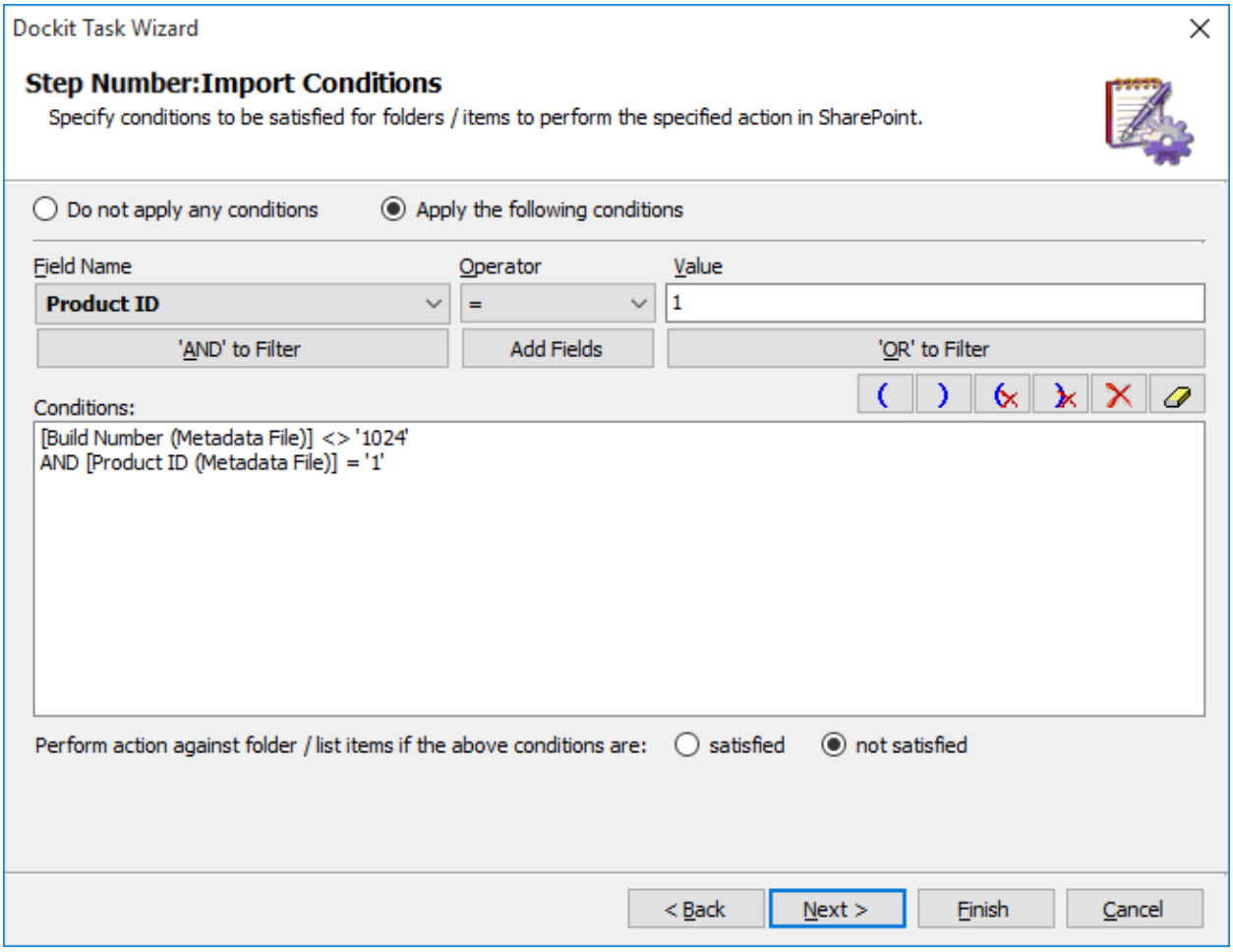
Specify the column name in **Name** textbox and select the data type of the column in SharePoint from **Type** drop-down field.

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.

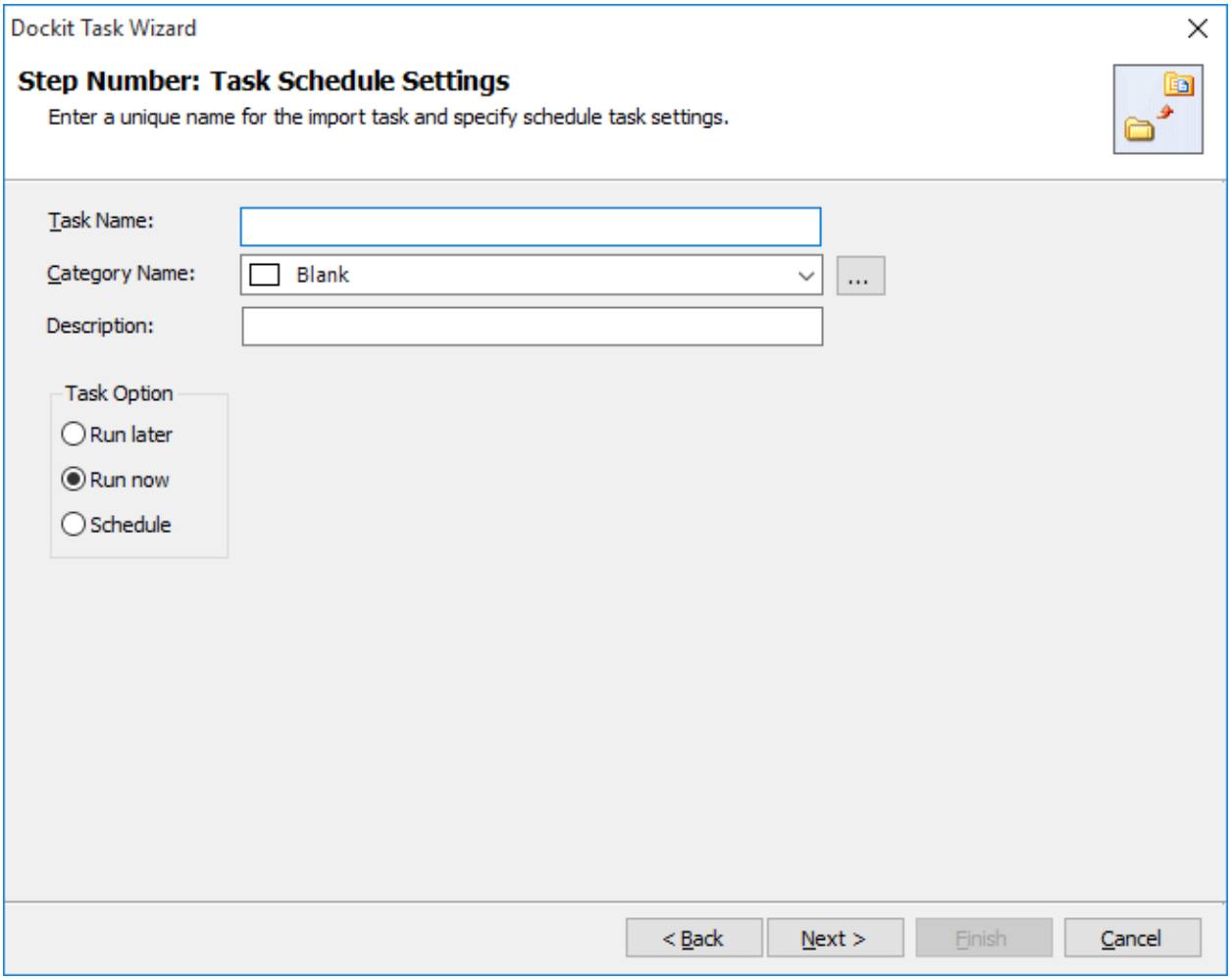


6. Click **Next** to proceed.

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:



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

9. 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.

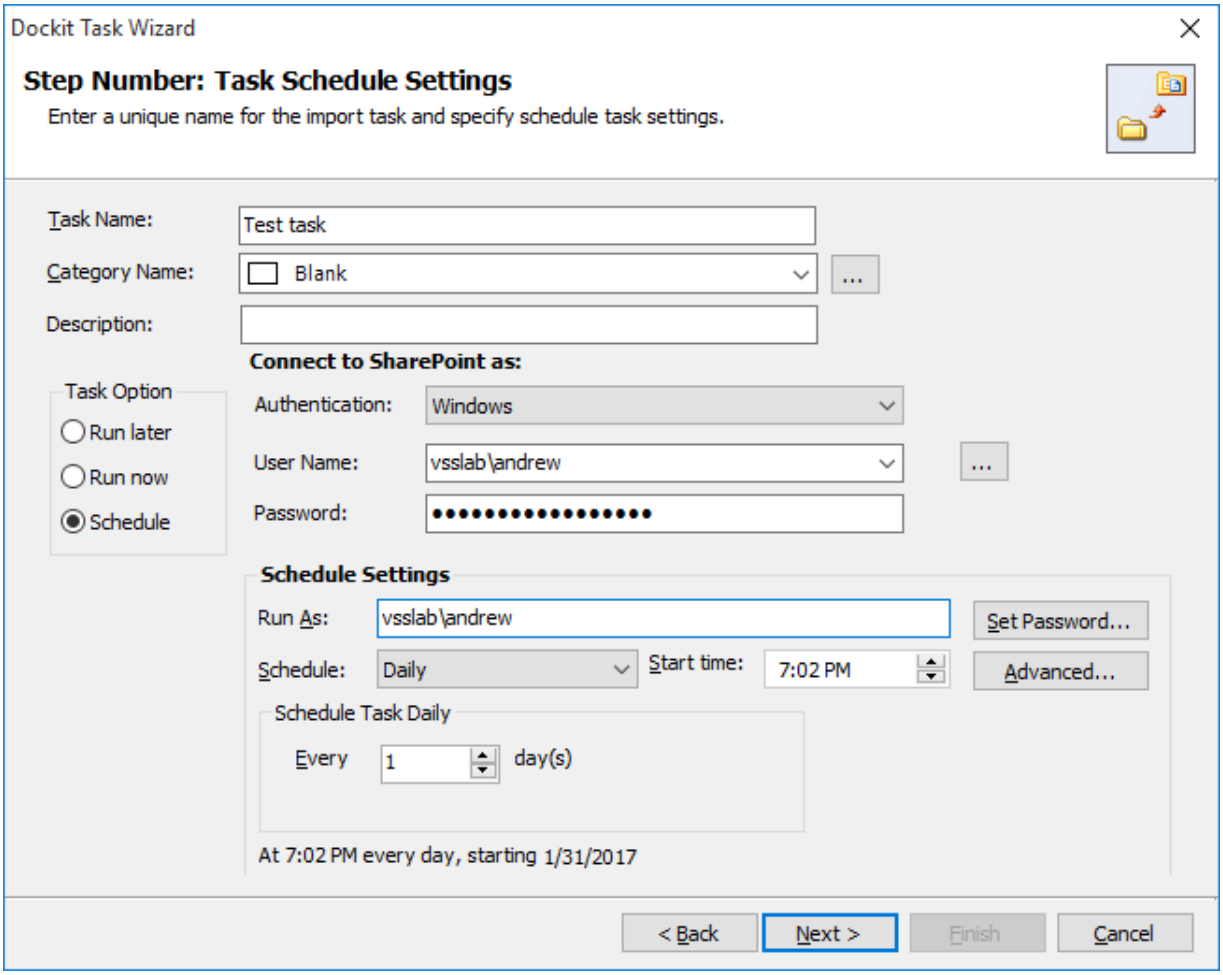
10. Select one of the following options to connect to the target SharePoint site:

    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.

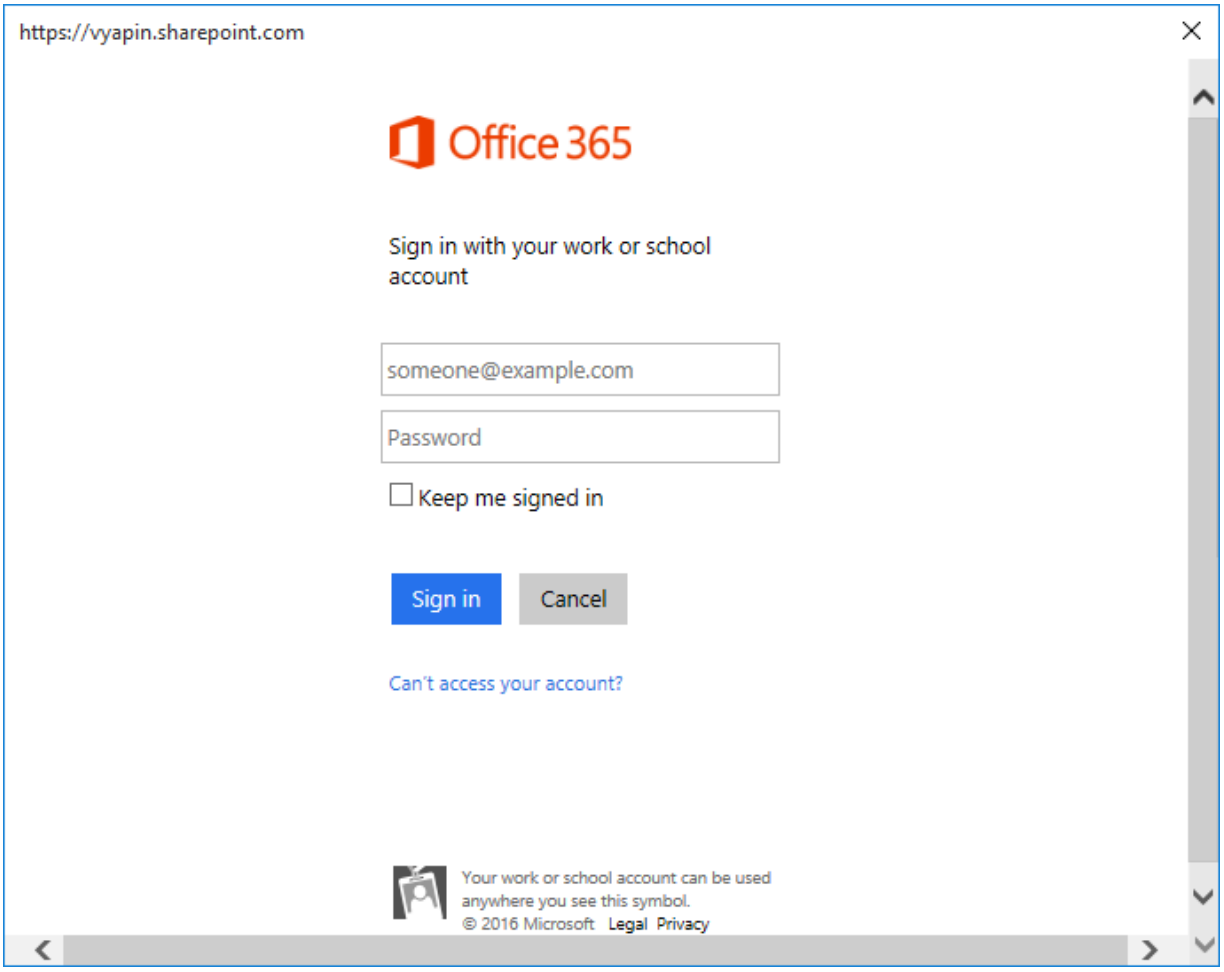
c. **Use 'Run As' user context given below** – This option will be available if you choose **Schedule** task option. Dockit will use the user account specified in the scheduled **Run As** user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint 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.



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).



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

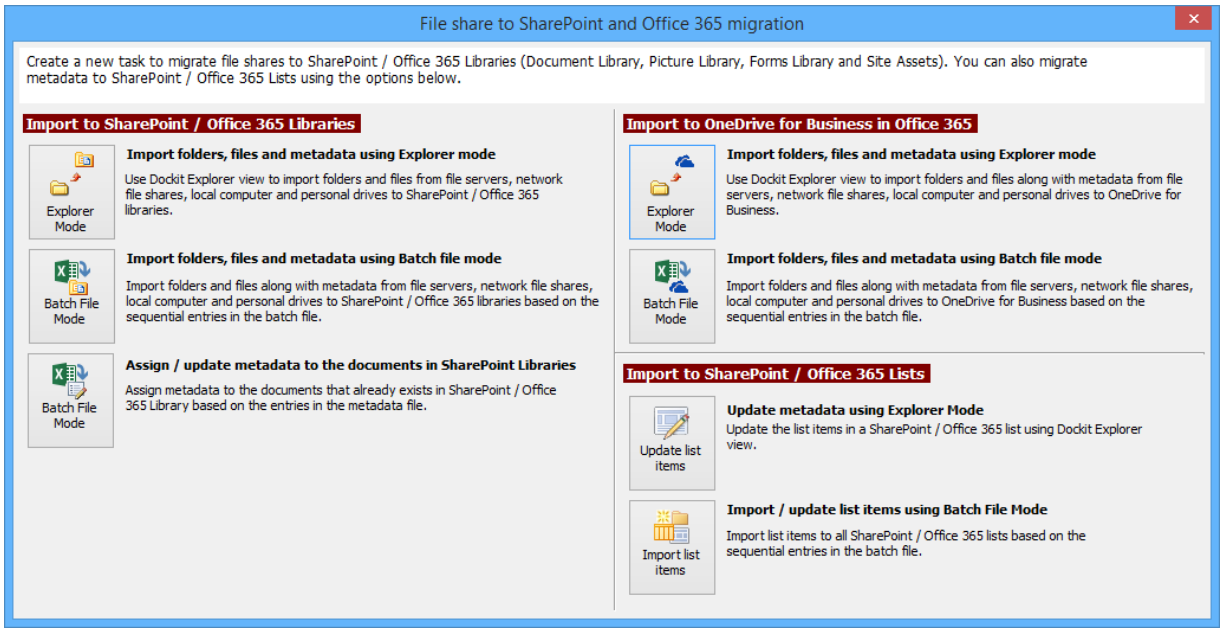
Import folders, files and metadata to OneDrive for Business (Batch File Mode)

- 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 Column Mapping
6. Specify Mapping Templates
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. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Windows 7"

Lookup (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Stock Details; Accounts; Product Details"
People or Group (Single Value)	User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. Do not use multiple values unless the equivalent column defined in SharePoint can accept multiple values. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\Administrator" "BUILTIN\Administrator" "Backup Owners" "someone@example.com" "John Doe"
People or Group (Multiple value)	User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\User1; BUILTIN\Administrators; Guest Members;Temps"
Hyperlink or Picture	The http URL of any resource or picture can be given to this field.	"http://sharepoint/Shared Documents/My Sample File.doc" "http://sharepoint/Pictures/chart.bmp"
Target Audiences	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 SharePoint Server 2010 and above).	SPUsers; Contributors; Designers
Publishing Schedule Start Date (Applicable only for Collaboration Portal / Publishing Portal Site)	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2010 10:50 AM" "1/25/2009"
Publishing Schedule End Date (Applicable only for Collaboration Portal / Publishing Portal Site)	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2009 10:50 AM" "1/25/2010"
Publishing Image (Applicable only for Collaboration Portal / Publishing Portal Site)	The http URL of any picture can be given to this field. Relative URL also can be given to this field.	http://sharepoint/Pictures/chart.bmp "Pictures/chart.bmp"
Publishing Hyperlink (Applicable only for Collaboration Portal /	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)		" NewsArticleImage.jpg"
Publishing HTML (Applicable only for Collaboration Portal / Publishing Portal Site)	HTML content can be given in this field. You can use HTML tags in order to create rich content in the field.	It is sample text
Business Data (BDC) / External Data (BCS) (Applicable only for SharePoint Enterprise Edition)	The BDC / BCS column value along with the filter name can be specified in this field. Dockit will search for the specified column value in the LOB entity using the given filter and assign the corresponding ID (when the BDC / BCS column value match is found) of the LOB record to the BDC / BCS column in SharePoint. Specify this value in filter name: value format. If the filter name contains colon (:) in its name, specify this value in FILTER:filter name, QUERY:value, where FILTER and QUERY are reserved words. Dockit also automatically fills-up the column values associated with the BDC / BCS column during import.	"Company Name:Vyapin" "ID:1000" "Product Name:Dockit Migrator 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:1000AX"
Managed Metadata (Single Value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the	"Continent|North America|Country|United States|States|Alaska" "Alaska"

	specified term value and assign the first matching term value for the corresponding managed metadata column.	
Managed Metadata (Multiple Values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	"Continent|North America|Country|United States|States|Washington;Continent |North America|Country|United States| States|California;Continent |North America|Country|United States| States|Alaska" "Washington;California; Alaska"
Geolocation	Location co-ordinates or name can be given to this field. The co-ordinates value must have latitude and longitude values separated by ':'. The latitude value must be between -90 and +90 and longitude value must be between -180 and +180.	"30:-60" "New York, United States"
Task Outcome	Text or Numeric value can be given to this field. Do not use multiple values for this column type.	"Complete" "4"
Related Items	The http absolute URL of any list item (including file) within the site collection can be given to this field. The values can be of single or multiple. Multiple values should be separated by ';'.	"http://sharepoint/Documents/Sample 1.doc; http://sharepoint/Documents/Sample 2.xlsx" "http://sharepoint/Lists/Custom List/1_.000"

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

- Choice*
- Lookup
- Person or Group

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

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

Sample format of a CSV / TEXT metadata file:

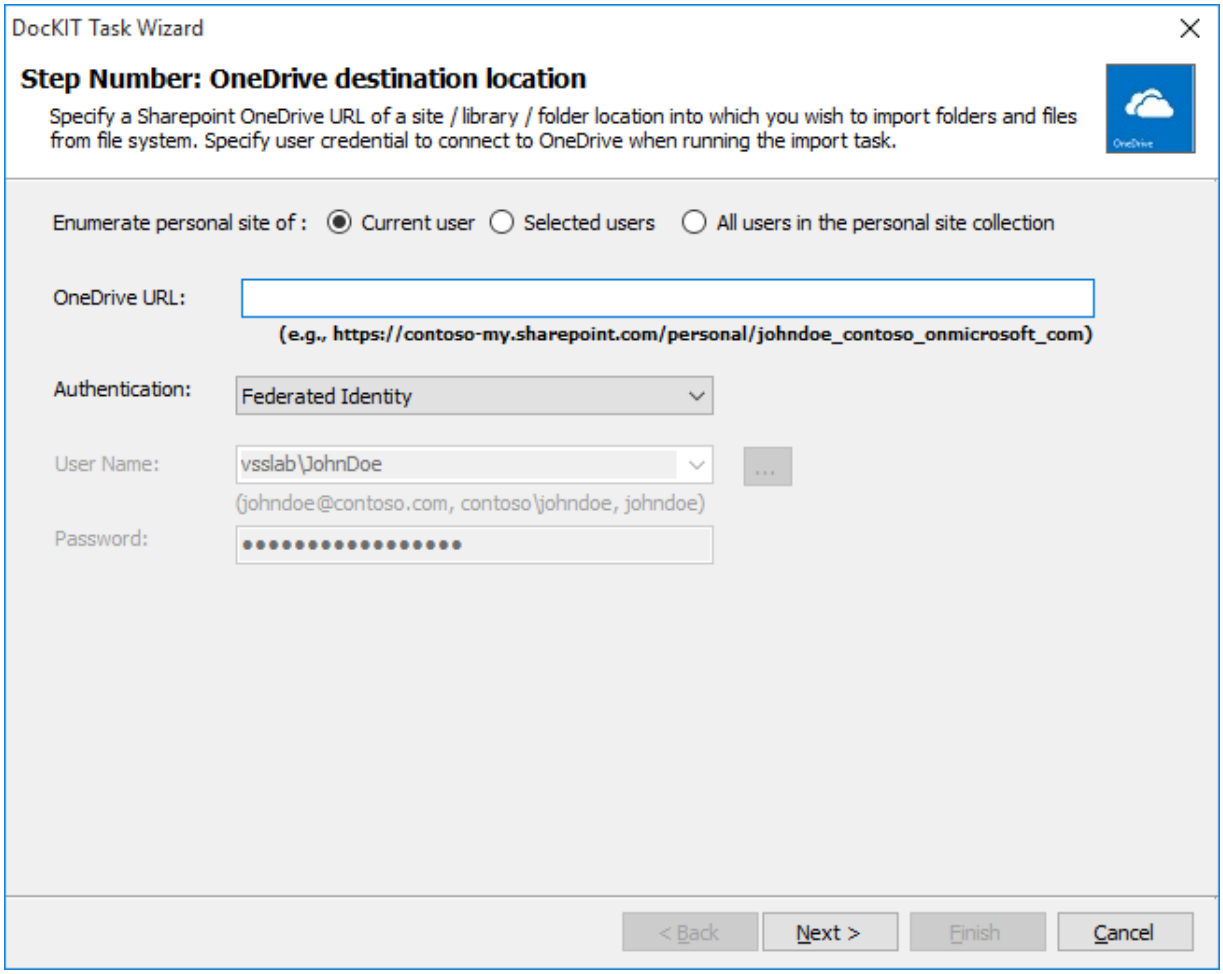
Note: Refer Point #2 for the separator to be used in the metadata file

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

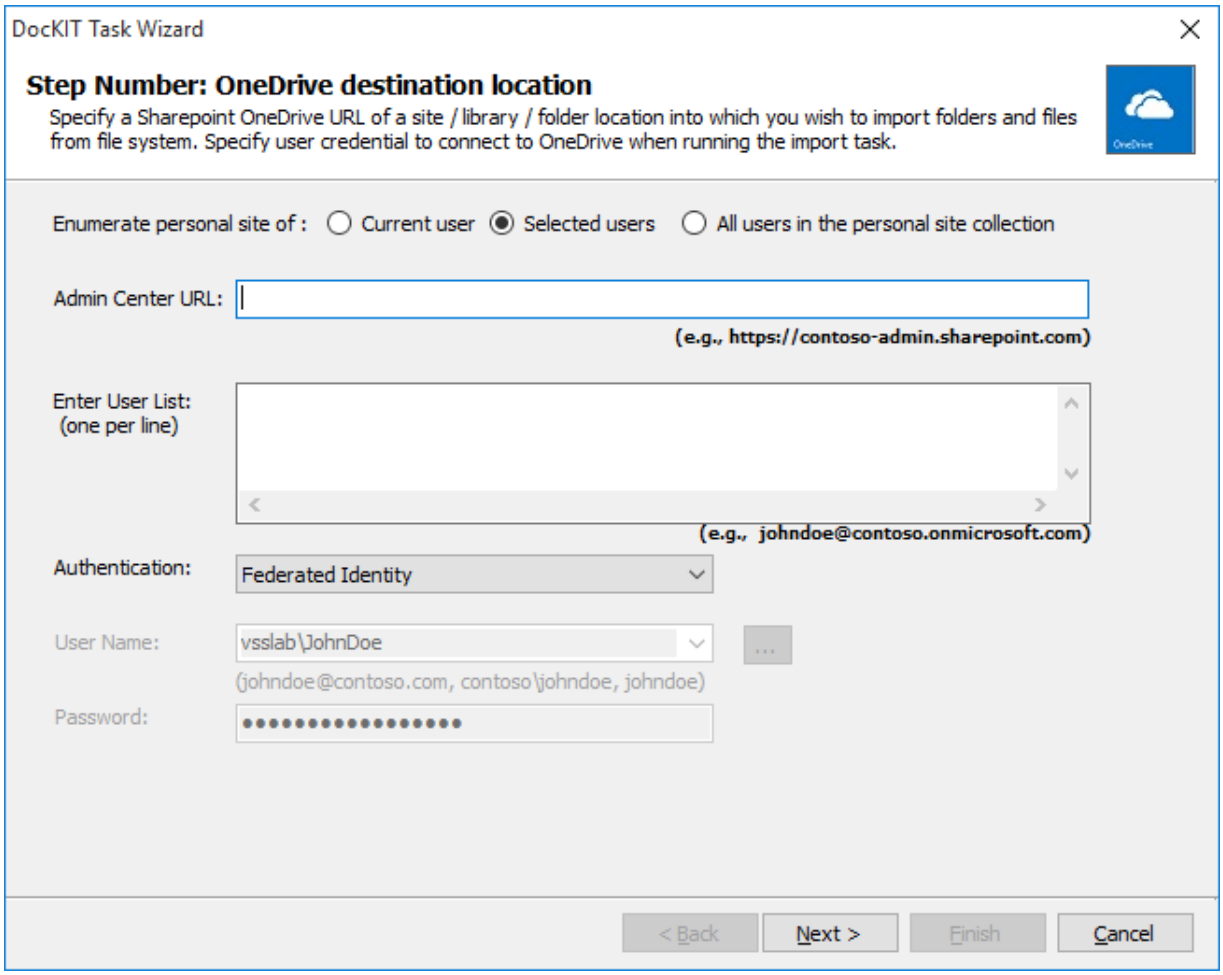
OneDrive destination location

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

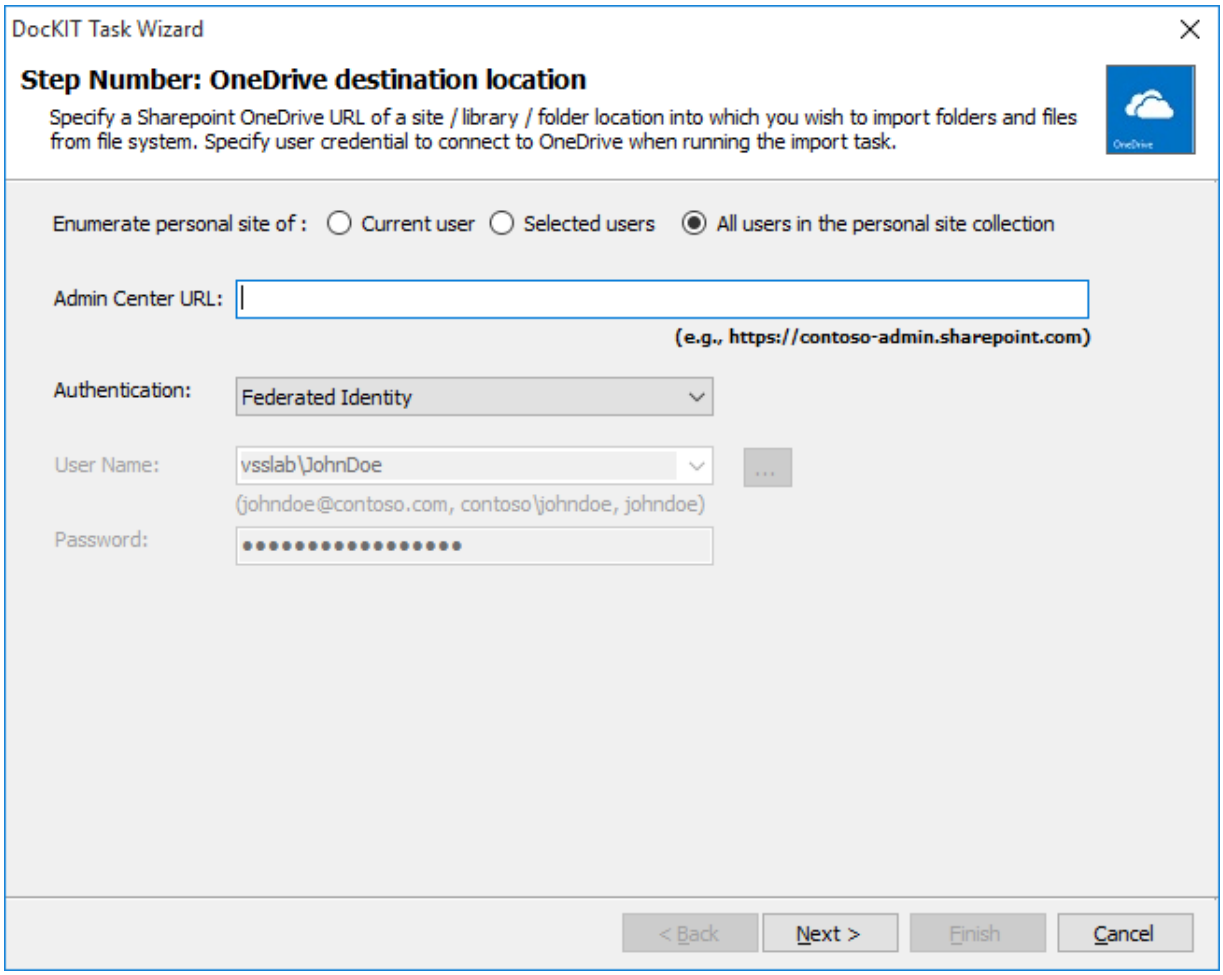
1. The **OneDrive destination location** step appears as shown below:



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.



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.



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.

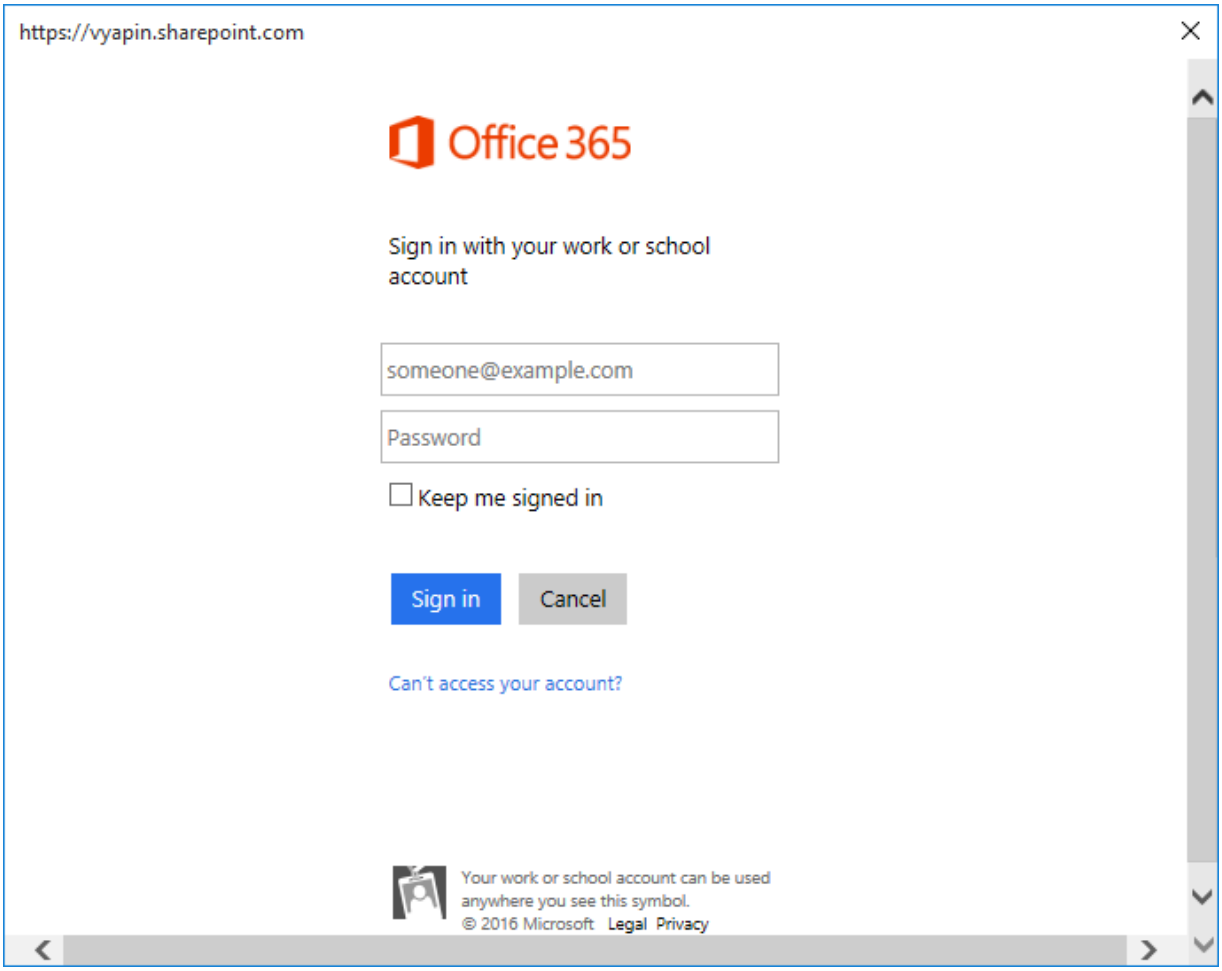
    b. To connect to SharePoint Online site configured with your Microsoft Windows ID, you can select below option and click **Next** to proceed.

    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:

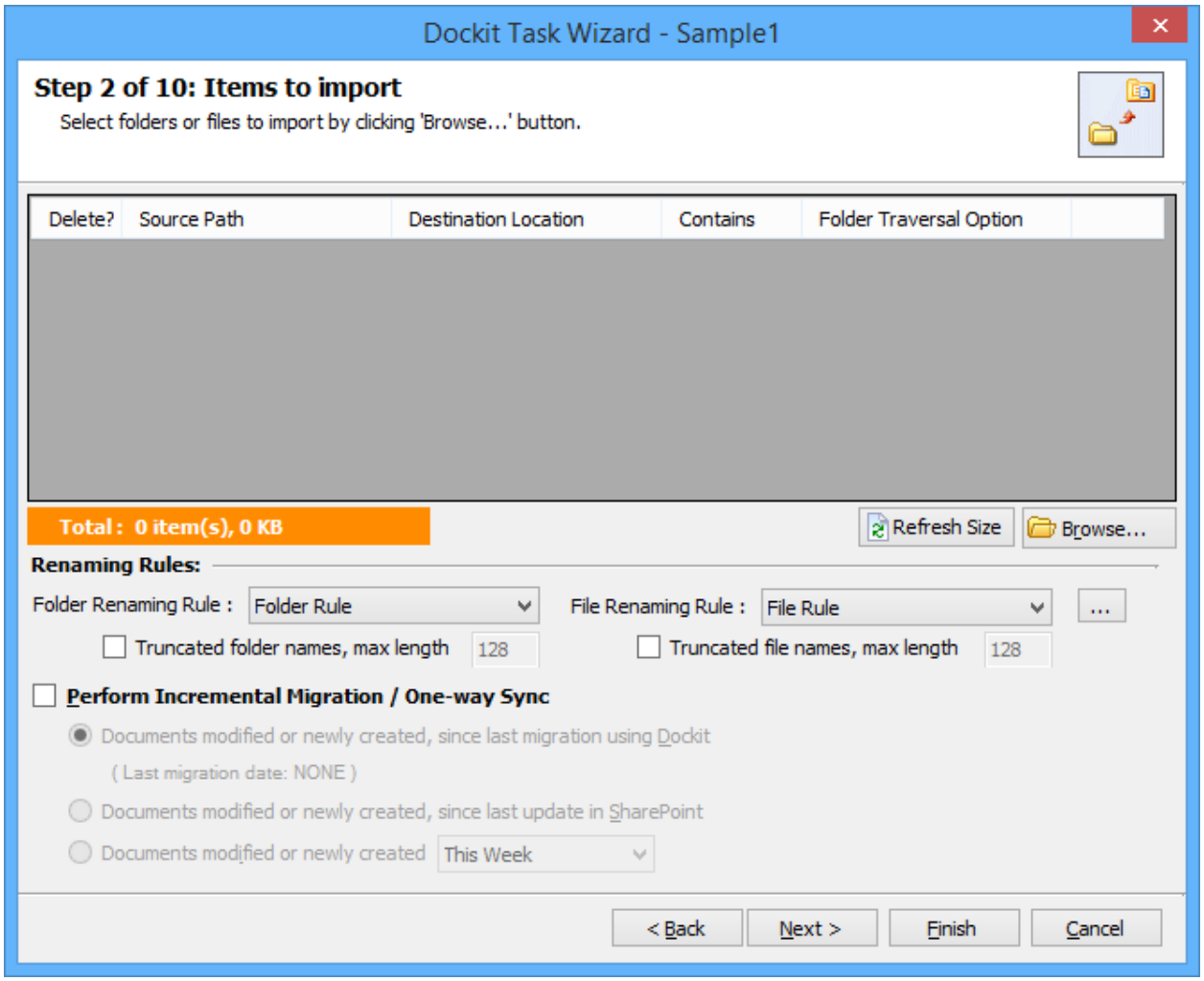


Provide **User ID** and **Password** in the respective textboxes and click **Sign in** button to proceed.

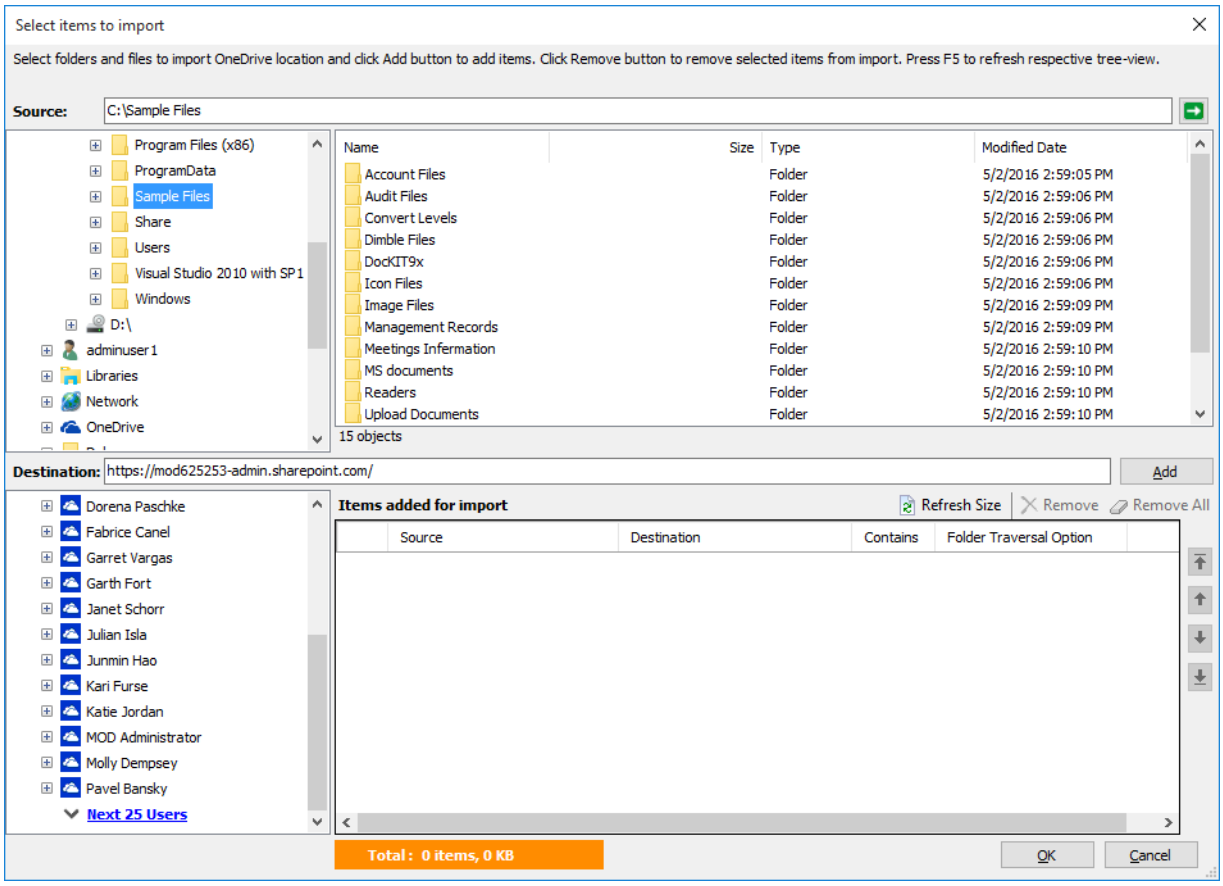
Items to import

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

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

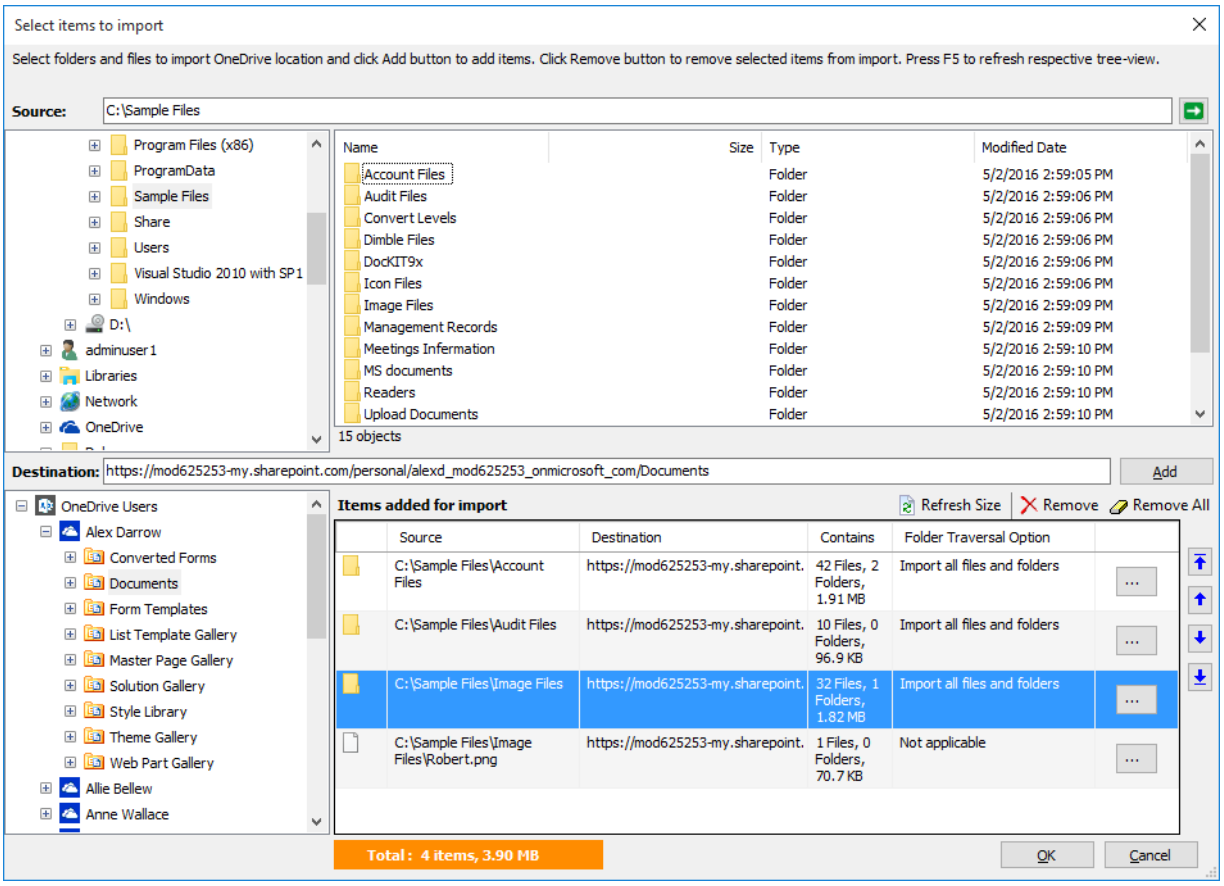


2. Click 'Browse...' button to add and remove the folders and files for import.
3. The **Select items to import** dialog appears as shown below:



4. **Select items to import** dialog contains a textbox (top), tree-view (top-left) and a list-view (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.



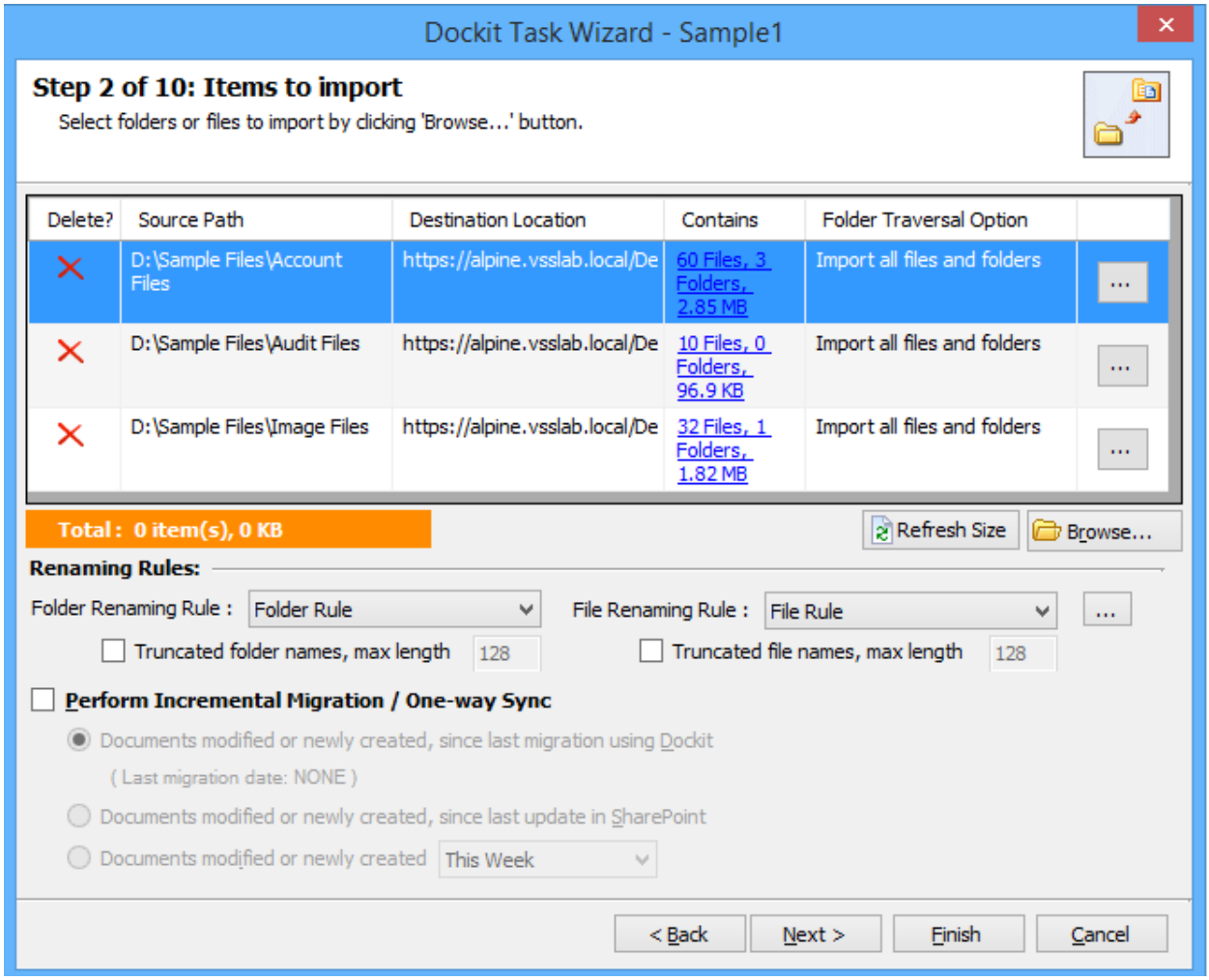
6. The selected folders and files added for import will be displayed in the **Items added for import** grid. Dockit processes the top-level folders and files added for import in the order in which it appears in the **Items added for import** grid. The import process order can be changed by the **navigation** 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 File Settings wizard step to handle file versions correctly.

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

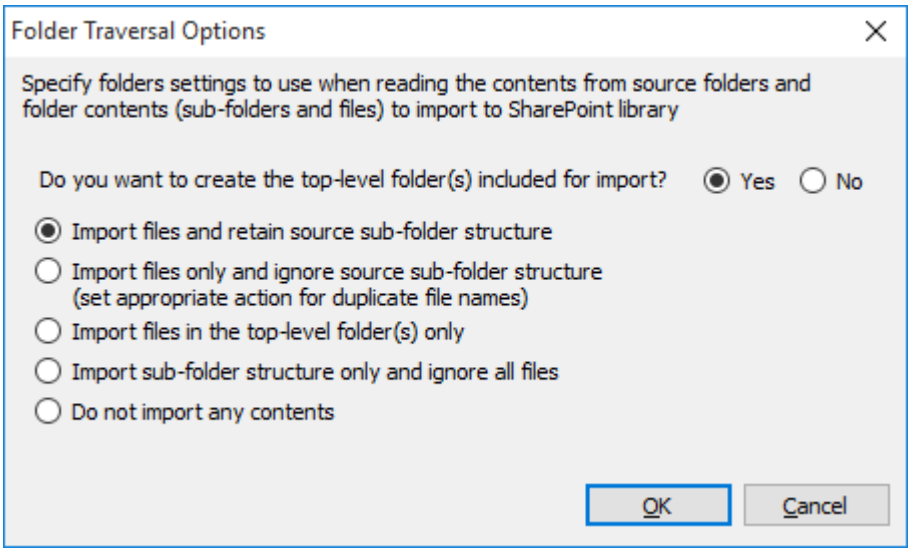
8. Click **OK** button to proceed or click **Cancel** to discard the changes.



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.



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 File Settings step to handle situations where same filenames may be available for more than one file in different source folder hierarchy (sub-folders).
c. **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.

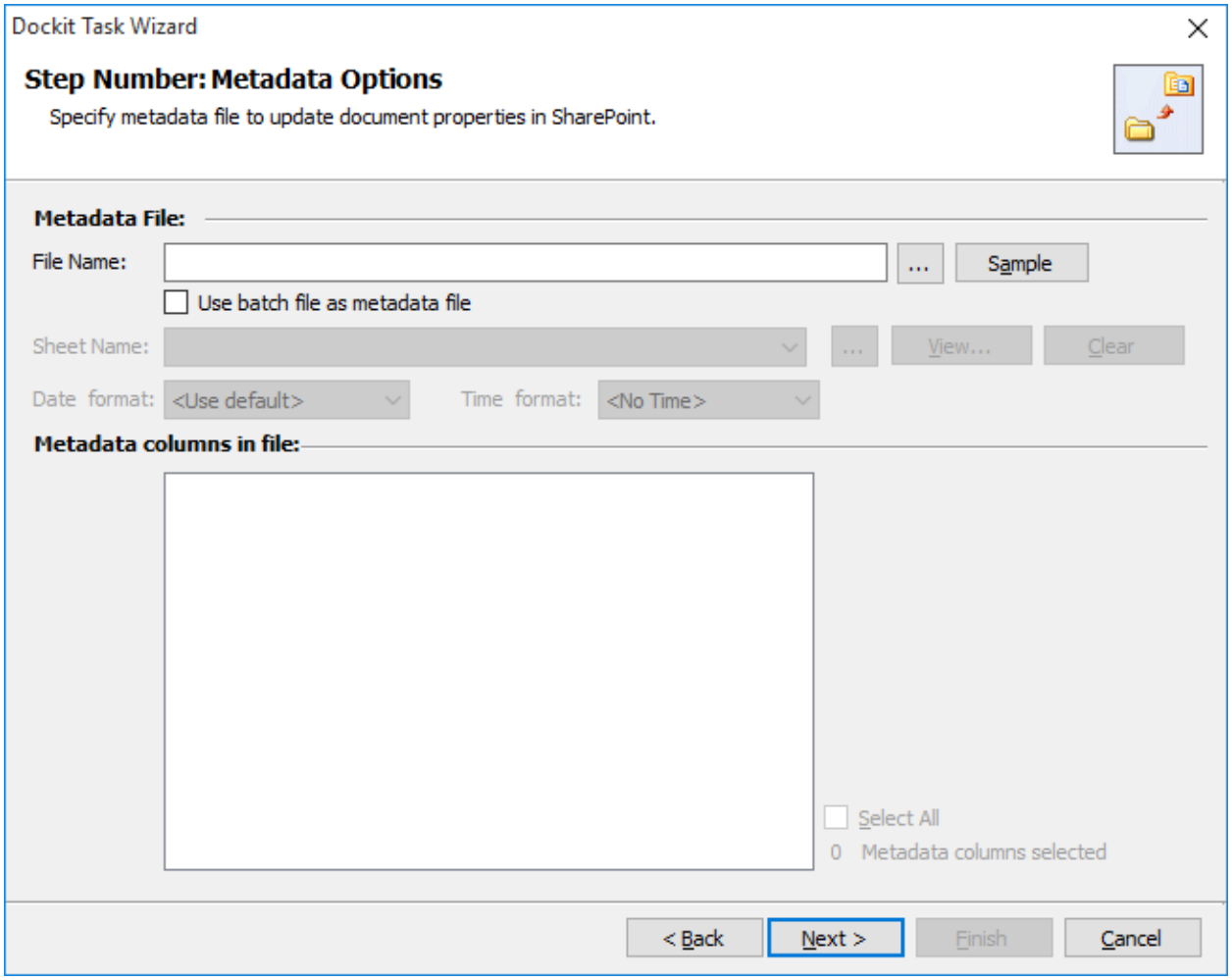
    a. **Documents Modified or newly created, since last migration using Dockit**
    b. **Documents Modified or newly created, since last migration in SharePoint**
    c. **Documents Modified or newly created** with specific time durations as follows '**This Week', 'Last 7 days', 'This Month', 'Last Week', '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:



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).

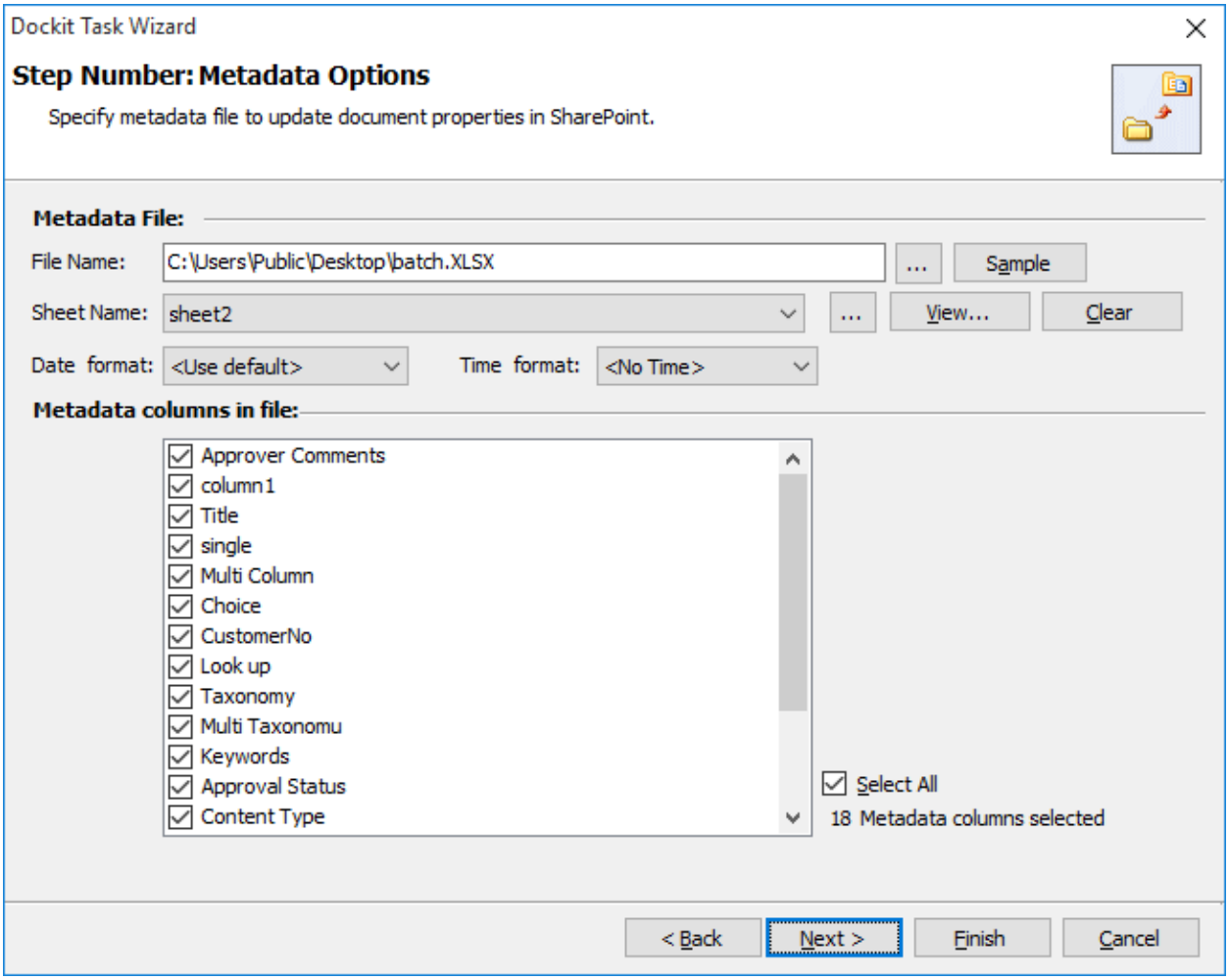
   For more information about how to create external metadata file, click here.

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.

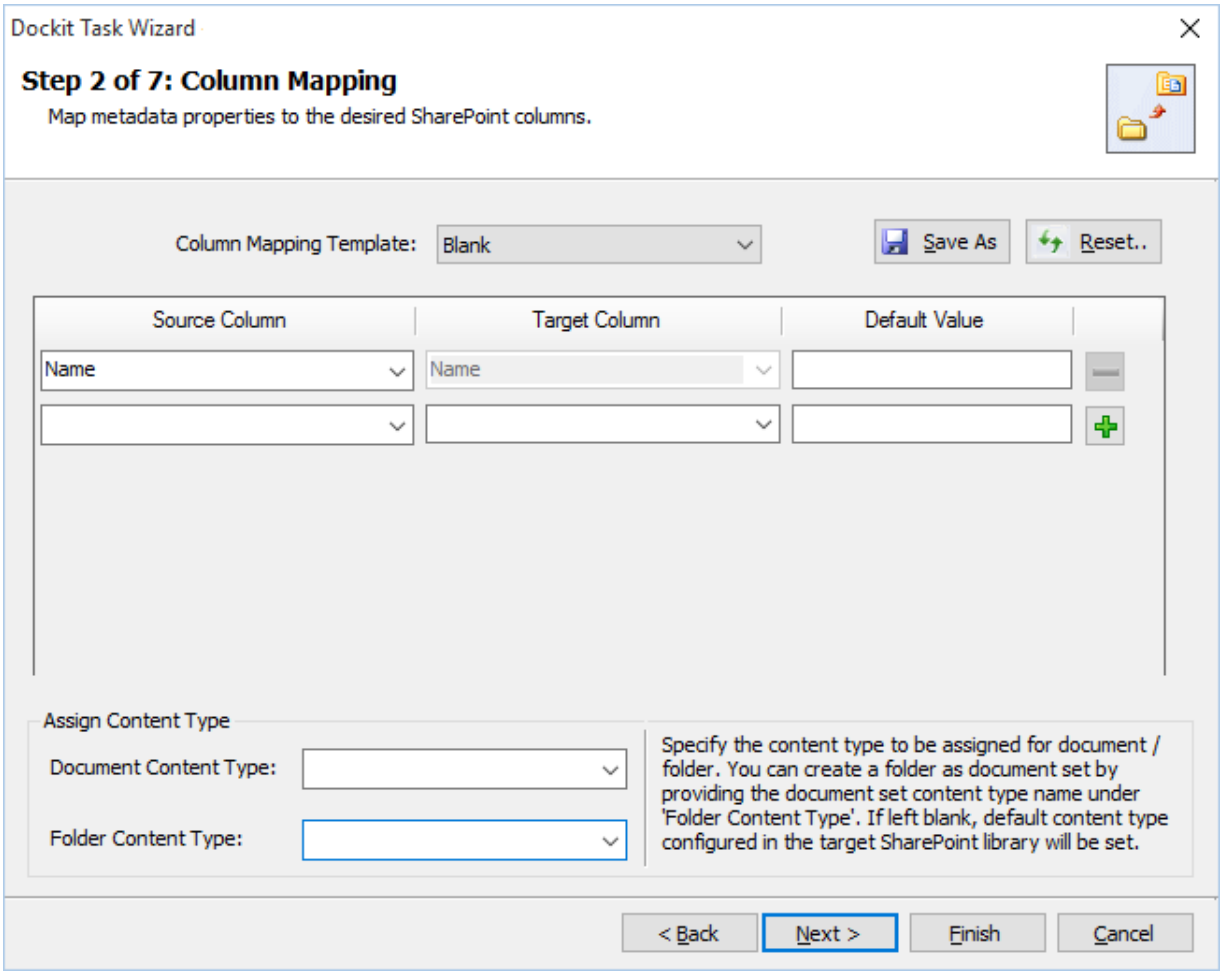


Click **Next** to proceed.

Column Mapping

To perform column mapping

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

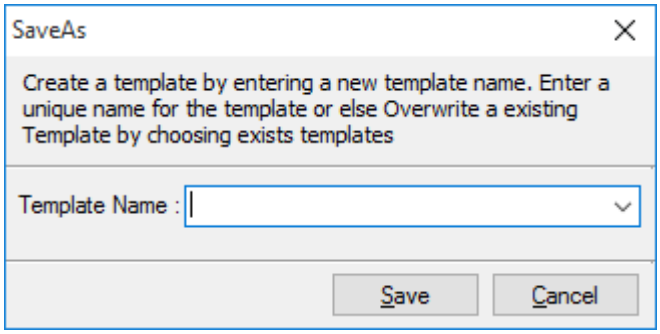


2. **Column Mapping Template:** Select any one of the column mapping templates to use from the list of available template(s). A couple of default templates ('**Blank**' and '**Core File Properties**') are readily available to ease the mapping configuration.

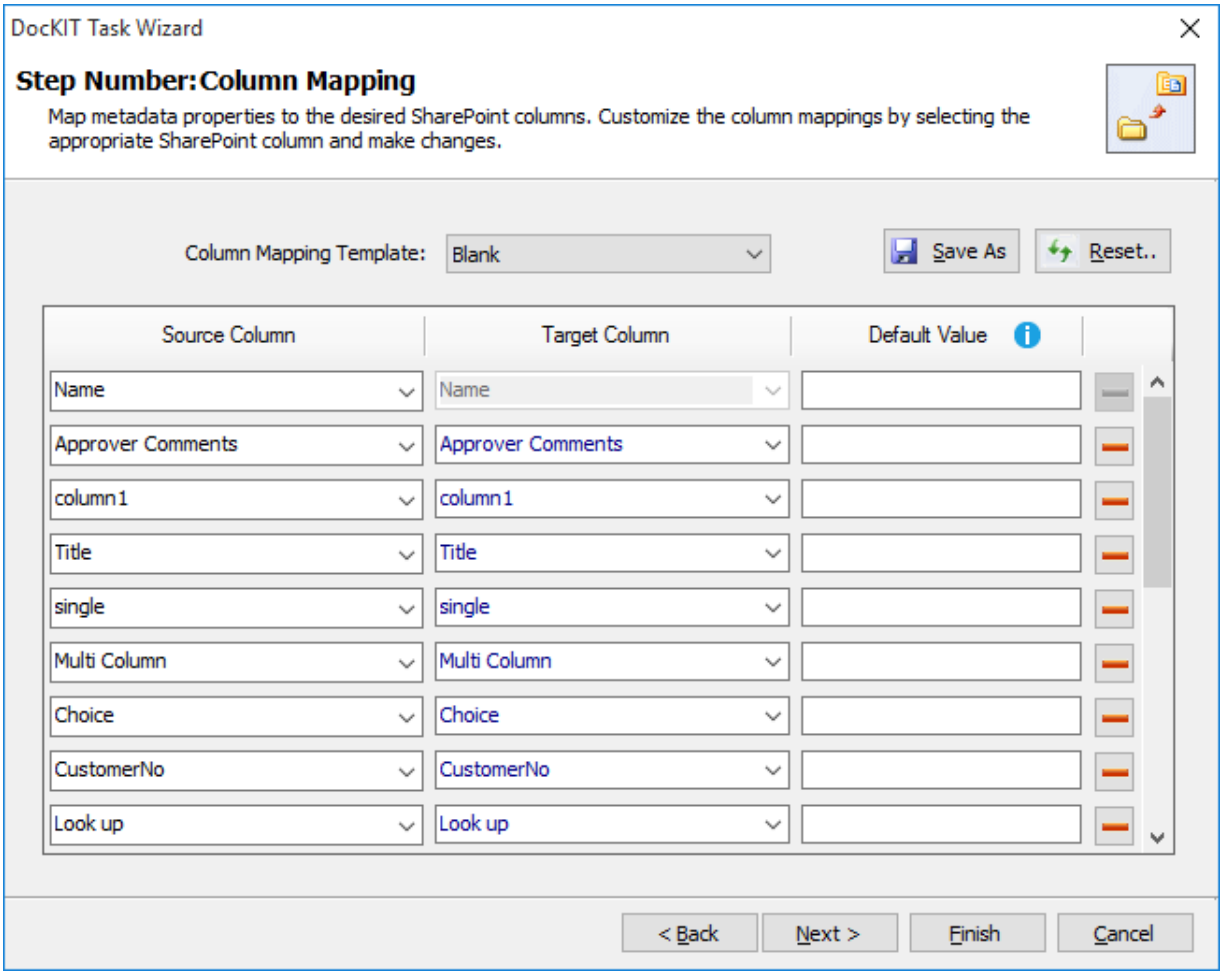
3. **Source Column:** You can specify source column values from **'File properties', 'Metadata File'**, 'Function Builder**'** and also from **'Other File Properties'** by entering the property name.
4. **Target Column:** You can specify the target SharePoint Column which needs to map and assign values.

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.



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

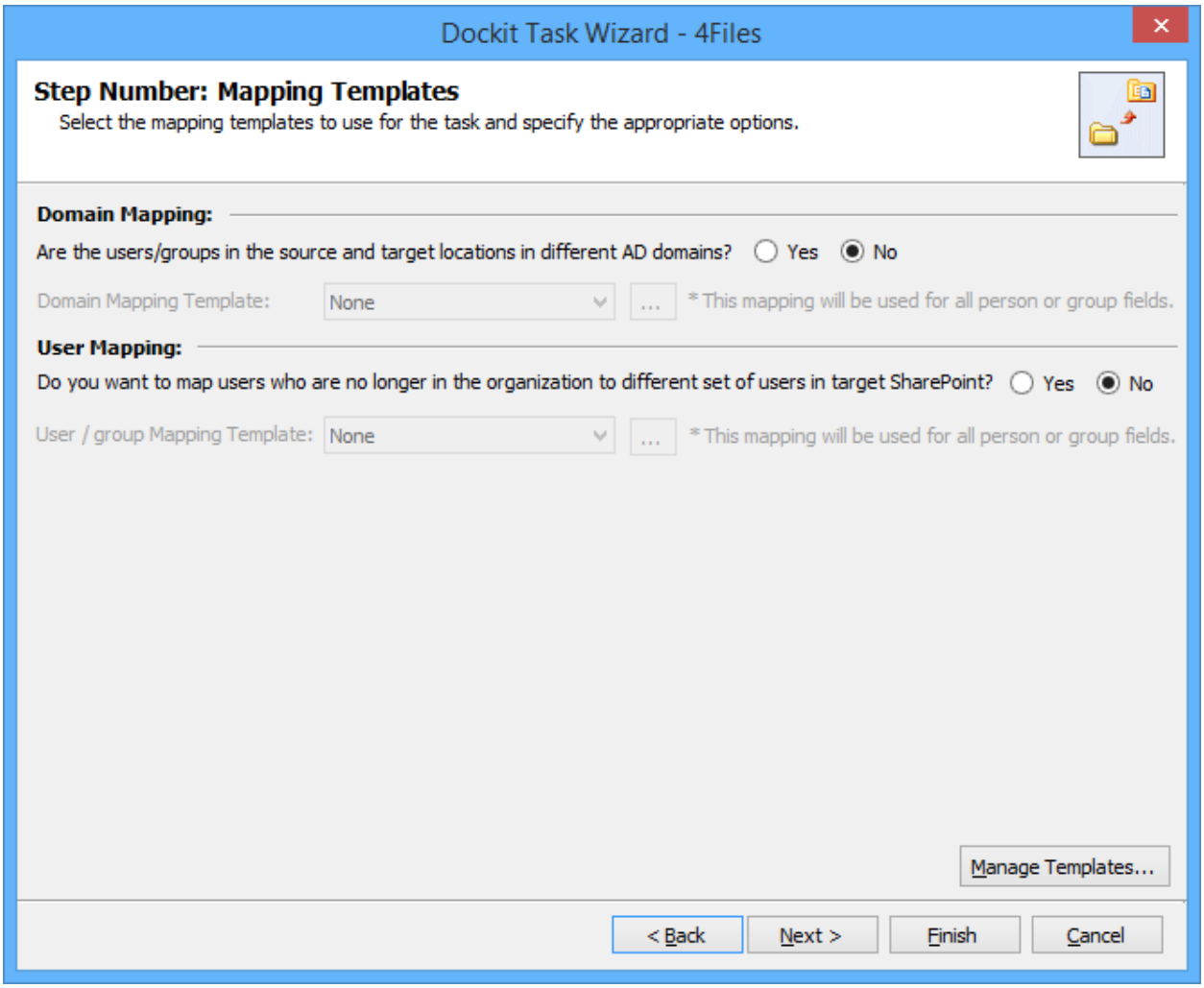


8. Click **Next** to proceed

Mapping Templates

To specify the mapping templates to use for the task:

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



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).

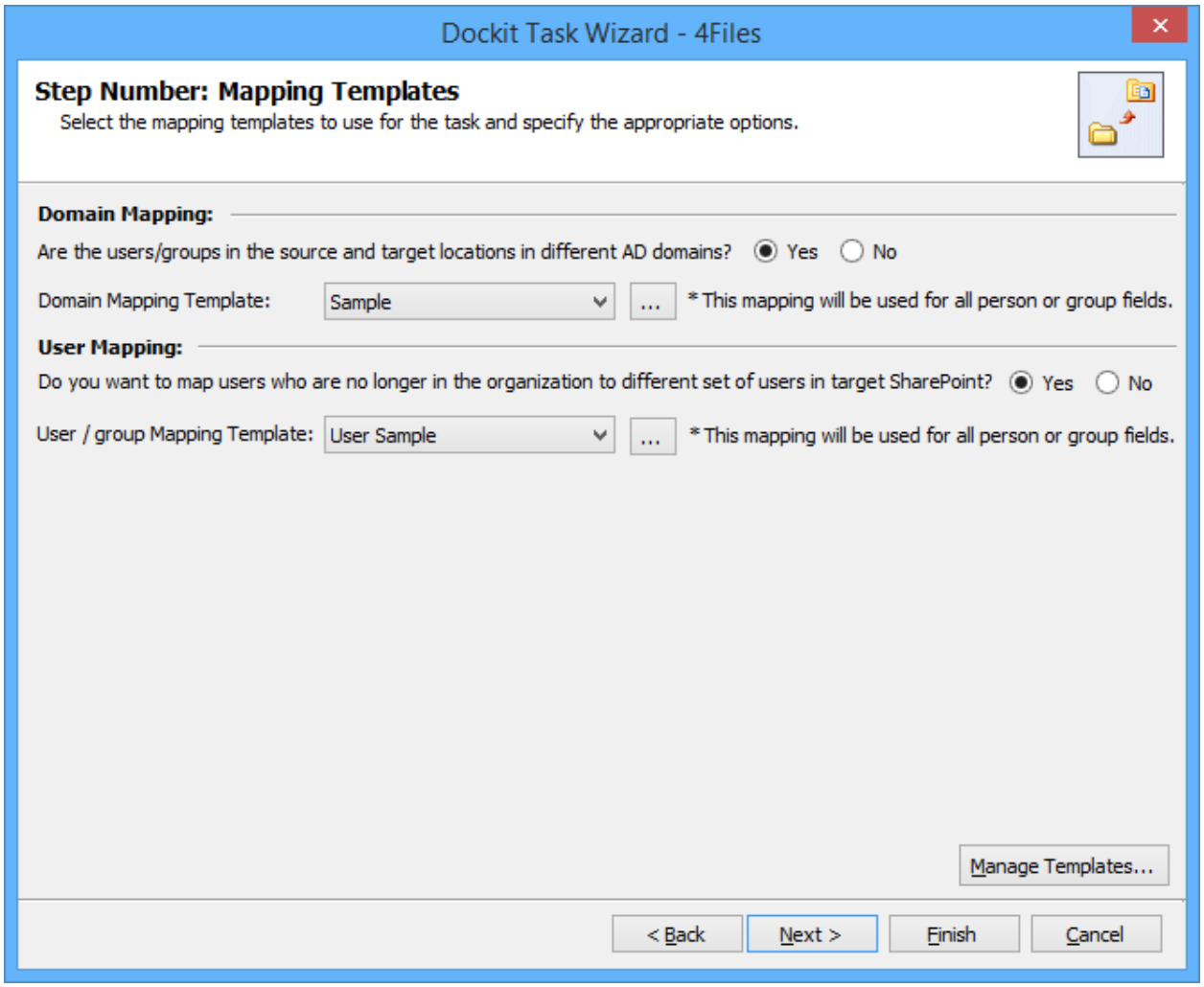
   None represents the default domain mapping template that helps to assign user / group as it is. This mapping is applicable for all the person or group columns to replace unavailable domain name in the user value with the valid domain name and make the user value valid.

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.

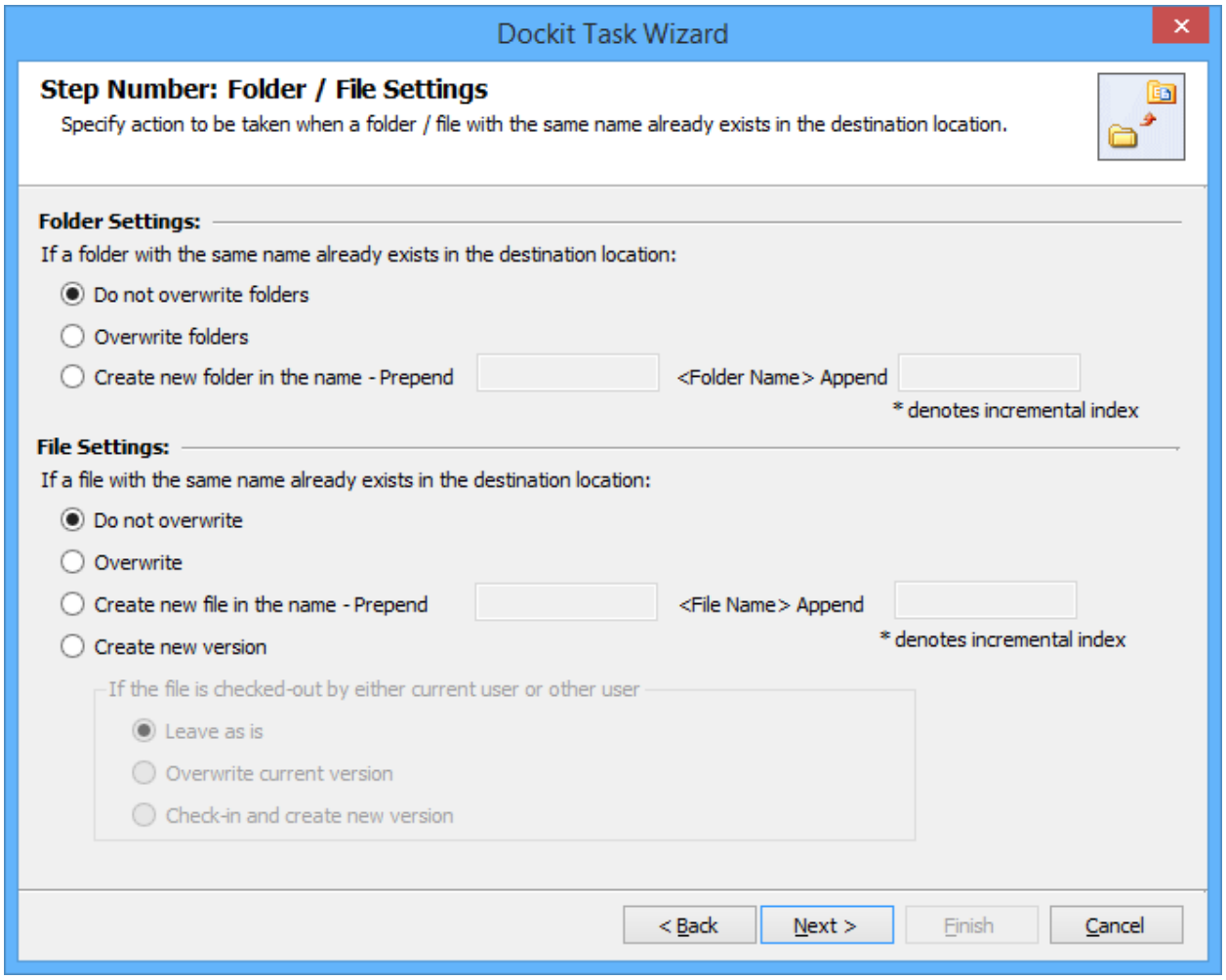


5. Click Next to proceed.

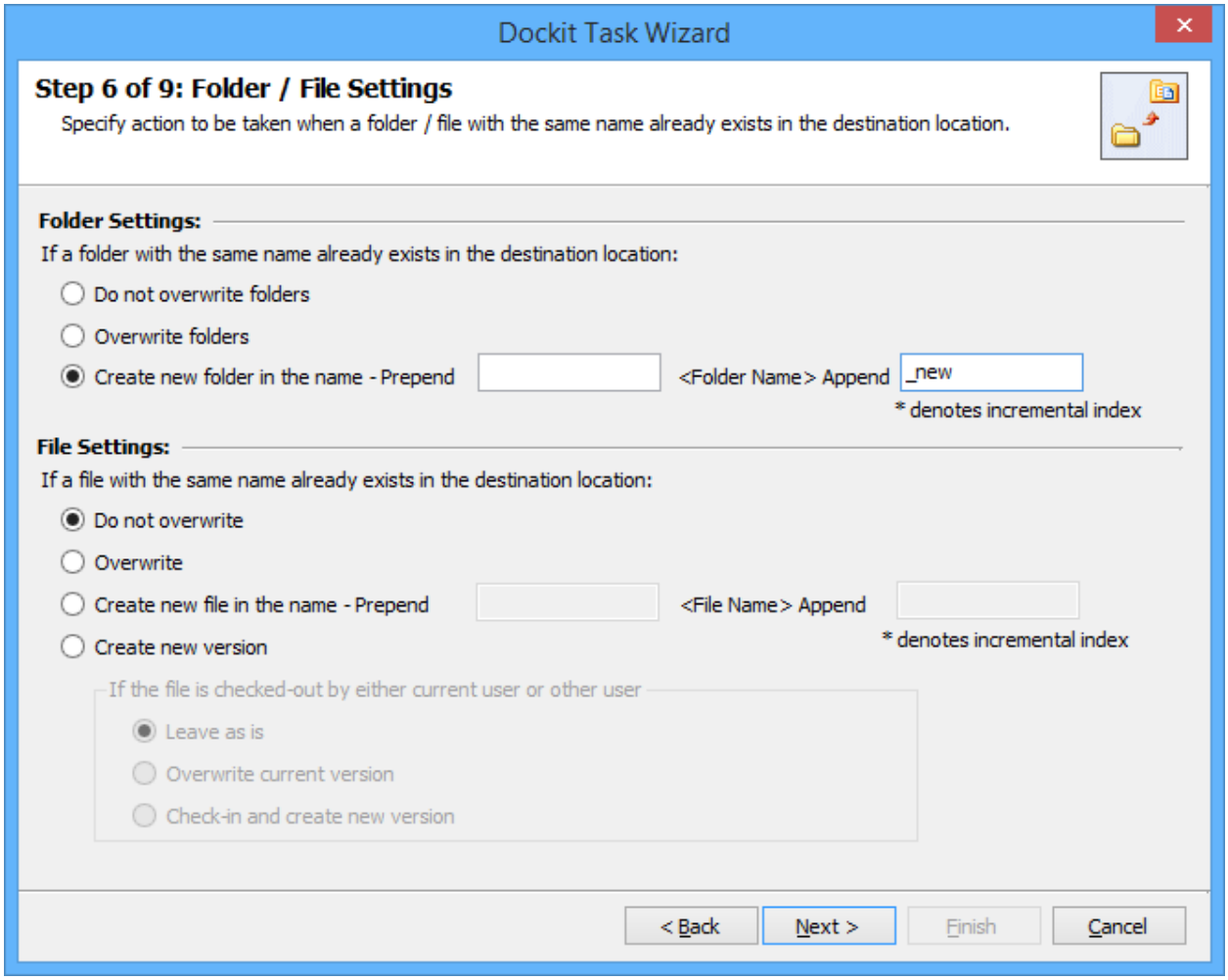
Folder / File Settings

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

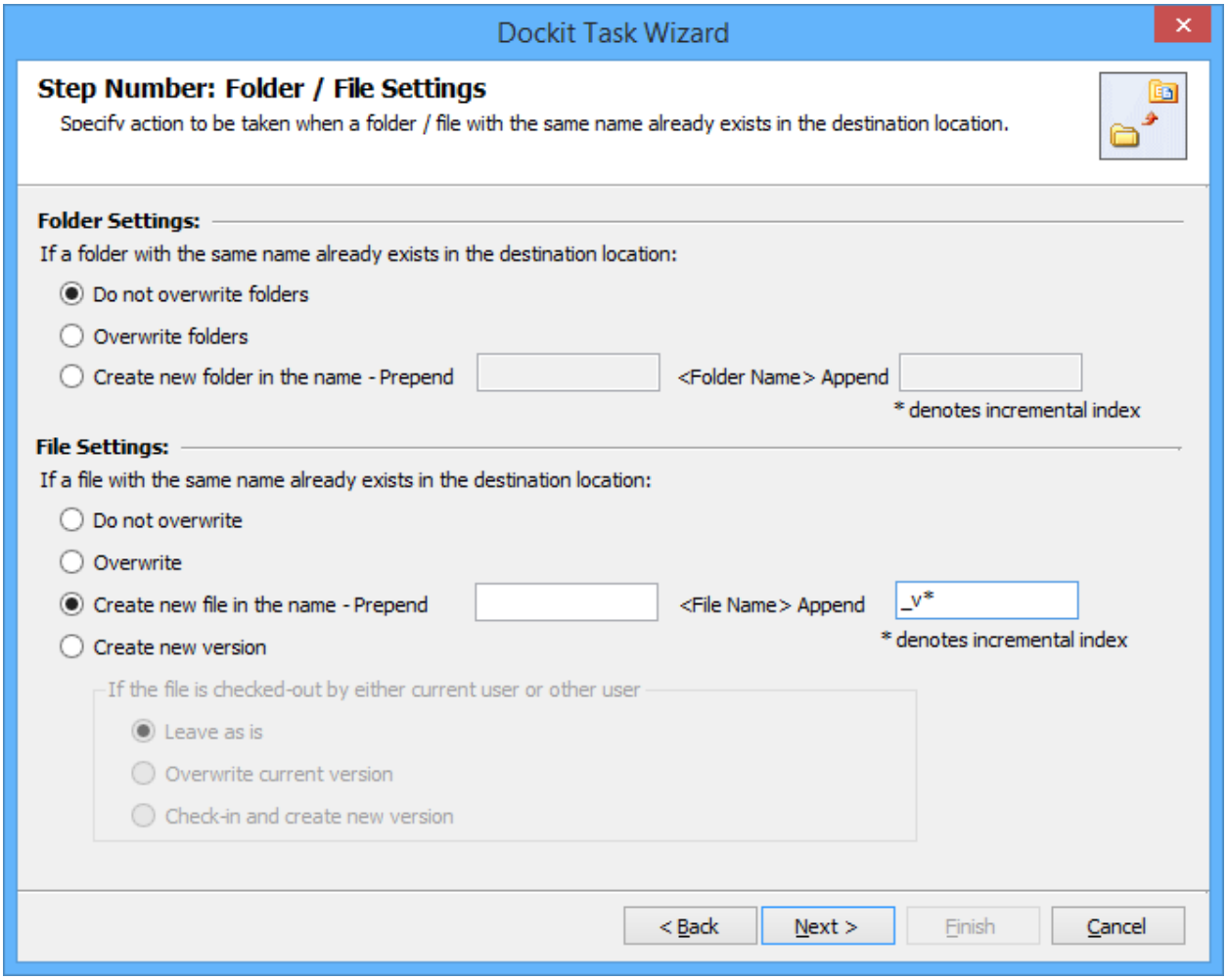
1. The **Folder / File Settings** step appears as shown below:



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.



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.

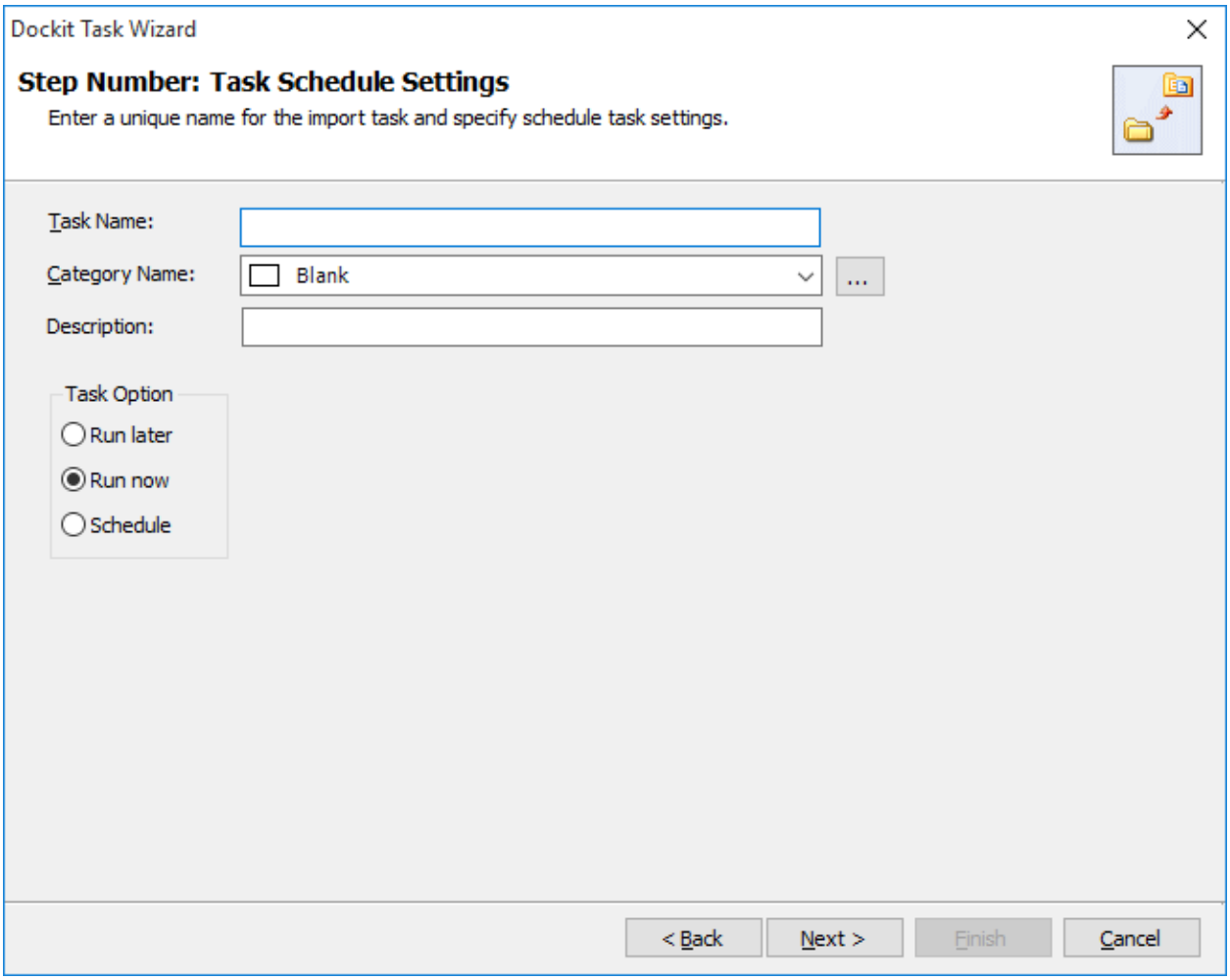


4. Click **Next** to proceed.

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:



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.

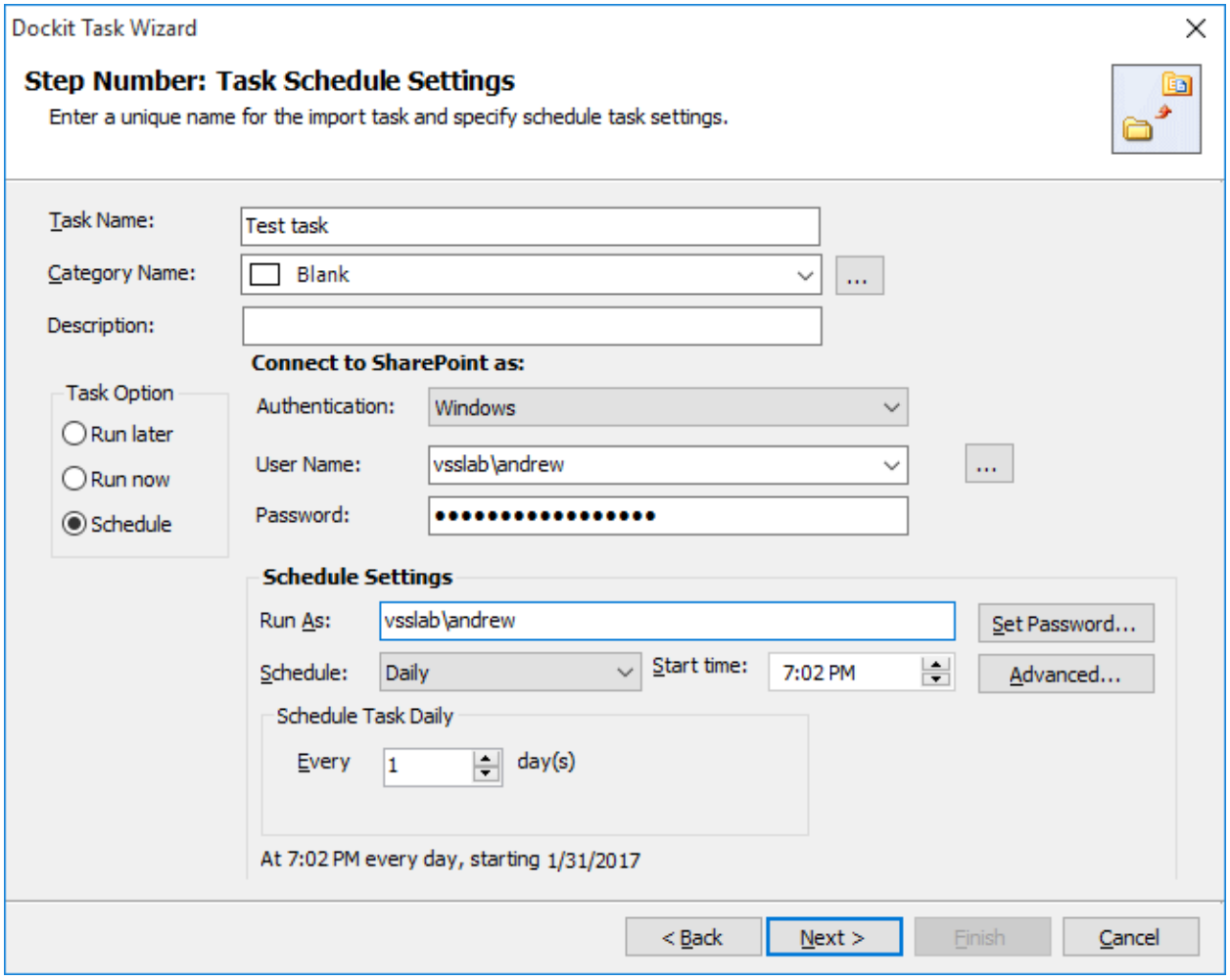
4. Select one of the following options to connect to the target SharePoint site:

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.

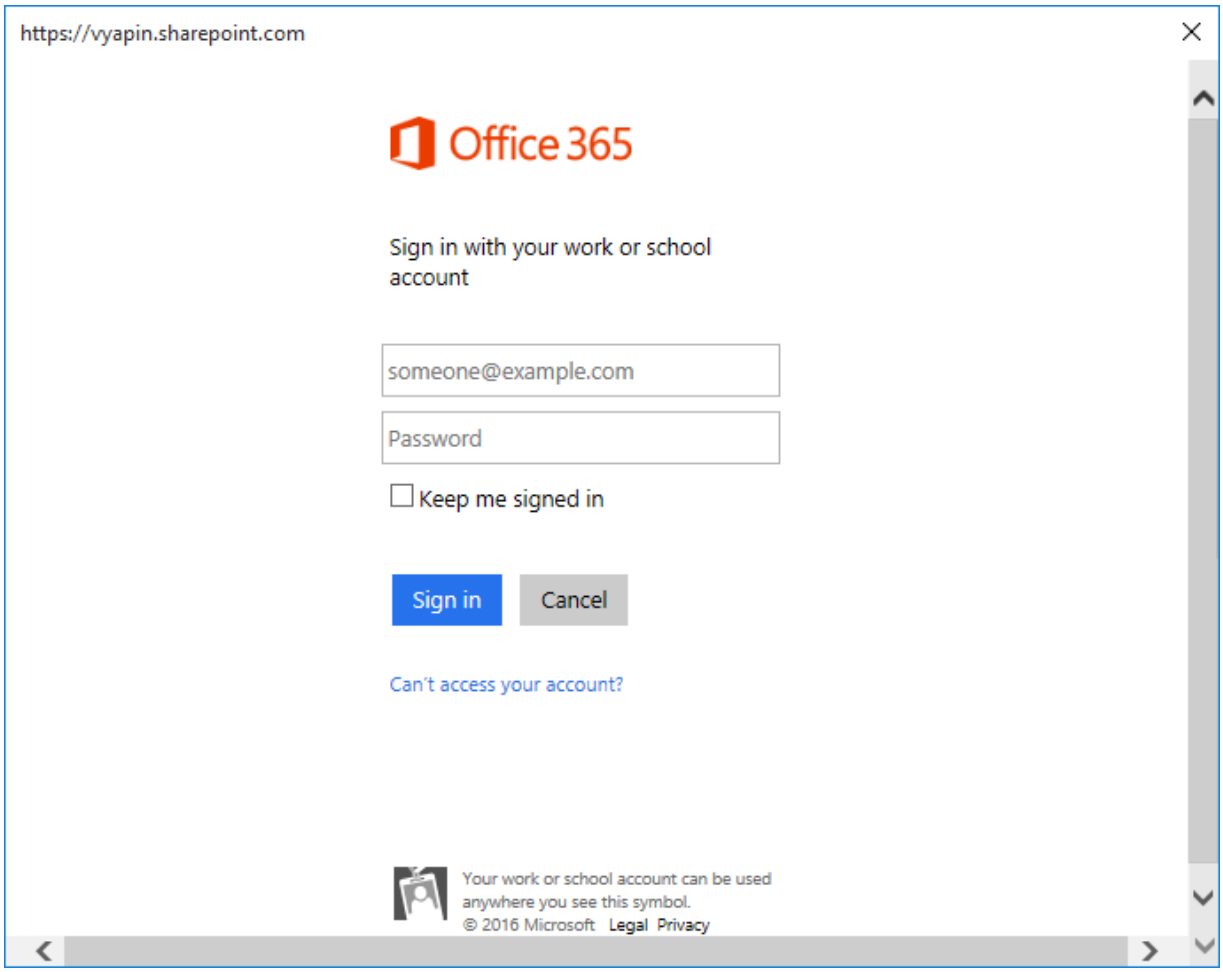
c. **Use 'Run As' user context given below** – This option will be available if you choose **Schedule** task option. Dockit will use the user account specified in the scheduled **Run As** user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint 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.



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).



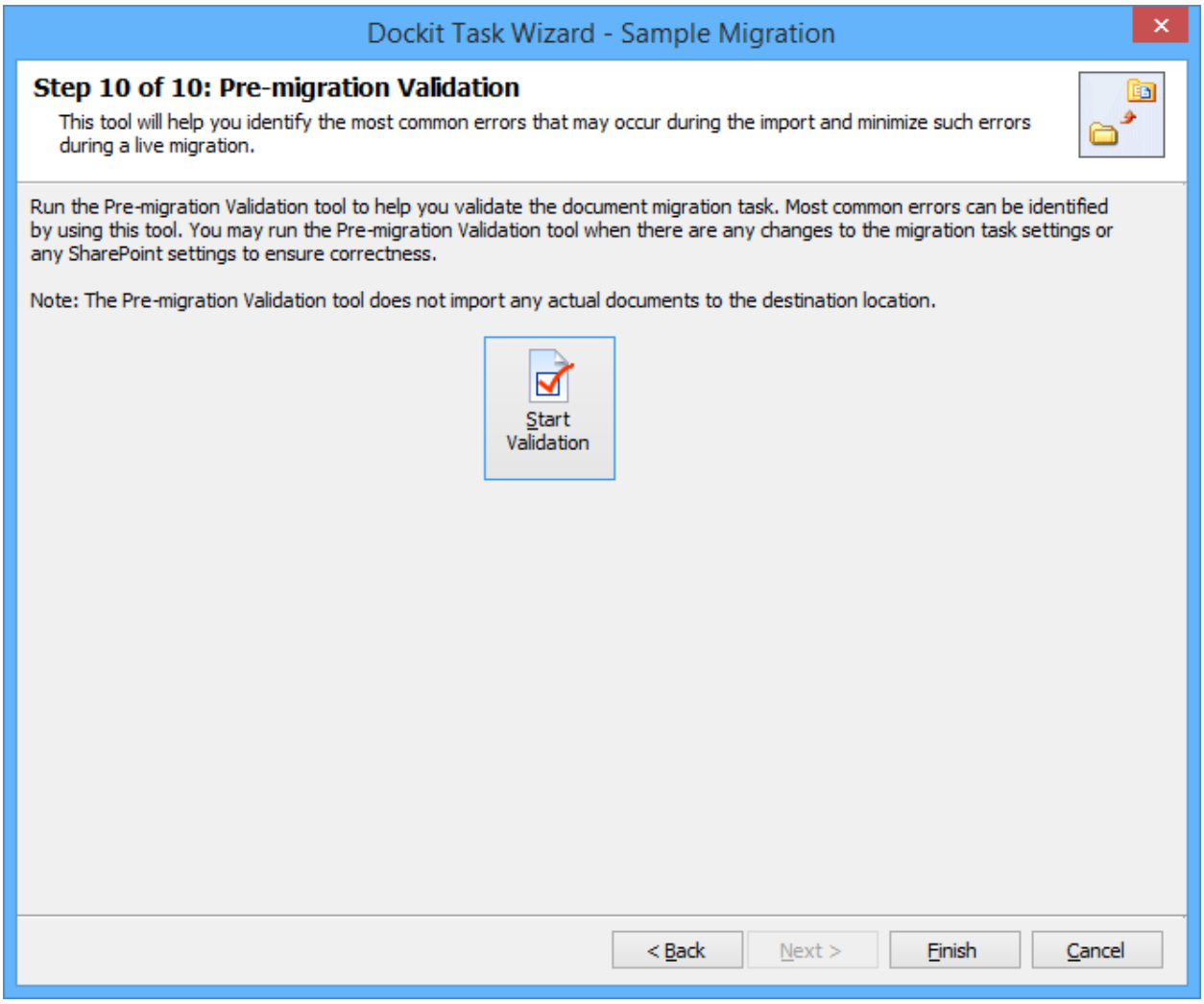
Provide username and password in the respective textboxes and click **Sign in** button to proceed.

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

Pre-migration Validation

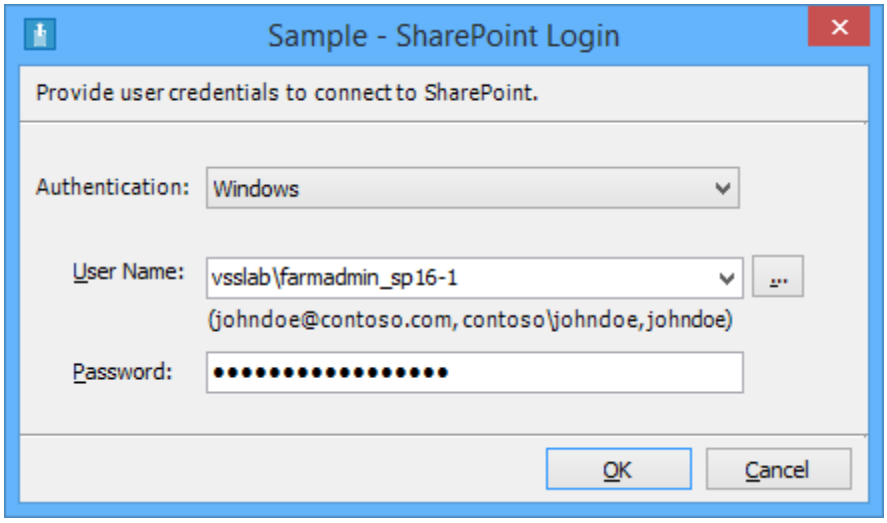
Pre-migration Validation tool helps you validate the exact steps performed by Dockit during the import process. This tool does not import any files to the destination location. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there are any changes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

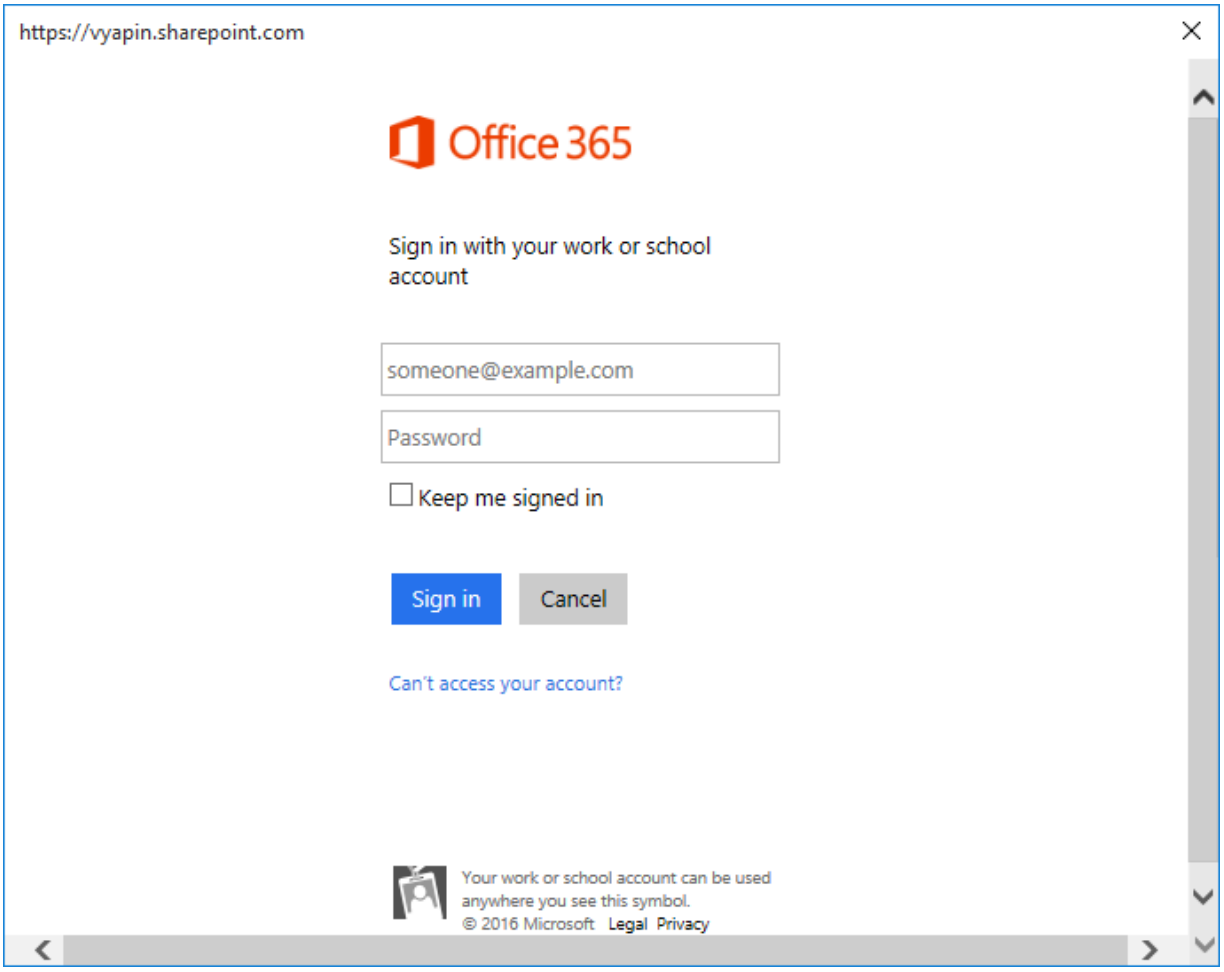


7. Click **Start Validation** button to invoke the Pre-migration Validation tool.

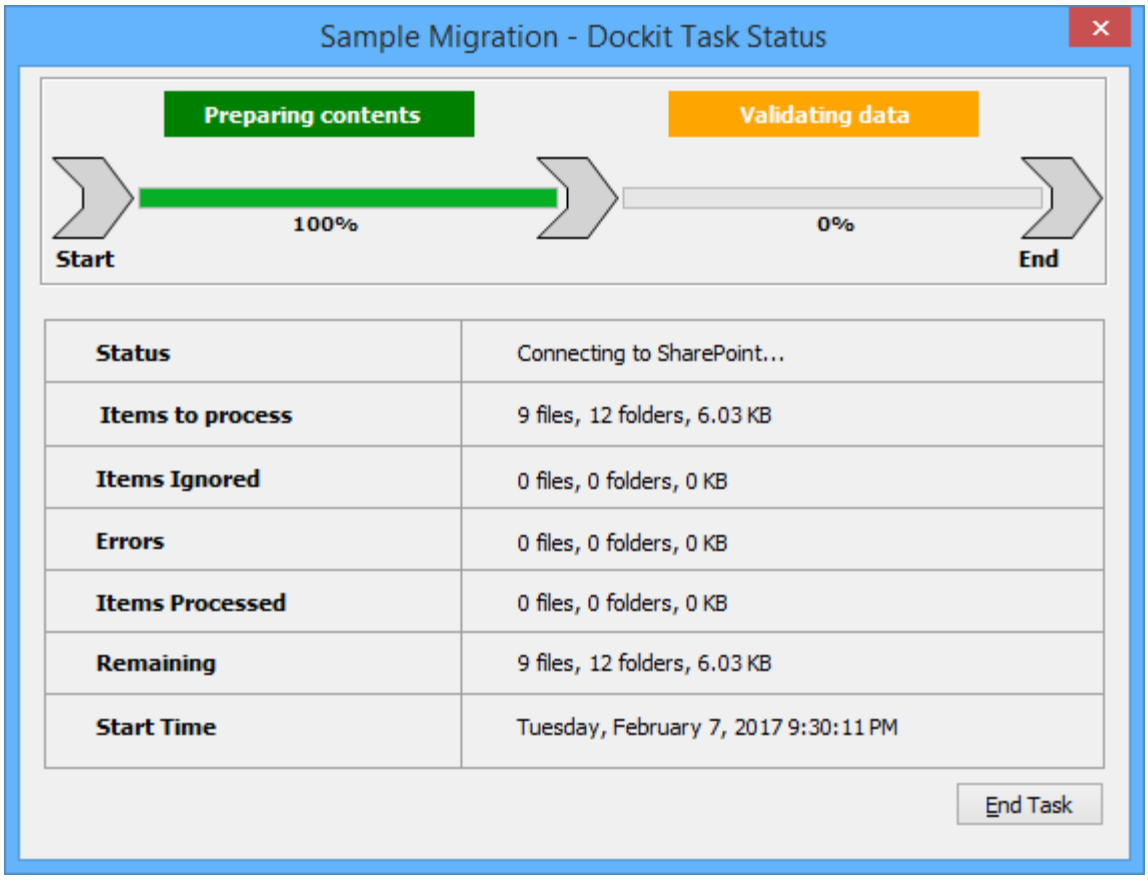
8. The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.



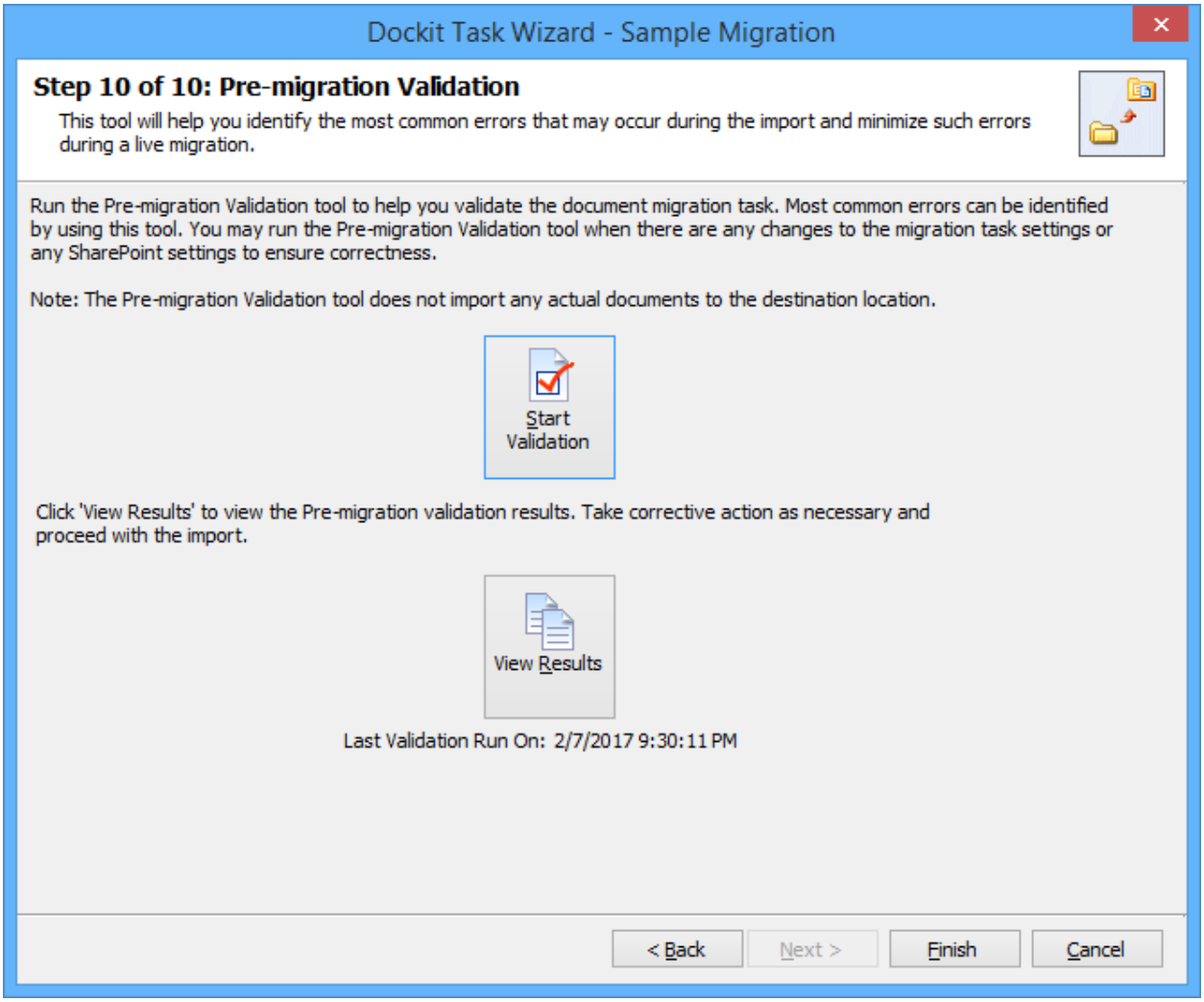
For **Federated authentication (Web Single Sign-on)** credential based import task. The Web Login Dialog to connect to SharePoint will appear as shown below:



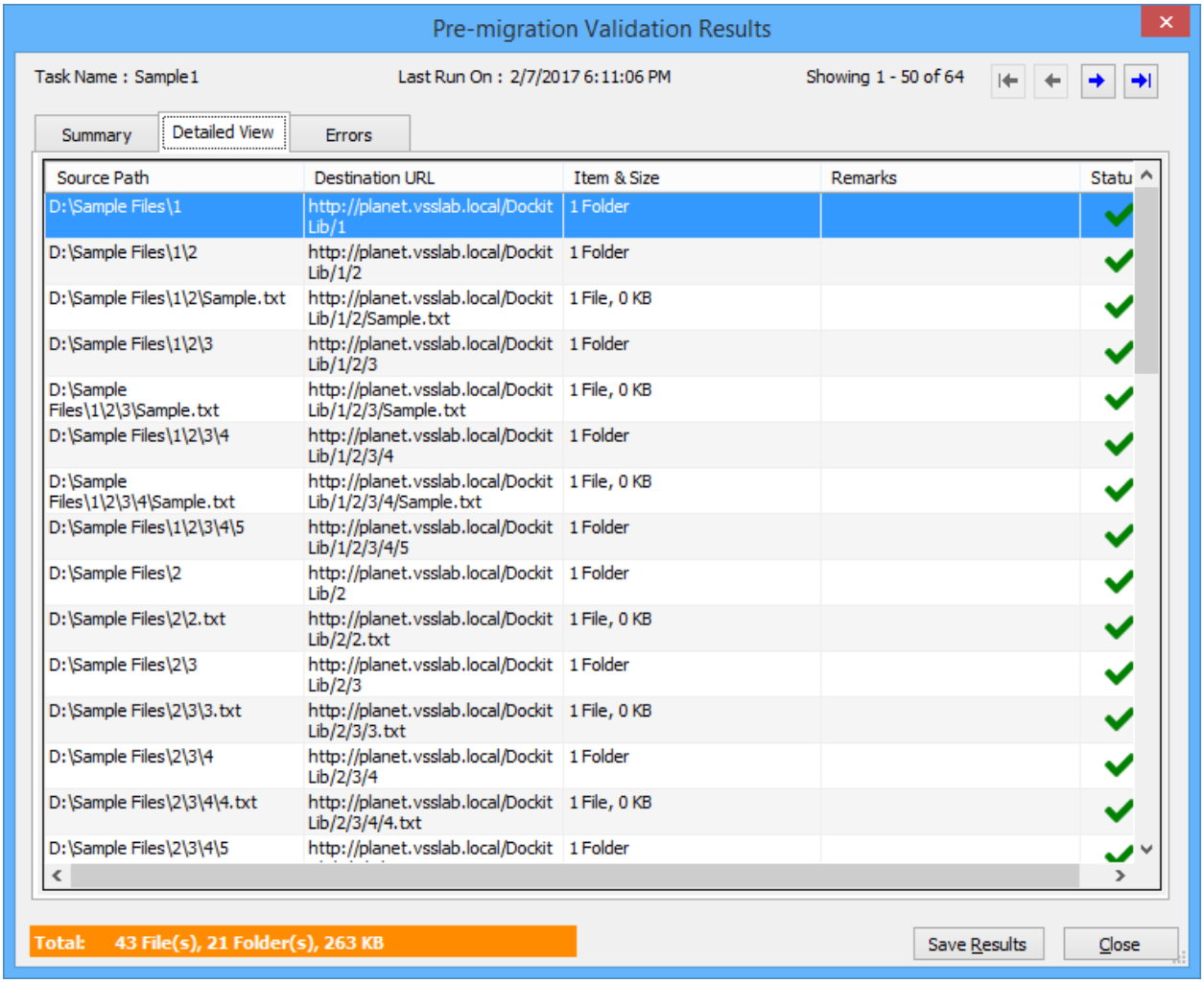
9. You will notice a task progress bar in a new window as shown below.



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.



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



- Refers the items that succeeded during pre-validation.
- 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
    - Managed Metadata - Checks for the term that matches the given value
    - User / Group - Check whether the user / group available in target location
    - Choice - Check whether the given value available under choice list

Limitations of Pre-migration Validation tool

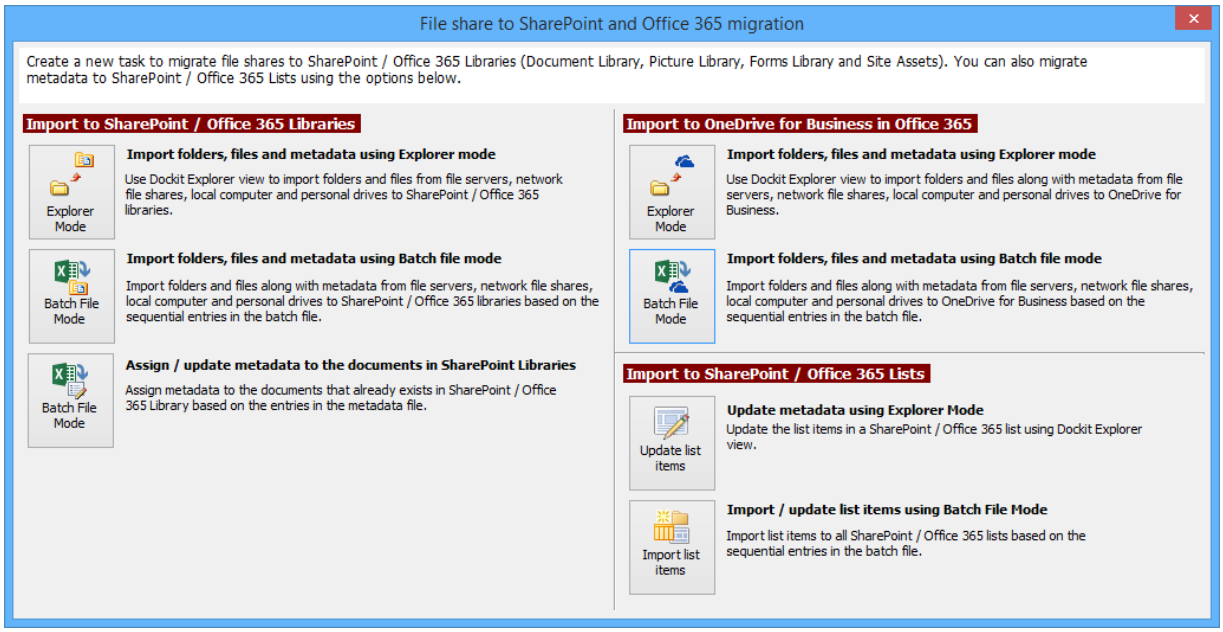
The Pre-migration validation check and the actual import results may vary in certain circumstances. The Pre-migration Validation Tool does not perform a few checks as the checks may either slowdown the validation process or a few errors will occur only when performing an actual live transfer. Please 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 Pre-migration 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 Document\Sample File.xlsx	http://sharepoint/technical documents/folder1	folder2/folder3

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

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

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

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

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

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

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

Sample format of a CSV / TEXT batch file:

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

“Path”,“Destination Path“,”New Folder”

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

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

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

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

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

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

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

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

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

Metadata file structure

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

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

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

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

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

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

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

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

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

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

SharePoint Data Type	Remarks	Example
Yes/No	If any other value appears in the metadata file, other than Yes/No, default value will be assigned.	"Yes" "No"
Text	The text length should not exceed 255 characters.	"This is sample text"
Multi-line Text	The text length should not exceed 255 characters (preferred).	"This is sample text\nThis is sample for multi-line text"
Date and Time	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2009 10:50 AM" "1/25/2010"
Number	The fixed or floating number can be given to this field. The value should not exceed the numeric boundary.	"10" "3.41"
Currency	The fixed or floating number can be given to this field. Do not use any currency symbol ($) with this field value. The value should not exceed the currency boundary.	"100" "10000" "1500.67"
Choice (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values.	"Male" "15"
Choice (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'.	"Windows 7; Windows Vista; Windows 2003; Windows XP"
Lookup (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Windows 7"

Lookup (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Stock Details; Accounts; Product Details"
People or Group (Single Value)	User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. Do not use multiple values unless the equivalent column defined in SharePoint can accept multiple values. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\Administrator" "BUILTIN\Administrator" "Backup Owners" "someone@example.com" "John Doe"
People or Group (Multiple value)	User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\User1; BUILTIN\Administrators; Guest Members;Temps"
Hyperlink or Picture	The http URL of any resource or picture can be given to this field.	"http://sharepoint/Shared Documents/My Sample File.doc" "http://sharepoint/Pictures/chart.bmp"
Target Audiences	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 SharePoint Server 2010 and above).	SPUsers; Contributors; Designers
Publishing Schedule Start Date (Applicable only for Collaboration Portal / Publishing Portal Site)	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2010 10:50 AM" "1/25/2009"
Publishing Schedule End Date (Applicable only for Collaboration Portal / Publishing Portal Site)	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2009 10:50 AM" "1/25/2010"
Publishing Image (Applicable only for Collaboration Portal / Publishing Portal Site)	The http URL of any picture can be given to this field. Relative URL also can be given to this field.	http://sharepoint/Pictures/chart.bmp "Pictures/chart.bmp"
Publishing Hyperlink (Applicable only for Collaboration Portal /	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)		" NewsArticleImage.jpg"
Publishing HTML (Applicable only for Collaboration Portal / Publishing Portal Site)	HTML content can be given in this field. You can use HTML tags in order to create rich content in the field.	It is sample text
Business Data (BDC) / External Data (BCS) (Applicable only for SharePoint Enterprise Edition)	The BDC / BCS column value along with the filter name can be specified in this field. Dockit will search for the specified column value in the LOB entity using the given filter and assign the corresponding ID (when the BDC / BCS column value match is found) of the LOB record to the BDC / BCS column in SharePoint. Specify this value in filter name: value format. If the filter name contains colon (:) in its name, specify this value in FILTER:filter name, QUERY:value, where FILTER and QUERY are reserved words. Dockit also automatically fills-up the column values associated with the BDC / BCS column during import.	"Company Name:Vyapin" "ID:1000" "Product Name:Dockit Migrator 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:1000AX"
Managed Metadata (Single Value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the	"Continent|North America|Country|United States|States|Alaska" "Alaska"

	specified term value and assign the first matching term value for the corresponding managed metadata column.	
Managed Metadata (Multiple Values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	"Continent|North America|Country|United States|States|Washington;Continent |North America|Country|United States| States|California;Continent |North America|Country|United States| States|Alaska" "Washington;California; Alaska"
Geolocation	Location co-ordinates or name can be given to this field. The co-ordinates value must have latitude and longitude values separated by ':'. The latitude value must be between -90 and +90 and longitude value must be between -180 and +180.	"30:-60" "New York, United States"
Task Outcome	Text or Numeric value can be given to this field. Do not use multiple values for this column type.	"Complete" "4"
Related Items	The http absolute URL of any list item (including file) within the site collection can be given to this field. The values can be of single or multiple. Multiple values should be separated by ';'.	"http://sharepoint/Documents/Sample 1.doc; http://sharepoint/Documents/Sample 2.xlsx" "http://sharepoint/Lists/Custom List/1_.000"

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

- Choice*
- Lookup
- Person or Group

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

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

Sample format of a CSV / TEXT metadata file:

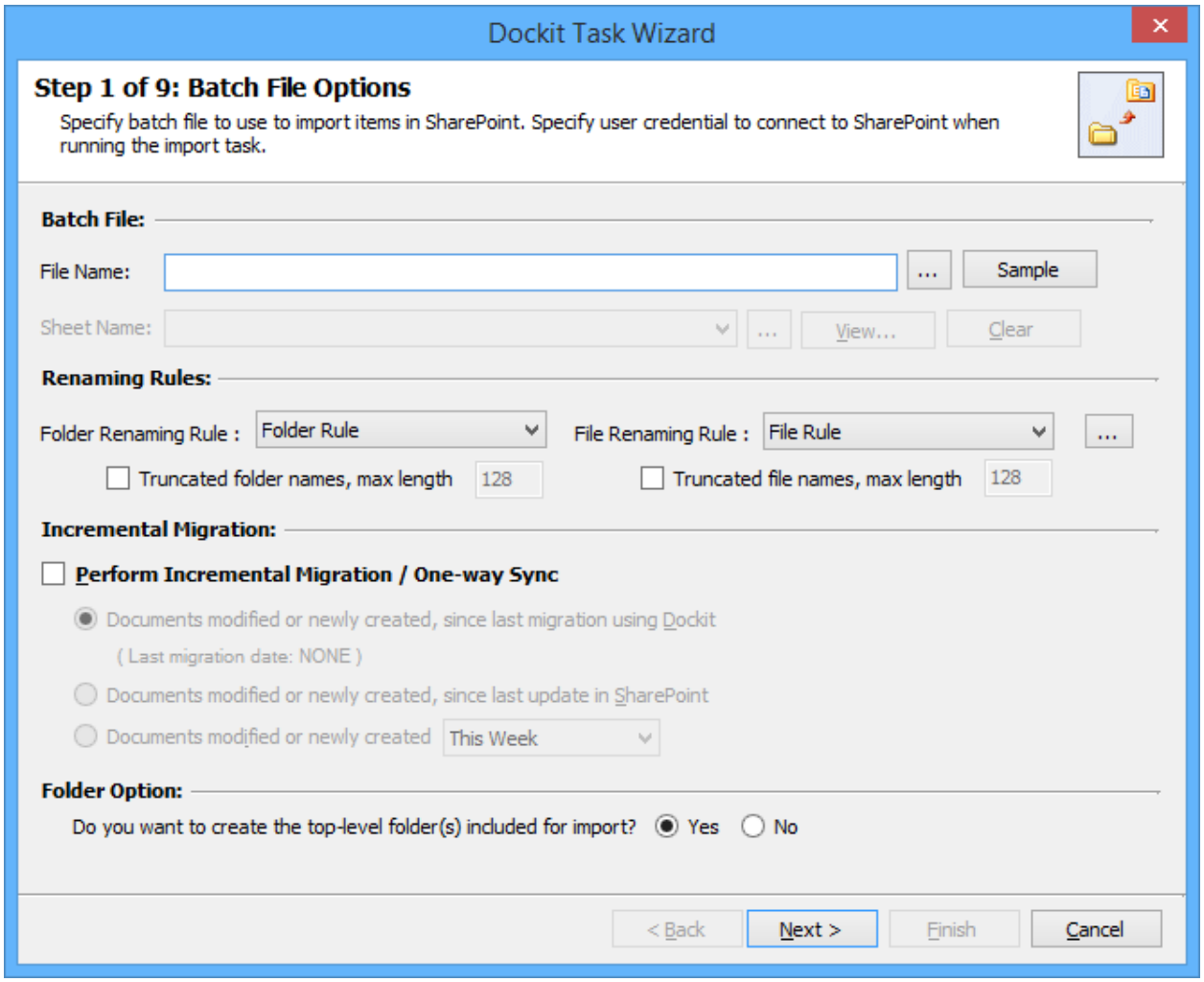
Note: Refer Point #2 for the separator to be used in the metadata file

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

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:



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, click here.

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.

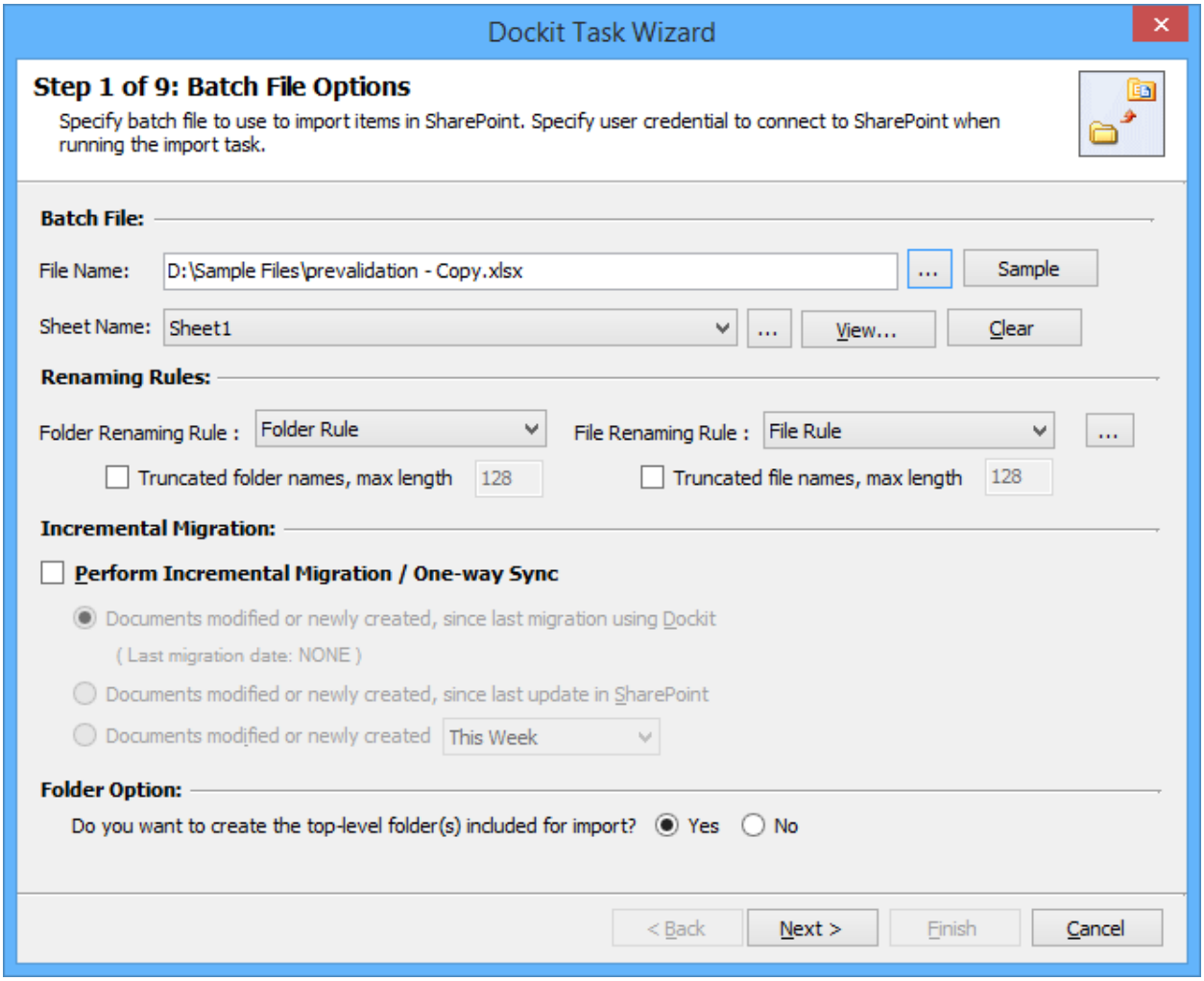
5. **File Renaming Rule:**

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'**



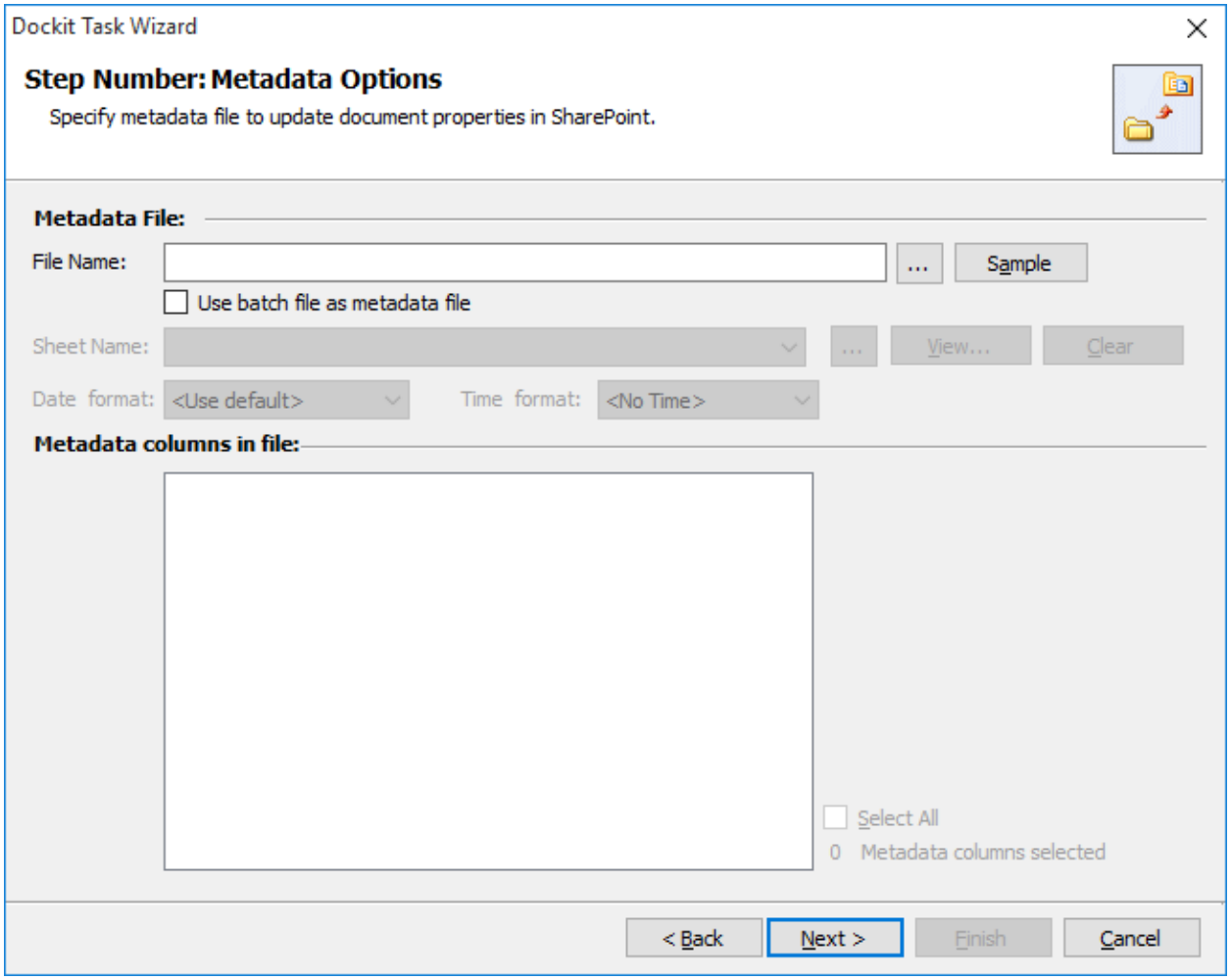
7. The top-level folder is the folder added or specified for import by the user. Dockit will commence the import process from this top-level folder. **Select** the appropriate option to create the top-level folder by selecting the option buttons (Yes/No).

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:



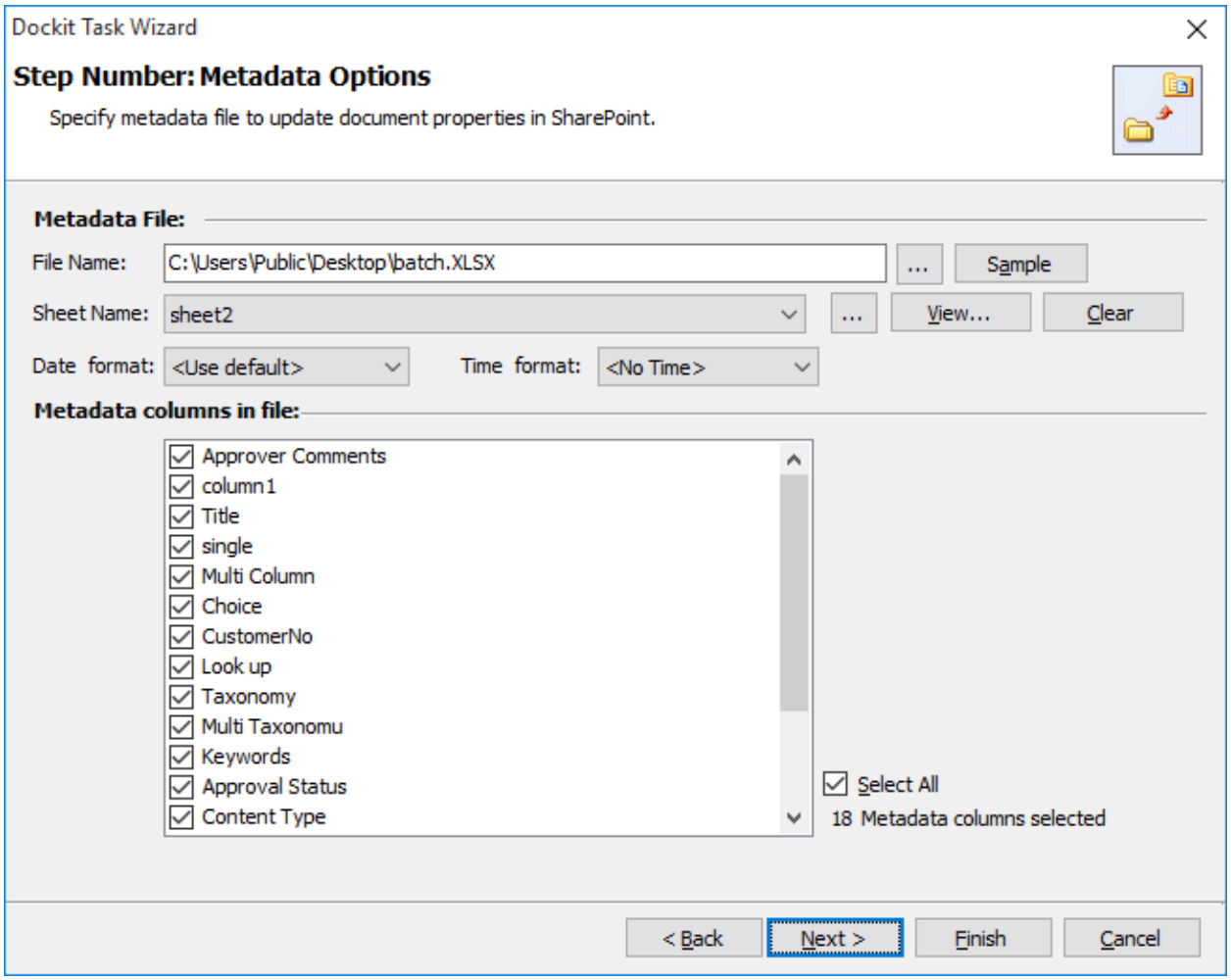
2. *Note: 'Use batch file as metadata file' option only available in 'Batch File Mode'.*

   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.

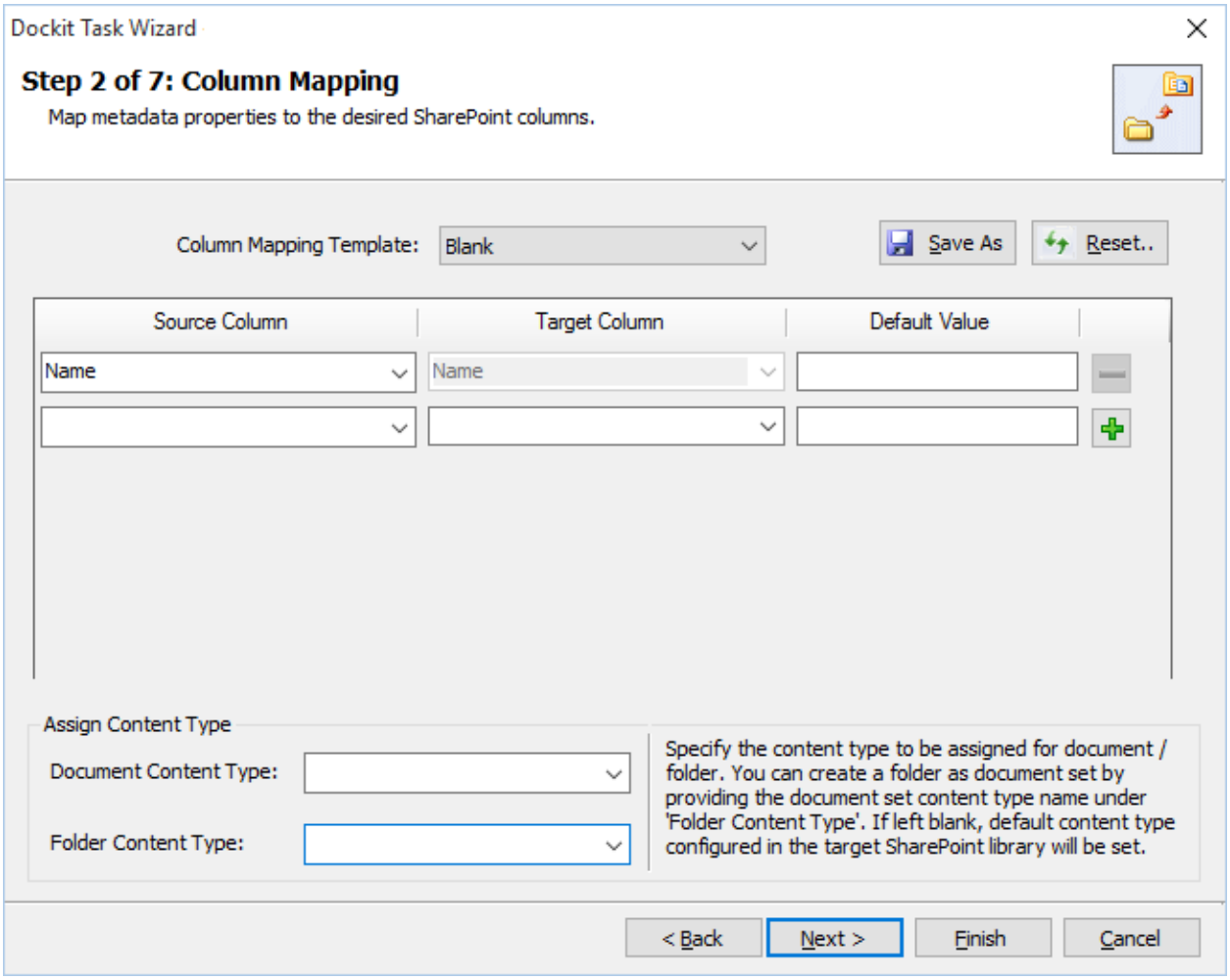


7. Click **Next** to proceed.

Column Mapping

To perform column mapping

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

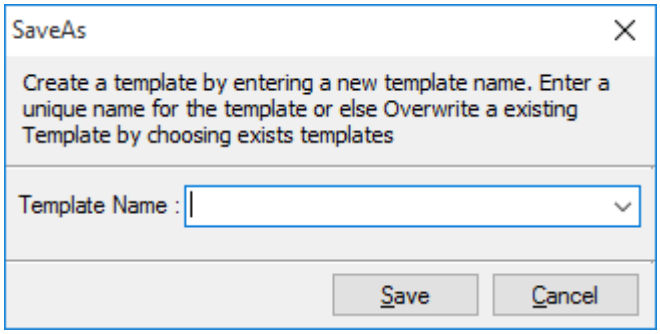


2. **Column Mapping Template:** Select any one of the column mapping templates to use from the list of available template(s). A couple of default templates ('**Blank**' and '**Core File Properties**') are readily available to ease the mapping configuration.

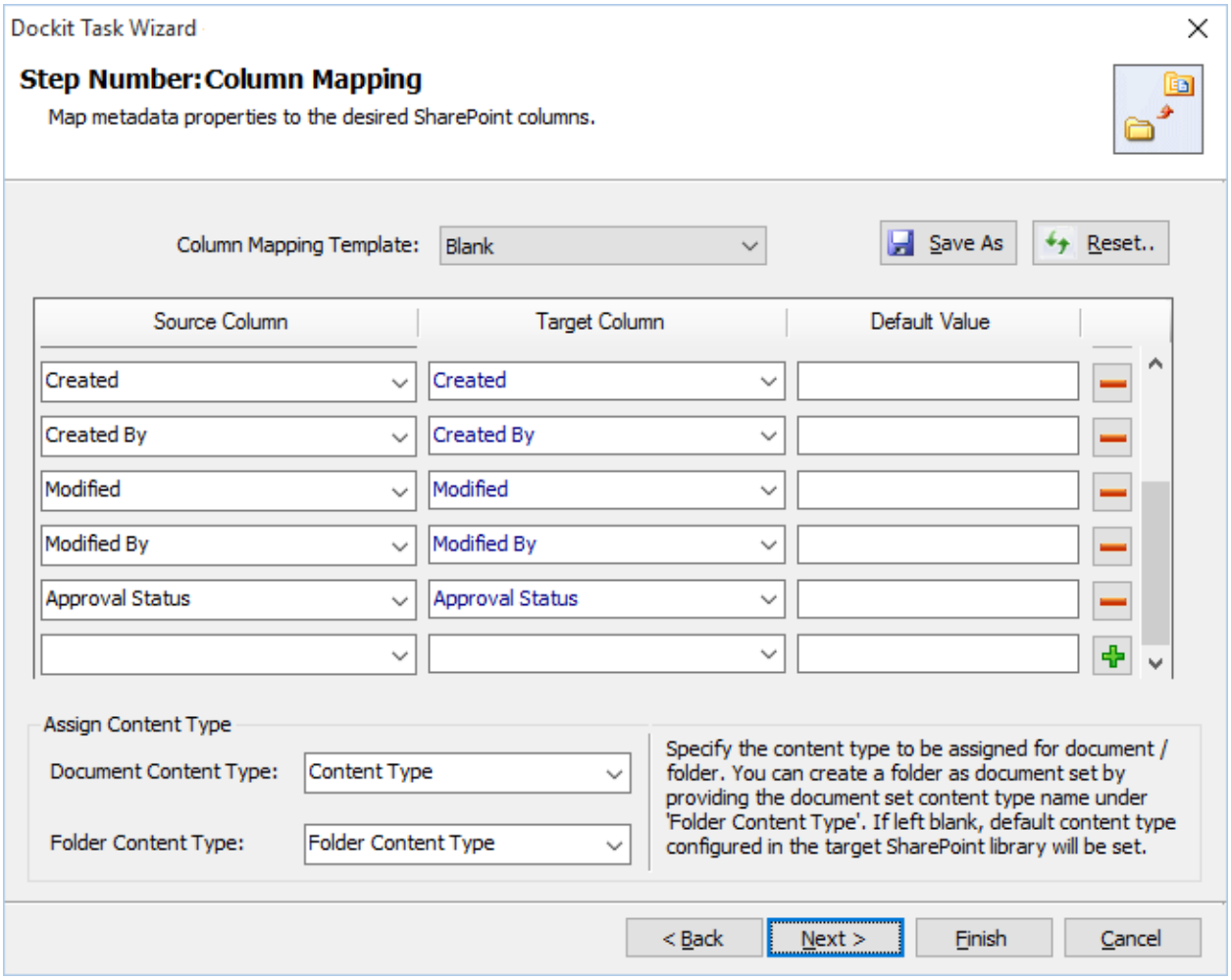
3. **Source Column:** You can specify source column values from **'File properties', 'Metadata File'**, 'Function Builder**'** and also from **'Other File Properties'** by entering the property name.
4. **Target Column:** You can specify the target SharePoint Column which needs to map and assign values.

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.



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

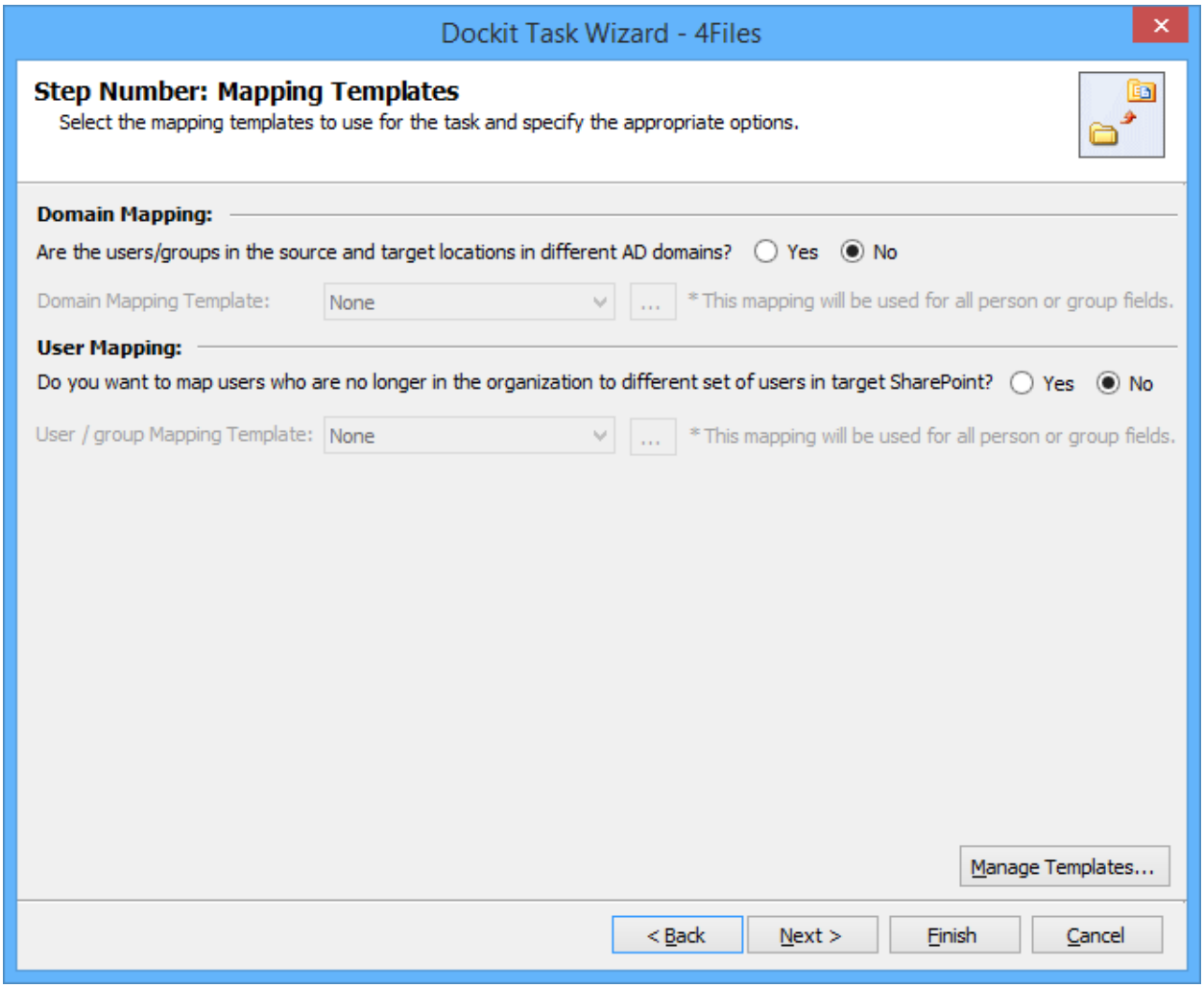


8. Click **Next** to proceed

Mapping Templates

To specify the mapping templates to use for the task:

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



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).

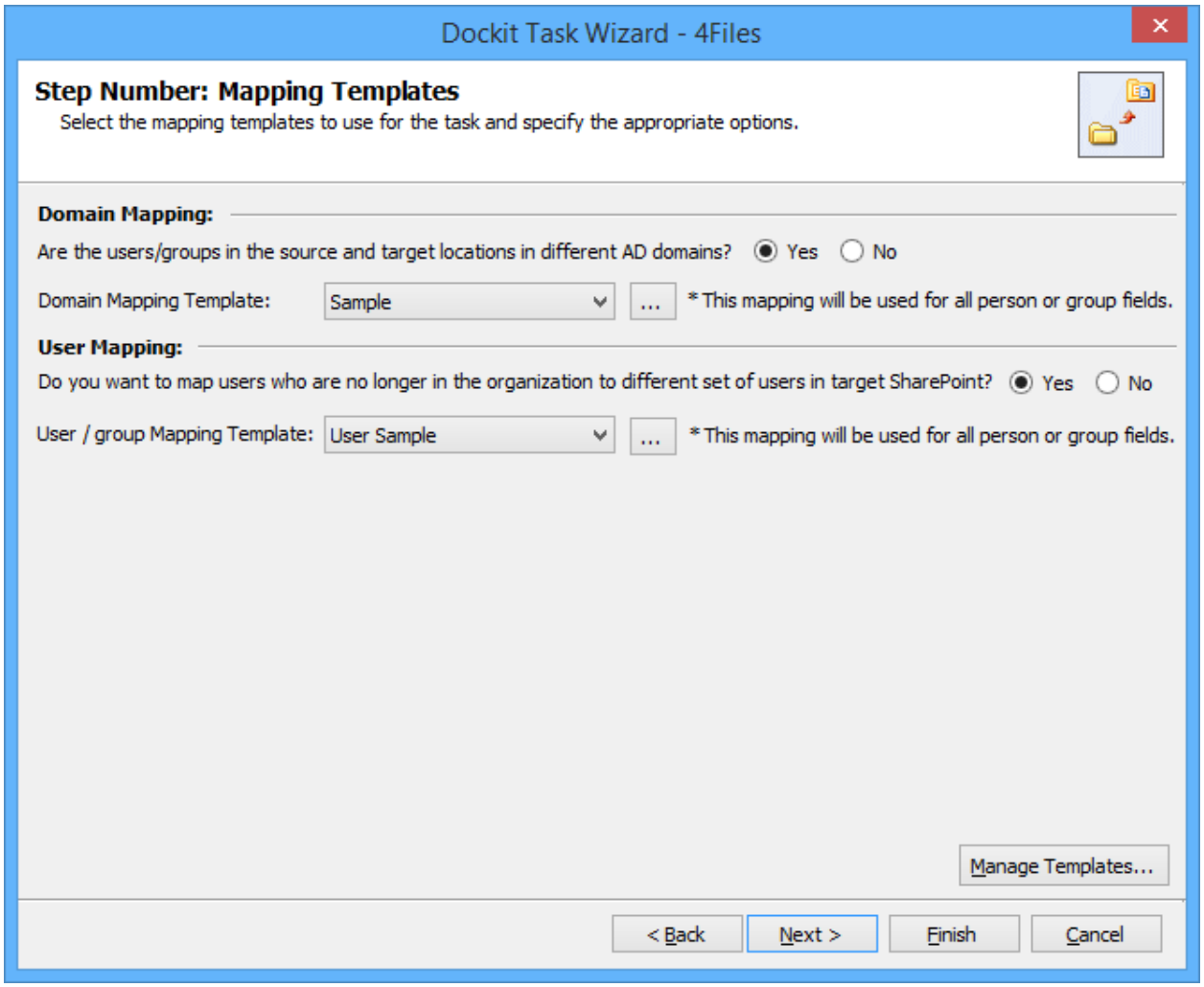
   None represents the default domain mapping template that helps to assign user / group as it is. This mapping is applicable for all the person or group columns to replace unavailable domain name in the user value with the valid domain name and make the user value valid.

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.

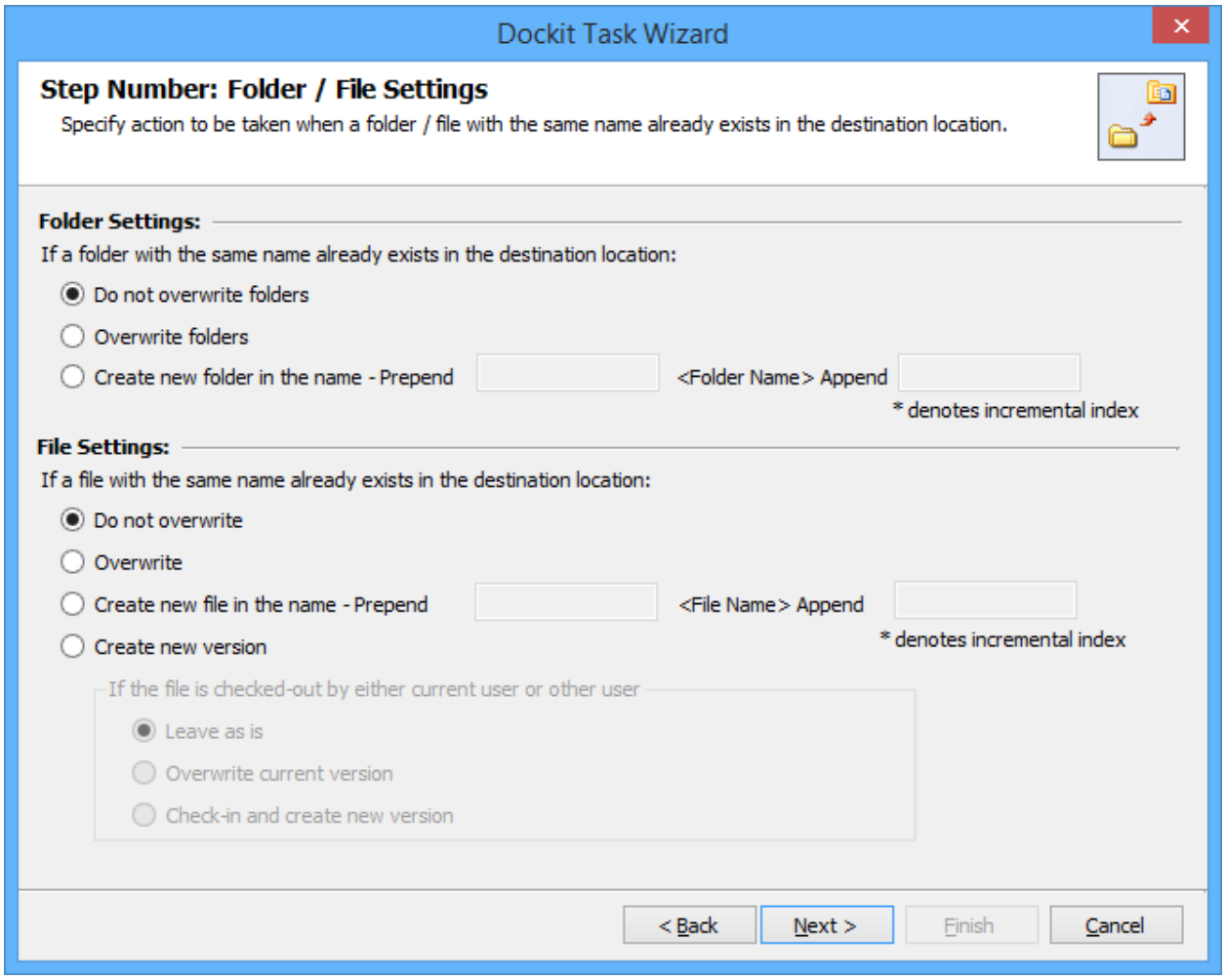


5. Click Next to proceed.

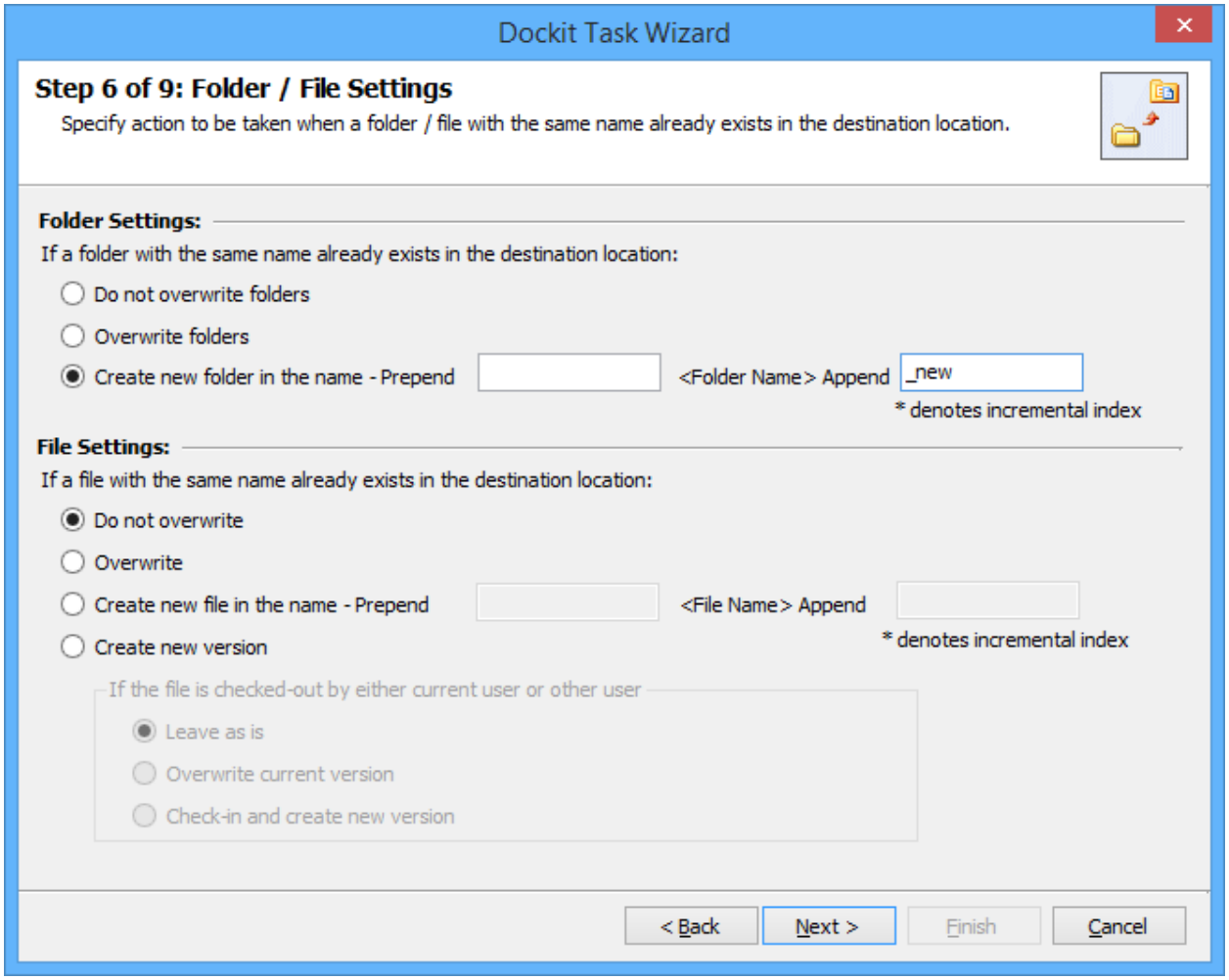
Folder / File Settings

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

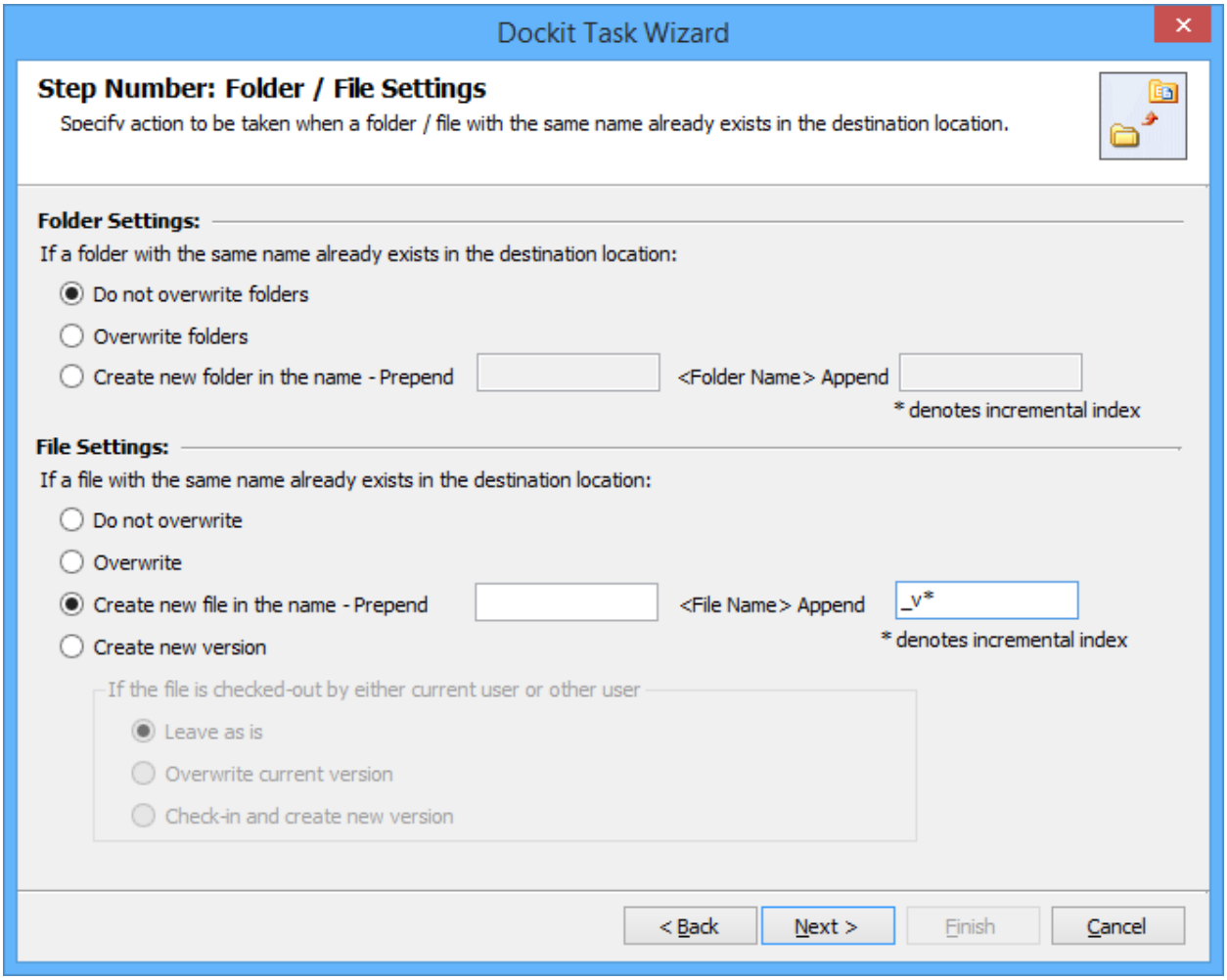
1. The **Folder / File Settings** step appears as shown below:



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.



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.

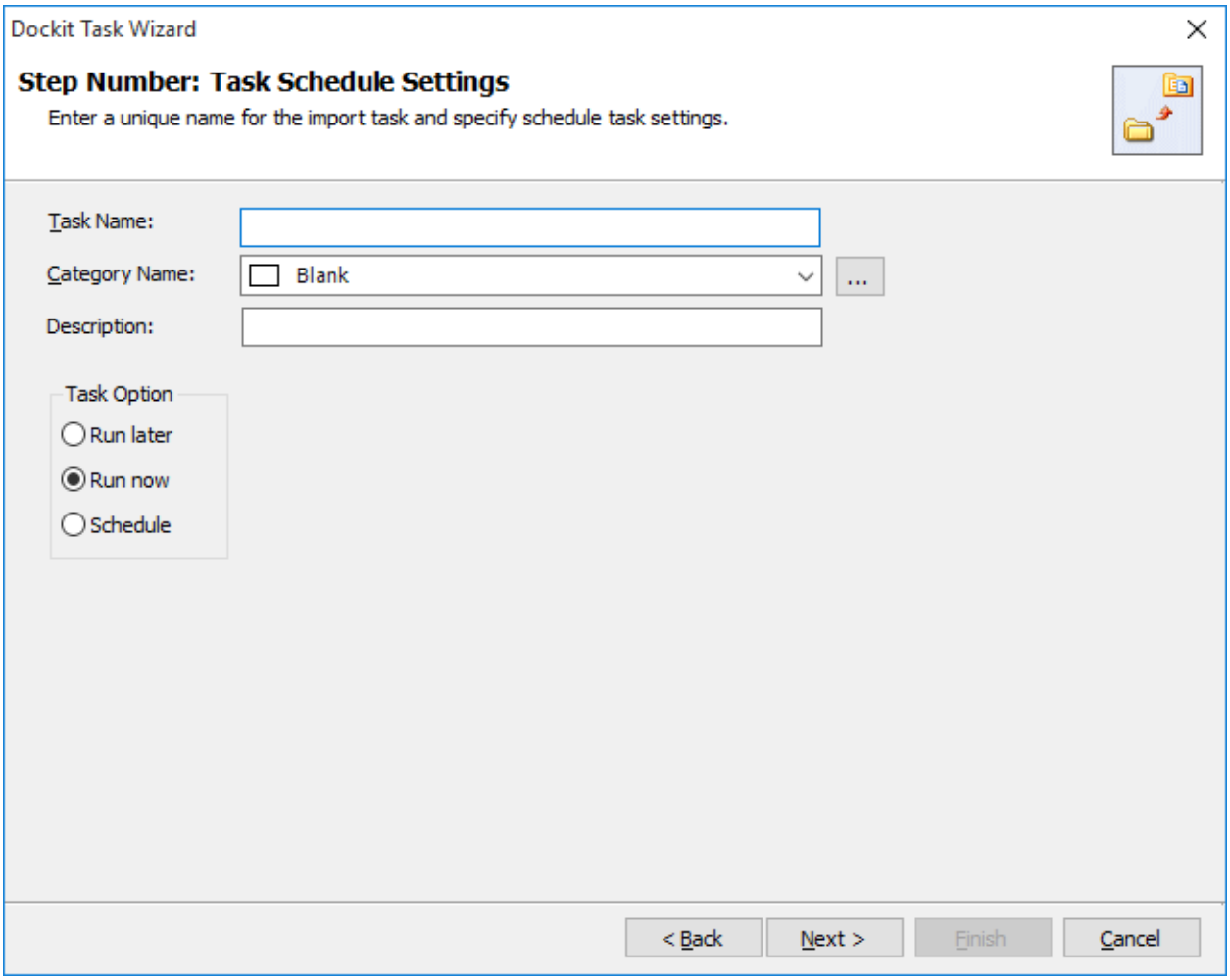


4. Click **Next** to proceed.

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:



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.

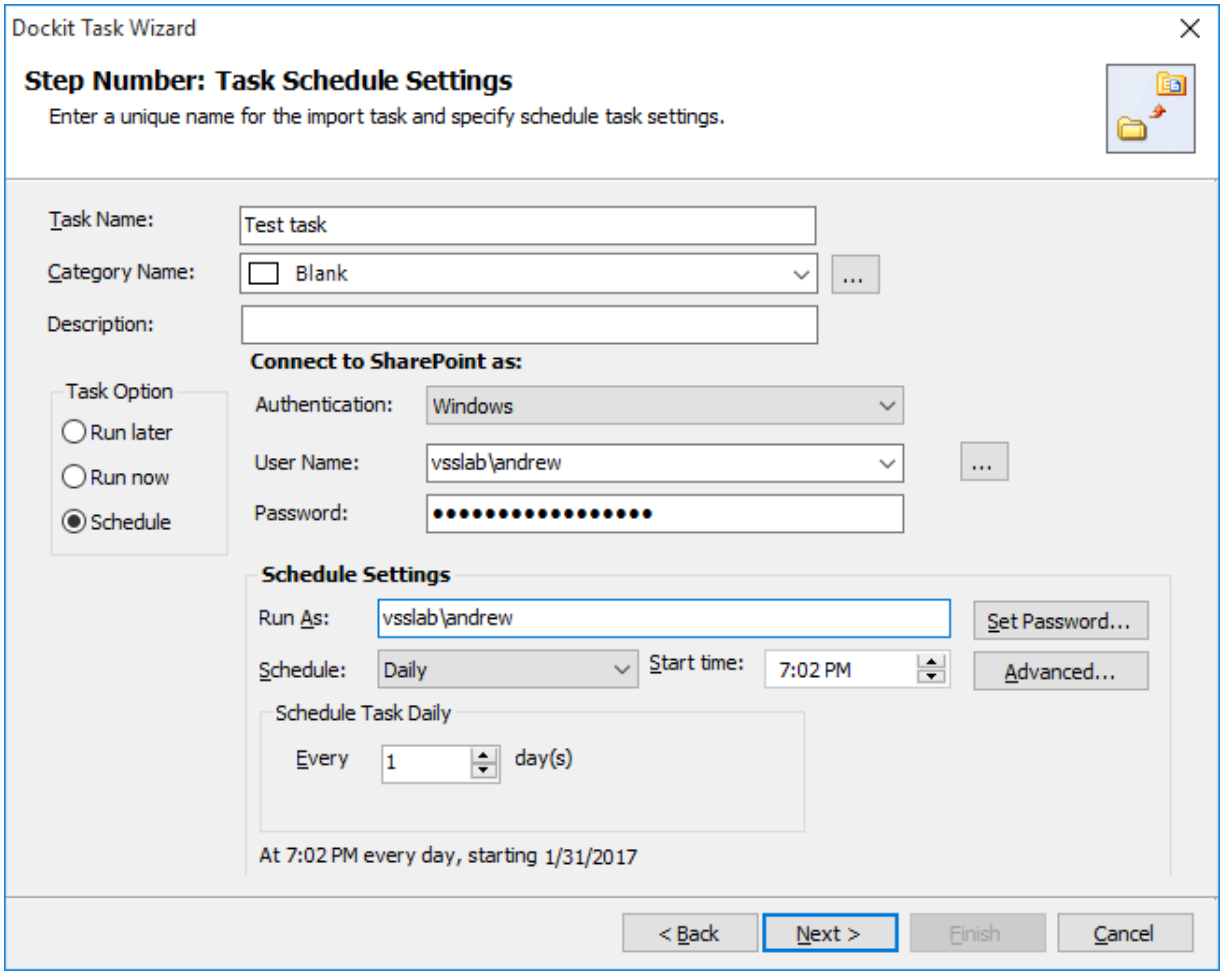
4. Select one of the following options to connect to the target SharePoint site:

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.

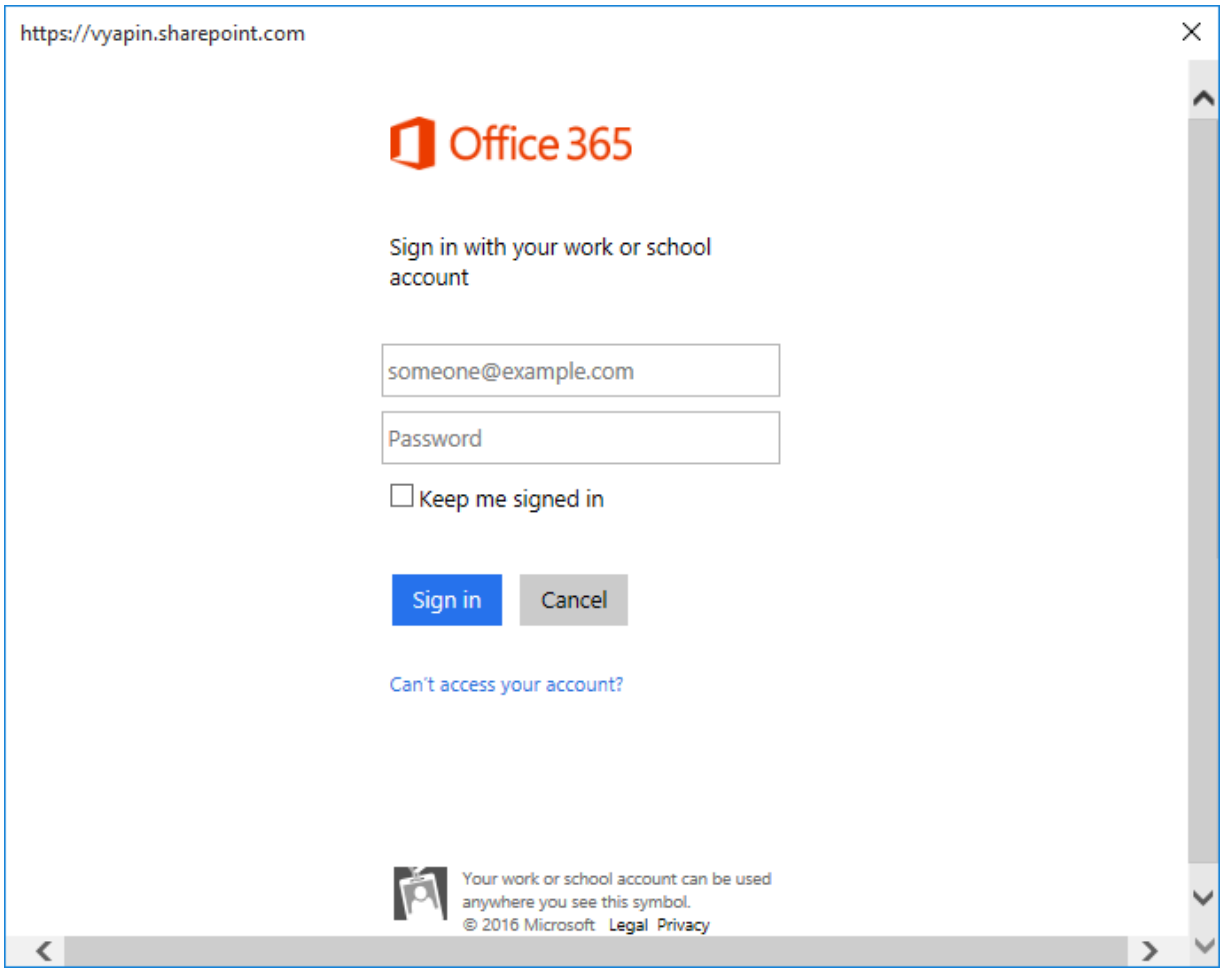
c. **Use 'Run As' user context given below** – This option will be available if you choose **Schedule** task option. Dockit will use the user account specified in the scheduled **Run As** user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint 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.



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).



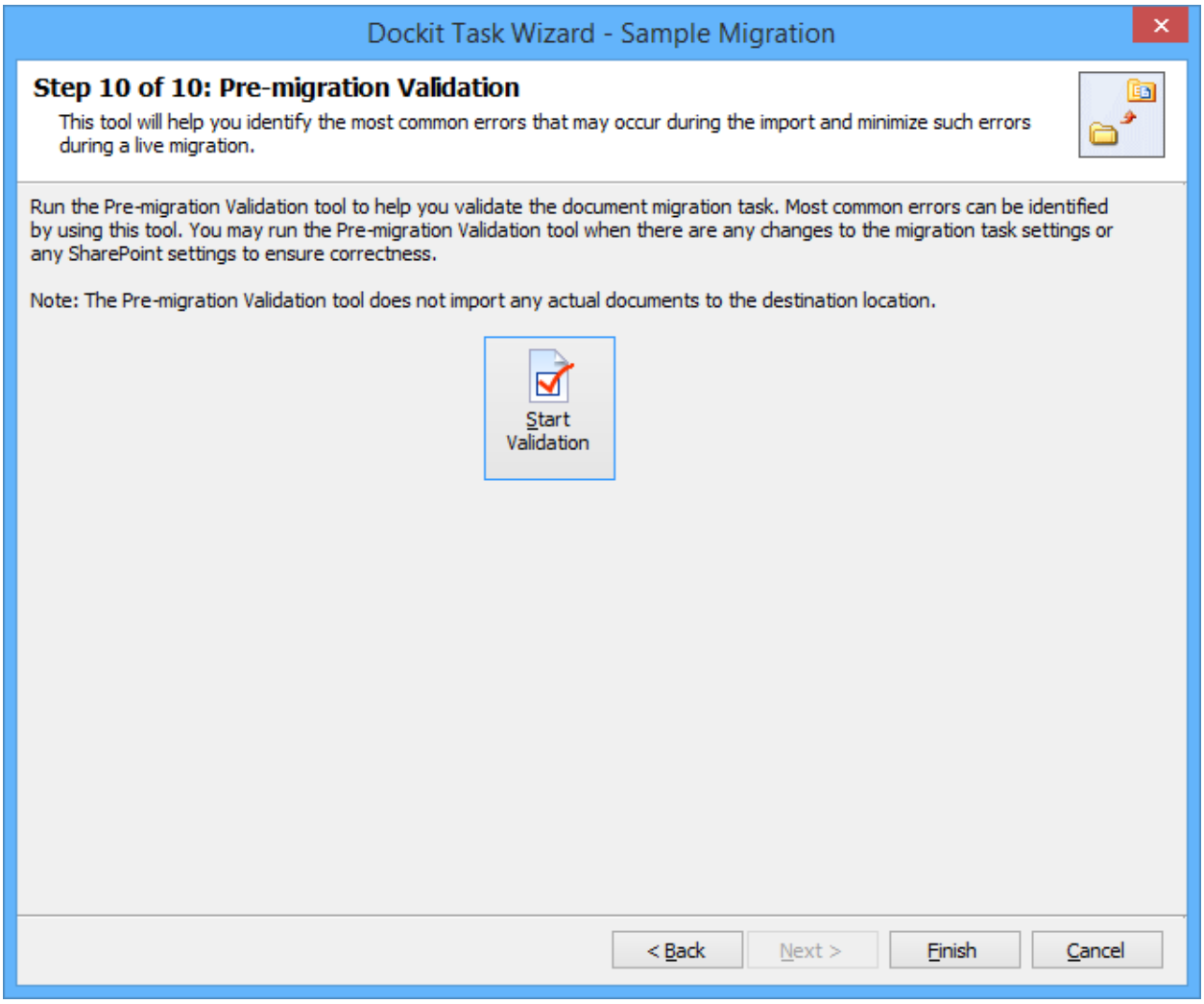
Provide username and password in the respective textboxes and click **Sign in** button to proceed.

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

Pre-migration Validation

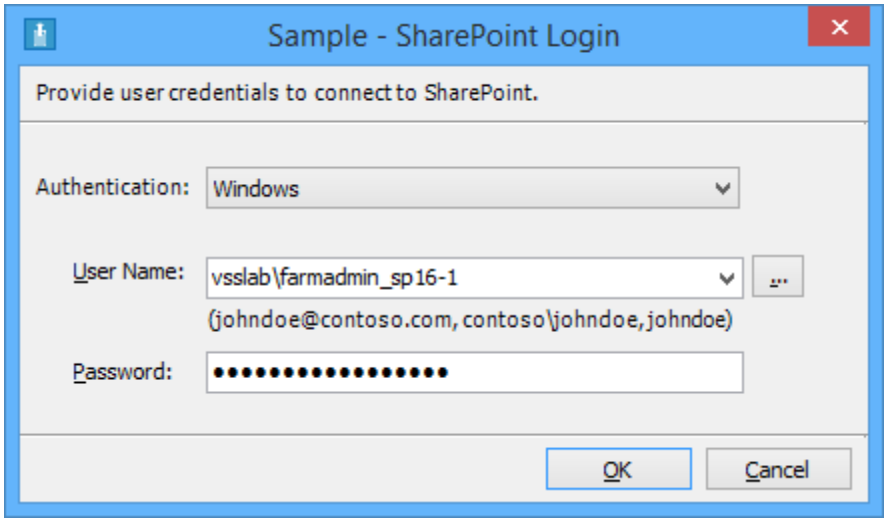
Pre-migration Validation tool helps you validate the exact steps performed by Dockit during the import process. This tool does not import any files to the destination location. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there are any changes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

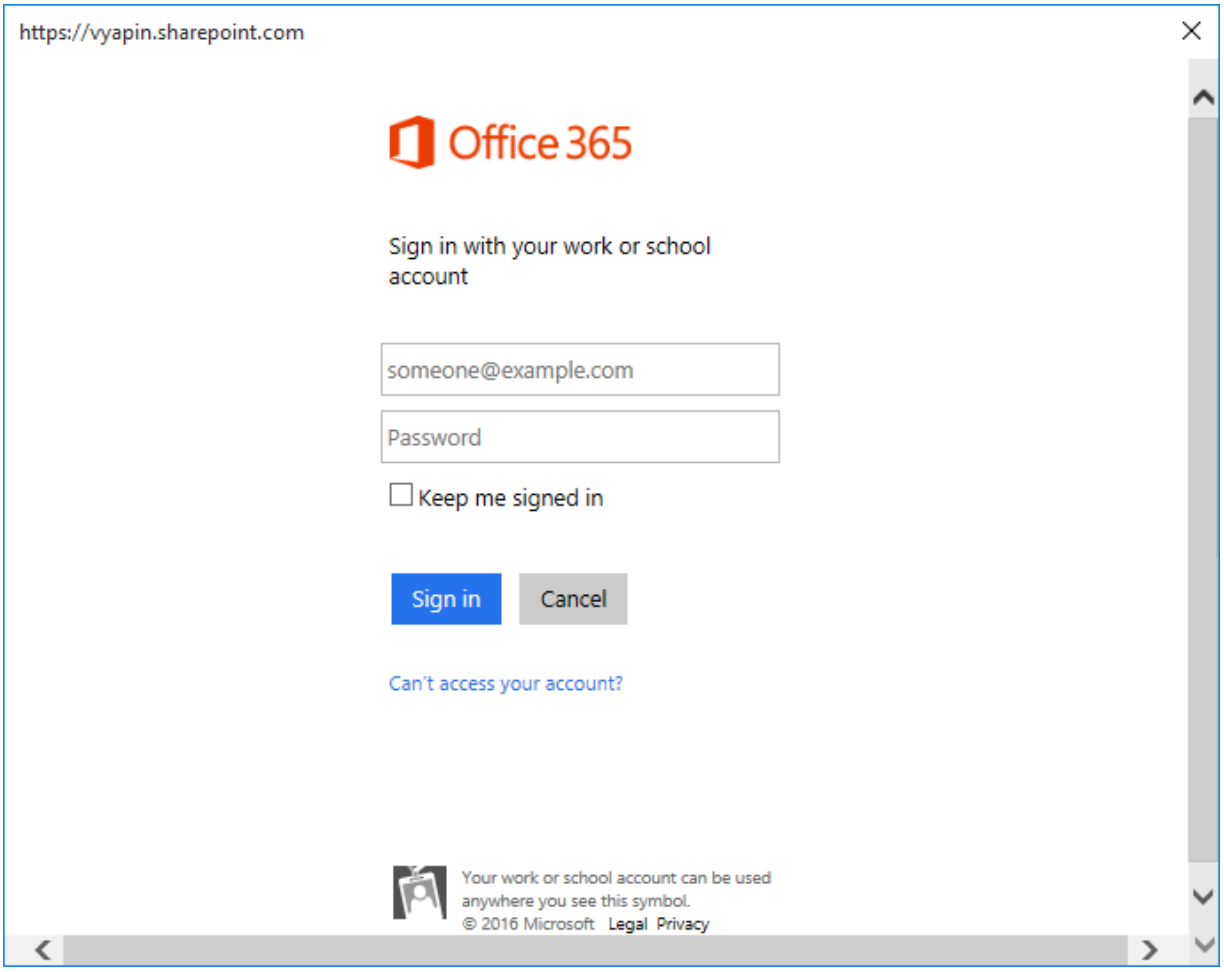


1. Click **Start Validation** button to invoke the Pre-migration Validation tool.

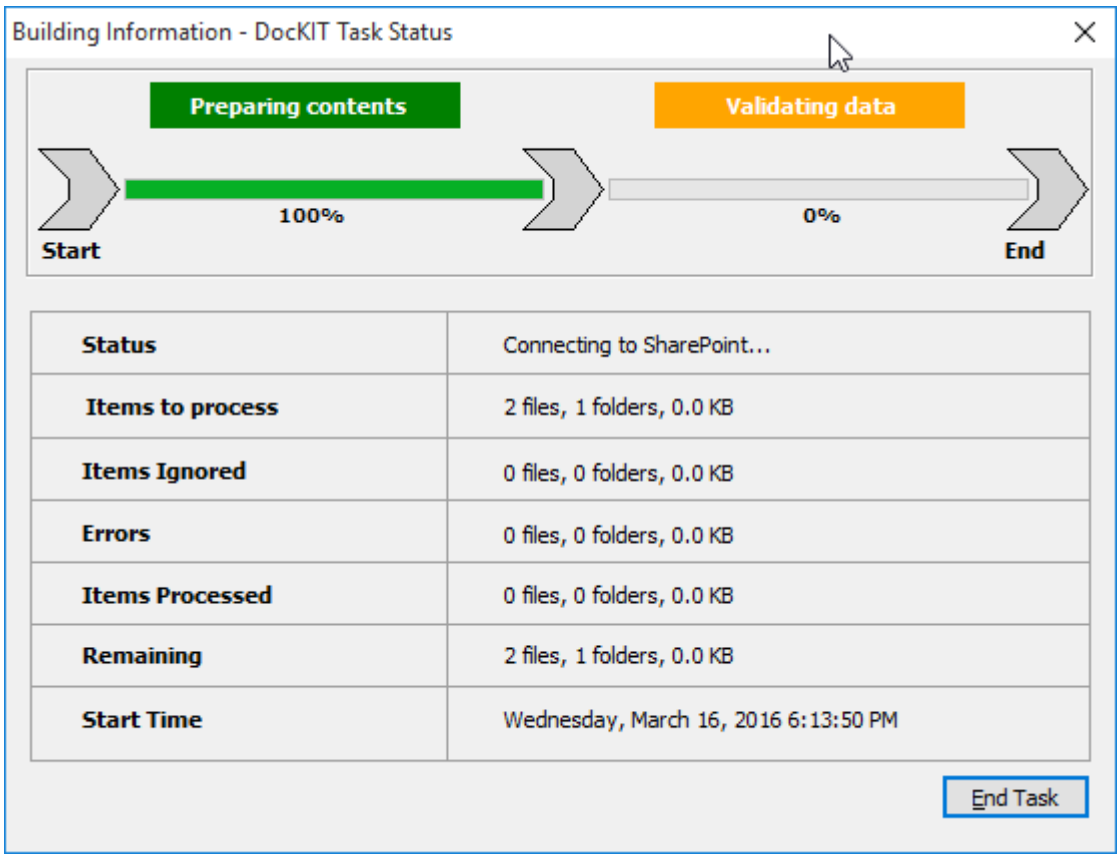
2. The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.



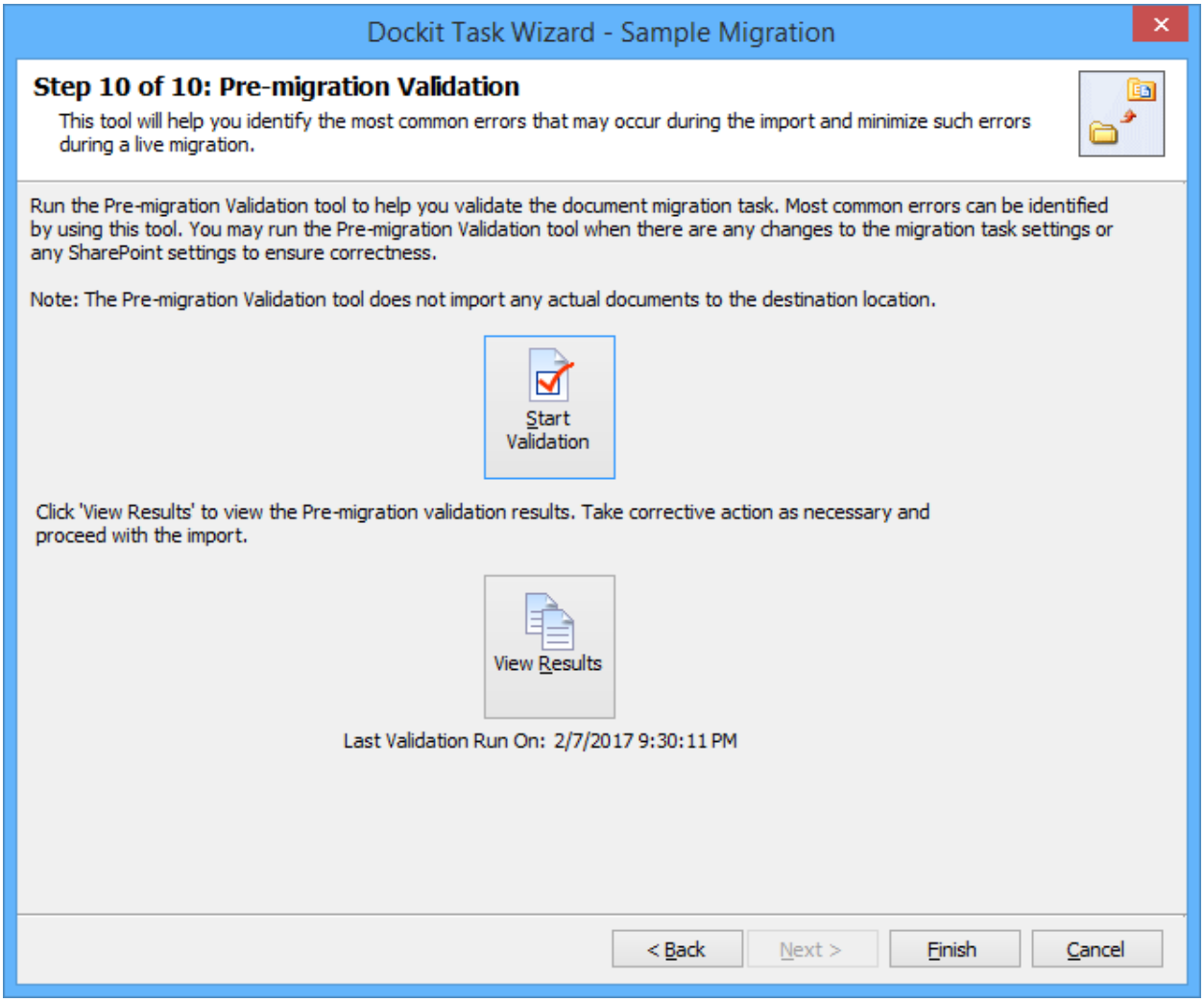
For **Federated authentication (Web Single Sign-on)** credential based import task. The Web Login Dialog to connect to SharePoint will appear as shown below:



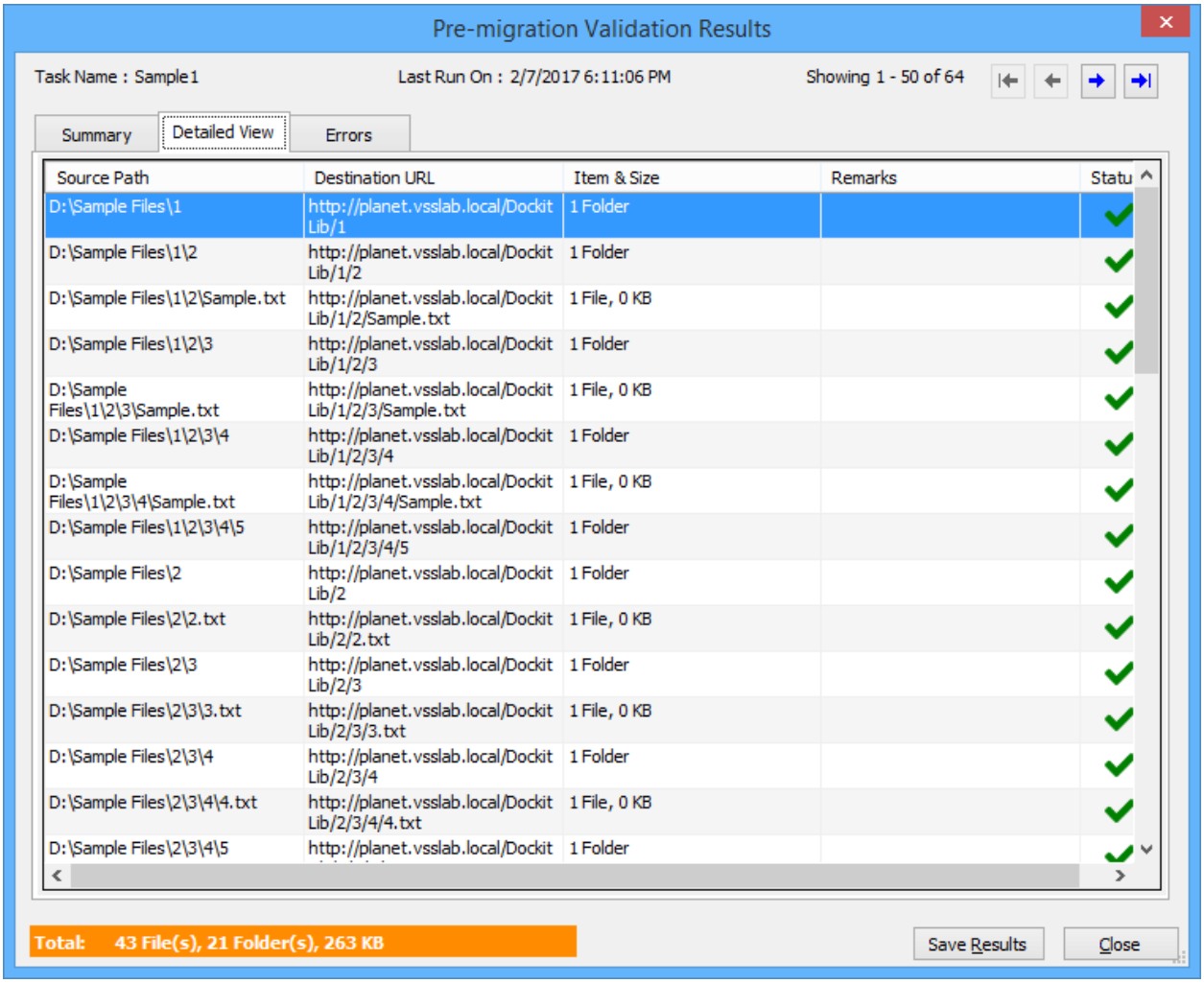
3. You will notice a task progress bar in a new window as shown below.



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.



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



- Refers the items that succeeded during pre-validation.
- 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
    - Managed Metadata - Checks for the term that matches the given value
    - User / Group - Check whether the user / group available in target location
    - 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 Pre-migration 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.

SharePoint Migration

Migrate Site & Lists using Explorer mode

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

Migrate Sites & Lists using Batch file mode

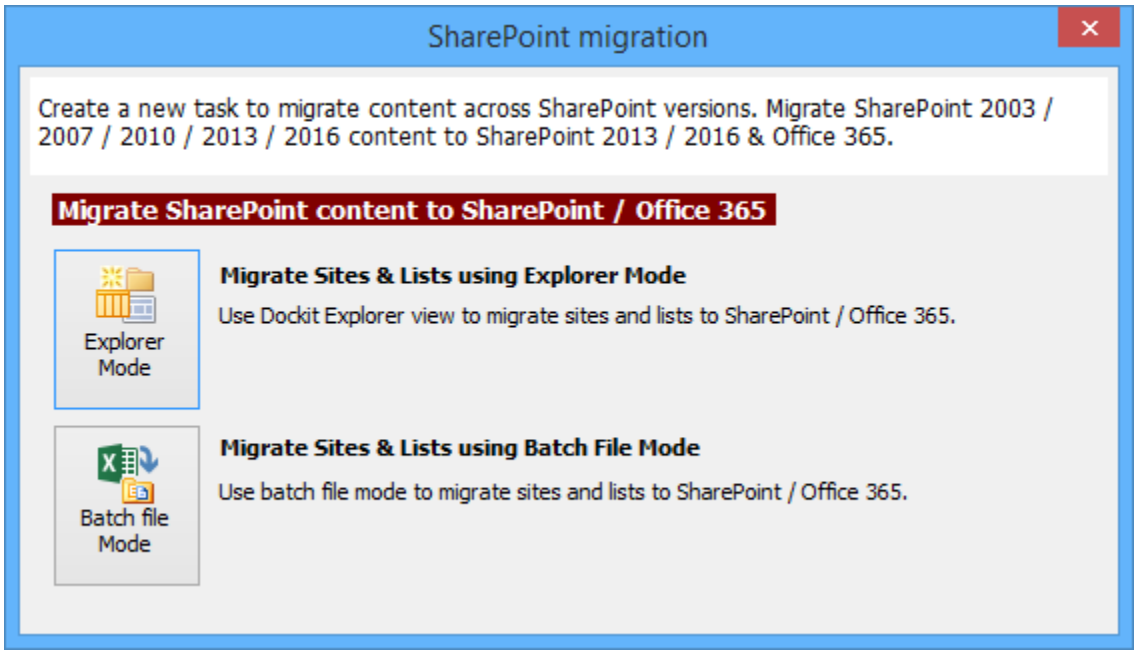
- Batch File Options
- Site / List elements to migrate
- External Metadata File
- Mapping Templates
- Migration Conditions
- Task Settings

Create Task

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

1. Click **SharePoint Migration** from Home menu of Dockit main screen.

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

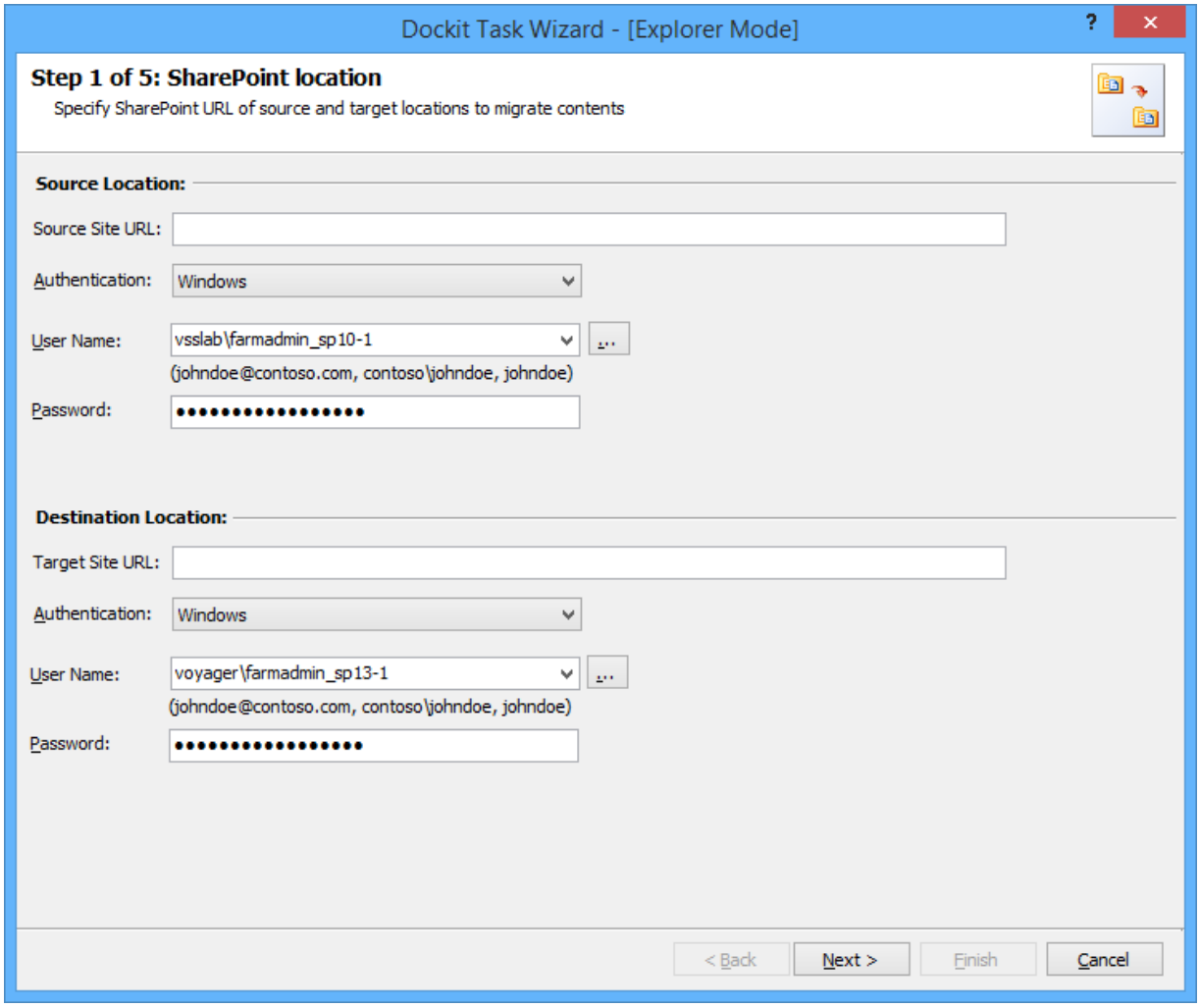


2. Specify SharePoint Location
3. Add Items to migrate
4. Specify Site / List elements to migrate
5. Specify Mapping Templates
6. Specify Task Settings
7. Click **Finish** button to create a task, or click **Back** button to change any task settings.

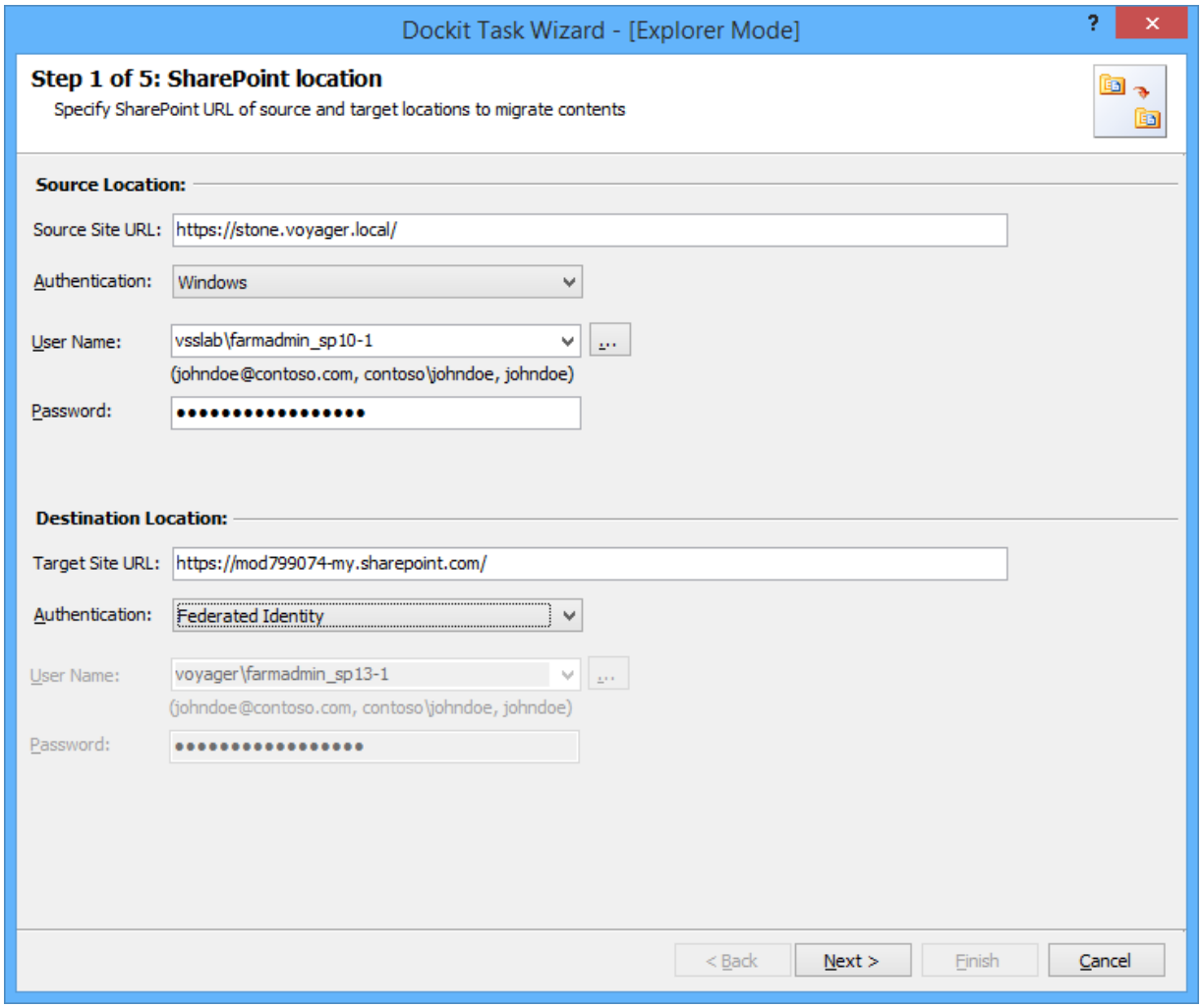
Source SharePoint Location

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:



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.



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.

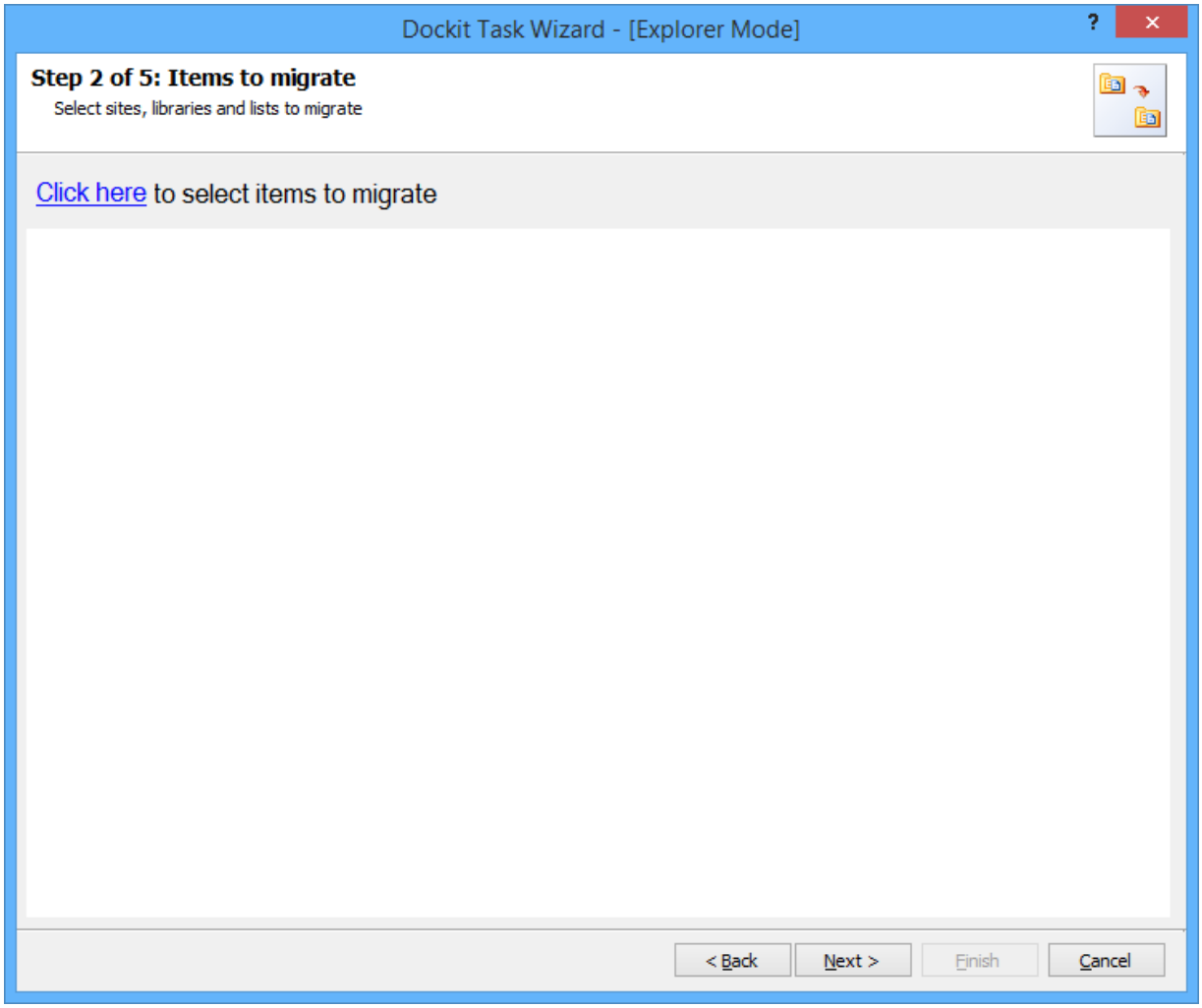
Click **...** button to create new user profile. Click here to view the details about Profile Manager dialog.

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

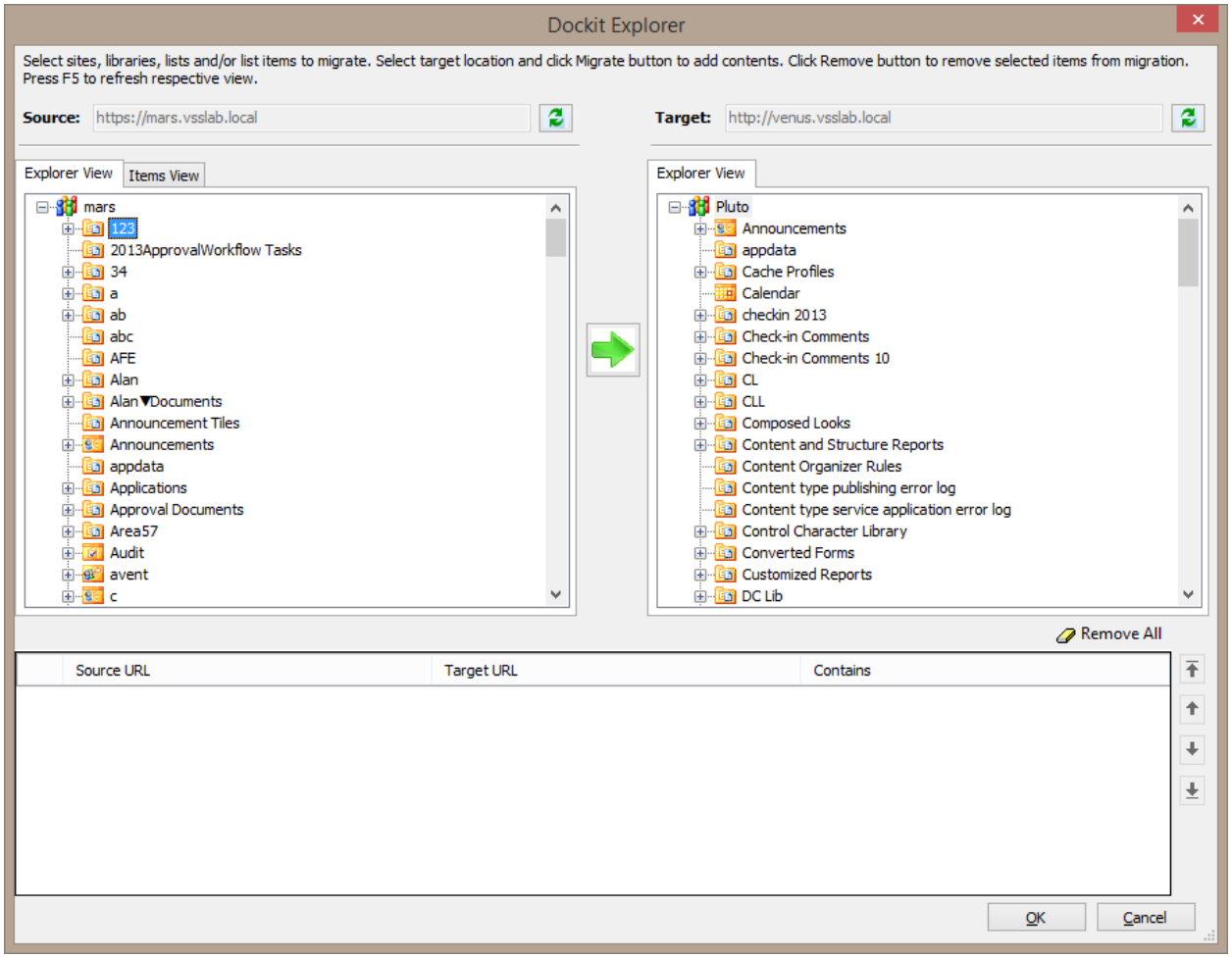
Items to migrate

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

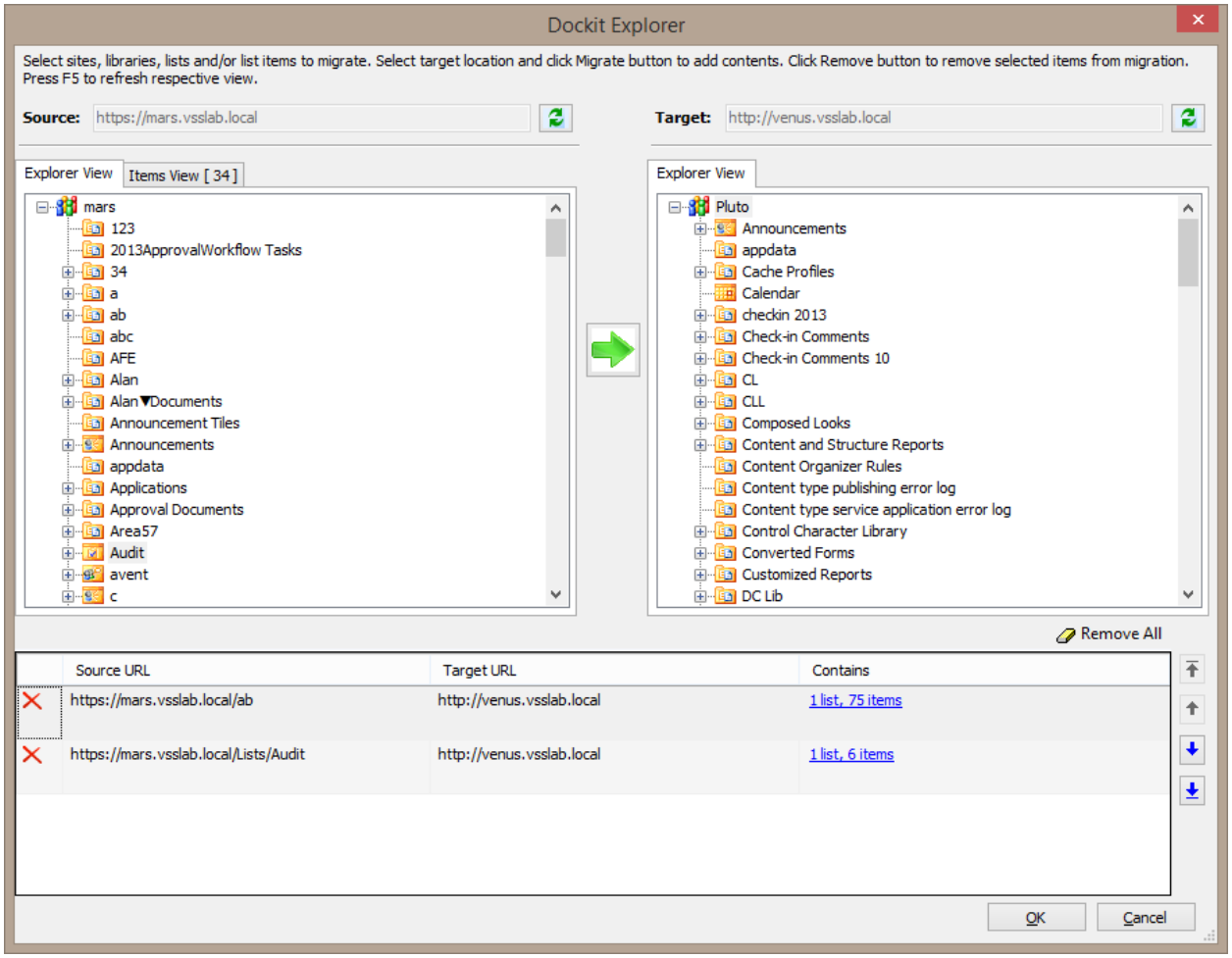
1. The **Items to migrate** step appears as shown below:



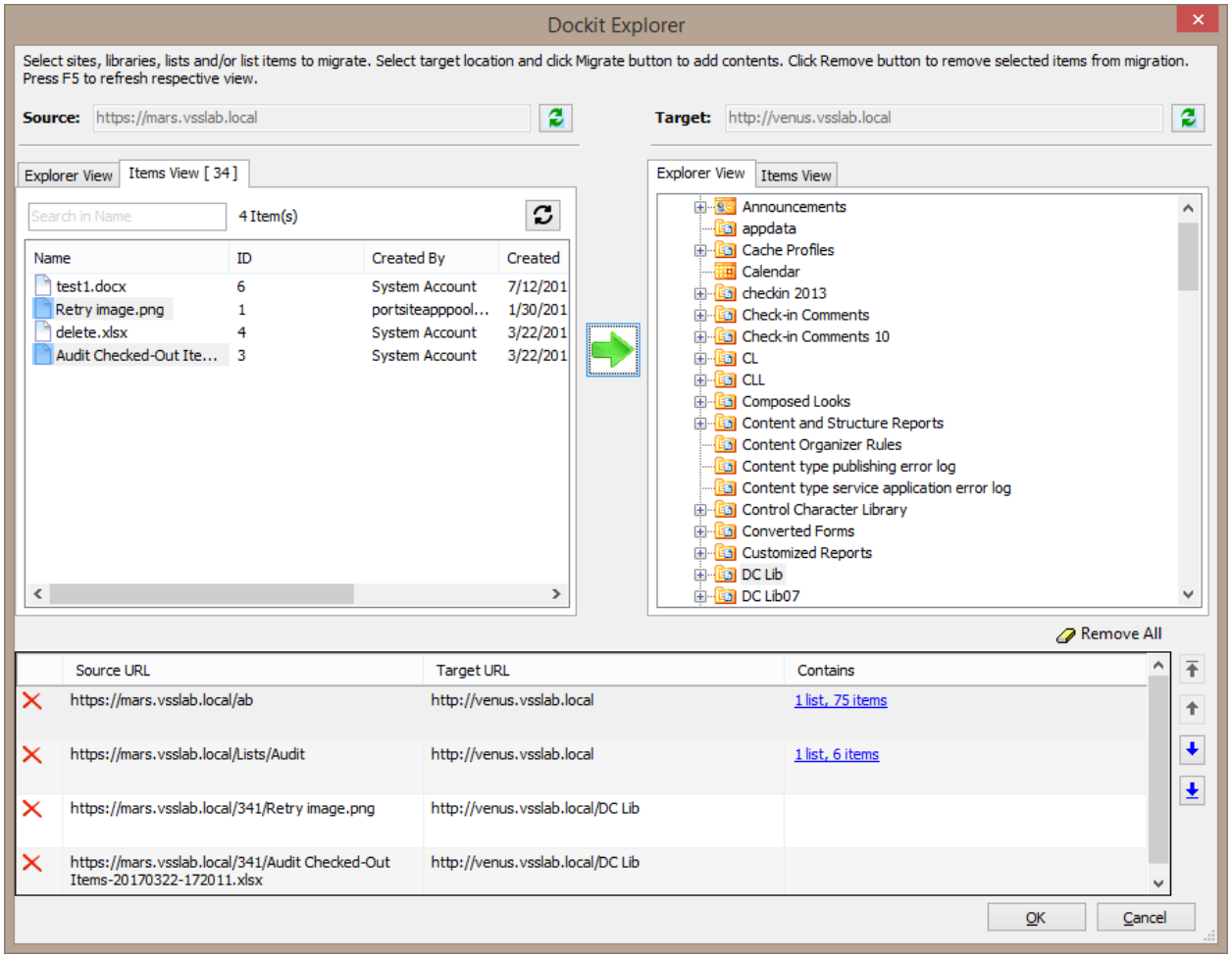
2. **Click here** hyperlink to add and remove the folders and files for migration.
3. The **Select content to migrate** dialog appears as shown below:



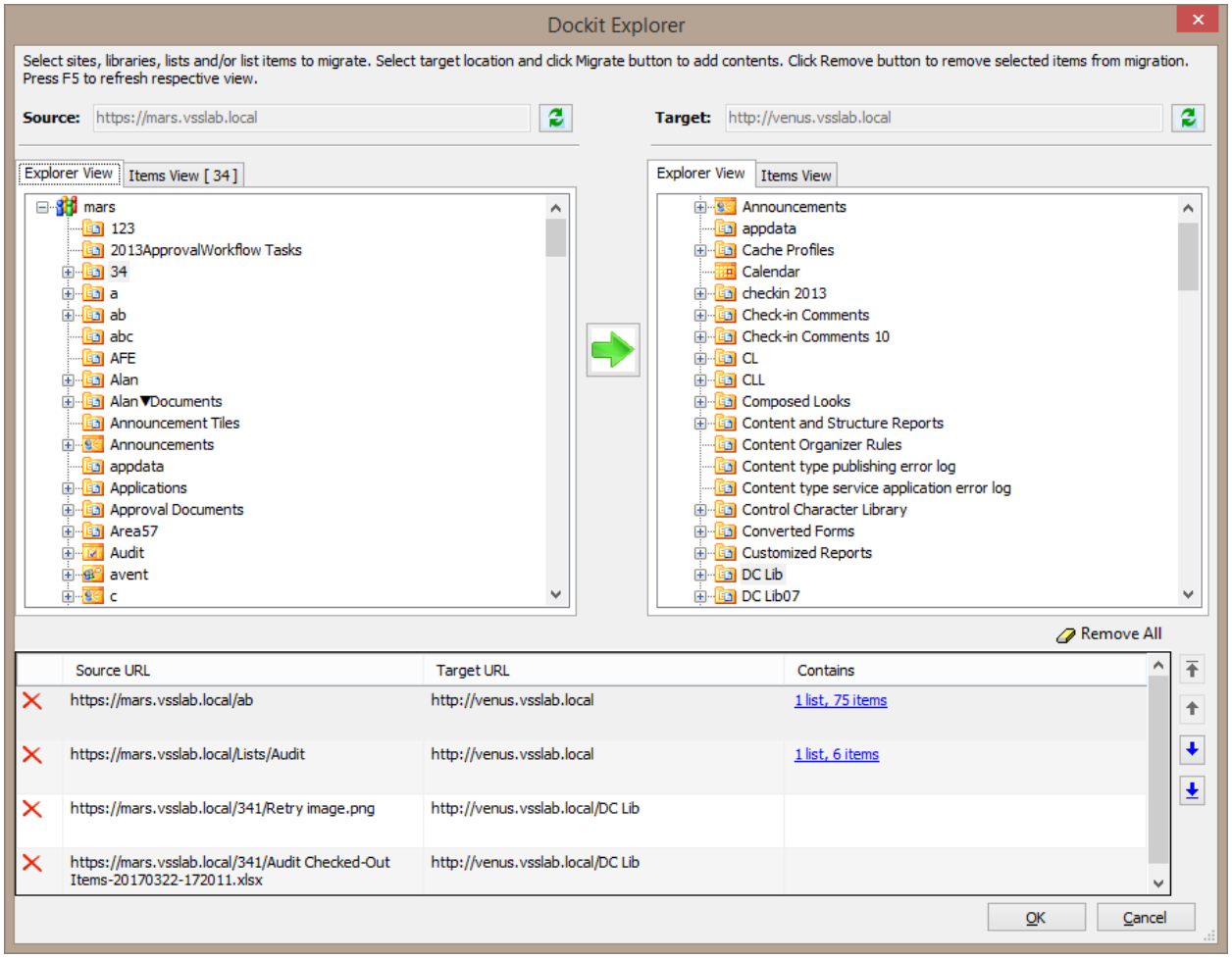
4. **a. Select content to migrate** dialog contains a tree-view, which provides explorer like view to select a site, list or folder. This option will helps if you are interesting in migrating whole site / list.



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.

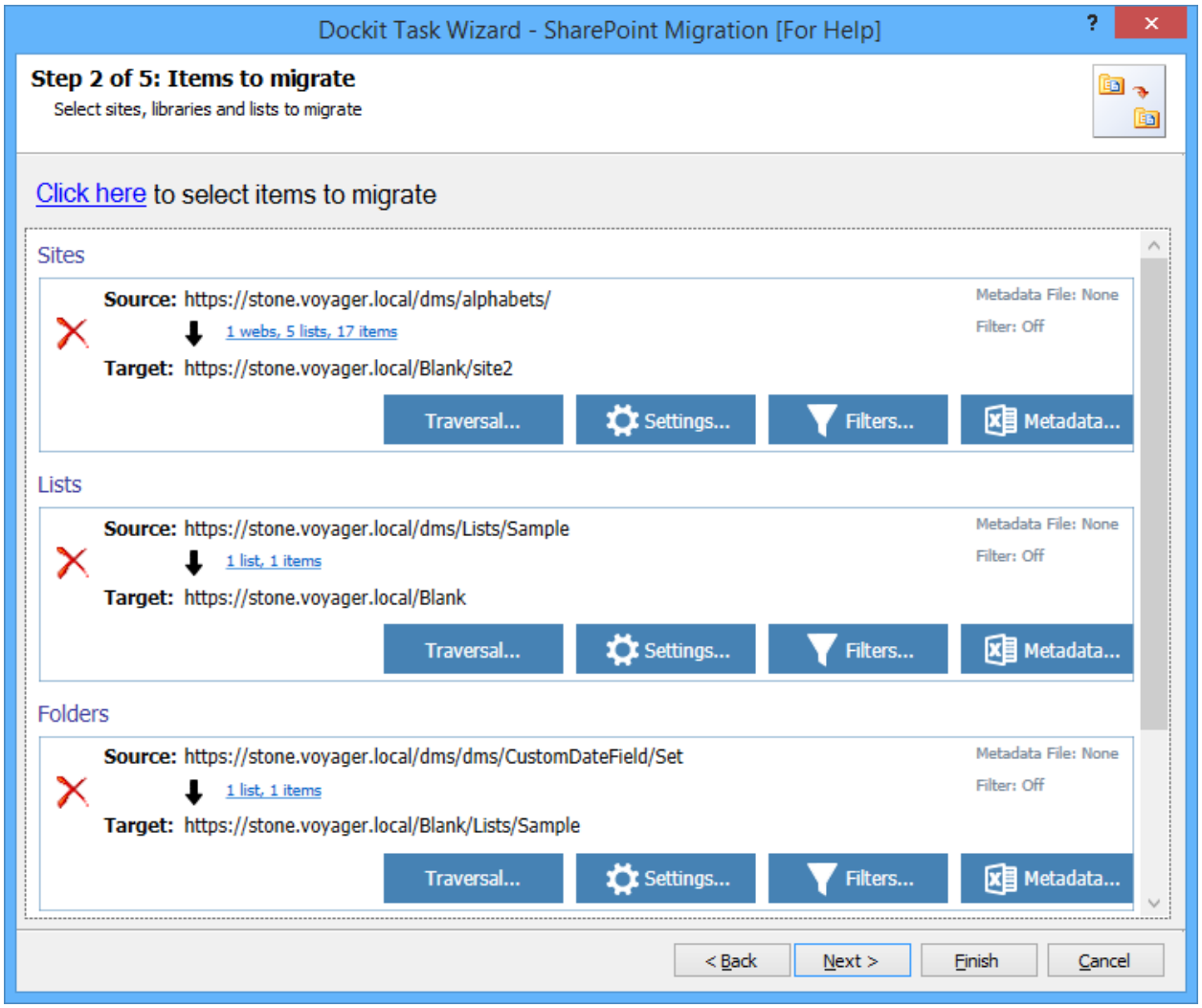


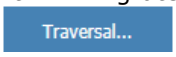
5. Browse the source folders, files and list items of source SharePoint list and select the required folders, files and list items from list view (top right pane). Select a destination location in the tree-view (bottom right pane) and click **MIGRATE** button to add selected items for migration.



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

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



7. 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.

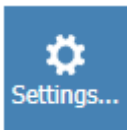
   To specify traversal options for site, click Site Traversal Options

   To specify traversal option for list, click List Traversal Options

   To specify traversal option for list, click Library Traversal Options

   To specify traversal options for folder, click Folder Traversal Options

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

Use 

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

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

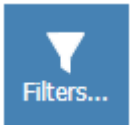
To specify migration options for site, click Site Migration Options

To specify migration option for list, click List Migration Options

To specify migration option for list, click Library Migration Options

To specify migration options for folder, click Folder Migration Options

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

   Use 

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

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

   To specify filter condition, click Filter Condition

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

    Use

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

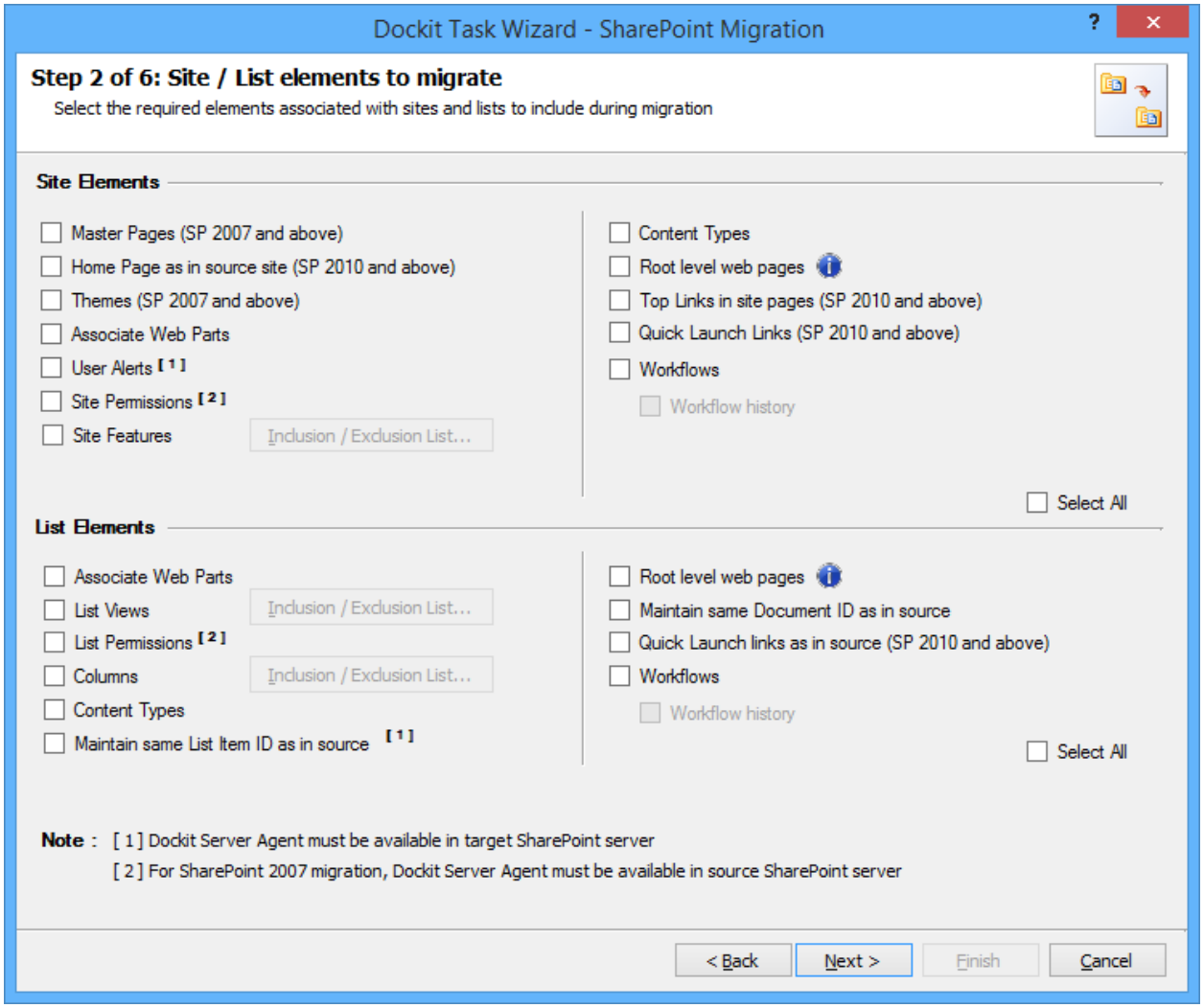
11. Click **OK** button to proceed or click **Cancel**

12. Click **Next** to proceed.

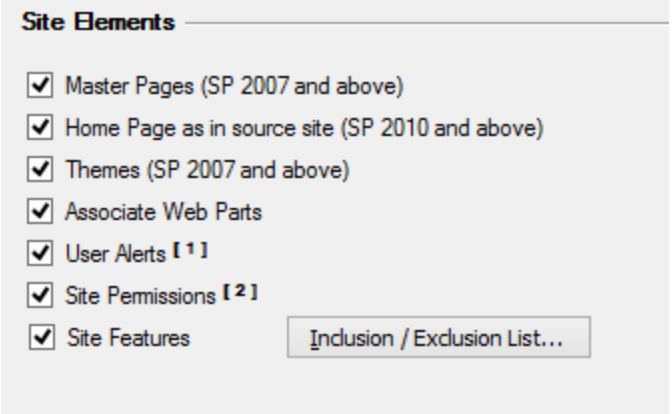
Site / List elements to migrate

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

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



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

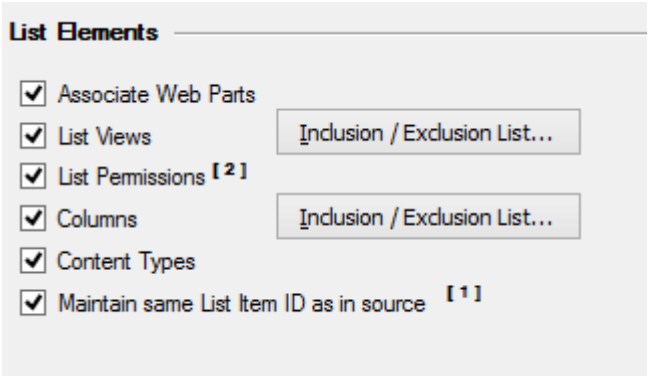


Master Pages	Migrate master pages. This can be done when migrating content from SharePoint 2007 and above.

Home Page as in source site	Set the home page as in source SharePoint site. This can be done when migrating content from SharePoint 2010 and above.
Themes	Migrate the themes. This can be done when migrating content from SharePoint 2007 and above.
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 target SharePoint server to migrate user alerts for on-premise.
Site Permissions:	To migrate site permissions.

	Note: Dockit Server Agent is required in the source SharePoint server to migrate when performing migration from SharePoint 2007.
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.

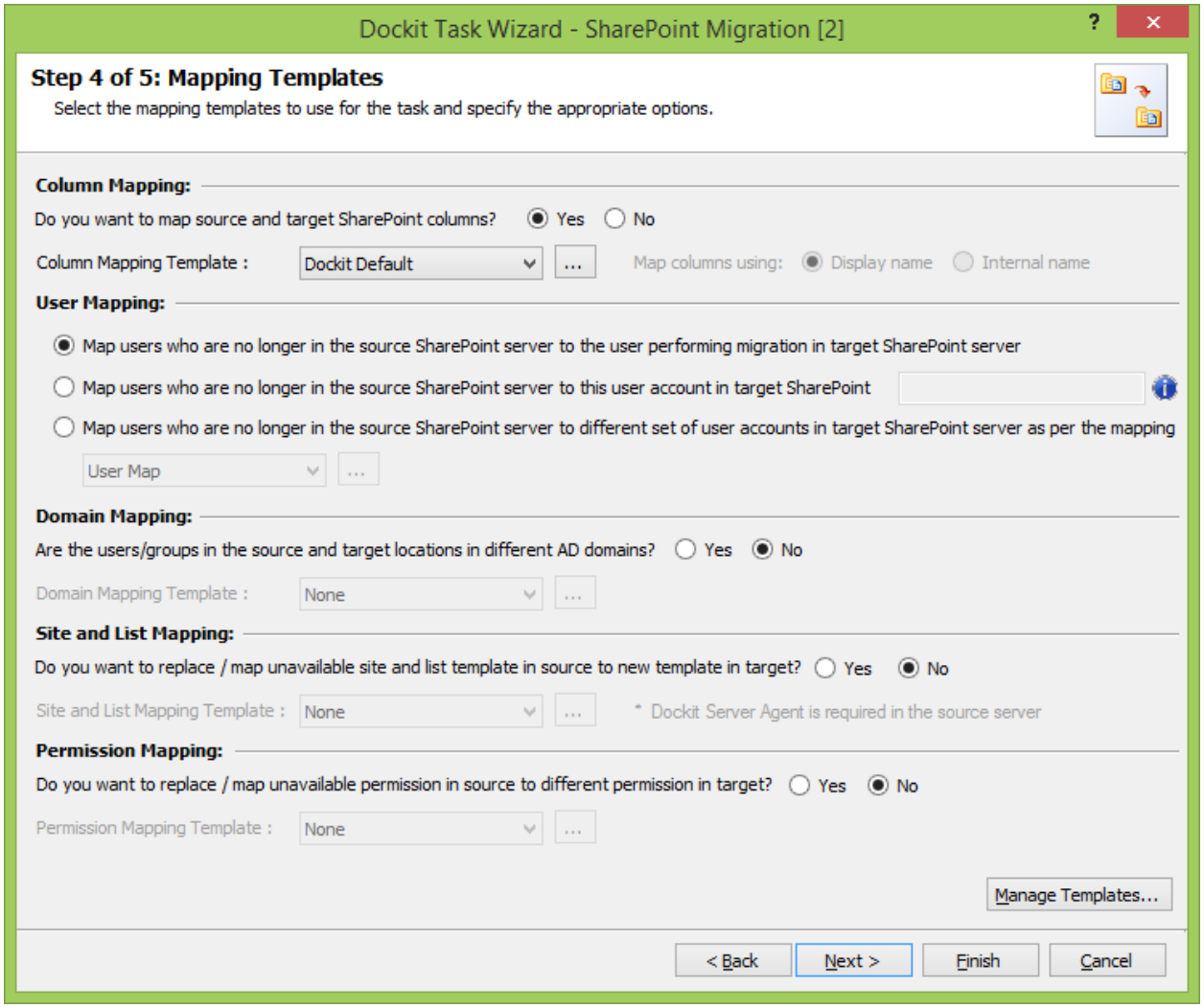


List Views:	To migrate list views.
List Permissions:	To migrate list permissions. **Note: Dockit Server Agent** is required in the source SharePoint server to migrate when performing migration from SharePoint 2007.
Content Types:	To create content types which are not available in the target SharePoint.
Maintain same List Item ID as in source:	To retain the list item IDs as same as source list item. **Note: Dockit Server Agent** is required in the target SharePoint server to retain list item ID.

Maintain same Document ID as in source:	To retain the document ID for the migrated document as same as source document (when Document ID Services feature is activated in both source and target SharePoint servers).

Mapping Template

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



2. **Column Mapping Template:**
Do you want to map metadata properties between SharePoint columns? (Yes/No)

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

Default template:

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

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

For more information, please visit Column Mapping Template.

3. **User Mapping Template:**
1. Map users who are no longer in the source SharePoint server to the user performing migration in target SharePoint server

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

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

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

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

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

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

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 Domain Mapping Template.

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 Site and List Template Mapping.

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).

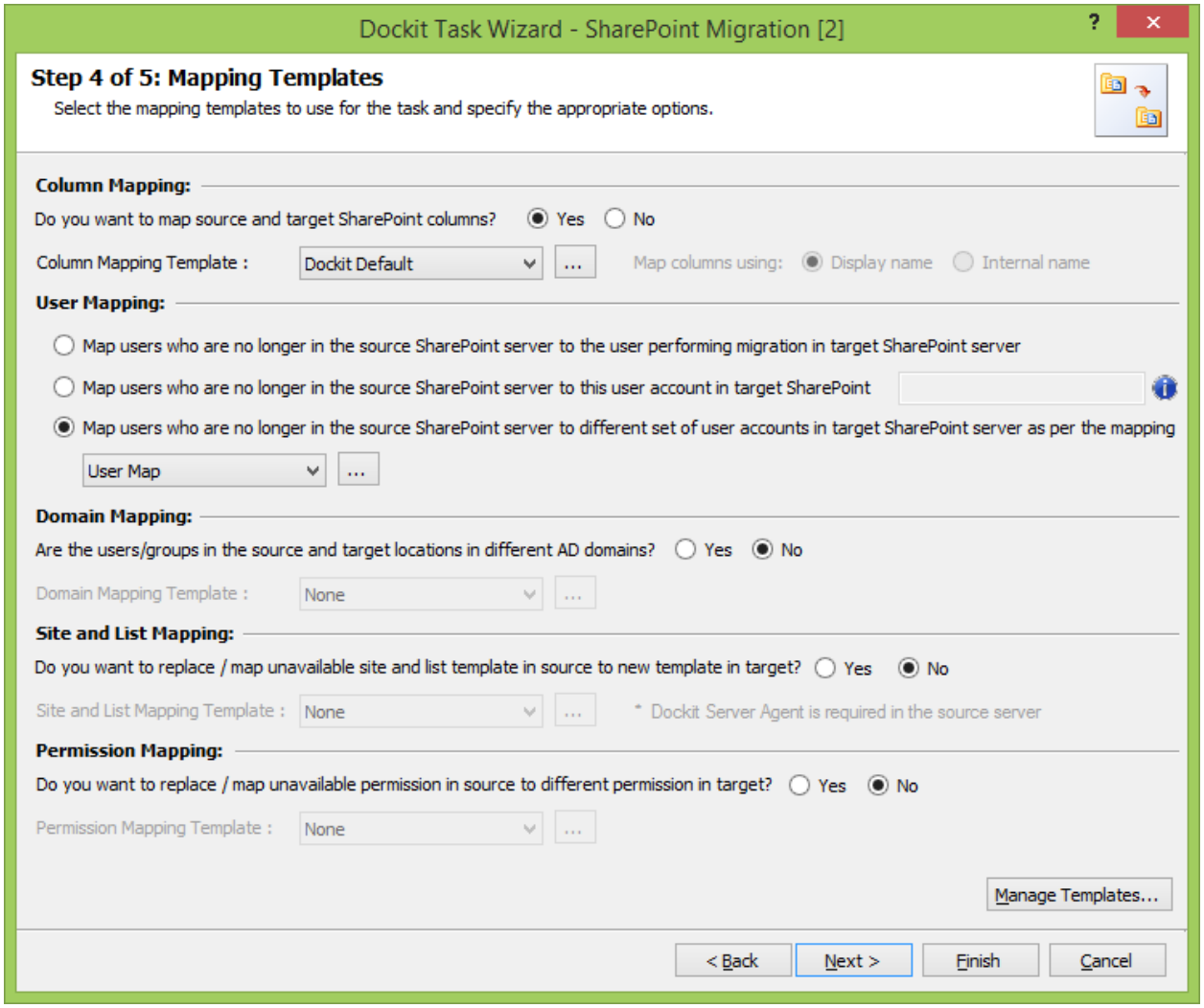
None represents the default permission mapping that helps to assign the permission as it is. For more information, please visit Permission Mapping Template.

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 Reference Mapping Template.

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

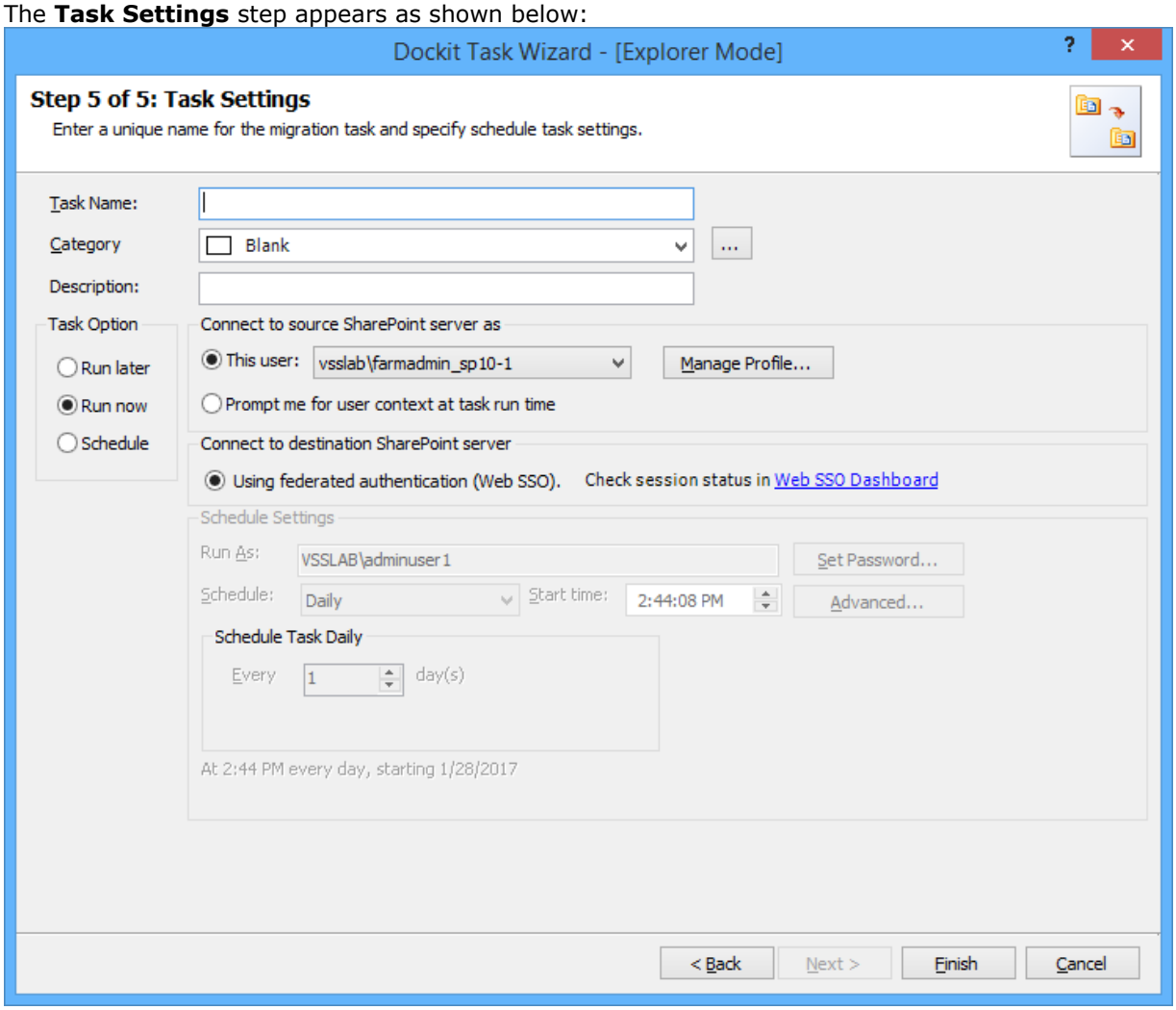


9. Click **Next** to proceed.

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:



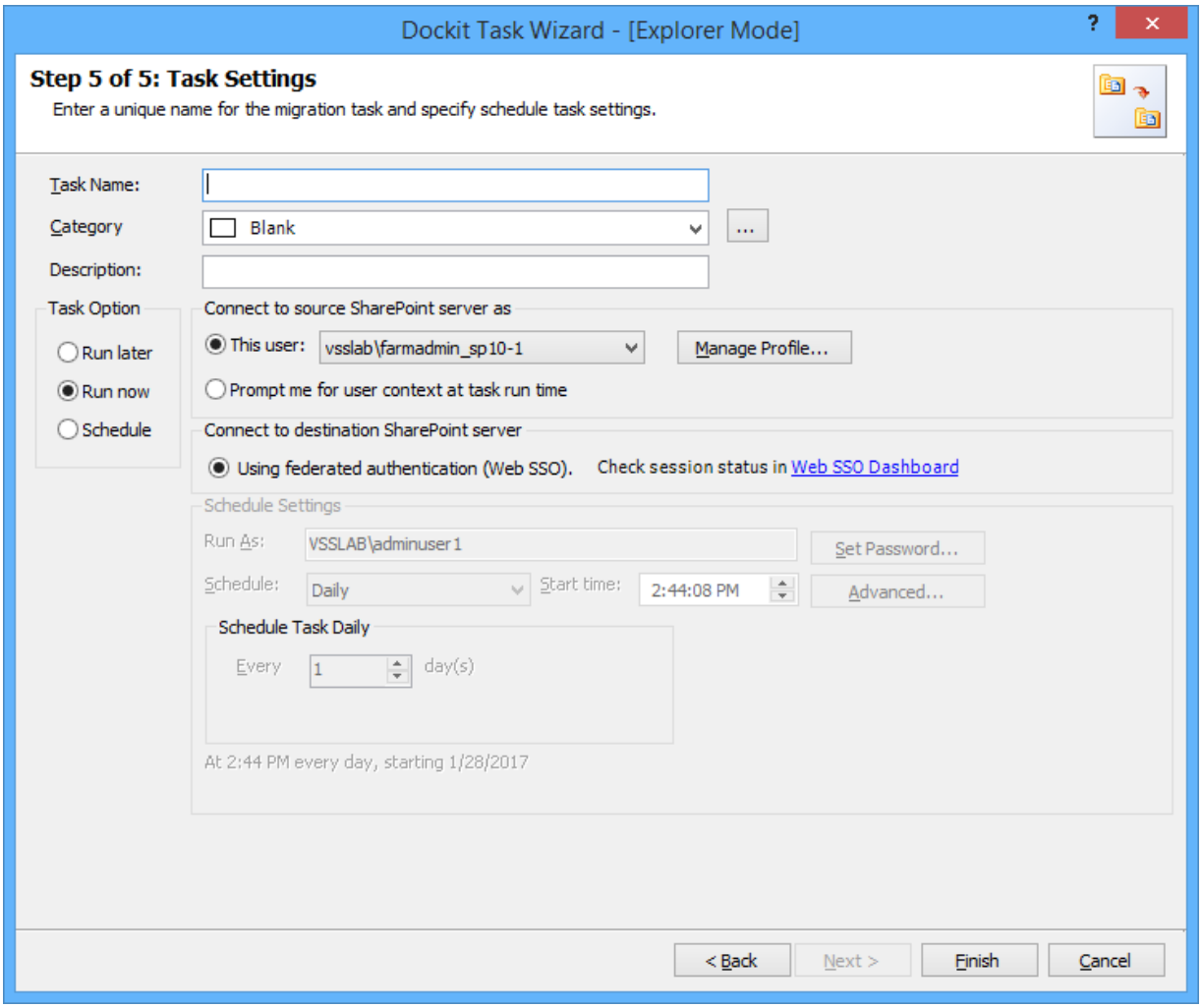
2. Enter a unique task name in **Task Name** textbox.
3. Select a **Task Option** from one of the following options:
    a. **Run later -** to run the task later as and when desired.
    b. **Run now**- to run the task immediately after clicking Finish button.
    c. **Schedule-** to create a Windows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

4. Select one of the following options to connect to the source and destination SharePoint. The options provided to the user will change depending on the authentication mechanism used by the source and destination SharePoint servers.

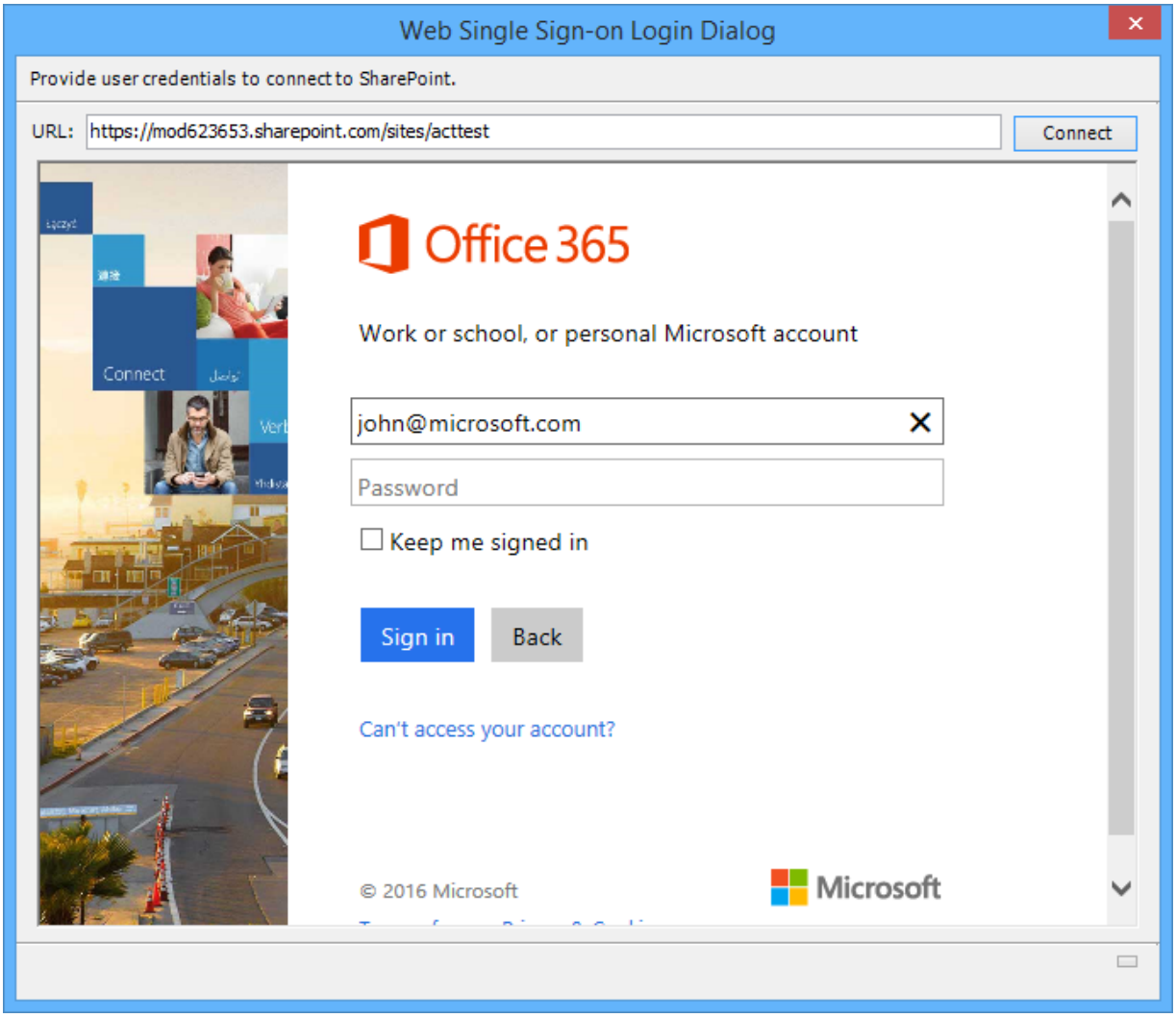
    a. **User Profiles <user name>** - This option is available if you choose **Run later** or **Run now** or **Schedule** task option.

b. **This user <user name>** - This option is available if you choose **Run later** or **Run now** or **Schedule** task option. Dockit will use stored profile context to connect corresponding SharePoint.
c. **Prompt me for user context at task run time**– This option is available if you choose **Run later** or **Run now** task option. Select this option if the SharePoint sites are configured to use Windows and/or Forms Authentication only. Dockit will prompt for the user context to use to connect to SharePoint sites when executing Dockit migration task.
d. **Use 'Run As' user context given below**– This option will be available if you choose **Schedule** task option. Dockit will use the user account specified in the scheduled **Run As** user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint when running the scheduled task, you can do so by storing the SharePoint user context for future use.
e. **Use federated authentication (Web SSO) for the SharePoint site**– This option is available if you choose **Run later** or **Run now** or **Schedule task** option. Select this option if the source or destination SharePoint site uses federated identity (Web SSO or Active Directory users configured via ADFS). Dockit will prompt for the user context to use to connect to SharePoint when executing Dockit migration task. To connect to Office 365's SharePoint Online environment, you can use **Web Single Sign-on option (Web SSO)** for both Cloud Identity (Office 365 Online User Credential e.g., johndoe@vyapin.onmicrosoft.com) and Federated Identity (configured via ADFS e.g., johndoe@vyapin.com).

5. 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:

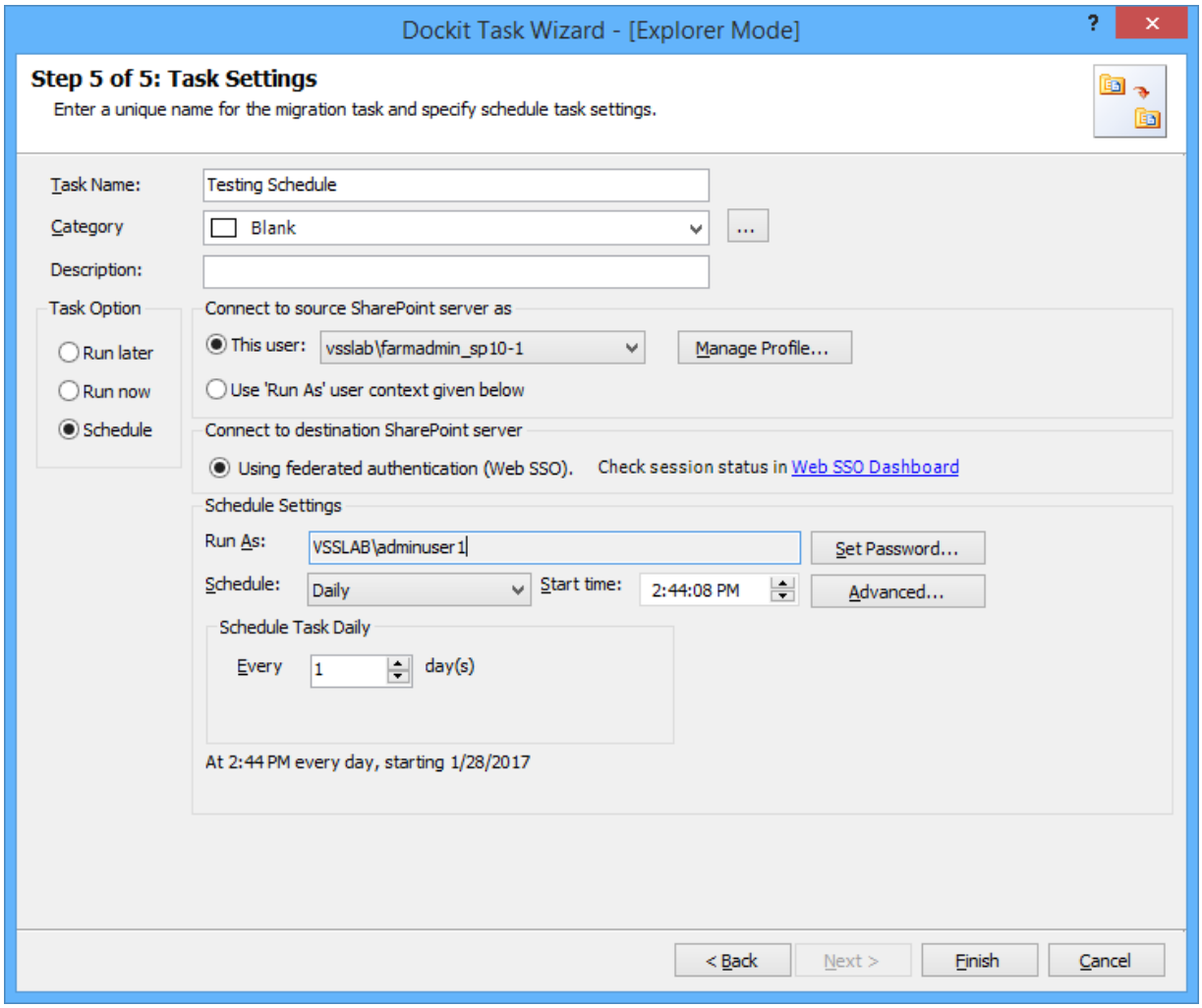


Upon clicking **Finish**, you will be prompted for credentials (username and password).



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:



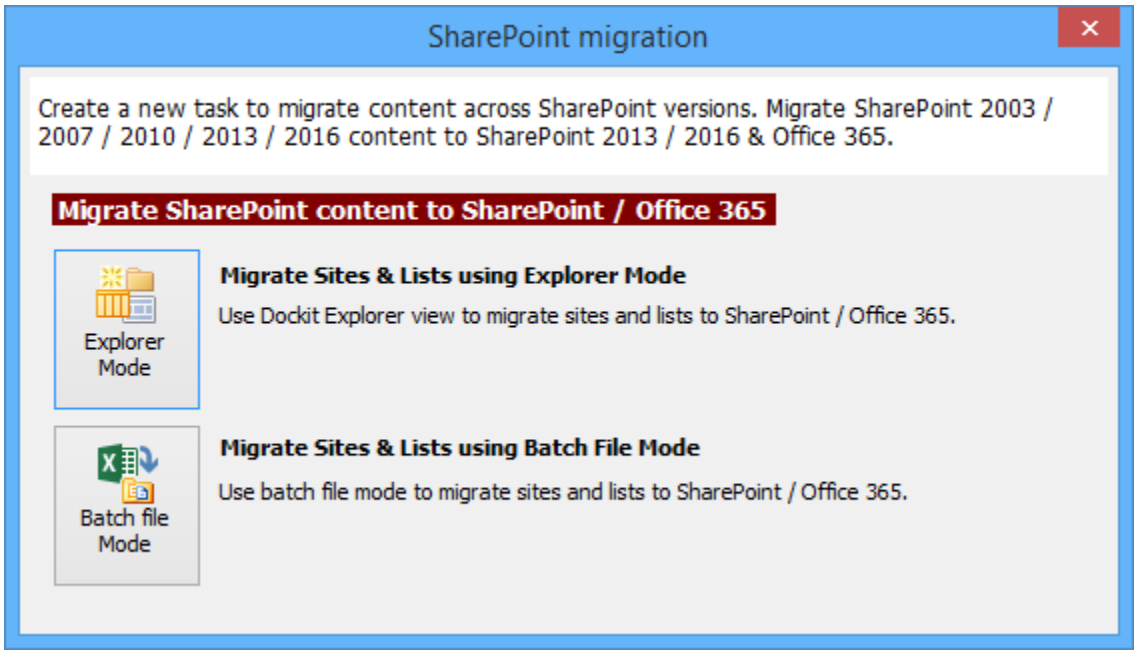
7. Click **Finish** button to create the task.

Create Task

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

1. Click **SharePoint Migration** from Home menu of Dockit main screen.

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

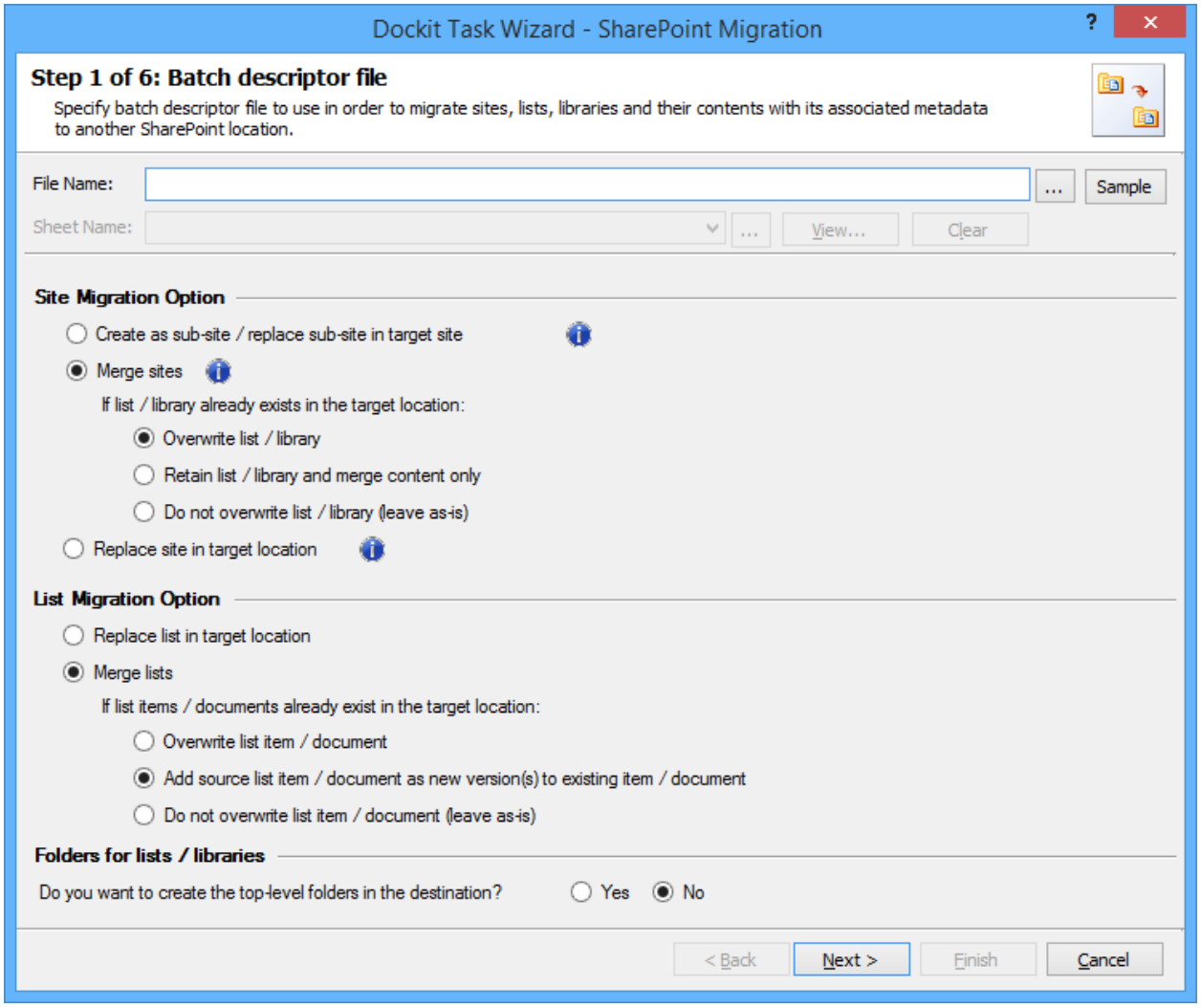


2. Specify Batch Descriptor File
3. Specify Site / List Elements to migrate
4. Specify External Reference File
5. Specify Mapping Templates
6. Specify Migration Conditions
7. Specify Task Settings
8. Click **Finish** button to create a task, or click **Back** button to change any task settings.

Batch Descriptor File

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

1. The **Batch descriptor file** step appears as shown below:



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, click here.

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.

4. 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.

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.

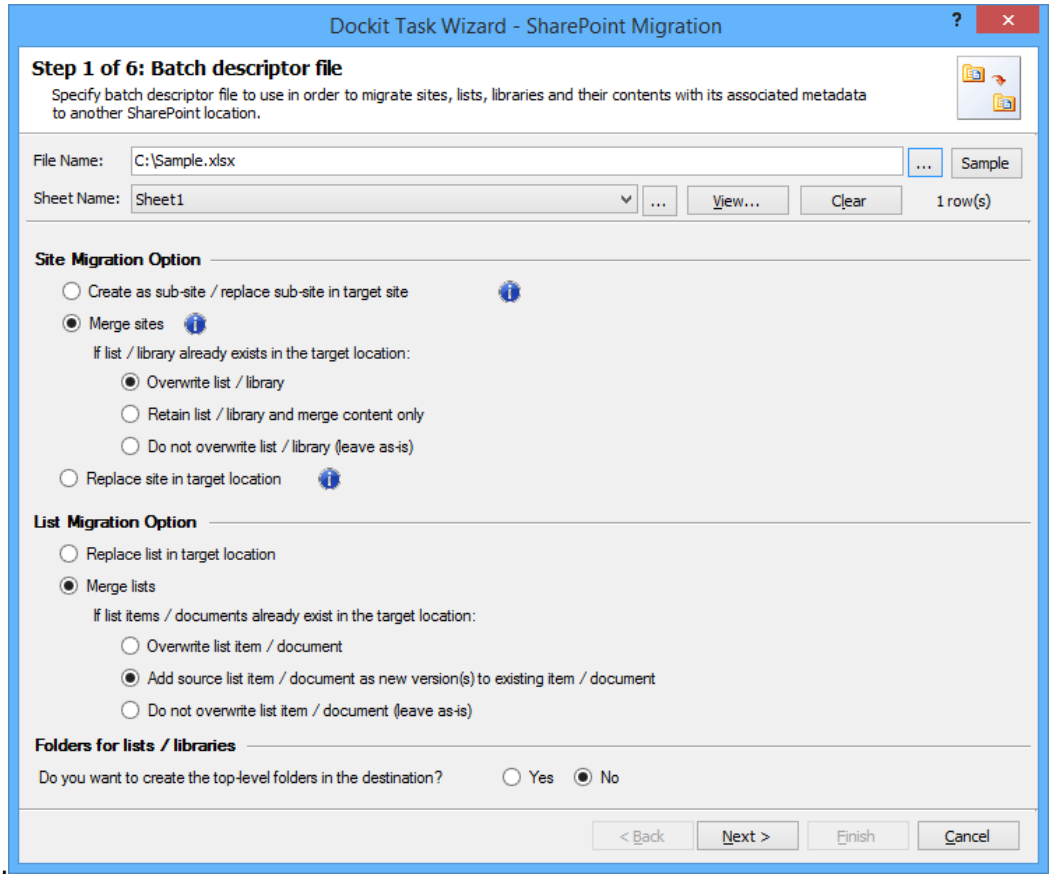
Select the appropriate option for 'Do you want to replace the site, if it already exists in destination location?' by selecting the option buttons (Yes/No).

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.

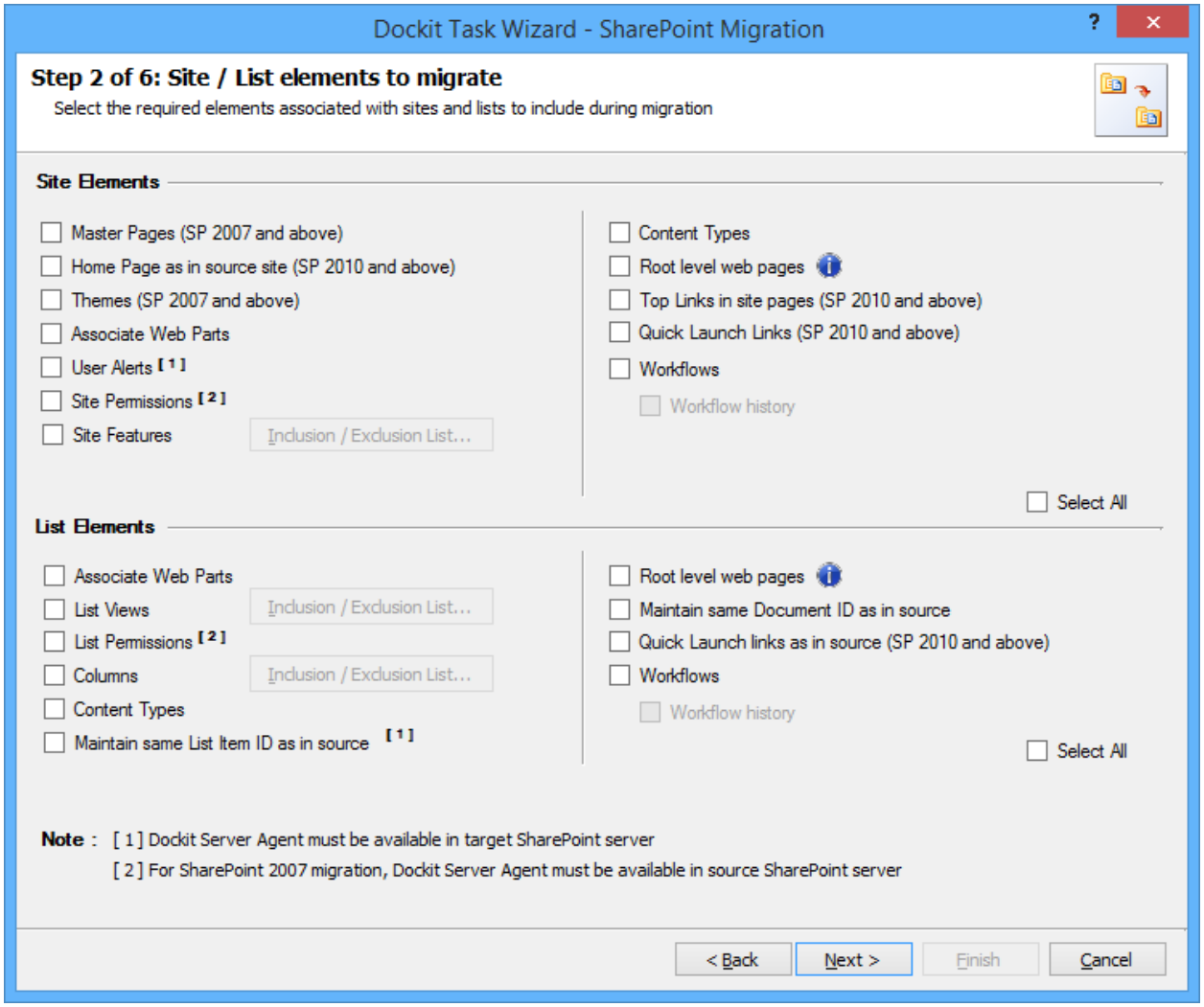


8. Click **Next** to Proceed.

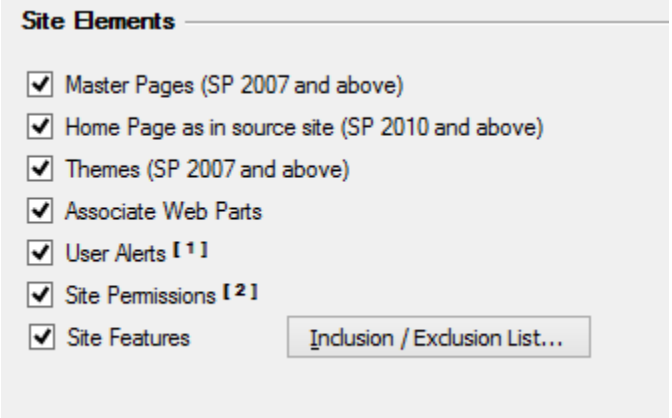
Site / List elements to migrate

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:



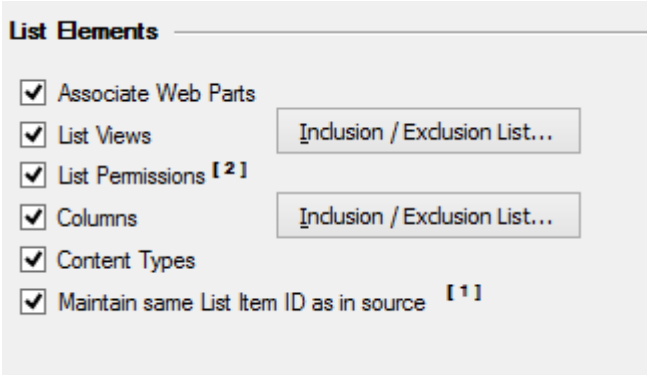
2. Specify the site elements to migrate during a Site / Web level migration to a target SharePoint 2007 / 2010 / 2013 / 2016 server and Office 365 site.



Master Pages	Migrate master pages. This can be done when migrating content from SharePoint 2007 and above.
Home Page as in source site	Set the home page as in source SharePoint site. This can be done when migrating content from SharePoint 2010 and above.
Themes	Migrate the themes. This can be done when migrating content from SharePoint 2007 and above.
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 source SharePoint server to migrate when performing migration from SharePoint 2007.
Activate Features:	To activate Site collection feature and site feature. **Note**: Click 'Exclusion List button' and specify the feature id's that are excluded during feature activation.

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



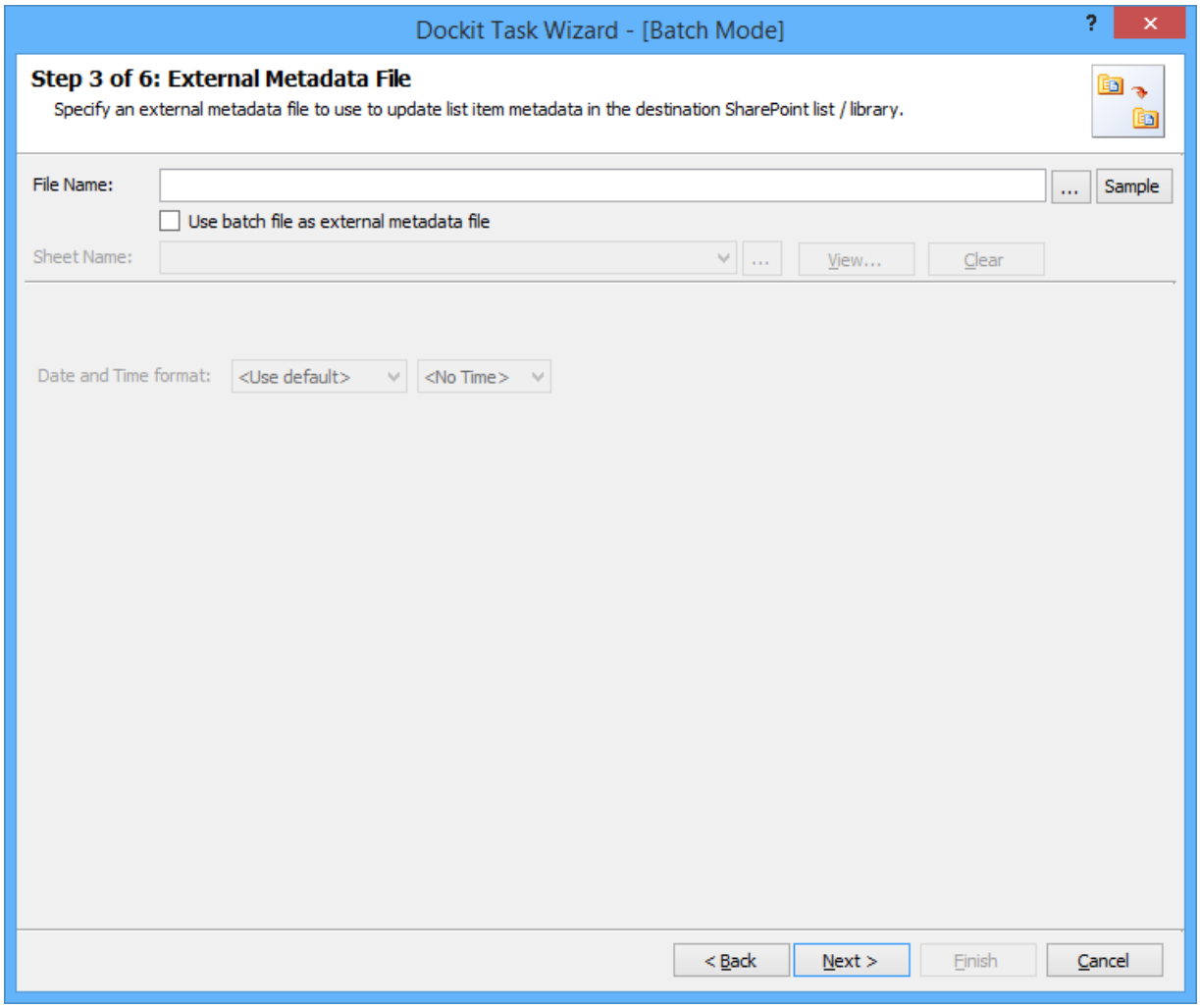
List Views:	To migrate list views.
List Permissions:	To migrate list permissions.

	Note: Dockit Server Agent is required in the source SharePoint server to migrate when performing migration from SharePoint 2007.
Content Types:	To create content types which are not available in the target SharePoint.
Maintain same List Item ID as in source:	To retain the list item IDs as same as source list item. **Note: Dockit Server Agent** is required in the target SharePoint server to retain list item ID.
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:

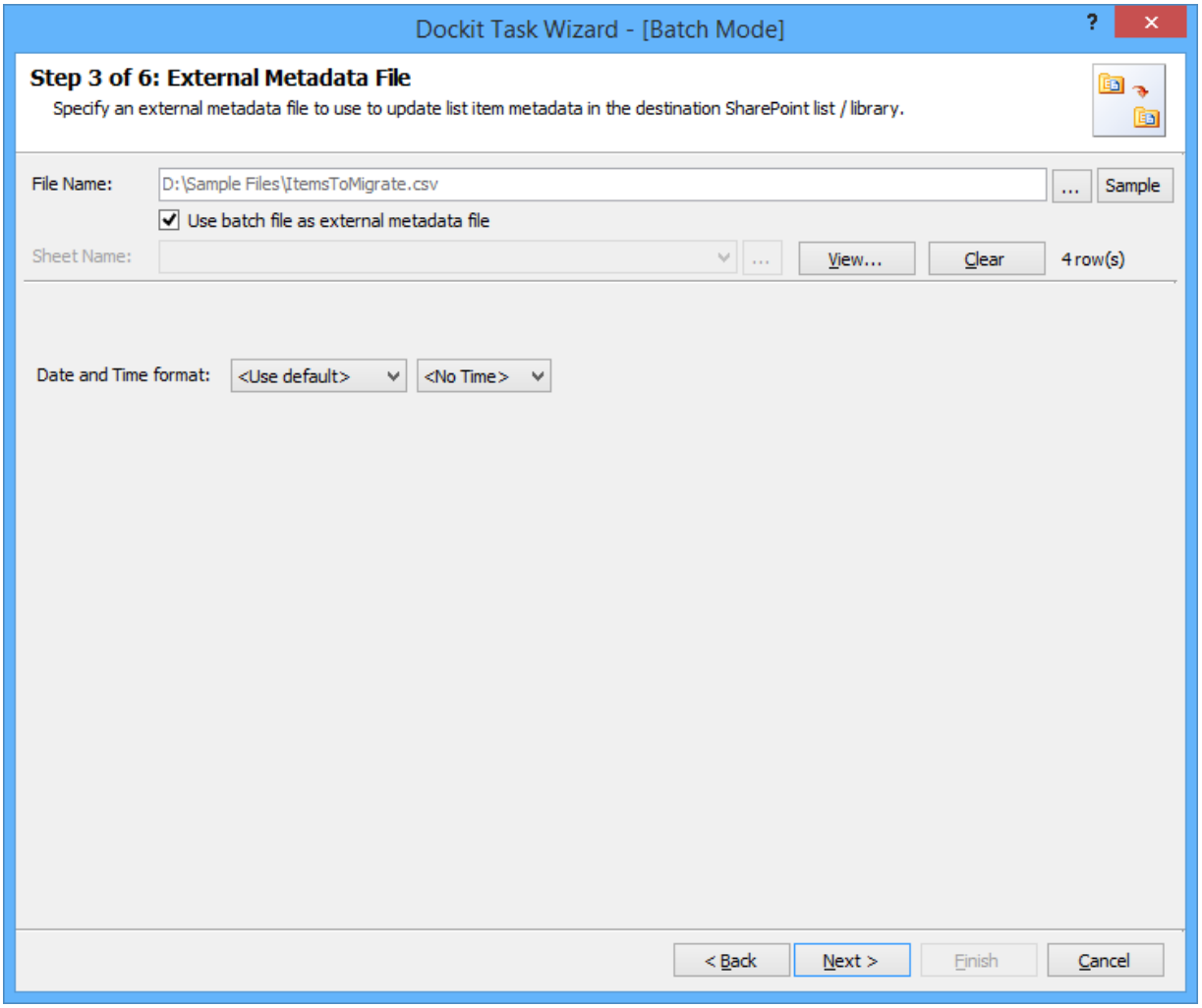


2. **Click (...)** button to specify the external reference file. The reference file can be any one of the following file formats - Comma delimited (CSV), Microsoft Excel (XLSX) or Text file (TXT).

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

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.

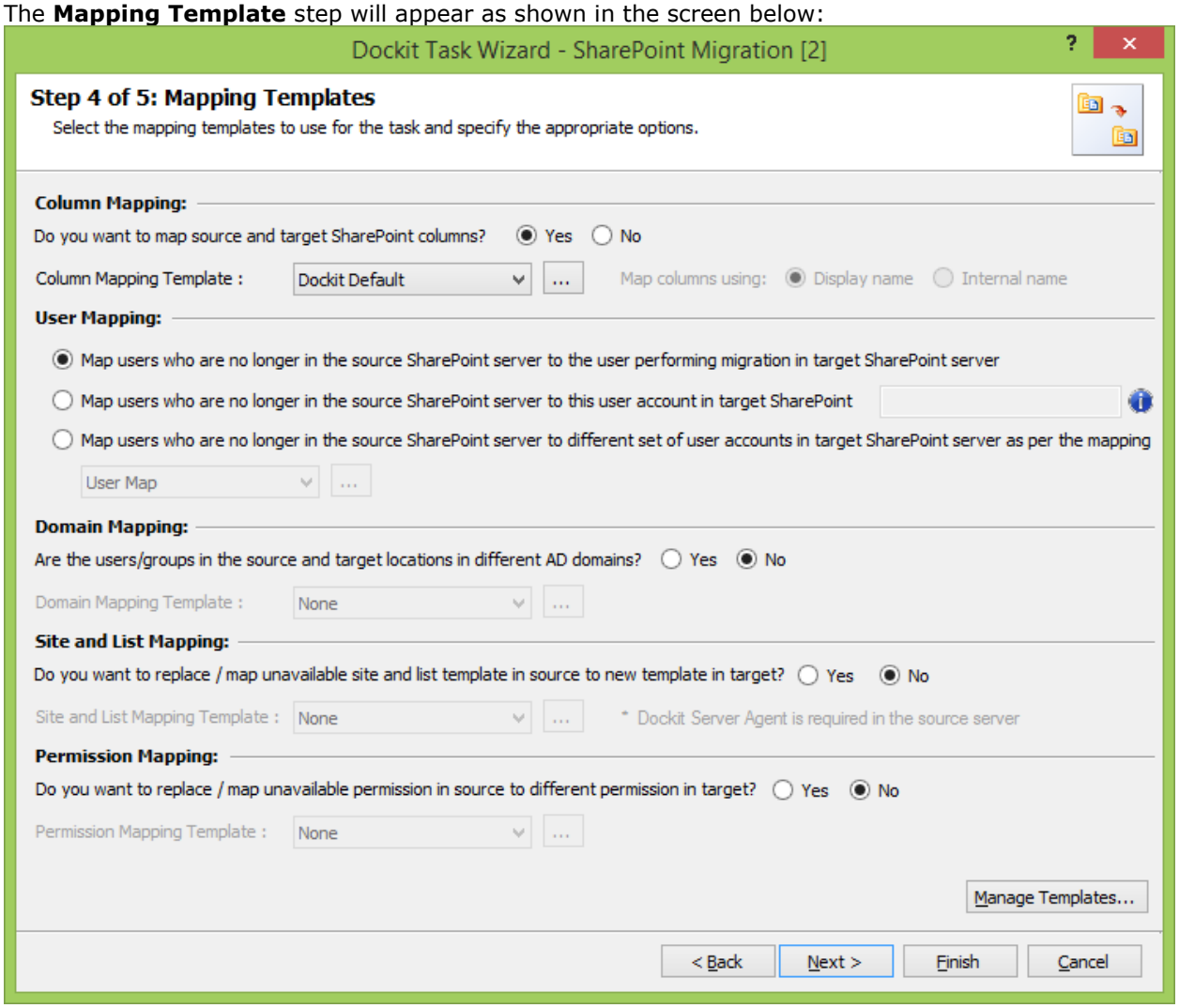
4. Specify **Date and Time format** for the date fields and the **User value format** for the user related columns entered in the reference file. The selected formats will be used to parse the external reference file and assign them to the respective columns in SharePoint.



5. Click **Next** to proceed.

Mapping Templates

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



2. **Column Mapping Template:**
   Do you want to map metadata properties between SharePoint columns? (Yes/No)
   If you choose 'Yes', select any one column mapping template from the list of available template(s)
   Default template:
   Dockit Default - Values for the destination SharePoint columns configured in this template, will be assigned as per the setting defined in Dockit default mapping template.

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

   For more information, please visit Column Mapping Template.

3. **User Mapping Template:**

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

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

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

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

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

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

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

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 Domain Mapping Template.

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).

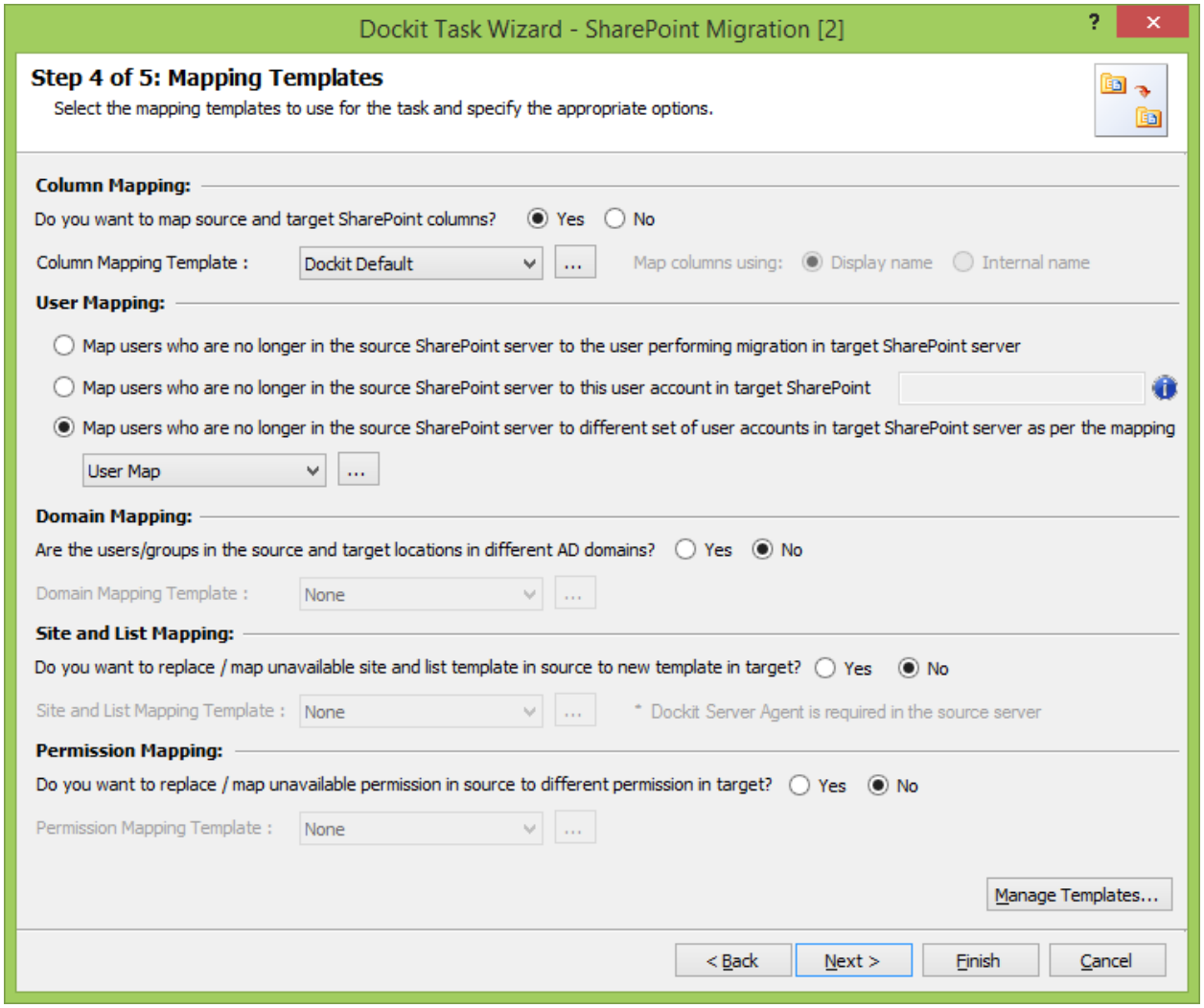
None represents the default site and list template mapping that helps to assign the list template as it is. The site and list template mapping requires the Dockit Server Agent to be installed in the target server. For more information, please visit Site and List Template Mapping.

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 Permission Mapping Template.

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

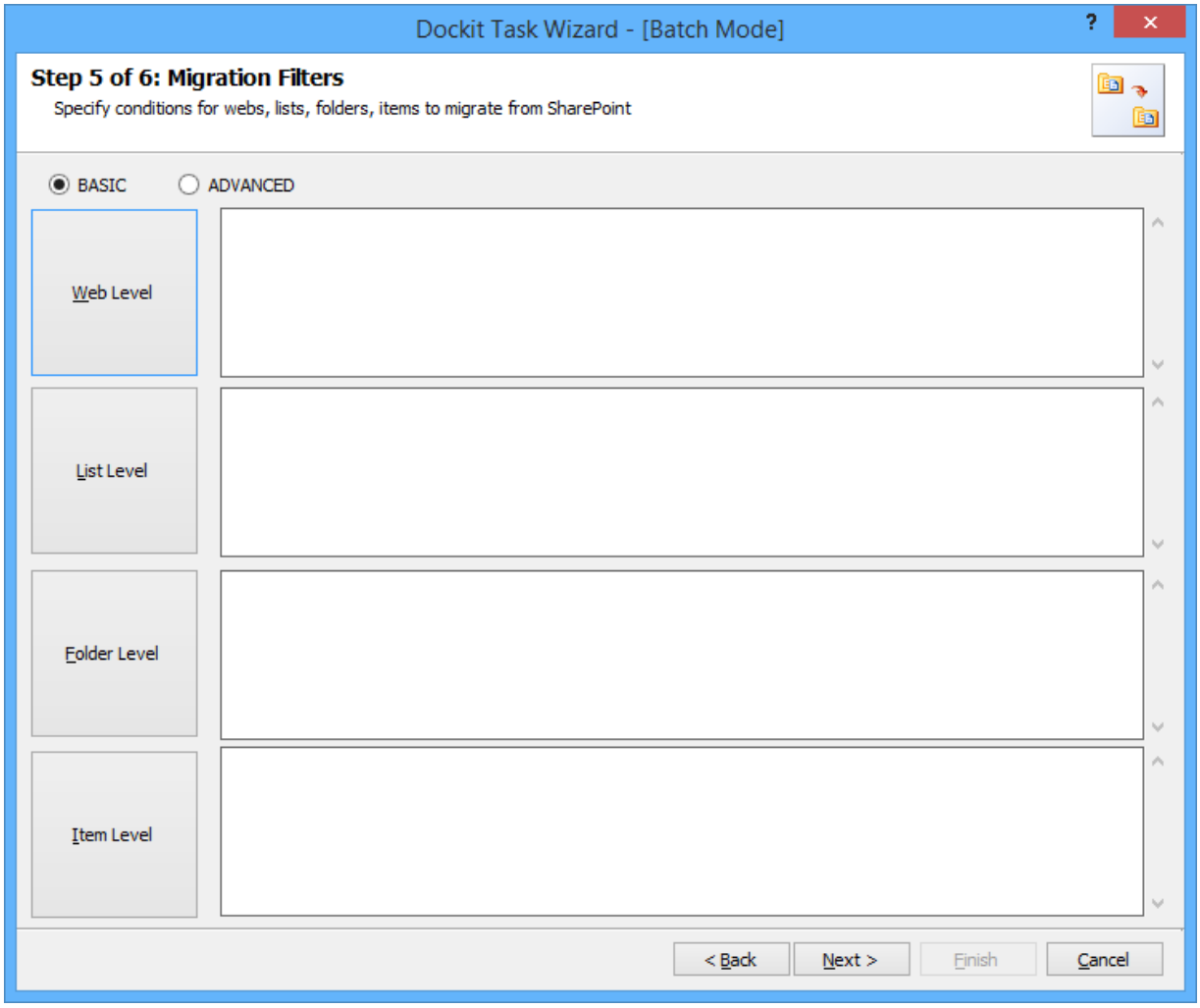


8. Click **Next** to proceed.

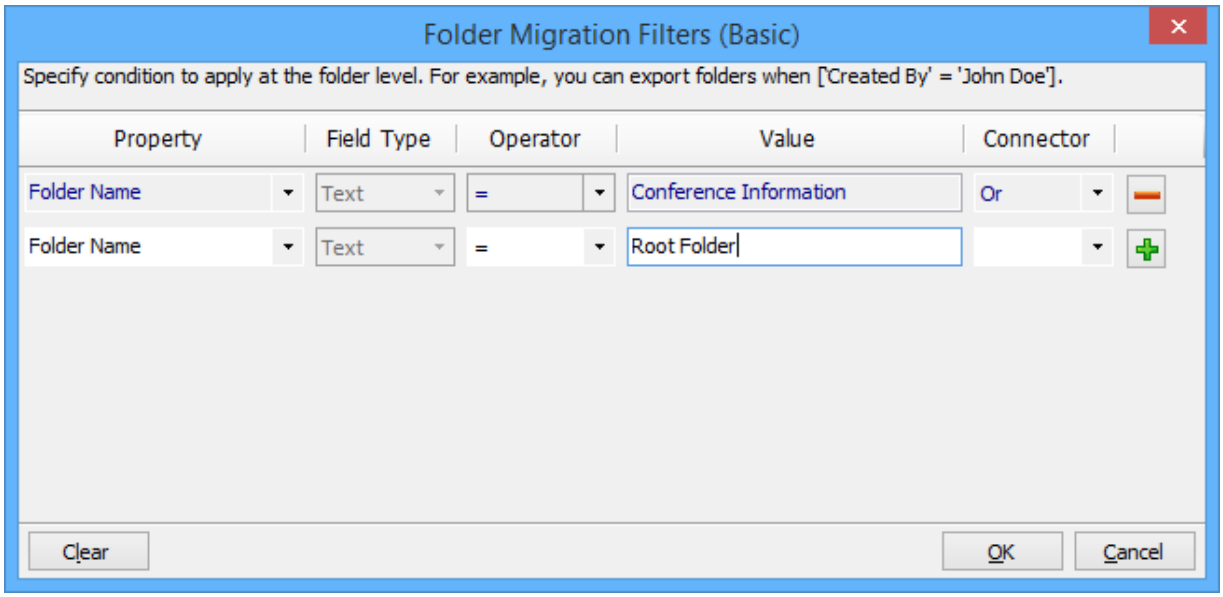
Migration Filters

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

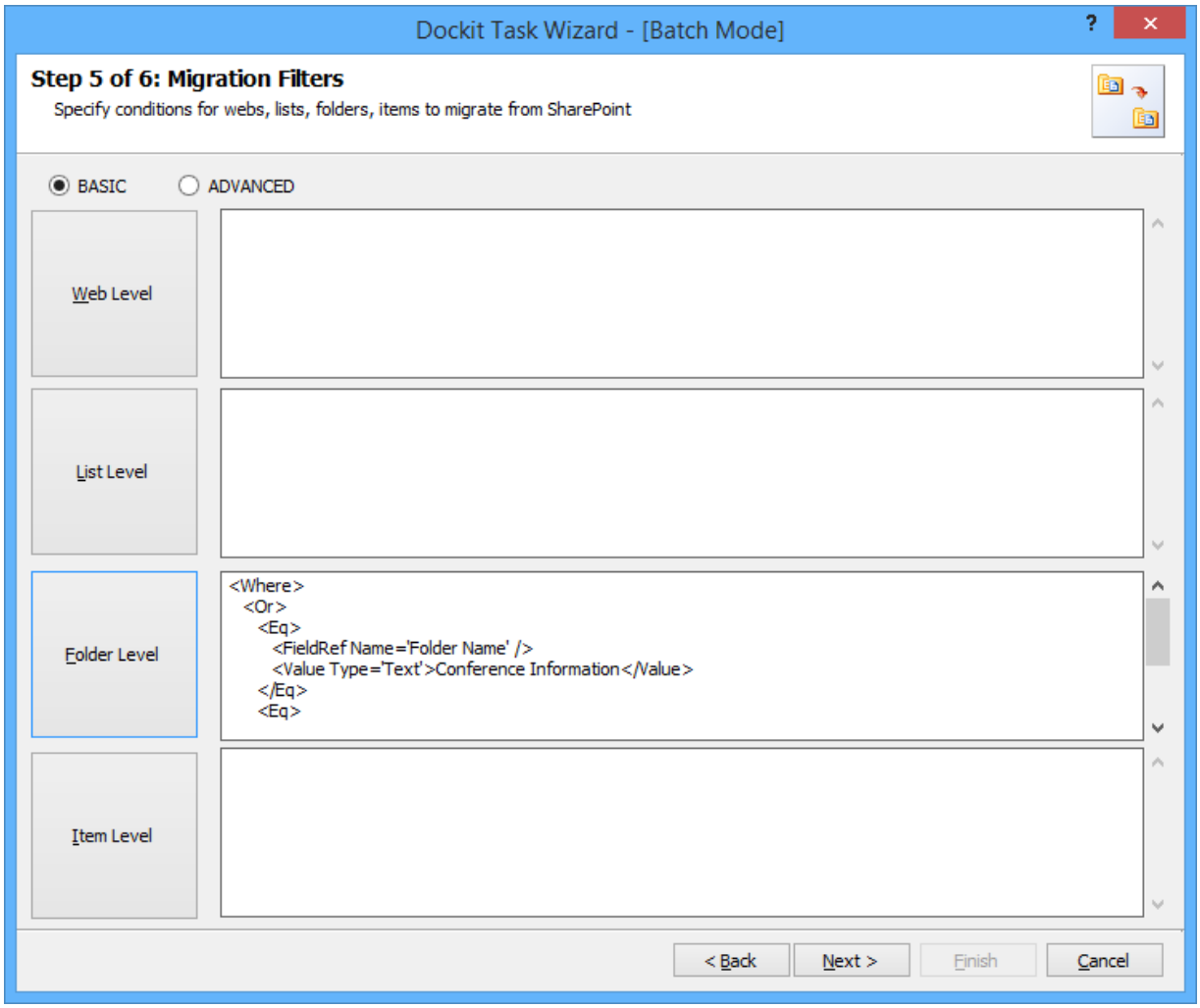
1. The **Migration filters** step appears as shown below:



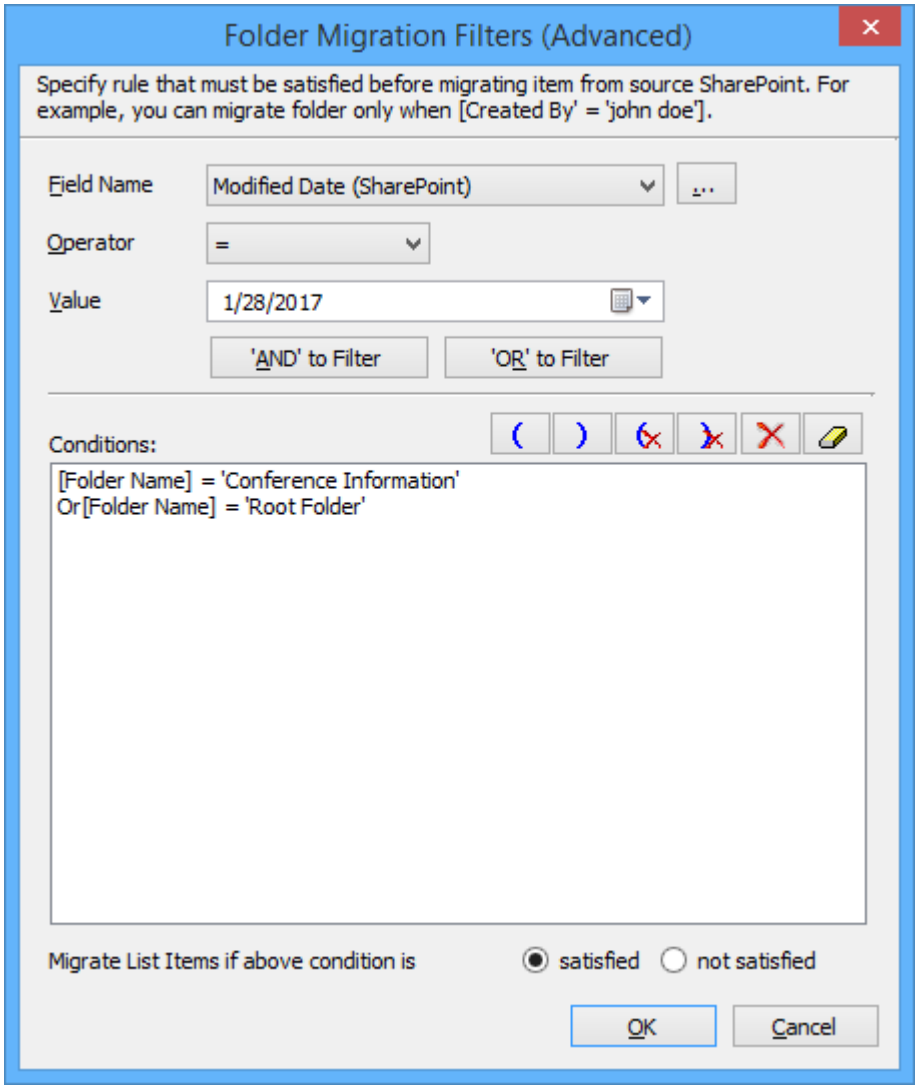
2. Select any one of the following options given below:
    a. **BASIC** -Basic migration filter will be used to filter webs, lists, folders and list items.
    b. **ADVANCED** - The available migration filters specified will be used to filter webs, lists, folders and list items.
3. You can specify migration 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:



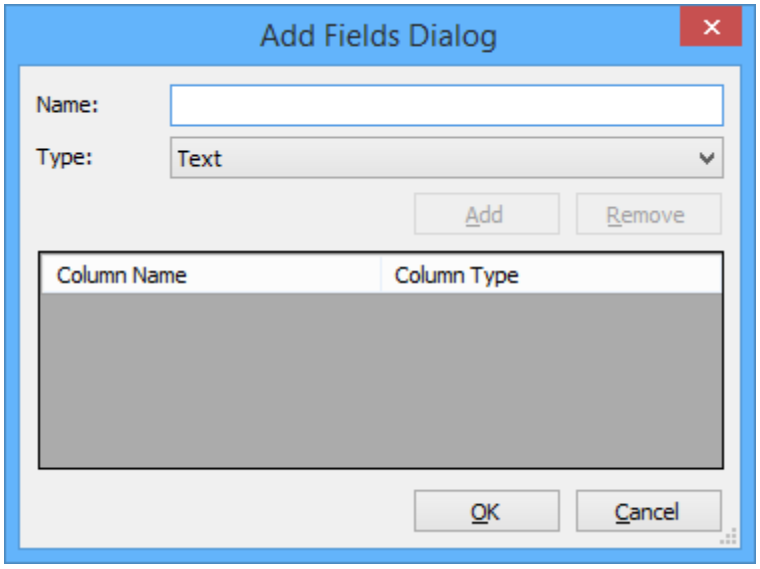
6. Once you specify the respective folder migration filter, the task wizard step appears as shown below:



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:



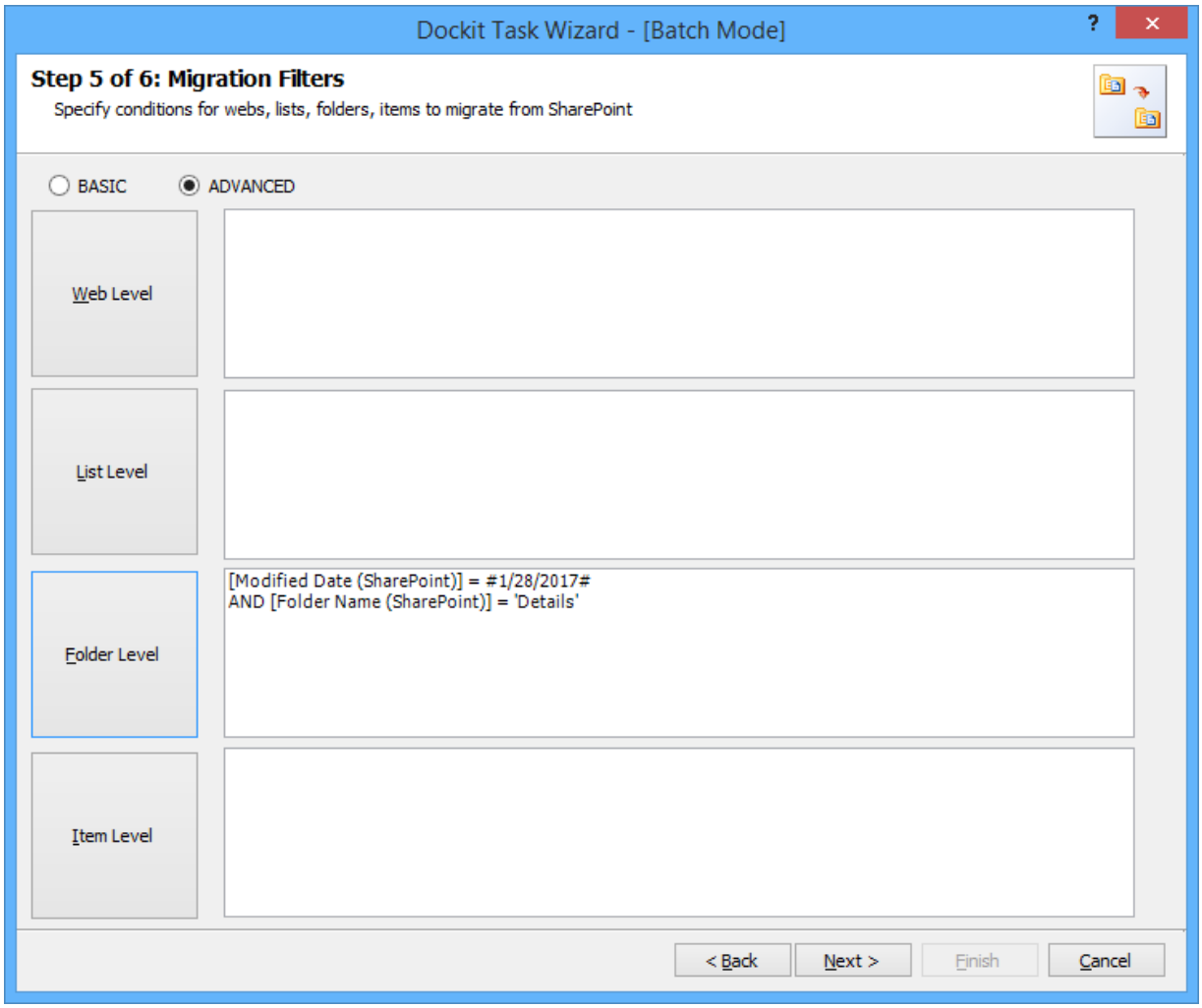
click (...)button to add the SharePoint columns in Filed Name edropdown. The Add Fileds Dialog appears as shown below:



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

Click **Add** button to add the columns to the fieldname dropdown list.
Click **Remove** button to remove the columns from the fieldname dropdown list.

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

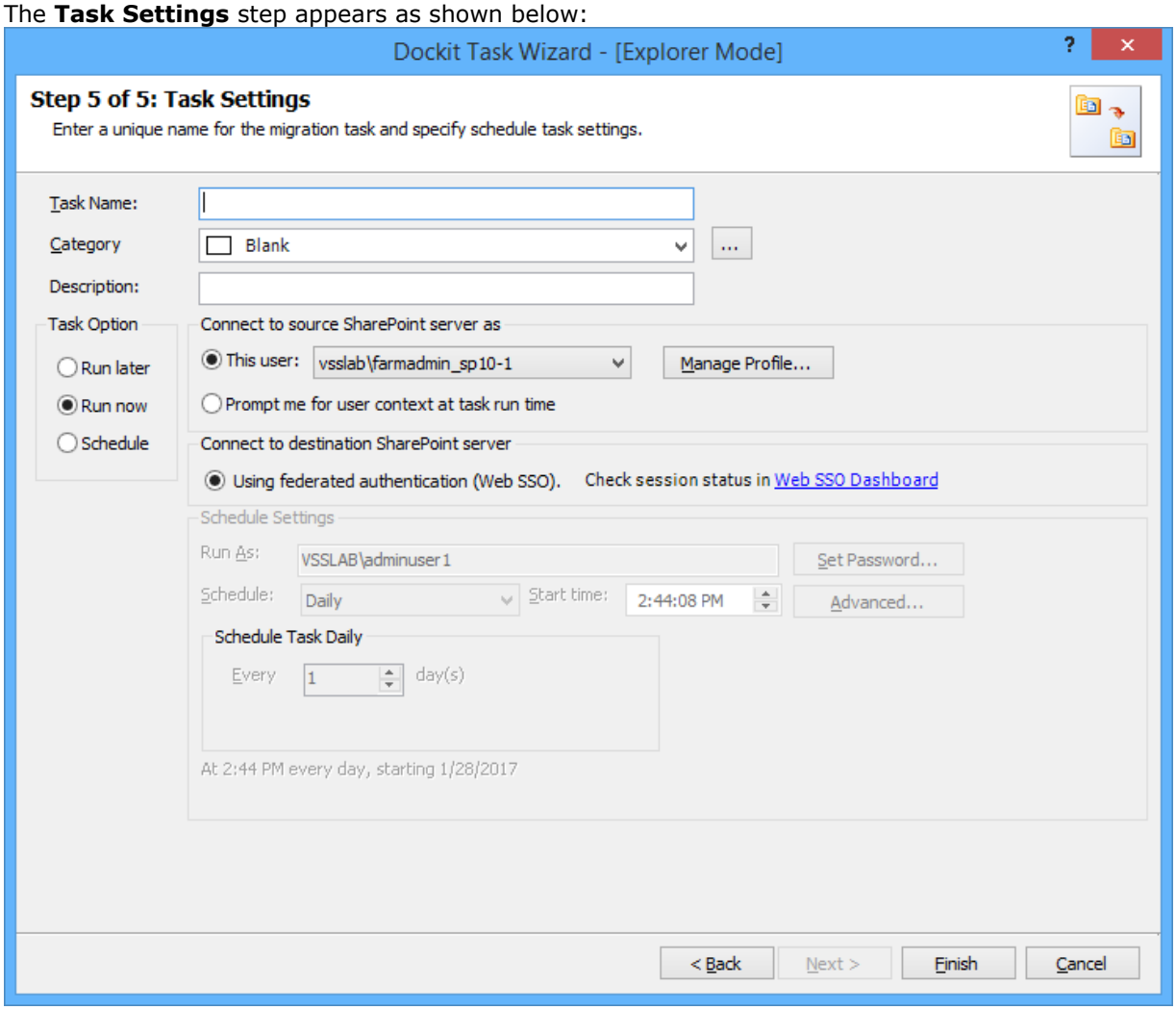


9. Click **Next** to proceed.

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:



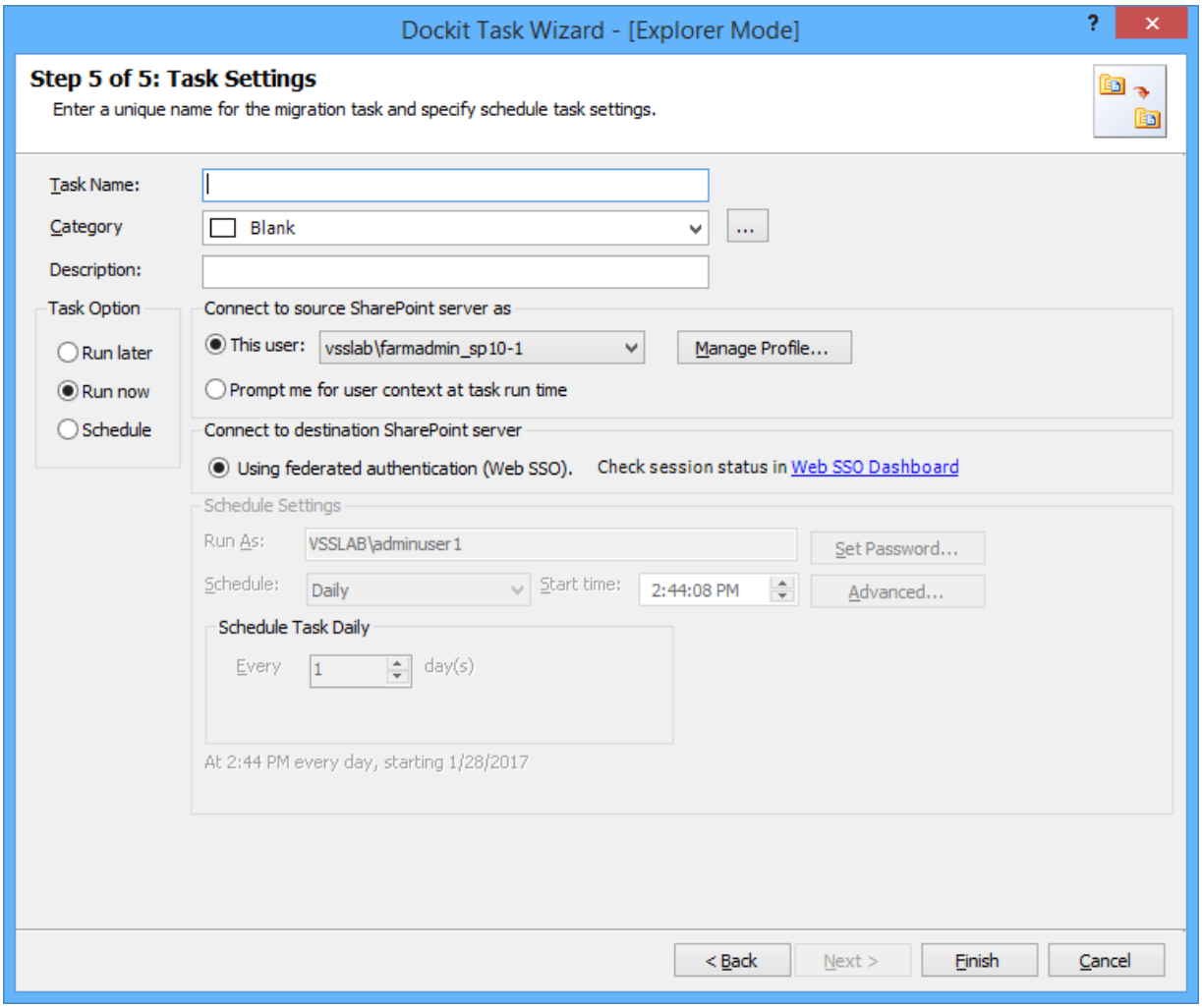
2. Enter a unique task name in **Task Name** textbox.
3. Select a **Task Option** from one of the following options:
    a. **Run later -** to run the task later as and when desired.
    b. **Run now**- to run the task immediately after clicking Finish button.
    c. **Schedule-** to create a Windows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

4. Select one of the following options to connect to the source and destination SharePoint. The options provided to the user will change depending on the authentication mechanism used by the source and destination SharePoint servers.

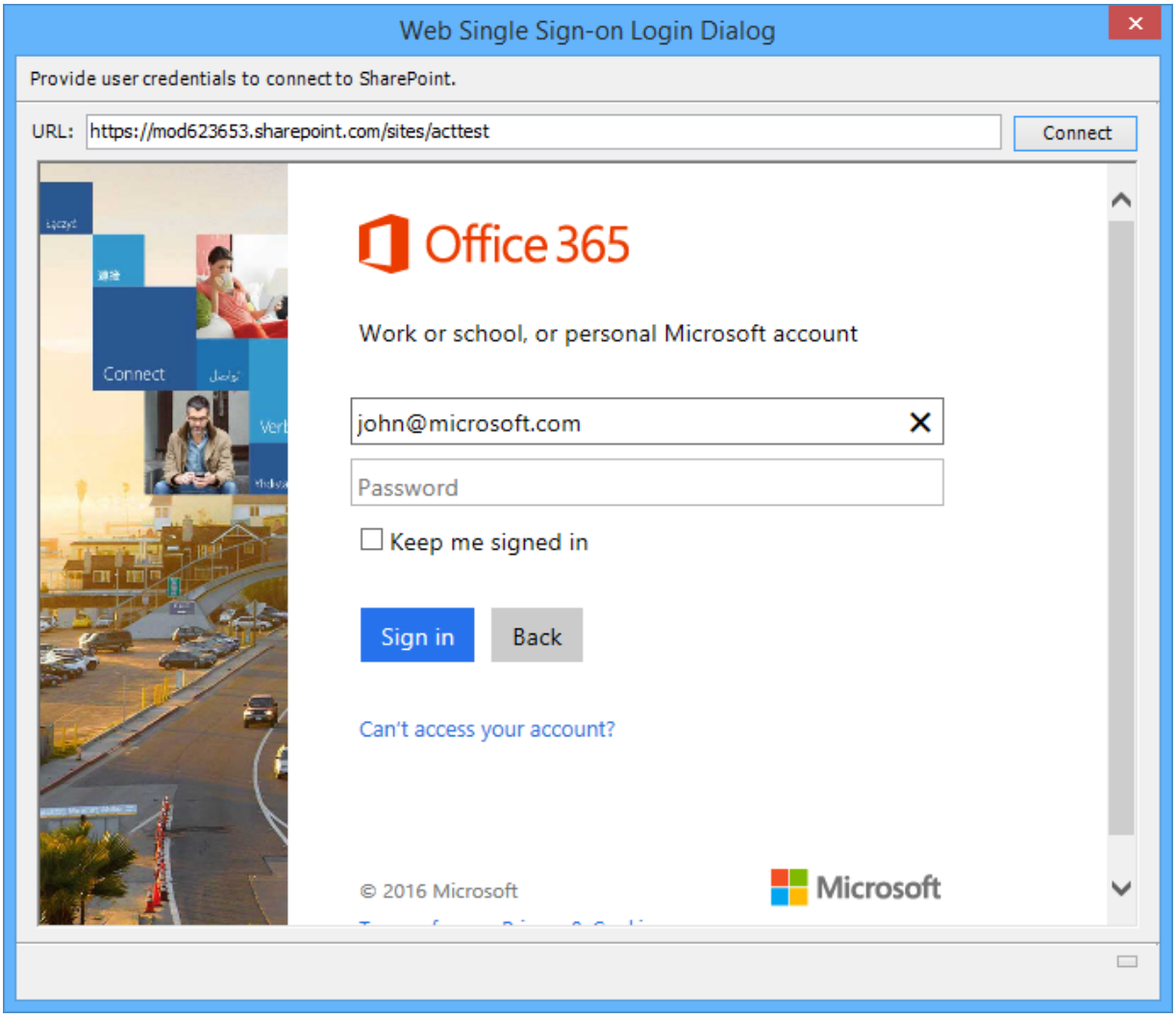
    a. **User Profiles <user name>** - This option is available if you choose **Run later** or **Run now** or **Schedule** task option.

b. **This user <user name>** - This option is available if you choose **Run later** or **Run now** or **Schedule** task option. Dockit will use stored profile context to connect corresponding SharePoint.
c. **Prompt me for user context at task run time**– This option is available if you choose **Run later** or **Run now** task option. Select this option if the SharePoint sites are configured to use Windows and/or Forms Authentication only. Dockit will prompt for the user context to use to connect to SharePoint sites when executing Dockit migration task.
d. **Use 'Run As' user context given below**– This option will be available if you choose **Schedule** task option. Dockit will use the user account specified in the scheduled **Run As** user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint when running the scheduled task, you can do so by storing the SharePoint user context for future use.
e. **Use federated authentication (Web SSO) for the SharePoint site**– This option is available if you choose **Run later** or **Run now** or **Schedule task** option. Select this option if the source or destination SharePoint site uses federated identity (Web SSO or Active Directory users configured via ADFS). Dockit will prompt for the user context to use to connect to SharePoint when executing Dockit migration task. To connect to Office 365's SharePoint Online environment, you can use **Web Single Sign-on option (Web SSO)** for both Cloud Identity (Office 365 Online User Credential e.g., johndoe@vyapin.onmicrosoft.com) and Federated Identity (configured via ADFS e.g., johndoe@vyapin.com).

5. 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:

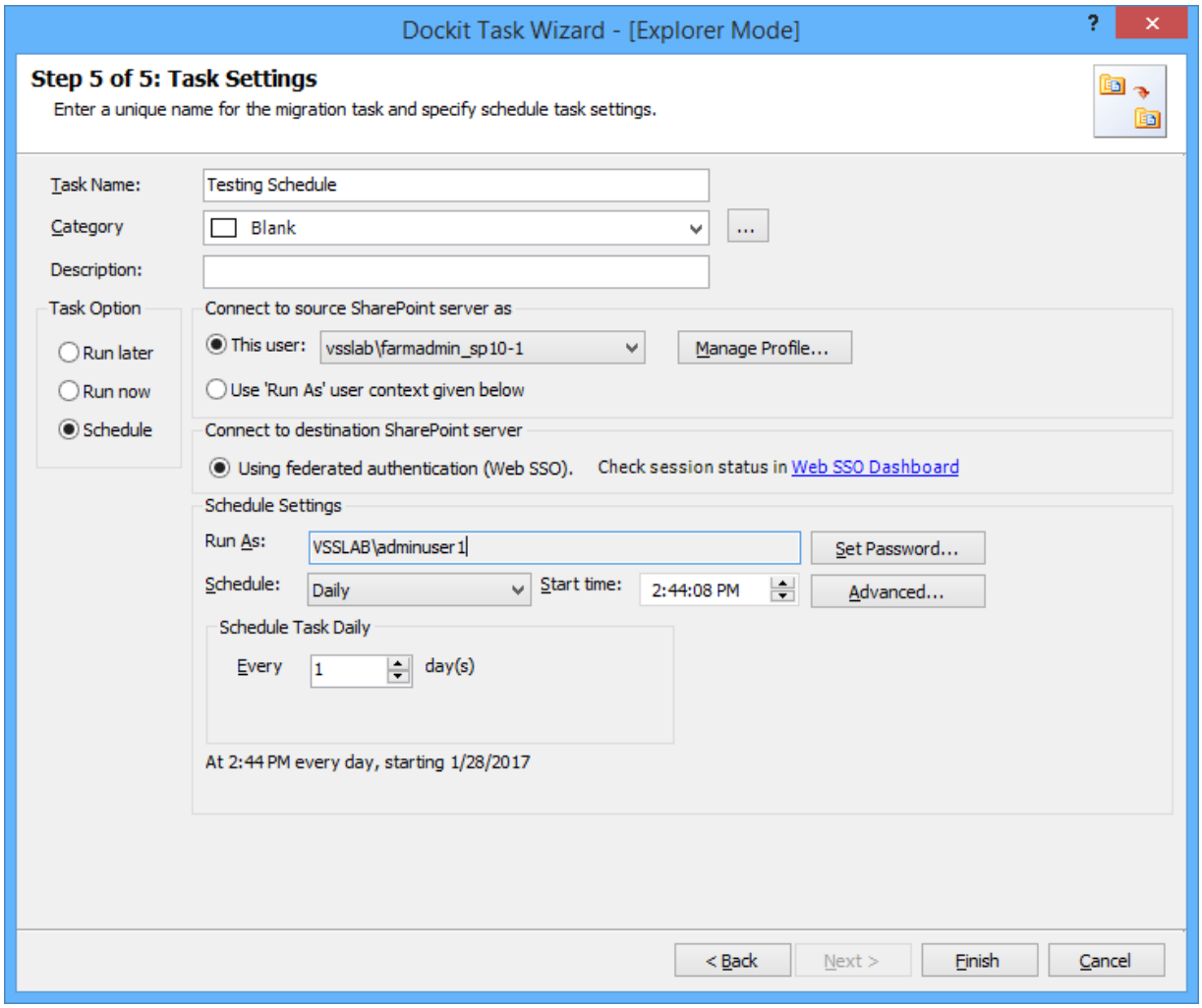


Upon clicking **Finish**, you will be prompted for credentials (username and password).



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:



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

How to Guide

- Import Document Versions
- Create Document Sets
- Rename Documents in File System
- Adding new terms in Managed Metadata column in SharePoint

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 Import folders, files and metadata to SharePoint Libraries (Explorer Mode) 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 Import folders, files and metadata to SharePoint Libraries (Batch File Mode) option task wizard. The relevant section for importing file versions has been described below:

   Dockit processes the entries in the batch descriptor file in the exact same sequence it appears in the file. You can specify the version folders in the batch file in the same sequence it needs to be imported in order to achieve the desired results in SharePoint.

   For example, let us say, you have different versions of files organized in the folder structure named as - C:\My Documents\Sales Proposals\version1, C:\My Documents\Sales Proposals\version2, C:\My Documents\Sales Proposals\version3 etc. You can create a batch descriptor file as follows to import the file versions correctly:

   ```
   "Path","Destination Path"
   "C:\My Documents\Sales Proposals\version1","http://sharepoint/DocLib"
   "C:\My Documents\Sales Proposals\version2","http://sharepoint/DocLib"
   "C:\My Documents\Sales Proposals\version3","http://sharepoint/DocLib"
   ```

   Select **Create new version** option in the File Settings wizard step to handle file versions correctly.

Importing document versions using the Folders & Files Renaming Rules engine

Dockit enables you to define flexible naming rules, in order to truncate or replace invalid and/or valid characters in folder and/or file names during import. By using wildcard characters ('*', '?') in the Find string in the naming rules, you can also create generic naming rules. By this way, you can rename the folder and/or file name that has the same naming convention throughout the file system.

For instance, all document versions of the same file are stored in a single folder as stated below and you would like to to import them as a single file with version history into the same document library.

D:\Document Store

- \Sample_v1.txt
- \Sample_v2.txt
- \Sample_v3.txt

In this case, you can create generic renaming rule using wildcard characters as shown below, in order to truncate the suffixed version string from the file name.

File Name	Find	Replace	Remarks
Sample_v1.txt Sample_v2.txt Sample_v3.txt	*_v?	*{empty}*	As we left the replace textbox with an empty string / space, the final file name will be 'Sample.txt'

Hence, the resultant file names are same for these files. Thus, Dockit will add as a new version for 'Sample.txt' file into the SharePoint library and we can have a single file with the required version history.

Please follow the instructions given below to use the folder & file renaming rules engine to import multiple documents to a SharePoint library:

You will have to first create a naming rule for importing document versions using Folder & File Renaming rules feature in Dockit. The naming rules are case insensitive. So that, you can use the same Find string for both UPPER and lower case file name. In other words, the Find string '*v?' and '*V?' are same in Renaming rules in Dockit. For more information, click Folder & File Renaming rules...

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

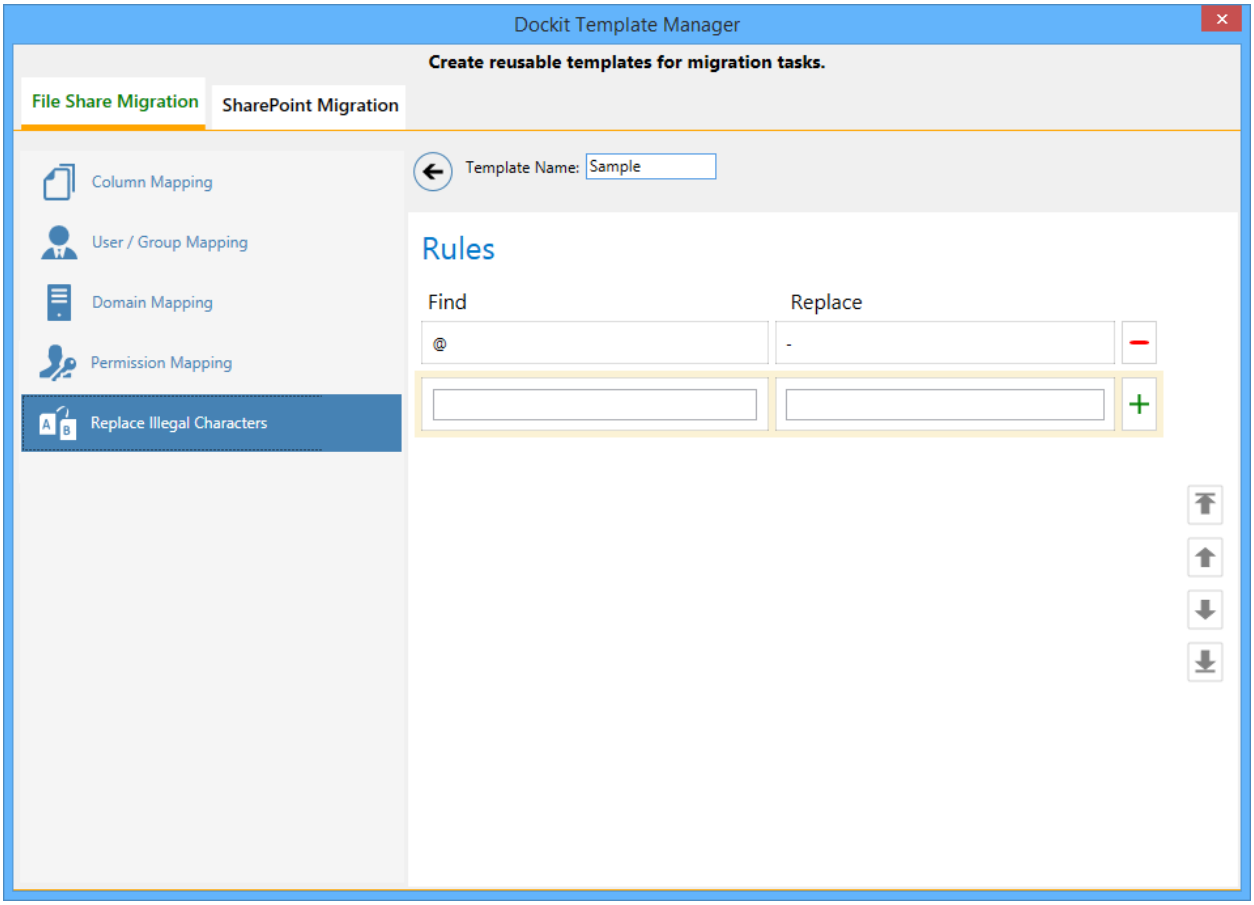
Create a batch descriptor file as given below:

"Path","Destination Path"
"F:\Document Store\Sample_v1.txt","http://sharepoint.vyapin.demo/sites/migration/Shared Documents"
"F:\Document Store\Sample_v2.txt","http://sharepoint.vyapin.demo/sites/migration/Shared Documents"
"F:\Document Store\Sample_v3.txt","http://sharepoint.vyapin.demo/sites/migration/Shared Documents"

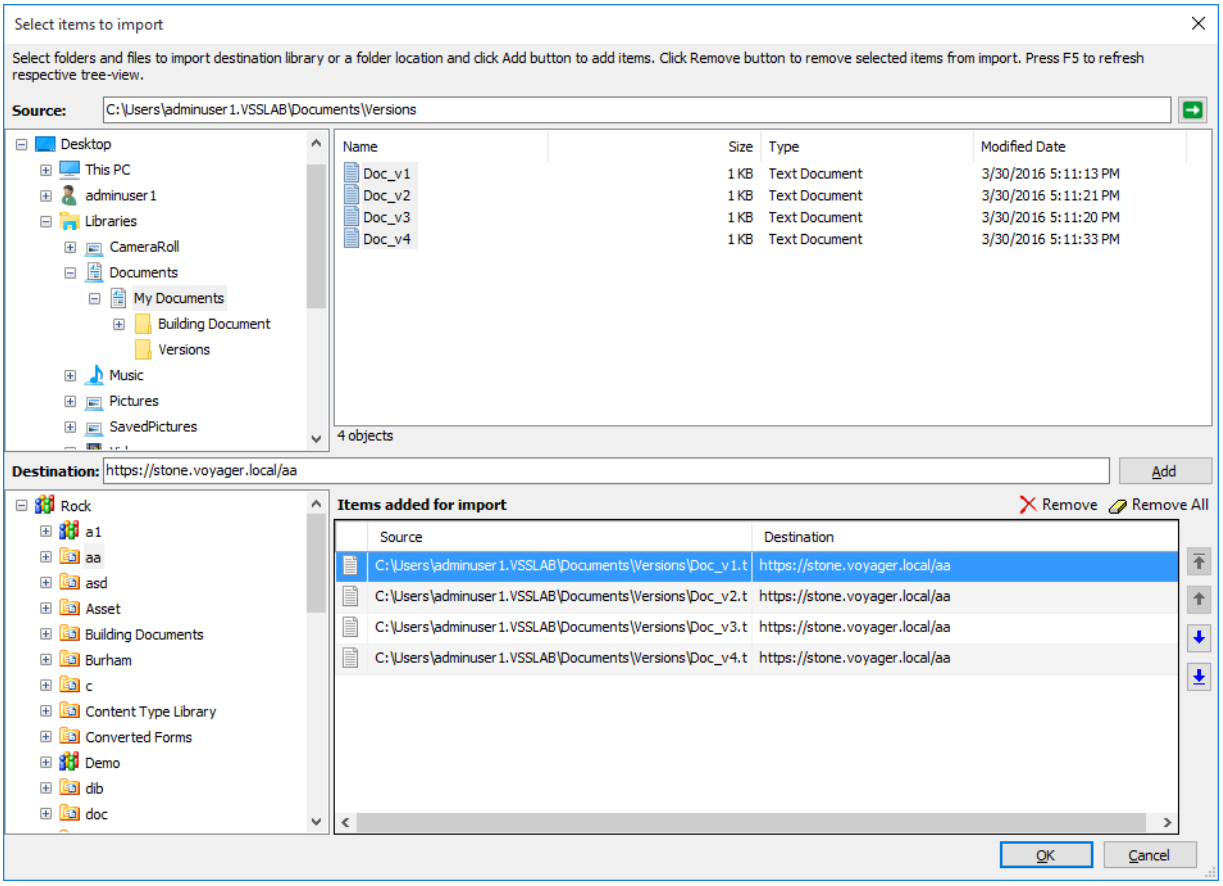
Please ensure that files are arranged / ordered with correct version sequence in the batch descriptor file. Dockit processes the files in the order in which they appear in the batch descriptor file.

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

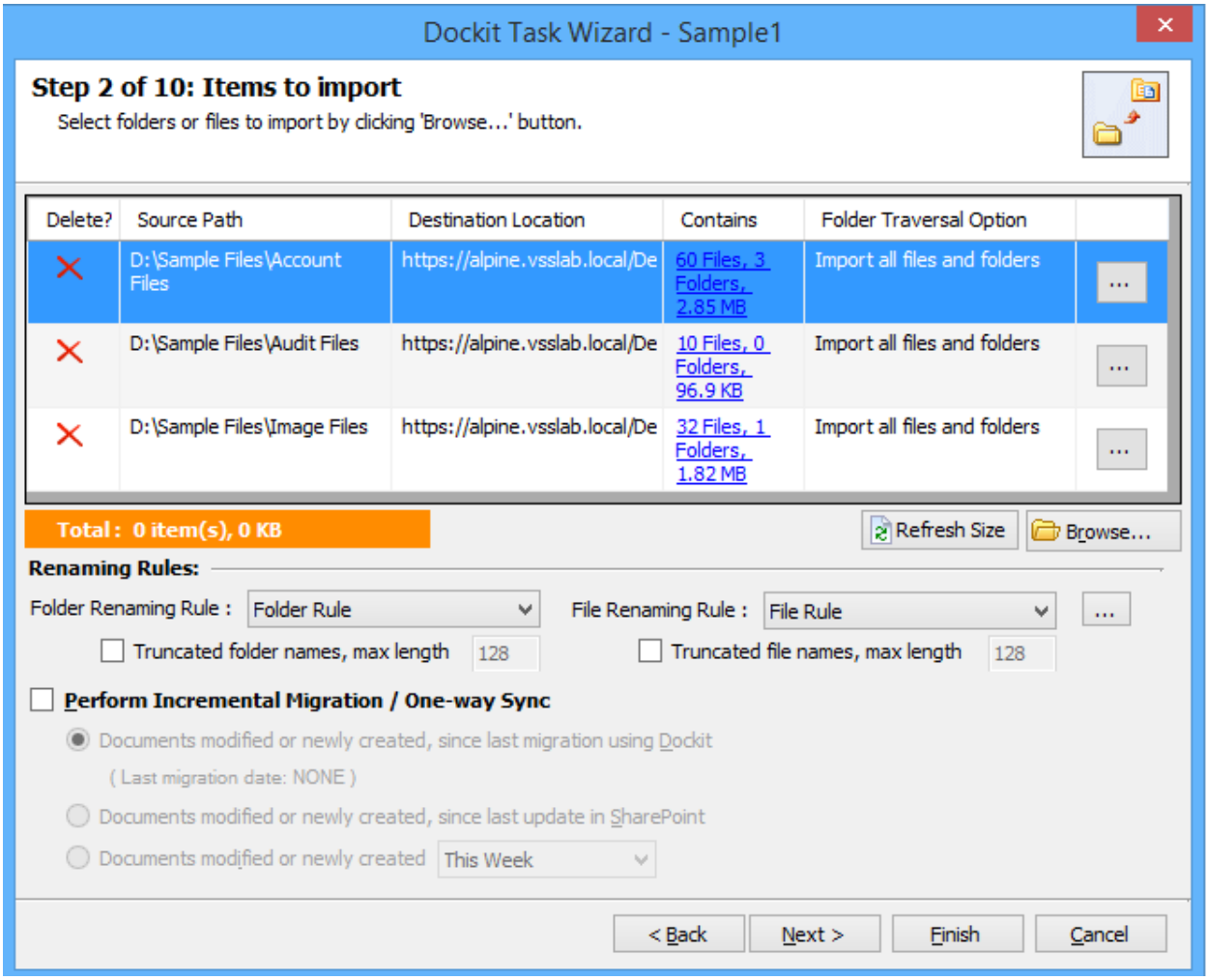
Go to 'Template Manager' under 'Tools Menu' and create renaming template as shown below:



Select the items to import into the SharePoint library. In the **Select items to import** dialog, click **Add** button to add the selected files for import as shown below. The import process order can be changed by the **navigation** buttons available in the right side of the grid. Please note that the files are arranged with respect to their version sequence.



In Items to import step of Dockit import task wizard, Select the template 'Sample rename' (the template one was created to rename the document) from the list of available templates under File Renaming Rule.



Click **Next** to proceed.

Select **Create new version** option in the File Settings wizard step to handle file versions correctly.

You can use **Pre-Migration Validation** step in Dockit Task Wizard to validate the task and avoid common errors.

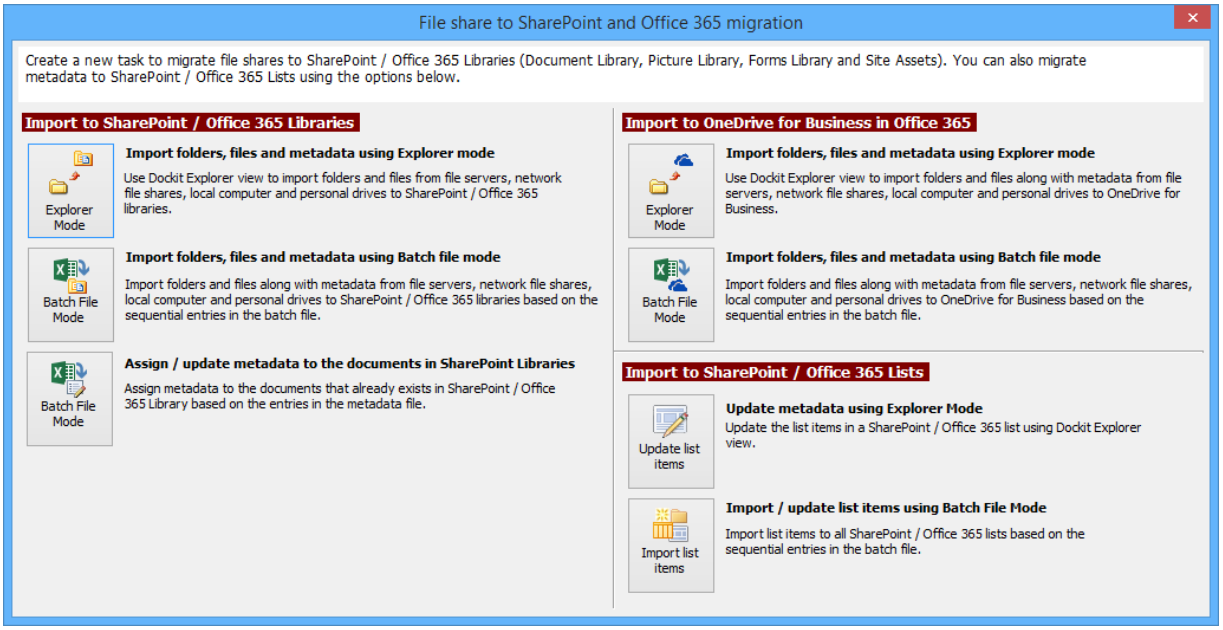
Create Document Sets

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.**



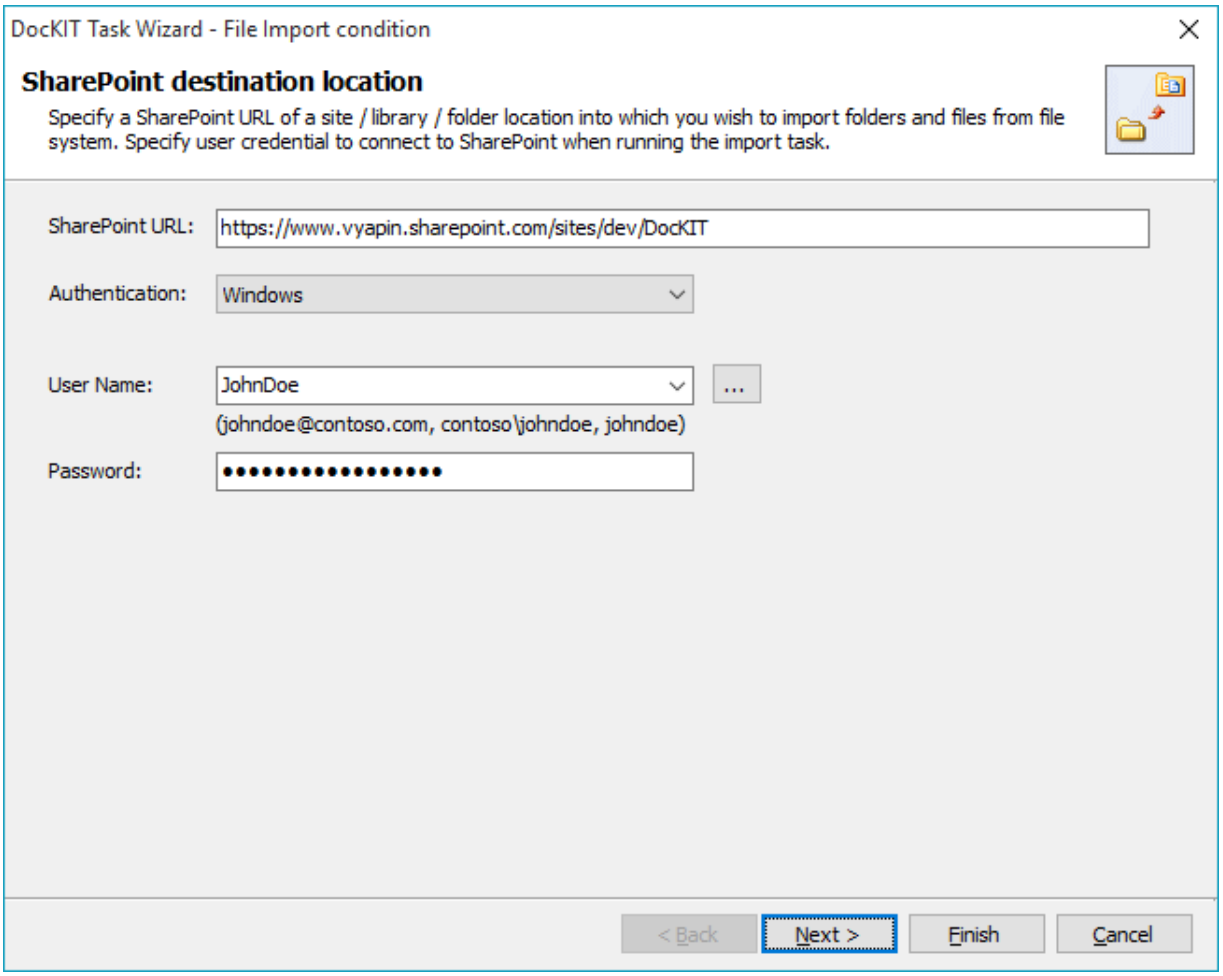
Note: You can also use **Batch File Mode** option from **Import folders, files and metadata to SharePoint Libraries** to create folders as new document sets from remote computer. In this section, we will discuss using the **Explorer Mode** option from **Import folders, files and metadata to SharePoint 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.

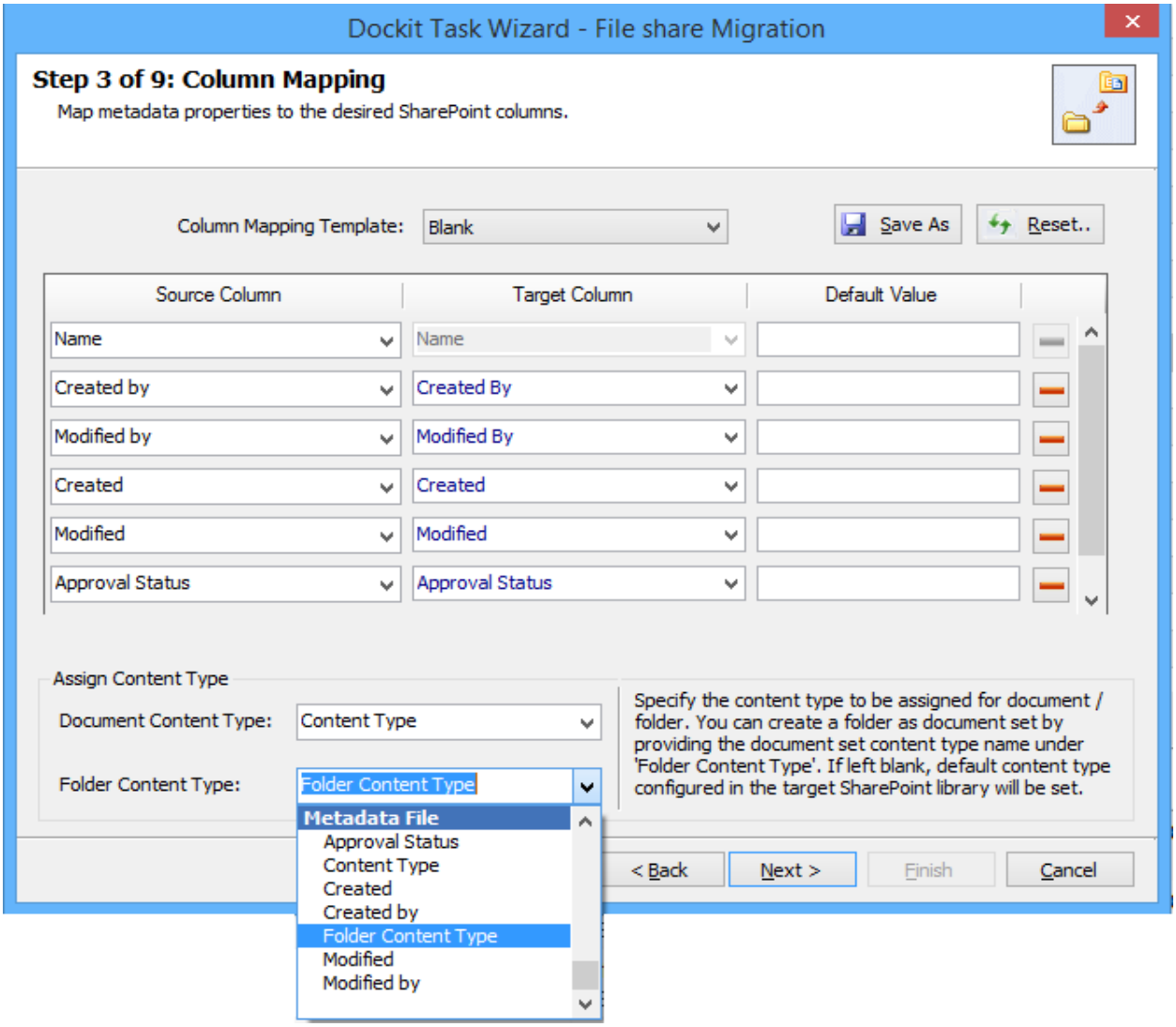
2. Dockit expects the user name specified in SharePoint Login dialog / user account specified in the Run As parameter in the scheduled task to be a:

   - 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.



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



6. In the dialog, specify the folder content type as any 'Document Set' derived content type to create a document set using one of the options given below:

    a. **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.

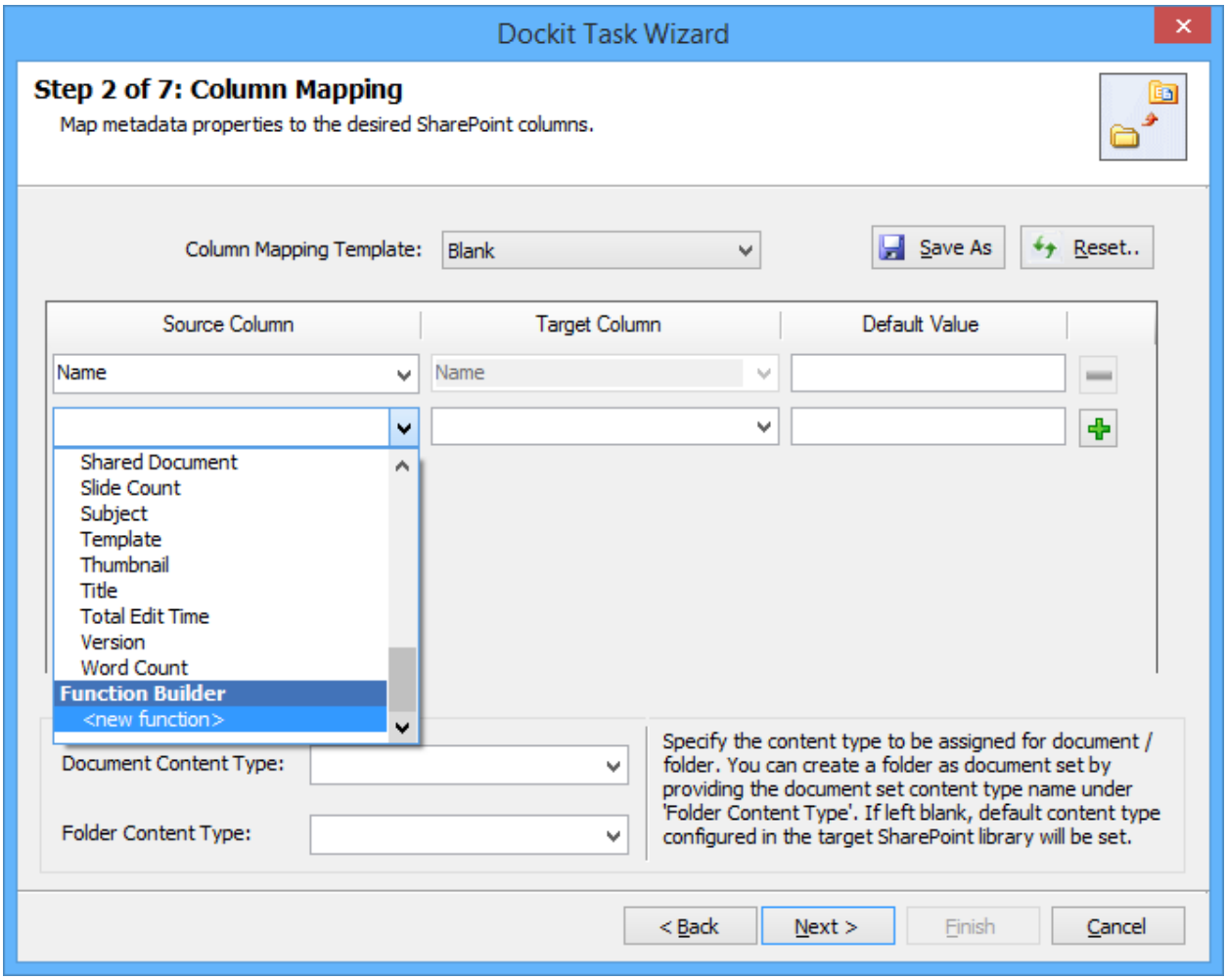
Function Builder

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.

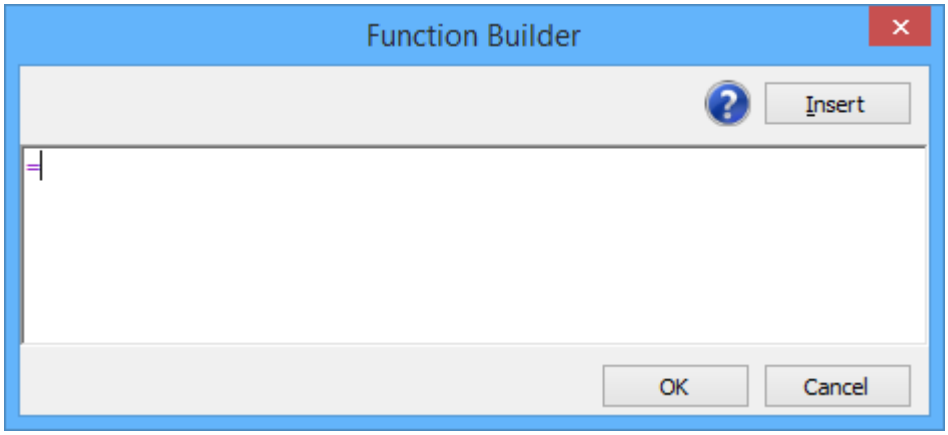
The metadata file column or file property (like Title.[metadatafile], Author.[fileproperty]) can be input as a parameter in a specific syntax. Note that the Function Builder tool recognizes the given parameter as metadata file column only if it ends with .[metadatafile] and similarly it recognizes the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

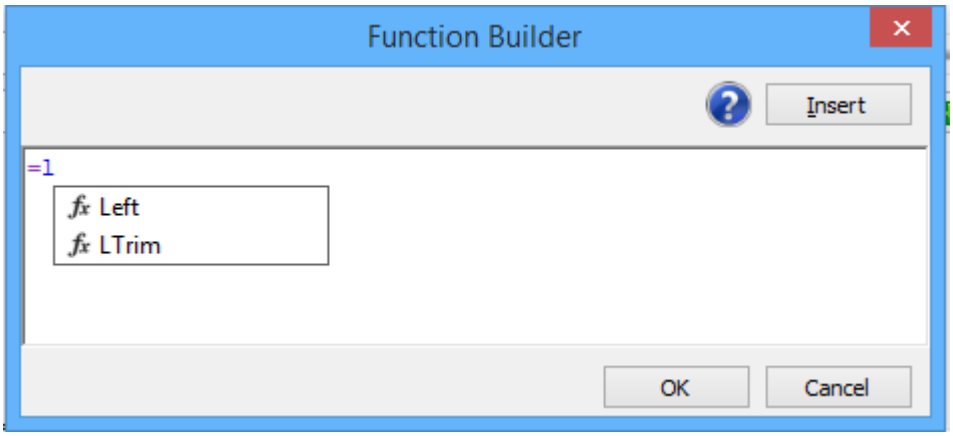
1. Select <new function> under 'Function Builder' as Source from the list as shown below:



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

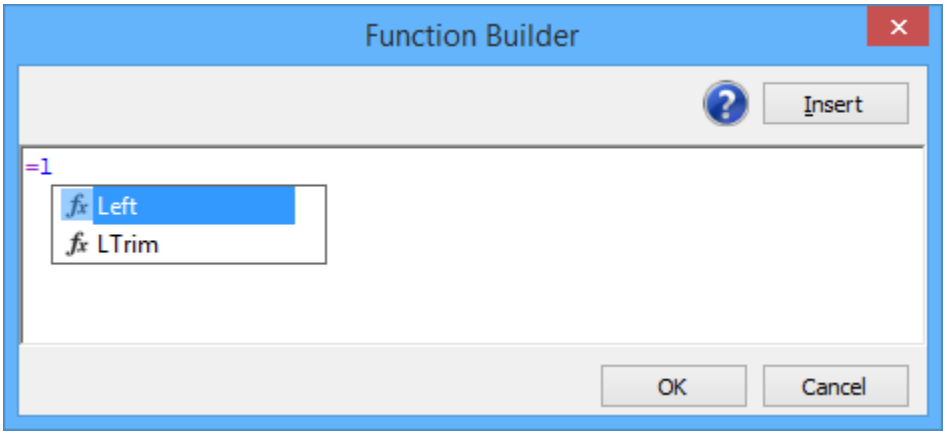


3. Enter a character in a textbox. If a character or substring starts with the built-in function name, suggestion list will appear as shown below:

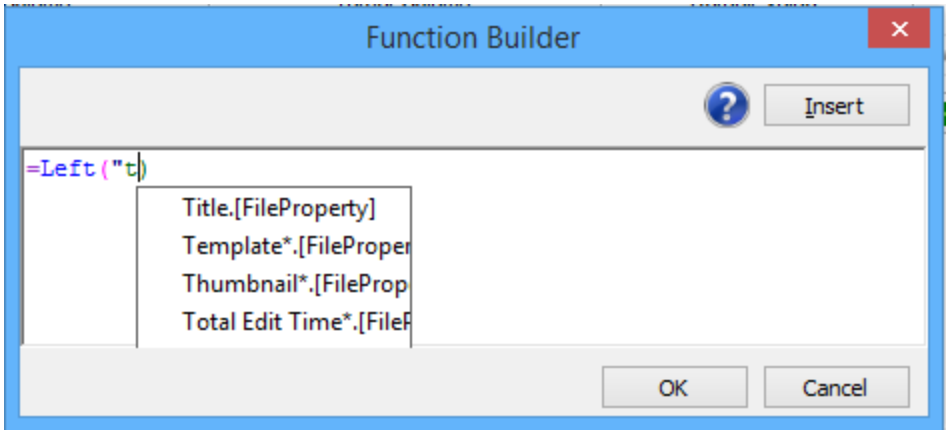


4. Select a function name from the list and press Enter key or Double Click to add the selected function to the function builder.

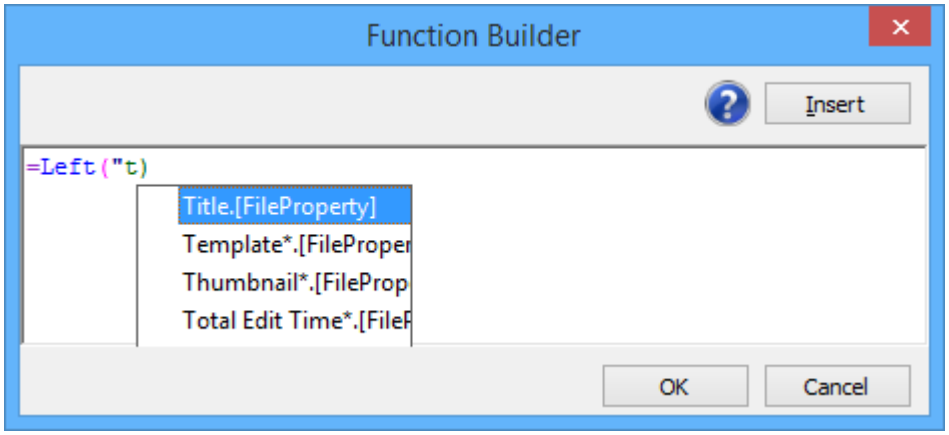
   NOTE: You can also add the built-in function to the function builder by click 'Insert button' and select a function in the function list.



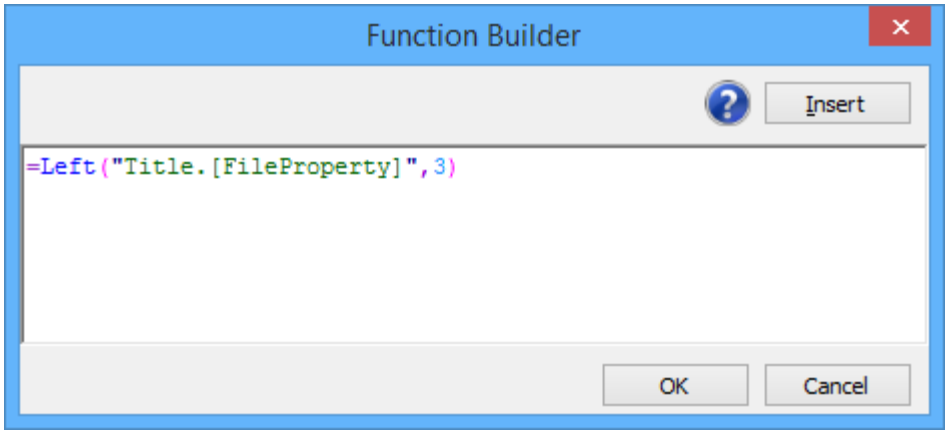
5. To add a file property or column in the metadata file as a parameter to the function, Enter a double quotes followed by character or sub string of a property. If the character starts with file property name or metadata file column name, then suggestion list will appear as shown below:



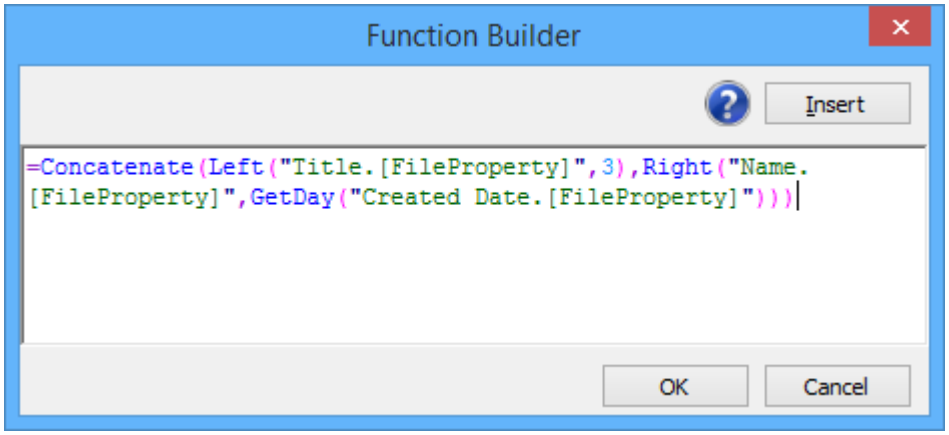
6. Select a property name and press Enter key or Double Click to add as a parameter for the function



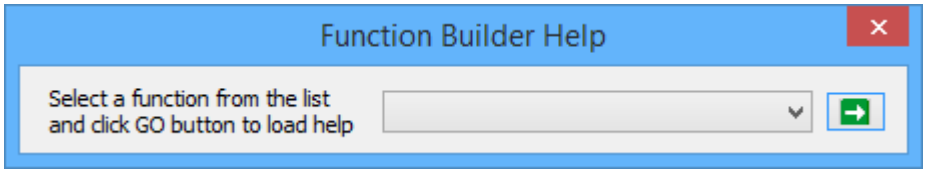
7. You can also provide a free text or integer as parameters for the function, if desired.



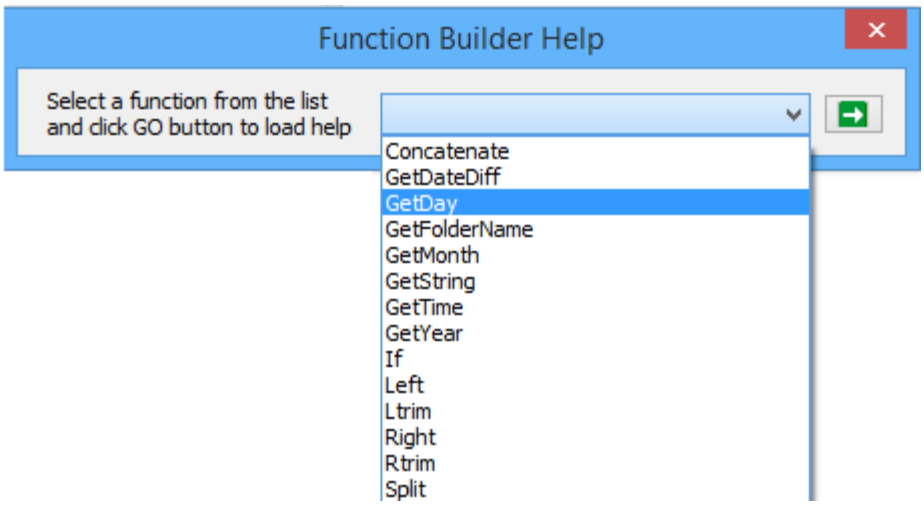
8. You can also use nested functions too as shown below:



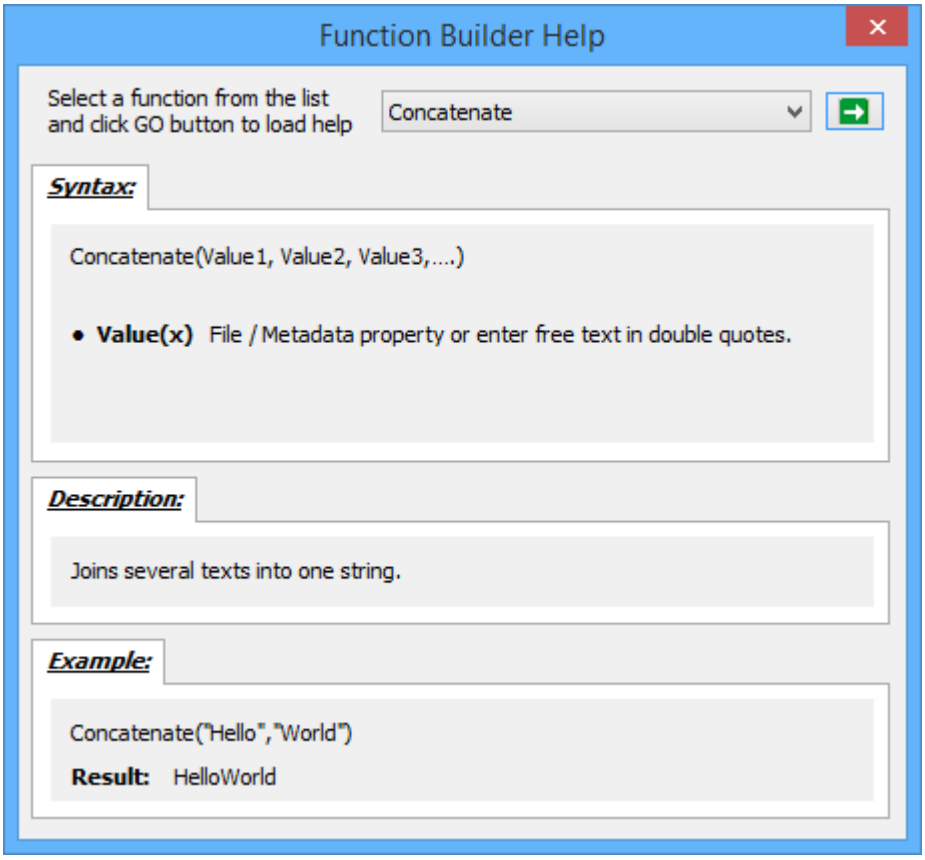
9. Click the question mark image in the function builder to show the information about built-in function in Dockit.



10. Select the option to show the information about the function in Dockit.



11. Information about the function in Function Builder Help dialog as shown below:



12. Click OK to insert the custom function in Function Builder dialog and proceed.

Dockit Built-in Functions

Concatenate

Joins several texts into one string.

Syntax

Concatenate(Value1, Value2, Value3,….)

where **Value(x)**: File / Metadata property or enter free text in double quotes.

Right

Returns the string value from the end of the string up to the specified number of characters.

Syntax

Right(Property / Value, Count)

- **Property/Value:** File / Metadata property or enter free text in double quotes.
- **Count:** Number of characters.

Left

Returns the string value from the start of the string up to the specified number of characters.

Syntax

Left(Property / Value, Count)

- **Property/Value:** File / Metadata property or enter free text in double quotes.
- **Count:** Number of characters.

RTrim

Removes the specified number of characters from the end of the string.

Syntax

RTrim(Property / Value, Count)

- **Property/Value:** File / Metadata property or enter free text in double quotes.
- **Count:** Number of characters.

LTrim

Removes the specified number of characters from the start of the string.

Syntax

LTrim (Property / Value, Count)

- **Property/Value:** File / Metadata property or enter free text in double quotes.
- **Count:** Number of characters.

GetFolderName

Returns the folder name at a specified hierarchical level from the complete folder path.

Syntax

GetFolderName(Property / Value, Level)

- **Property/Value:** File / Metadata property or enter free text in double quotes.
- **Level:** Hierarchical level of the folder name to return.

GetDay

Returns the day value of the given date.

Syntax

GetDay(Date value)

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

GetMonth

Returns the month value of the given date.

Syntax

GetMonth(Date value, Format)

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

GetYear

Returns the year value of the given date.

Syntax

GetYear(Date value, Format)

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

GetTime

Returns the time value of the given date.

Syntax

GetTime(Date value)

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

GetDateDiff

Returns the difference between two date values.

Syntax

GetDateDiff(Date value, Date value)

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

If

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

Syntax

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

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

GetString

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

Syntax

GetString(Property / Value, Pattern)

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

Split

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

Syntax

Split(Property / Value, Split Character, Occurrence)

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

Example of custom functions and their resultant values:

Function	Sample Metadata file column Value	Sample File Property Value	Result	Remarks
Right("Title.[metadatafile]",5)	test value		value	Right function returns last two characters from the value in the metadata file column 'Title'
Left("Title.[fileproperty]",2)		test property value	te	Left function returns the first two characters from the value in the file property 'Title'
RTrim ("Sample Value",5)			Sample	Rtrim truncates *Value* from the given value *Sample Value* and returns *Sample*
LTrim ("Demo Version",5)			Version	LTrim function truncate

				s *Demo* from the given value and returns *Version*
GetFolderName("path.[fileproperty]",2)		*C:\Sample Folder\Test\Demo.txt*	Sample Folder	Returns the name of the folder at level two in the full path
GetDay("Created Date.[fileproperty]")		11/21/1986	21	Returns the date value 21 from the date.
GetMonth("Modified Date.[fileproperty]", "MMM")		11/21/1986	Nov	Returns the month value in MMM format from the date.
GetYear("Date Field.[metadatafile]", "YY")	09/21/1990		90	Returns the year value in YY format from the given date.
GetTime("Time field.[metadatafile]")	09/21/1990 15:05:05		15:05:05	Returns the time value from the given date.

GetDateDiff("Created Date.[fileproperty]","Date Field.[metadatafile]")	09/21/1990	09/ 21/1989	366	Returns the difference between two date values.
Concatenate("Title.[FileProperty]","-","Name.[MetadataFile]")	Content	Type	Type-Content	Joins several texts into one string.
If("Title.[fileproperty]","StartsWith[FileShare]","File","Folder")		FileShare Document	File	If the condition is TRUE, it returns the True part string value.
Split("Name.[fileproperty]","_",2)		Dockit_UserManual_2012	UserManual	Splits the given string based on the split character (_) and returns the value from the second part / occurrence.
GetString("Title.[metadatafile]","\w{4}")	test case		test	Returns the string value that matches with the regular expression pattern.

Rename Documents in File System

SharePoint does not permit certain characters in folder and file names. Dockit provides the ability to rename invalid character(s) to valid character(s) using **Folder & File Renaming Rules**, thereby eliminating the tedious step of renaming the source folders / files. Dockit also allows you to truncate / replace some valid character(s) in folder and/or file names using the **Folder & File Renaming Rules**. This feature helps you in avoiding certain unwanted string characters (e.g., file suffixes) that are in the source folder / file names to be part of the folder / file name in SharePoint library.

For instance, if a file is named as 'Product Specification_en.doc' and you need to truncate the suffix '_en' from the file name during import, you can create a file naming rule as stated in the example below:

File Name	Find	Replace	Remarks
Product Specification_en.doc	*_en	*{empty}*	As the Replace textbox with an empty string, the final file name will be 'Product Specification.doc'
Product # Table.doc	#	*Number*	As the Replace textbox has the text 'Number' instead of the # symbol, the file name will be 'Product Number Table.doc'

Note: Dockit replaces '_en' with empty string in (or truncates '_en' from) the file name, if the primary part of the file name ends with '_en'. Also, the renaming rule does not replace any characters in extension part (secondary part) of the file name.

Dockit enables you to define flexible naming rules, in order to truncate or replace invalid and/or valid characters in folder and/or file names during import. By using wildcard characters ('*', '?') in the Find string in the naming rules, you can also create generic naming rules.

The naming rules are case insensitive. You can use the same Find string for both UPPER and lower case file names. For more information, please read Folder & File Renaming rules... section in the help document.

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:

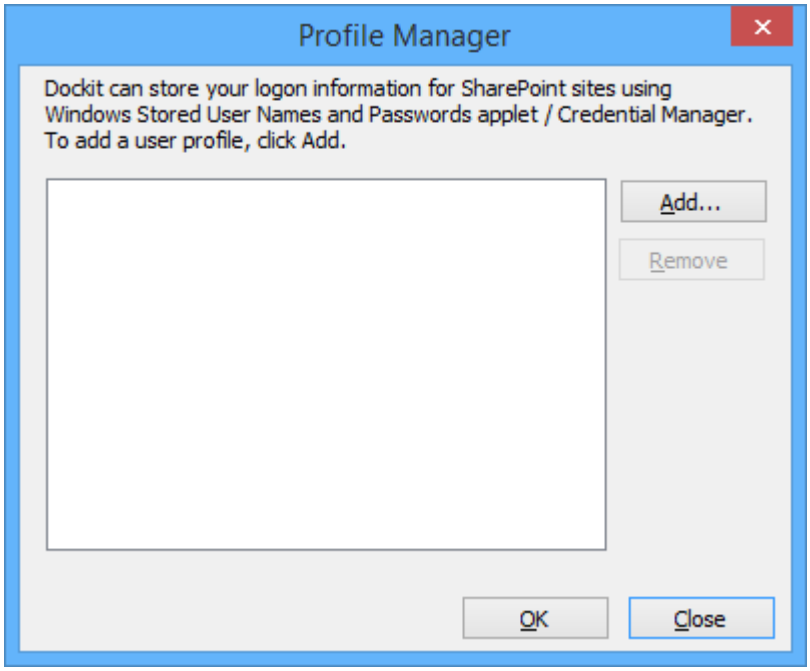
- Migrating content from SharePoint 2003 / 2007 / 2010 / 2013 / 2016 environment to SharePoint 2007 / 2010 / 2013 / 2016 environment
- Migrating content between two different SharePoint 2007 / 2010 / 2013 / 2016 server farms
- Migrating content using Laptop / PC that is not part of the SharePoint domain

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.

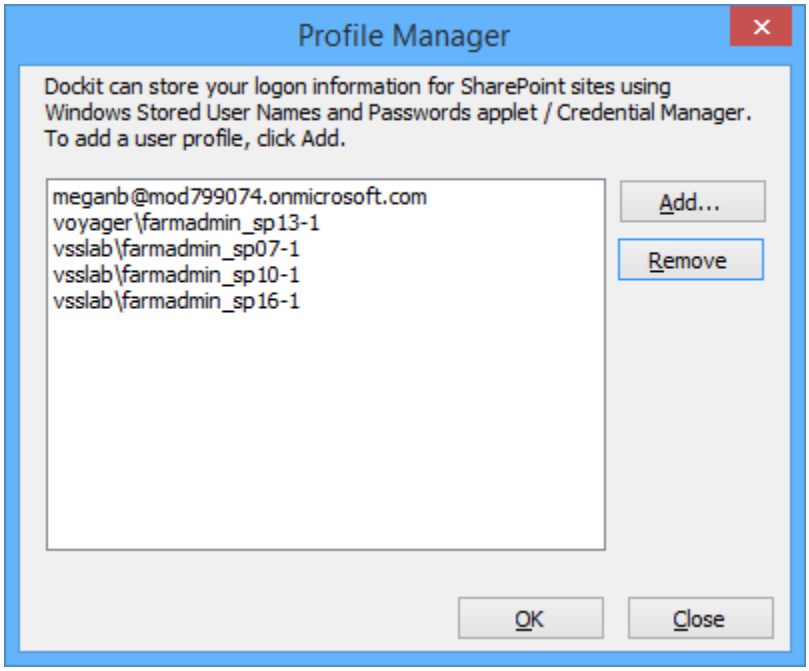
1. The **Profile Manager** dialog will be shown as below:



2. In order to add user profile, click **Add** button and provide user information in the **New User Profile** as shown below:

Click OK.

3. The newly added user profile will be shown in the **Profile Manager** as below:



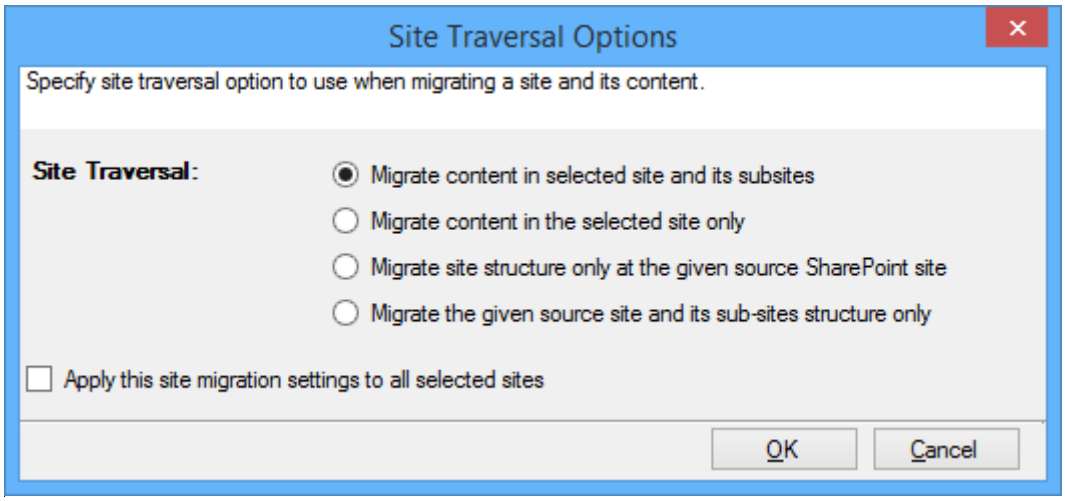
4. Henceforth, the stored user profile can be used as credential input in Dockit application in order to connect to the SharePoint environment.
5. Click **Close** button to close the **Profile Manager** dialog.
6. **Additional References:**

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:



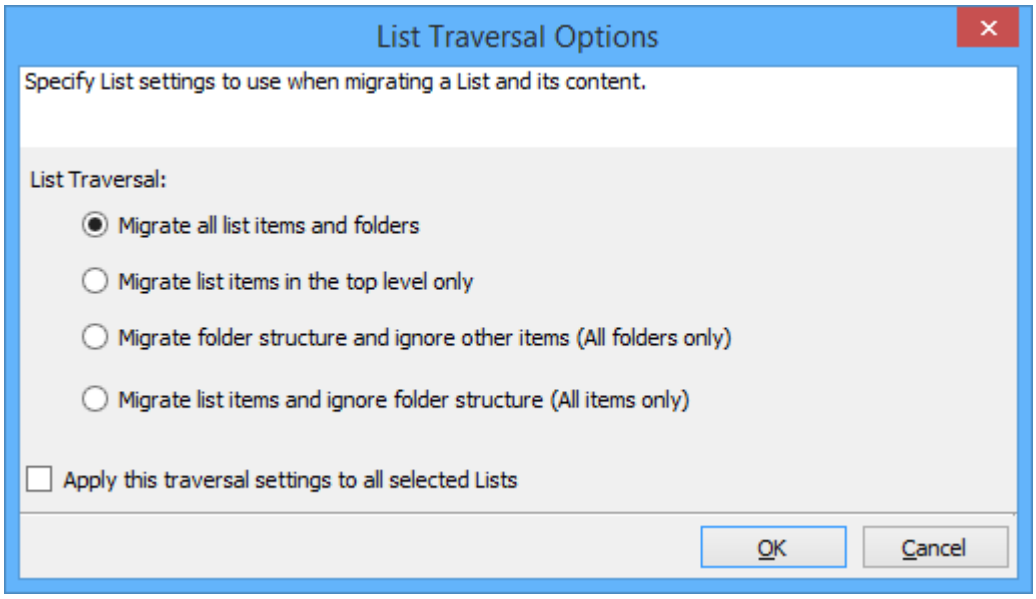
2. Select anyone of the following options given below to specify the content to be migrated from the source sites:

   - **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:



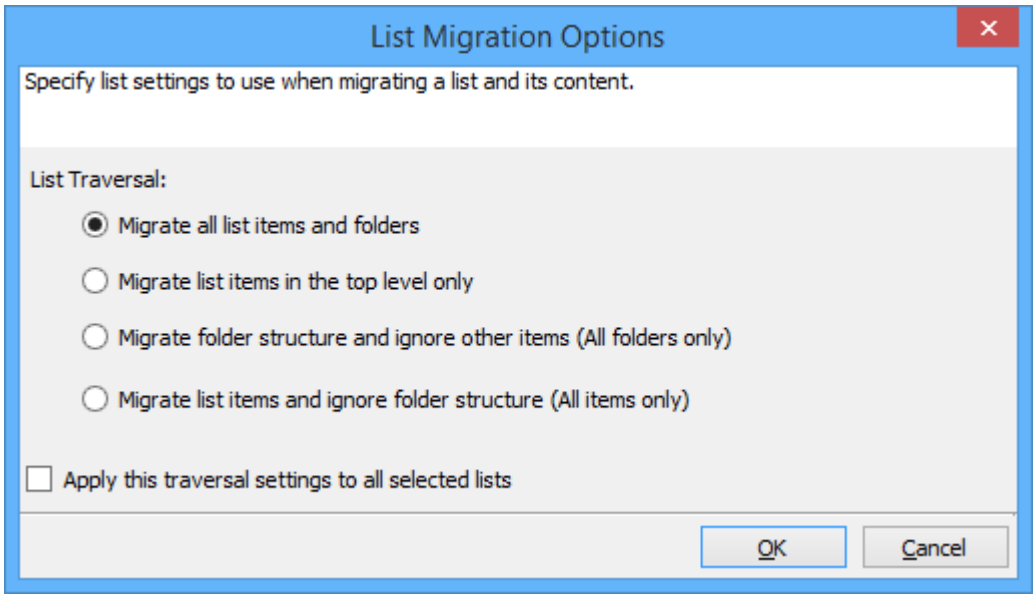
2. Select anyone of the list traversal options given below to specify the cotents to be migrated from source lists:

    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 top-level only. Dockit will not traverse the subfolders within the top-level folders.
    c. **Migrate folder structure and ignore other items (All folders only)** - This option creates the sub-folder structure in the destination location and ignores all list items that are available within the added list and its sub-folders.
    d. **Migrate list items and ignore folder structure (All items only)** - This option migrates files only and ignore its source folder structure in the source SharePoint list.Note: Specify the appropriate options in File Settings step to handle situations where same filenames may be available for more than one file in different source folder hierarchy (sub-folders).

3. Click **OK** to proceed.

Library Traversal Options

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



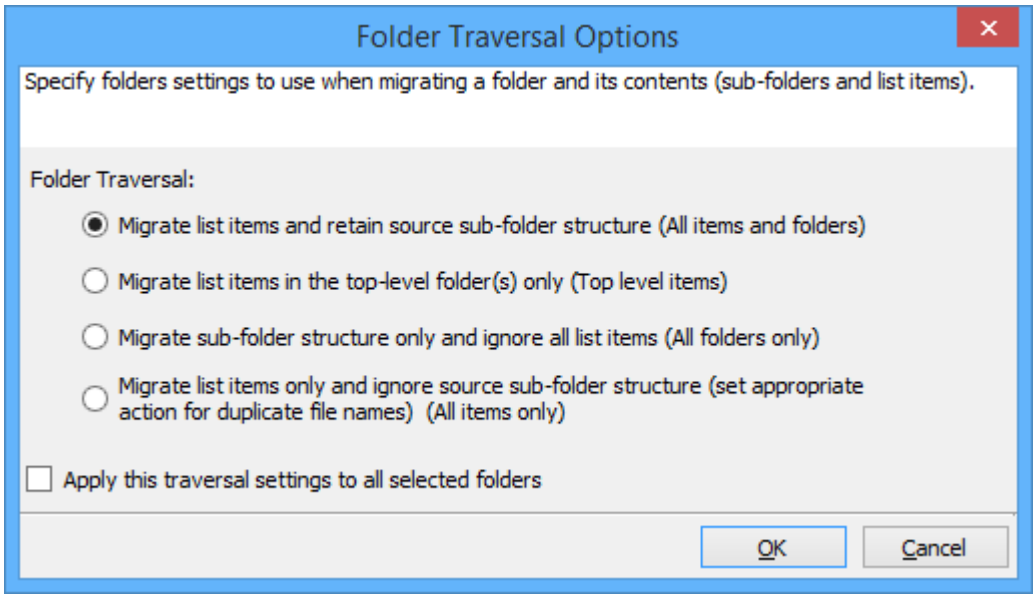
2. Select anyone of the library traversal options given below to specify the cotents to be migrated from source lists:

    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 top-level only. Dockit will not traverse the subfolders within the top-level folders.
    c. **Migrate folder structure and ignore other items (All folders only)** - This option creates the sub-folder structure in the destination location and ignores all files that are available within the added library and its sub-folders.
    d. **Migrate list items and ignore folder structure (All items only)** - This option migrates files only and ignore its source folder structure in the source SharePoint library.Note: Specify the appropriate options in File Settings step to handle situations where same filenames may be available for more than one file in different source folder hierarchy (sub-folders).

3. Click **OK** to proceed.

Folder Traversal Options

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



2. Select the appropriate option to create the selected folder by selecting the option buttons (Yes / No).

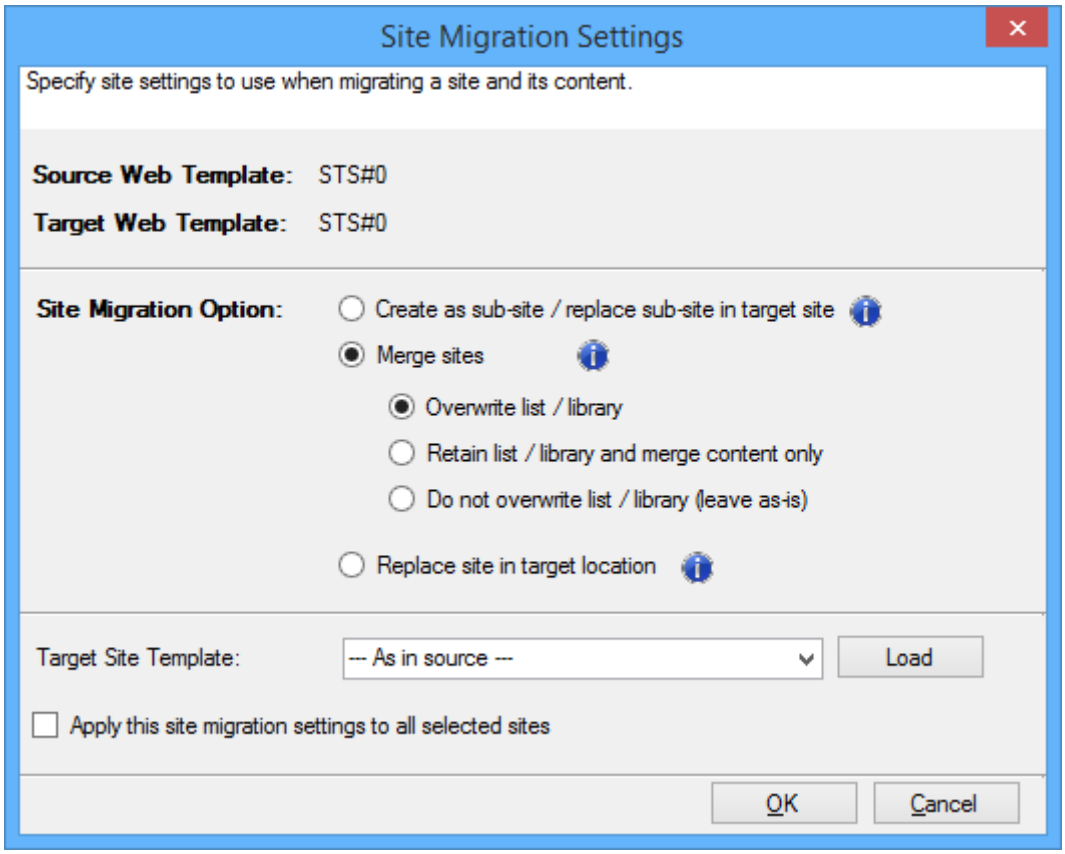
3. Select anyone of the list traversal options given below to specify the cotents to be migrated from source lists:

    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.

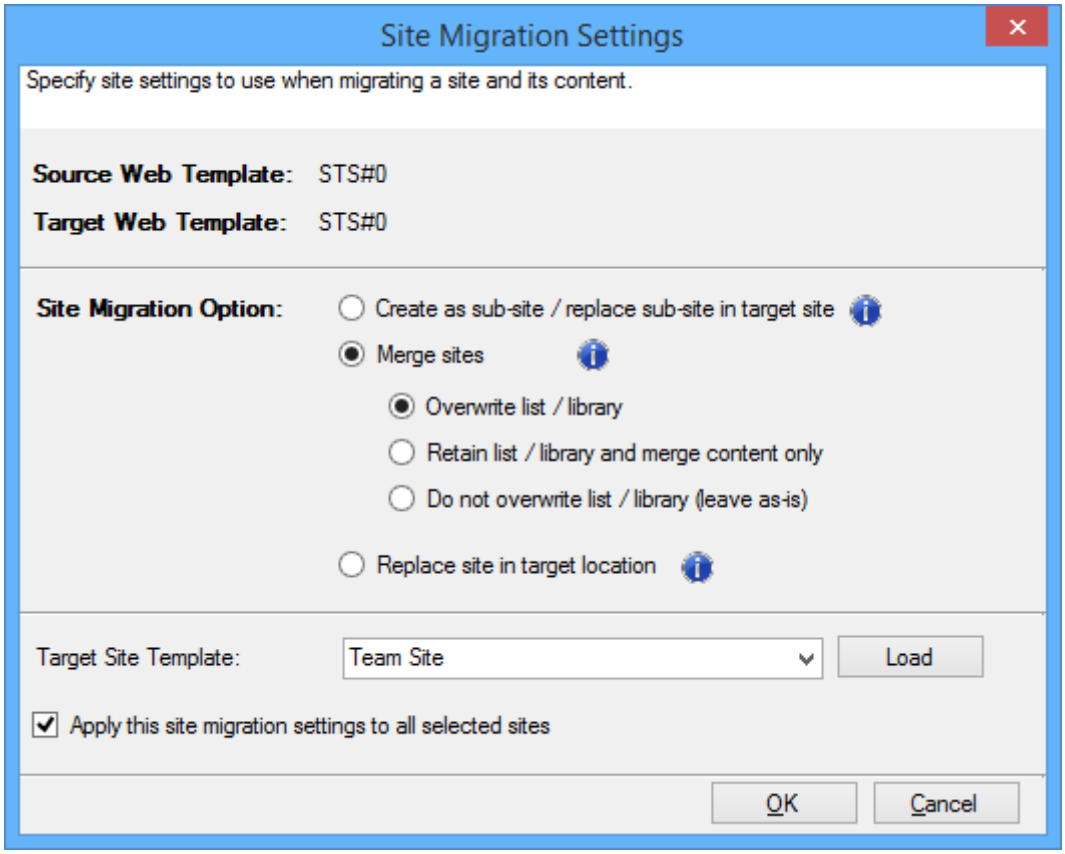
3. Select anyone of the following options given below to specify the content to be migrated from the source sites:

   - **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.

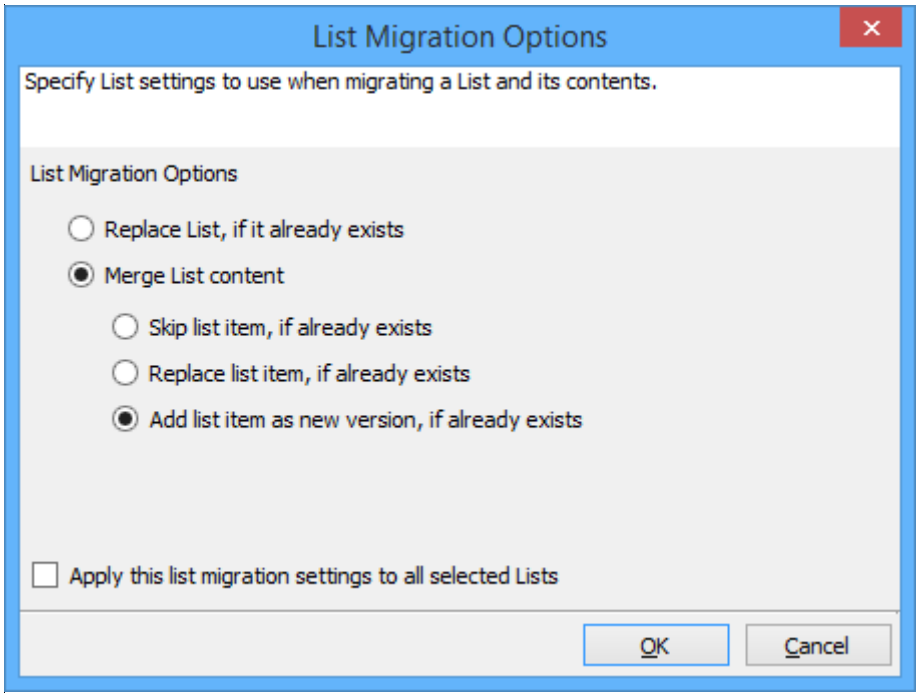
4. Select the option to apply this migration settings to all selected sites.

5. Click **OK** to proceed.



List Migration Options

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



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

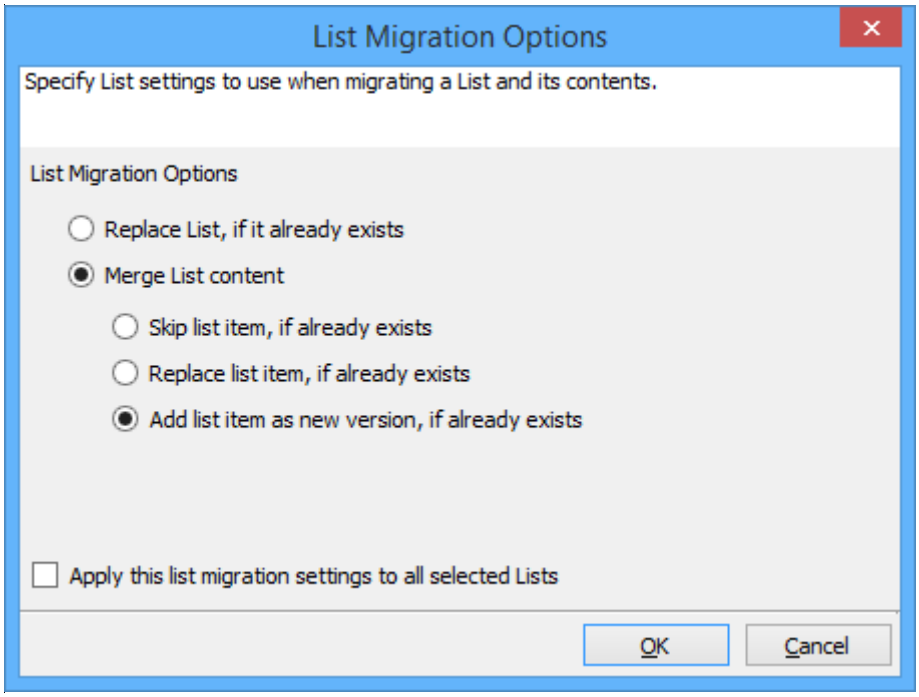
    a. **Replace list, if it already exists** - This option replaces the list in the target location, if the list already exists in the target location.
    b. **Merge list contents** - This option merge the list contents only with the following options
    c. **Skip list item, if already exists** - This 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:



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

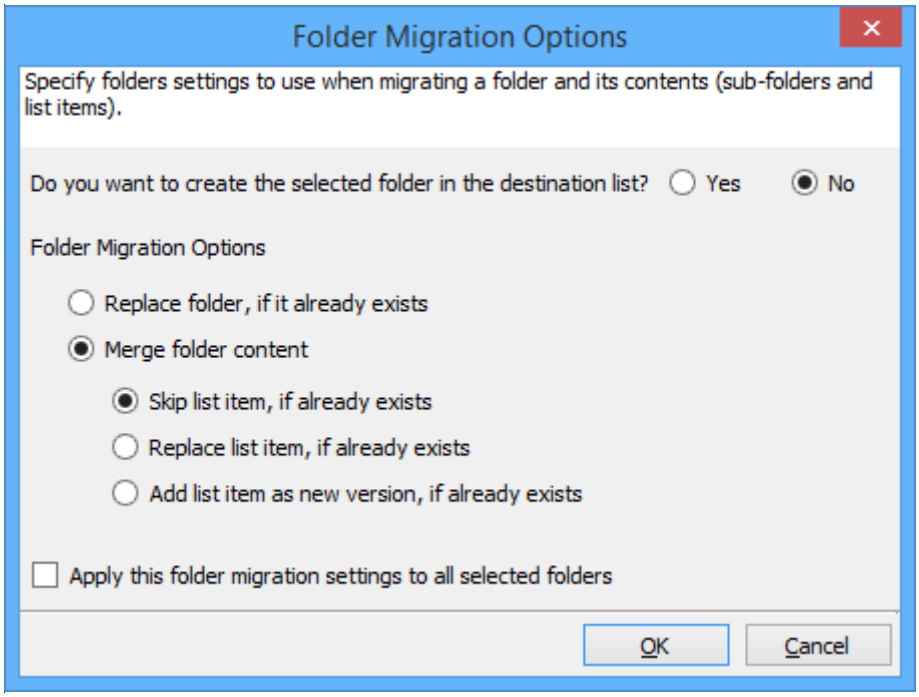
    a. **Replace list, if it already exists** - This option replaces the list in the target location, if the list already exists in the target location.
    b. **Merge list contents** - This option merge the list contents only with the following options
    c. **Skip list item, if already exists** - This 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:



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:

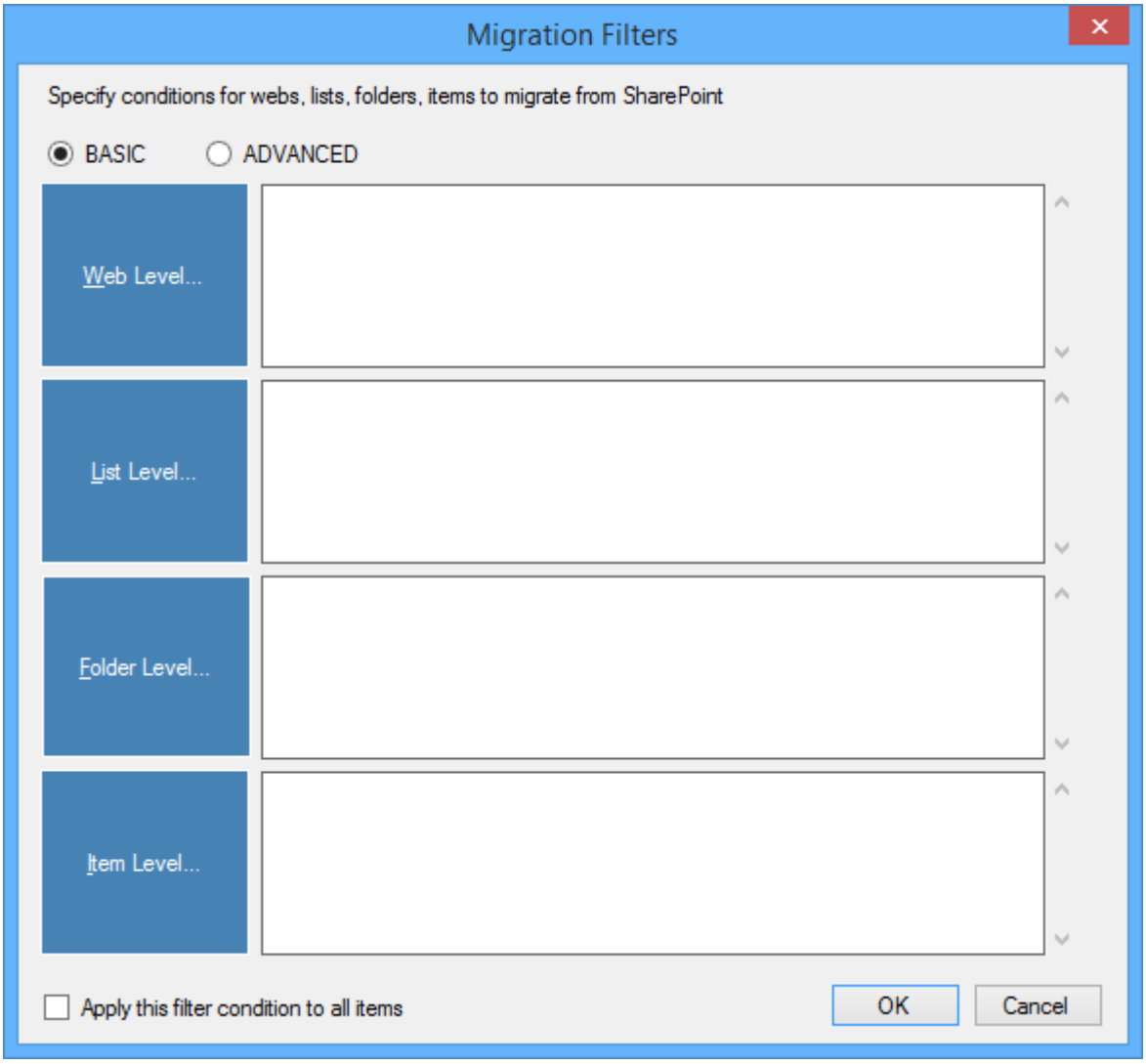
    a. **Replace folder, if it already exists** - This option replaces the folder in the target location, if the list already exists in the target location.
    b. **Merge folder contents** - This option merge the folder contents only with the following options
    c. **Skip list item, if already exists** - 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:



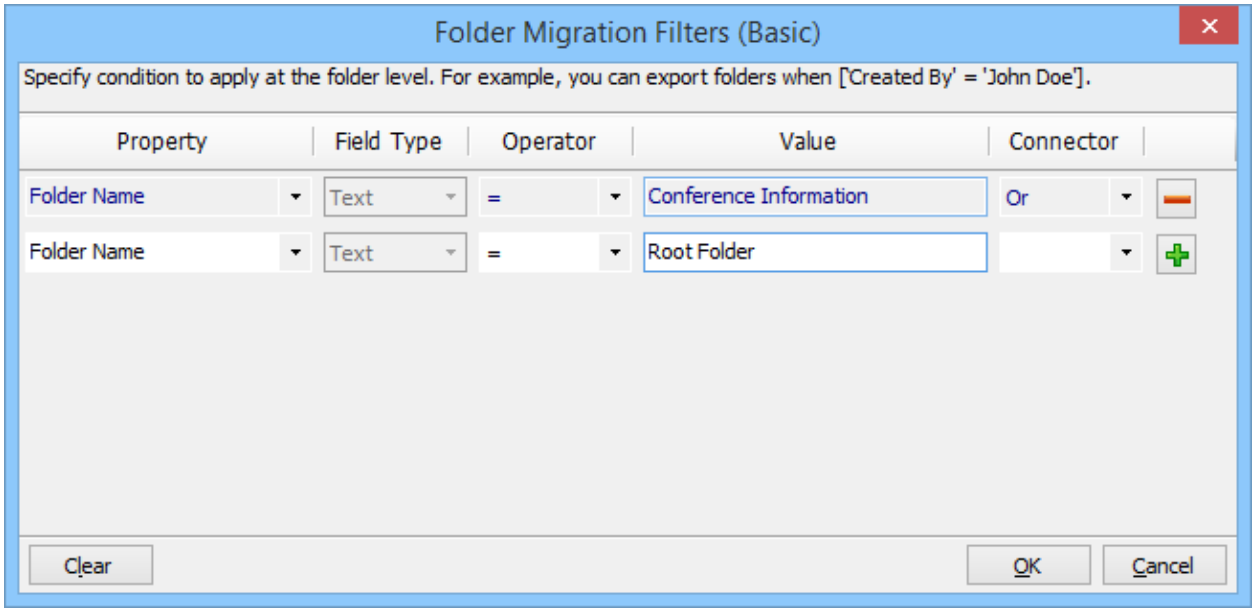
2. Select any one of the following options given below:

   - **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.

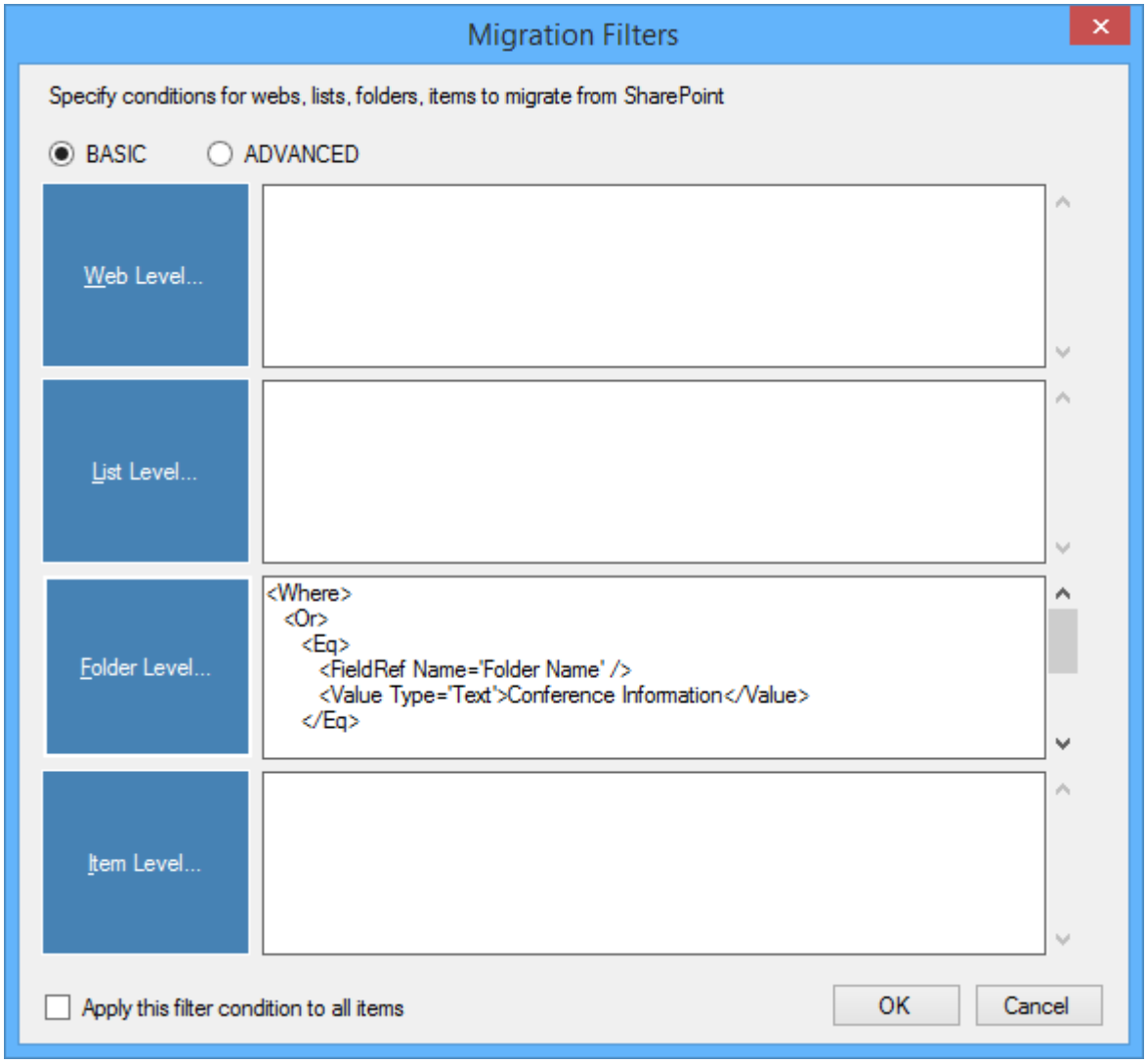
3. You can specify migration conditions at four levels:

   - **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.

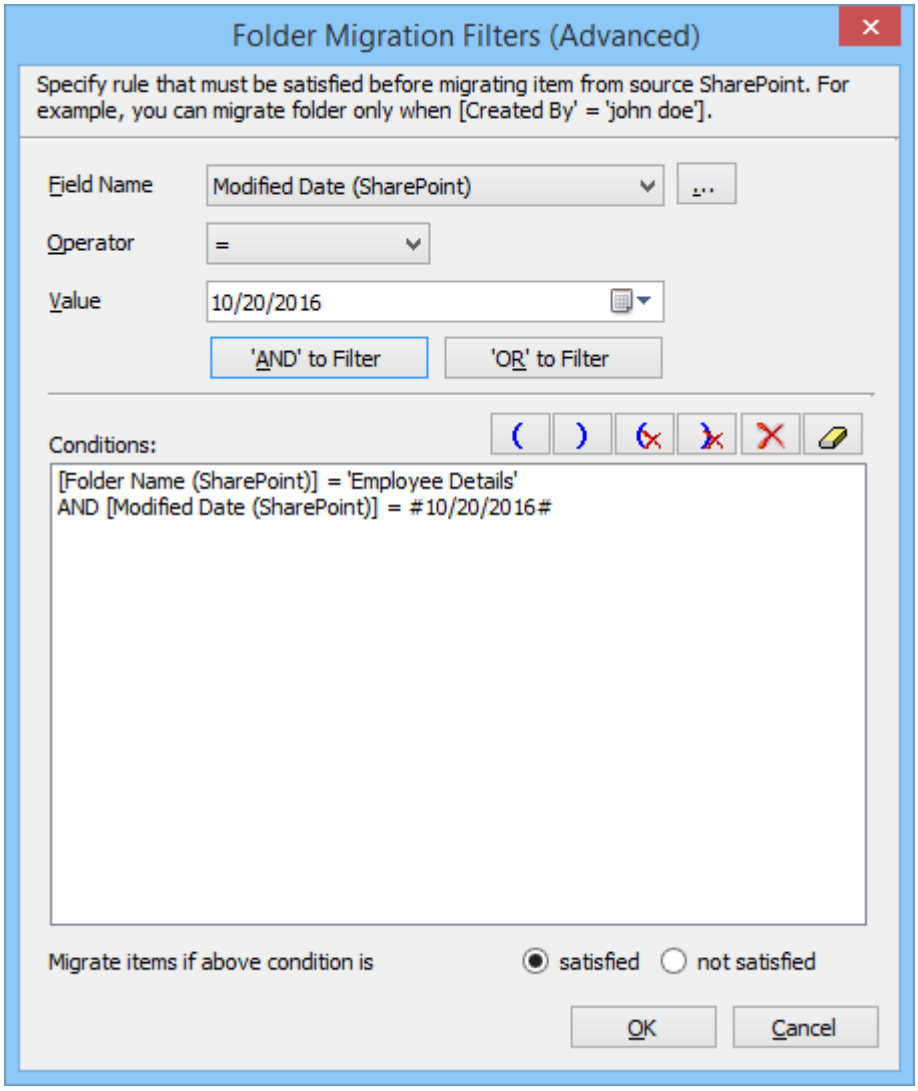
4. Option that has discussed below is **Folder Level Filters**
5. Once you select **BASIC** and click 'Folder Level Filter...' button button to specify the respective filter condition. The migration filter dialog will appear as shown below:



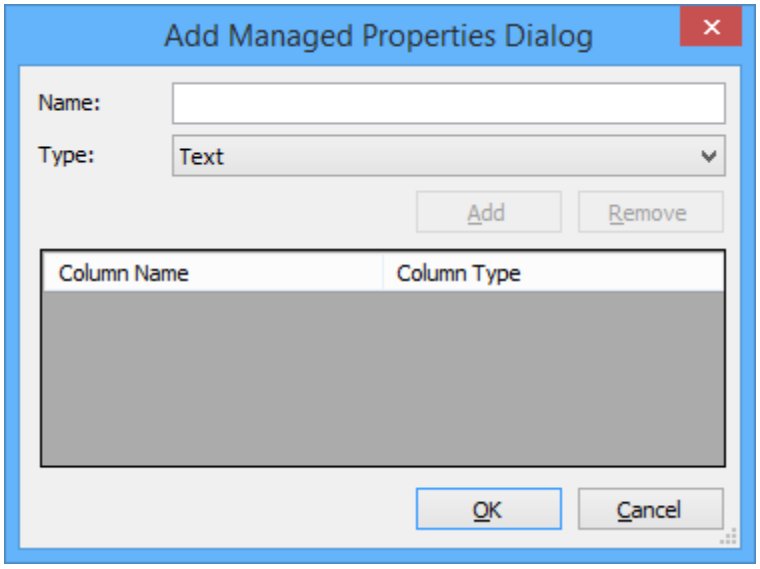
6. Once you specify the respective folder migration filter, the task wizard step appears as shown below:



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:



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

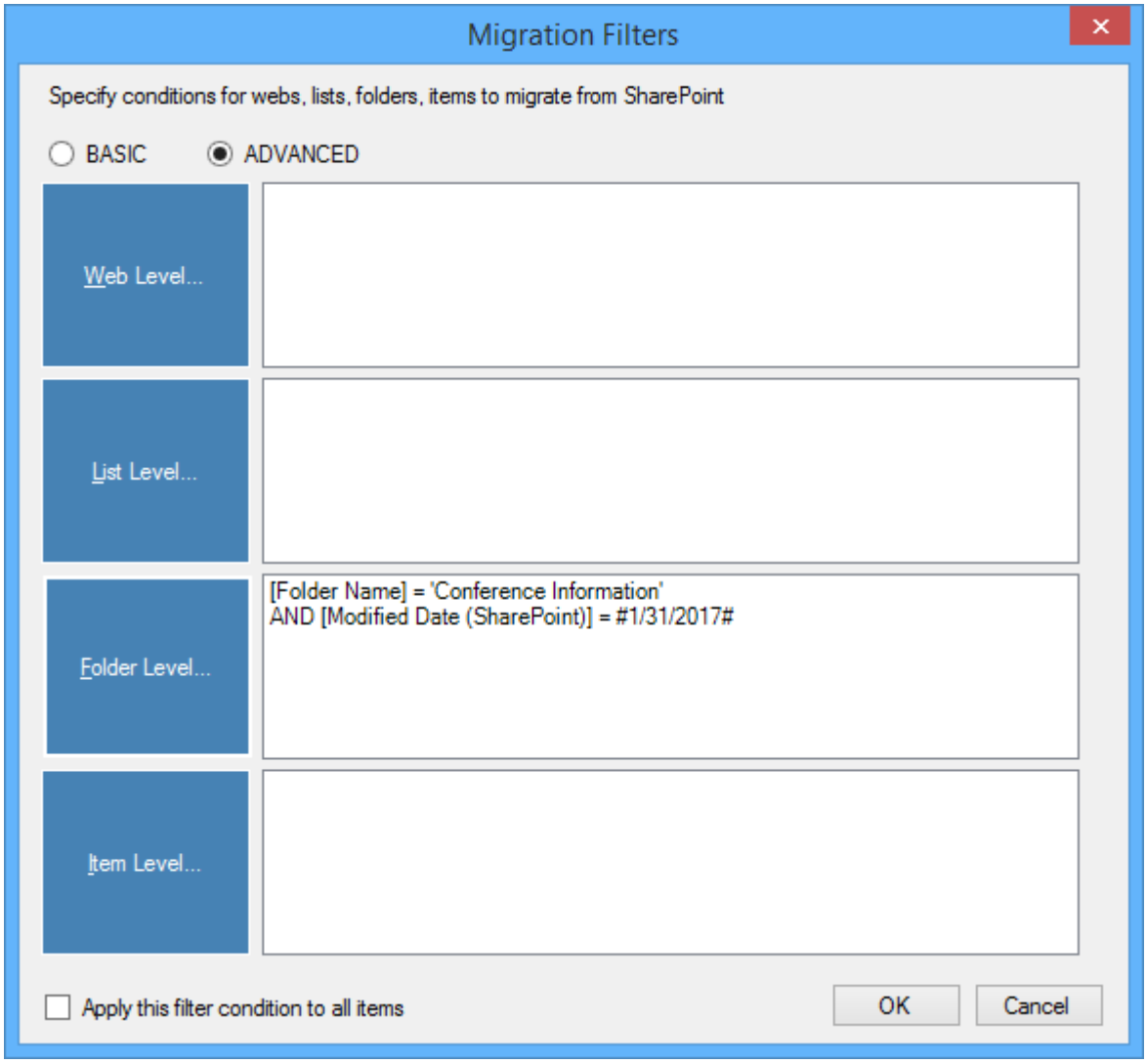


Specify the column name in **Name** textbox and select the data type of the column in SharePoint from **Type** drop-down.

Click **Add** button to add the columns to the fieldname dropdown list.

Click **Remove** button to remove the columns from the fieldname dropdown list.

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



10. Click **Next** to proceed.

Folders & File Renaming Rules

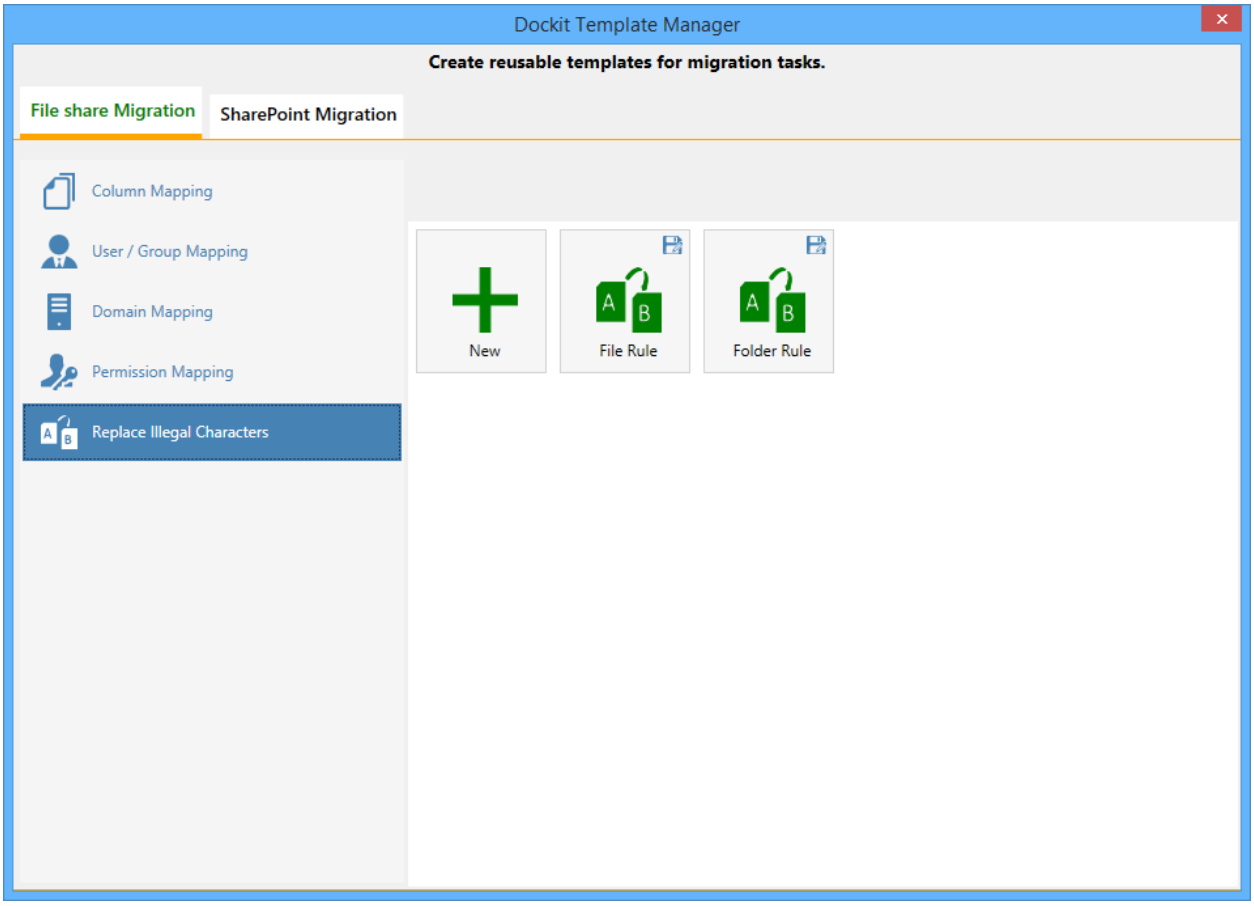
SharePoint does not permit certain characters in folder and file names. Dockit provides an ability to rename invalid character(s) to valid character(s) and also support any character(s) to be renamed using rules, thereby eliminating the tedious step of renaming the source folders / files. You can create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

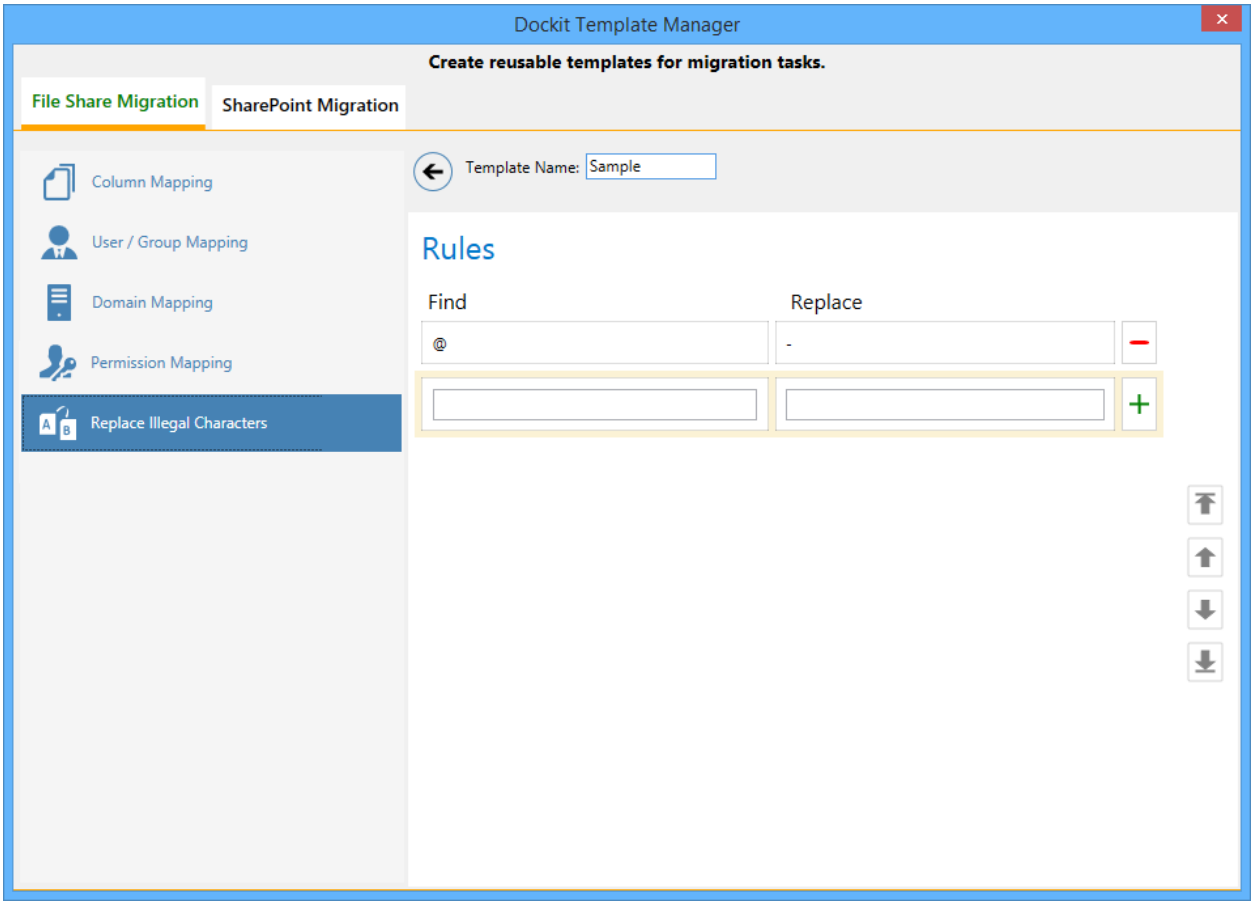
To specify a rule for invalid character sequence to valid character sequence:

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:



2. Once the new renaming rule template created,

    a. Specify the SharePoint invalid character in **Find** textbox and its valid character in **Replace** textbox, then click **Add** button.
    b. Click **Remove** button to remove the selected naming rule.



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

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

Sample Renaming Rules

Sample renaming rules:

File Name	Find	Replace	Result	Remarks
SampleV1	*V1	*{empty}*	Sample	Truncate V1, if the file ends with V1
SampleV1	*V1	A	SampleA	Replace V1 with A, if the file name ends with V1
Hello_World	Hello_*	*{empty}*	World	Truncate Hello_, if the file name starts with Hello_
Hello_World	*_World	*{empty}*	Hello	Truncate _World, if file name ends with _World
SampleV1	v?	*{empty}*	Sample	Truncate V and the file name character following it (immediately succeeding character), if the file names contains V and followed by any one character.
Sample	?p	*{empty}*	Sale	Truncate one character preceding the letter p in the file name.
SampleV12	V??	*{empty}*	Sample	Truncate two characters following the character / letter V in the file name.
SampleFileVersion	*File*	*{empty}*	SampleVersion	Truncate the word 'File' in any position in the file name.
Sample.Matrix	.	Dot	SampleDotMatrix	
Sample?File	?	Text	SampleTextFile	
Hello*World	*	*{empty}*	HelloWorld	
Sample$	$	Dollar	SampleDollar	
Sample^File	^	*{empty}*	SampleFile	
Sample+Document	+	Plus	SamplePlusDocument	
Hello<World	<	*{empty}*	HelloWorld	
Hello>World	**>**	*{empty}*	HelloWorld	
[Document	**[**	Word	WordDocument	
Word]	**]**	Document	WordDocument	
(File	**(**	Sample	SampleFile	
Sample)	**)**	Document	SampleDocument	

Reference

Batch file structure
Metadata file structure
File structure for metadata
Error Messages and Resolution
Troubleshooting

Batch file structure

The following section describes the guidelines to create a batch descriptor file for **Migrate SharePoint site, list & library content using batch file mode** task option.

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

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

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

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

3. The 'Source Path' and 'Destination Path' fields will not be carried forward as a metadata column in SharePoint.
4. The 'Source Path' column of all the rows should contain the URL of the source SharePoint site / list / folder / file / list item. e.g., "http://sharepoint/site1", "http://sharepoint/site1/Lists/Contacts".
5. If a site URL is given in the batch file, then you can use the following wildcards to exclude / include the sub-sites.

Wildcard characters	Example	Description
.	http://sharepoint/site1/.	Migrate all lists, items and folders at the given source SharePoint site level only (excluding sub-sites).
*	http://sharepoint/site1/*	Migrate 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/1_.000	http://sharepoint/Employee Details	Sales/Executives

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

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

Source Path	Destination Path	Site Template
http://sharepoint.vyapin.com/sites/Mission/Wild	http://sharepoint/sites/Mission	Team Site
http://sharepoint.vyapin.com/sites/Adventure/Estuary	http://sharepoint/sites/Mission/Adventure	Blank Site

Dockit creates the site (wild) underneath the specified destination location (Mission) with the template specified in Site Template column (Team Site). The 'Wild' site content will be migrated into the new destination location 'http://sharepoint/sites/Mission/Wild'.

9. For CSV and TXT formats, all field names and their corresponding metadata values should be enclosed within double quotes (" ") e.g., "John Doe". When using accented characters such as [á é í ó] in folder / file names, the CSV / TXT batch descriptor file must be in UNICODE encoded format.
10. For Microsoft Excel file formats (XLS / XLSX), do not enclose the field names and their corresponding metadata values within double quotes.
11. Ensure date values are in 'Date Only' or 'Date And Time' format.
12. Lookup data type value will be assigned based on column value only. Lookup columns referring to **non-existing list and column** will not be updated by Dockit.
13. People or Group data type value should be user name, Active Directory (AD) group name or SharePoint group name. User or group name referring to **non-existing user or group** will not be updated by Dockit. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com) can be used to denote a user account.

Sample format of a CSV / TEXT batch file:

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

"Source Path","Destination Path","Issue Date","Author Name","Position","Department"
"http://sharepoint.vyapin.com/Documents/Sample Brochure.doc","http://sharepoint/libone1","11/06/2006","John Doe","Director","Senior Management"
"http://sharepoint.vyapin.com/Documents/Sales/Sample Sales Template.xls","http://sharepoint/libone2","11/24/2006","Jane Doe","VP Sales","Corporate Sales"
"http://sharepoint.vyapin.com/Documents/Sample Product Demo.ppt","http://sharepoint/libone3/folder","09/09/1999","David Blake","Sales Manager","Consumer Sales"
"http://sharepoint.vyapin.com/Lists/Contacts/1_.000","http://sharepoint/Exmployee Details","10/21/2003","Schew","VP Accounts","Accounts"
"http://sharepoint.vyapin.com/Lists/Tasks/10_.000","http://sharepoint/Lists/Tasks/Folder","09/12/2009","Crouch","Sales Executive","Consumer Sales"

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

Lookup (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Stock Details; Accounts; Product Details"
People or Group (Single Value)	User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. Do not use multiple values unless the equivalent column defined in SharePoint can accept multiple values. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\Administrator" "BUILTIN\Administrator" "Backup Owners" "someone@example.com" "John Doe"
People or Group (Multiple value)	User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\User1; BUILTIN\Administrators; Guest Members;Temps"
Hyperlink or Picture	The http URL of any resource or picture can be given to this field.	"http://sharepoint/Shared Documents/My Sample File.doc" "http://sharepoint/Pictures/chart.bmp"
Target Audiences	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 SharePoint Server 2010 and above).	SPUsers; Contributors; Designers
Publishing Schedule Start Date (Applicable only for Collaboration Portal / Publishing Portal Site)	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2010 10:50 AM" "1/25/2009"
Publishing Schedule End Date (Applicable only for Collaboration Portal / Publishing Portal Site)	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2009 10:50 AM" "1/25/2010"
Publishing Image (Applicable only for Collaboration Portal / Publishing Portal Site)	The http URL of any picture can be given to this field. Relative URL also can be given to this field.	http://sharepoint/Pictures/chart.bmp "Pictures/chart.bmp"
Publishing Hyperlink (Applicable only for Collaboration Portal /	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)		" NewsArticleImage.jpg"
Publishing HTML (Applicable only for Collaboration Portal / Publishing Portal Site)	HTML content can be given in this field. You can use HTML tags in order to create rich content in the field.	It is sample text
Business Data (BDC) / External Data (BCS) (Applicable only for SharePoint Enterprise Edition)	The BDC / BCS column value along with the filter name can be specified in this field. Dockit will search for the specified column value in the LOB entity using the given filter and assign the corresponding ID (when the BDC / BCS column value match is found) of the LOB record to the BDC / BCS column in SharePoint. Specify this value in filter name: value format. If the filter name contains colon (:) in its name, specify this value in FILTER:filter name, QUERY:value, where FILTER and QUERY are reserved words. Dockit also automatically fills-up the column values associated with the BDC / BCS column during import.	"Company Name:Vyapin" "ID:1000" "Product Name:Dockit Migrator 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:1000AX"
Managed Metadata (Single Value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the	"Continent|North America|Country|United States|States|Alaska" "Alaska"

	specified term value and assign the first matching term value for the corresponding managed metadata column.	
Managed Metadata (Multiple Values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	"Continent|North America|Country|United States|States|Washington;Continent |North America|Country|United States| States|California;Continent |North America|Country|United States| States|Alaska" "Washington;California; Alaska"
Geolocation	Location co-ordinates or name can be given to this field. The co-ordinates value must have latitude and longitude values separated by ':'. The latitude value must be between -90 and +90 and longitude value must be between -180 and +180.	"30:-60" "New York, United States"
Task Outcome	Text or Numeric value can be given to this field. Do not use multiple values for this column type.	"Complete" "4"
Related Items	The http absolute URL of any list item (including file) within the site collection can be given to this field. The values can be of single or multiple. Multiple values should be separated by ';'.	"http://sharepoint/Documents/Sample 1.doc; http://sharepoint/Documents/Sample 2.xlsx" "http://sharepoint/Lists/Custom List/1_.000"

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

- Choice*
- Lookup
- Person or Group

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

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

Sample format of a CSV / TEXT metadata file:

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

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

Metadata file structure

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

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

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

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

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

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

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

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

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

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

SharePoint Data Type	Remarks	Example
Yes/No	If any other value appears in the metadata file, other than Yes/No, default value will be assigned.	"Yes" "No"
Text	The text length should not exceed 255 characters.	"This is sample text"
Multi-line Text	The text length should not exceed 255 characters (preferred).	"This is sample text\nThis is sample for multi-line text"
Date and Time	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2009 10:50 AM" "1/25/2010"
Number	The fixed or floating number can be given to this field. The value should not exceed the numeric boundary.	"10" "3.41"
Currency	The fixed or floating number can be given to this field. Do not use any currency symbol ($) with this field value. The value should not exceed the currency boundary.	"100" "10000" "1500.67"
Choice (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values.	"Male" "15"
Choice (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'.	"Windows 7; Windows Vista; Windows 2003; Windows XP"
Lookup (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Windows 7"

Lookup (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Stock Details; Accounts; Product Details"
People or Group (Single Value)	User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. Do not use multiple values unless the equivalent column defined in SharePoint can accept multiple values. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\Administrator" "BUILTIN\Administrator" "Backup Owners" "someone@example.com" "John Doe"
People or Group (Multiple value)	User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\User1; BUILTIN\Administrators; Guest Members;Temps"
Hyperlink or Picture	The http URL of any resource or picture can be given to this field.	"http://sharepoint/Shared Documents/My Sample File.doc" "http://sharepoint/Pictures/chart.bmp"
Target Audiences	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 SharePoint Server 2010 and above).	SPUsers; Contributors; Designers
Publishing Schedule Start Date (Applicable only for Collaboration Portal / Publishing Portal Site)	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2010 10:50 AM" "1/25/2009"
Publishing Schedule End Date (Applicable only for Collaboration Portal / Publishing Portal Site)	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2009 10:50 AM" "1/25/2010"
Publishing Image (Applicable only for Collaboration Portal / Publishing Portal Site)	The http URL of any picture can be given to this field. Relative URL also can be given to this field.	http://sharepoint/Pictures/chart.bmp "Pictures/chart.bmp"
Publishing Hyperlink (Applicable only for Collaboration Portal /	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)		" NewsArticleImage.jpg"
Publishing HTML (Applicable only for Collaboration Portal / Publishing Portal Site)	HTML content can be given in this field. You can use HTML tags in order to create rich content in the field.	It is sample text
Business Data (BDC) / External Data (BCS) (Applicable only for SharePoint Enterprise Edition)	The BDC / BCS column value along with the filter name can be specified in this field. Dockit will search for the specified column value in the LOB entity using the given filter and assign the corresponding ID (when the BDC / BCS column value match is found) of the LOB record to the BDC / BCS column in SharePoint. Specify this value in filter name: value format. If the filter name contains colon (:) in its name, specify this value in FILTER:filter name, QUERY:value, where FILTER and QUERY are reserved words. Dockit also automatically fills-up the column values associated with the BDC / BCS column during import.	"Company Name:Vyapin" "ID:1000" "Product Name:Dockit Migrator 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:1000AX"
Managed Metadata (Single Value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the	"Continent|North America|Country|United States|States|Alaska" "Alaska"

	specified term value and assign the first matching term value for the corresponding managed metadata column.	
Managed Metadata (Multiple Values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	"Continent|North America|Country|United States|States|Washington;Continent |North America|Country|United States| States|California;Continent |North America|Country|United States| States|Alaska" "Washington;California; Alaska"
Geolocation	Location co-ordinates or name can be given to this field. The co-ordinates value must have latitude and longitude values separated by ':'. The latitude value must be between -90 and +90 and longitude value must be between -180 and +180.	"30:-60" "New York, United States"
Task Outcome	Text or Numeric value can be given to this field. Do not use multiple values for this column type.	"Complete" "4"
Related Items	The http absolute URL of any list item (including file) within the site collection can be given to this field. The values can be of single or multiple. Multiple values should be separated by ';'.	"http://sharepoint/Documents/Sample 1.doc; http://sharepoint/Documents/Sample 2.xlsx" "http://sharepoint/Lists/Custom List/1_.000"

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

- Choice*
- Lookup
- Person or Group

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

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

Sample format of a CSV / TEXT metadata file:

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

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

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.	Ensure that the given choice value is available in the corresponding Choice field definition in SharePoint library. If the given value is unavailable, Dockit reports this message and the value will not be updated in SharePoint. Note: if you wish to add newer values (that is not available in the field definition) during import process, specify 'Yes' value for 'Allow Fill-in' option available in Choice field column

	settings in SharePoint library. The 'Allow Fill-in' option in Choice field column is used as a flag in Dockit to specify whether to add newer value to the choice field definition during import process.
The '<value>' could not be assigned for the taxonomy field '<field name>' since there are no matching value defined in the taxonomy field definition.	Ensure that the specified term value is available in the corresponding managed metadata field termset definition in SharePoint library. If the given value is unavailable and the selected termset is not opened for new term creation, Dockit reports this message and the term value will not be updated in SharePoint.
'<value>' - Not a valid list item URL in the site collection.	Ensure that the given list item URL is a valid list item's URL. Unavailability of the list item causes the error.
'<value>' - Related item must be a valid list item within the site collection.	Ensure that the given list item URL is a valid list item's URL within the site collection.
Latitude value must be between -90 and +90 for a Geolocation field.	Ensure that the given latitude value is in between -90 and +90.
Longitude value must be between -180 and + 180 for a Geolocation field.	Ensure that the given longitude value is in between -180 and +180.
There is no entry for this file in the external metadata file.	Ensure that the metadata values are provided for all documents that are imported.
Source folder or file not found	Ensure that the given source Path is valid and available. Invalid or unavailable source paths will result in this error.
Unable to locate library with the specified URL (or) Unable to locate destination folder / file with the specified URL.	Ensure that the given Destination Path is valid and exists.
Dockit will not apply metadata for standard folders.	Ensure that you can assign a folder content type to the given destination folder. Dockit will not assign metadata for a standard folder.
The following file(s) have been blocked by the administrator: <filename>	Ensure that the file type being imported is not blocked. For example, asp, chm, mdb, etc

	files are generally blocked in SharePoint by administrators.
The file is checked out or locked for editing by user	If the given file is checked out by another user and you are trying to check-in the file, then this error may occur.
Could not import document as mandatory columns do not have values	The values are required for mandatory columns in a SharePoint library. The file will be skipped as mandatory columns do not have values. The column value for a mandatory column may not available in either the external metadata file or file system properties. Ensure all mandatory columns have values in the respective files added for import.
Could not update metadata values as mandatory columns do not have values	The values are required for mandatory columns in a SharePoint library. The file will be skipped as mandatory columns do not have values. The column value for a mandatory column may not available in the external metadata file.
<fieldname> must contain a metadata value or its corresponding library column must have a default value defined.	This field is defined to be a required field in SharePoint, meaning column value cannot be empty. Moreover, the default value of the column may also be empty. Ensure that a default value is specified for the required field in SharePoint or enter a value for this field in the corresponding file.
Dockit Server Agent version mismatch	Ensure Dockit application version matches with Dockit Server Agent version installed in the destination SharePoint Server. Ensure the same version of Dockit desktop application and Dockit Server Agent is used when importing the Created Date and Last Modified Date fields to SharePoint.
[Created Date], [Modified Date] could not be updated	Ensure Dockit Server Agent is installed and running in the destination SharePoint Server. Dockit will carry forward the two date fields to a SharePoint

	library residing in the SharePoint server in which *Dockit Server Agent* is installed.
Required column(s) may be empty.	Some of the required fields in a SharePoint library may be empty. Ensure all mandatory columns have values in the respective files added for import.
Checkin operation failed	Checkin operation will fail, in case mandatory fields of SharePoint library do not have values (empty) provided to them at the time of check-in.
Checkout operation failed	Checkout operation will fail in case access is denied (or) file is already locked by some other user.
Content Type <name> could not be found in the library	Ensure that the specified content type is available in the destination SharePoint library.
Content Type <name> found in the library, but it is not a valid file content type	Ensure that the list content type is derived from a 'Document' parent content type in the SharePoint site.
Import condition not satisfied	The file does not satisfy the import condition specified in the task settings. Dockit will log this message in the Activity log and the file will be skipped for import.
Import condition has failed <error message>	Ensure that the constructed import condition is correct. The column name used in import condition may not be available in the external metadata file.
Renaming rule has failed <error message>	Ensure that the constructed Folder / File Renaming rules is correct. The find string used in renaming rules may have reserved characters which cause to misinterpret the rule.
Unable to read 'Owner' value from the file - Some or all identity references could not be translated.	The Owner value of the file or folder must be a trusted domain user account.
No matching LOB record	Ensure that the specified BDC / BCS value is available in the LOB system instance.
Multiple LOB records found	This message will occur if the given BDC / BCS value matches with more than one LOB record

	in the LOB system instance. Refine your BDC / BCS query value in order to retrieve a single LOB record only.
The specified filter is not available	Ensure that the specified filter name is available in the LOB System instance. If the specified filter is unavailable, Dockit reports this message and the BDC / BCS value will not be updated in SharePoint.
List data validation failed	Ensure that the given column value satisfies the validation condition defined in the SharePoint library validation settings. Dockit reports this error message when the validation condition (given in Validation Settings) is not satisfied and the respective columns will not be updated in SharePoint.

Troubleshooting

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

1. *Error log file* - e.g., <*Application Data Folder*>\Log\DockitErrorLog.txt
2. For issues while running a task, the Activity Log and Error Log files will be generated in a date and time-stamp folder within the task folder name under 'TaskHistory' folder.
   a. *Activity log file* - e.g., <*Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\logs\ActivityLog.txt
   b. *Error log file* - e.g., <*Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\logs\ActivityErrors.txt
   c. *Metadata log file* - e.g., <*Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\logs\MetadataErrors.txt
   d. *Dockit error log file* - e.g., <*Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\logs\DockitErrorLog.txt
   e. *Move Activity log file* - e.g., <*Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\logs\MoveActivityLog.txt
   f. *Task settings file* - e.g., <*Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\settings\Details.xml
   g. *Library settings file* - e.g., <*Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\settings\LibrarySettings.xml
   h. *Process details file* - e.g., <*Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\settings\ListItemProcessCount.xml

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

a. Windows 2003 - C:\Documents and Settings\All Users\Documents
b. Windows 10, Windows 8, Windows 7, Windows 2012, Windows 2008 - C:\Users\Public\Documents