

User Manual

Dockit Migrator

Last Updated: December 2018

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

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



Vyapin Software Systems Private Limited

Website: <https://www.vyapin.com/>

Sales Contact: sales@vyapin.com

Technical Support: support@vyapin.com

Table of Contents

Dockit Introduction	8
Install Dockit Server Agent	9
Change Application Data folder location	10
How to uninstall Dockit?	12
How to purchase?	15
How to Activate the Software?	15
Technical Support	16
Dockit Task Manager	18
Task Manager	19
Create New Task on SharePoint On-Premise Migration	22
Create New Task on SharePoint Online (Office 365) Migration	25
Edit Task for SharePoint On-Premise Migration	28
Edit Task for SharePoint Online (Office 365) Migration	29
Run a Task on SharePoint On-Premise Migration	30
Run a Task on SharePoint Online (Office 365) Migration	33
Re-do Migration	36
Incremental Migration (On Premise)	37
Incremental Migration (Online)	39
Delete an existing task	41
Copy an existing task	43
Reschedule Task	45
Validate Task	47
Manage Categories	51
Cleanup history	54
View Job Instance	56
Task History	58
Dockit Tools	59
Dockit Template Manager	60
Column Mapping Template	62
Domain Mapping Template	64
User / Group Mapping Template	67
Permission Mapping Template	70
Replace Illegal Characters	74
SharePoint Migration – Column Mapping Template	78
SharePoint Migration – User / Group Mapping Template	80
SharePoint Migration – Domain Mapping Template	83
SharePoint Migration – Site and List Mapping Template	86
SharePoint Migration – Permission Mapping Template	88

SharePoint Migration – Reference Mapping Template	91
Server Agent Test Tool	93
Metadata Extractor.....	96
Metadata Collator.....	103
Migration Planner	108
File Share Migration Planner	109
SharePoint Migration Planner	117
Migration Settings Tasks	126
Domain Mapping	127
User / Group Mapping.....	132
Permission Mapping.....	137
Site and List Mapping	144
Reference Mapping Template.....	149
Renaming rules.....	151
Folder / File Settings	159
Post Migration Action	162
File Version Status	164
Item Version Status.....	166
Dockit Features	170
On Premise.....	171
File Share to SharePoint Migration.....	172
Explorer mode (Create Task)	173
Metadata file structure.....	174
SharePoint Destination Location.....	182
Items to Import.....	184
Migration Settings.....	190
Metadata Options.....	190
Column Mapping	194
Filter Conditions.....	198
Task Schedule Settings.....	202
Batch file mode (Create Task).....	204
Batch File Structure.....	205
Metadata File Structure.....	208
Batch File Options	216
Migration Settings.....	218
Metadata Options.....	219
Column Mapping	222
Filter Conditions.....	226

Task Schedule Settings.....	230
SharePoint Migration	232
Explorer Mode (Create Task)	233
Source SharePoint Location	234
Items to migrate.....	237
Site / List elements to migrate.....	243
Migration Settings.....	249
Column Mapping	250
Task Schedule Settings.....	254
Batch File Mode (Create Task)	256
Batch Descriptor File	257
Site / List elements to migrate.....	261
Migration Settings.....	267
Metadata Options.....	268
Column Mapping	270
Filter Conditions.....	274
Task Schedule Settings.....	279
Clean Up Metadata	281
Document Libraries (Create Task)	282
Create Metadata File	283
Metadata Options.....	292
Migration Settings.....	294
Column Mapping	295
Filter Conditions.....	299
Task Schedule Settings.....	303
Other List Types (Batch File Mode)	305
Batch File Structure.....	306
Batch Import Settings	317
Migration Settings.....	319
Column Mapping	320
Filter Conditions.....	324
Task Schedule Settings.....	328
Online.....	330
SharePoint Online (Office 365) Migration.....	331
File Share to Office 365	332
Batch File Structure.....	336
Items to Migrate	340
Migration Settings.....	341

Pre-Migration Validation.....	367
File Share to OneDrive	369
OneDrive Users.....	373
Batch File Structure.....	375
Items to Migrate	379
Migration Settings.....	380
File Settings	381
Renaming Rules.....	382
Domain Mapping	386
User Mapping	388
Permission Mapping	390
Filter Conditions.....	392
Performance Tuner.....	394
Job Scheduler.....	395
Pre-Migration Validation	396
SharePoint to Office 365 Migration	398
SharePoint On-premises to Office 365 Migration.....	399
Items to migrate.....	403
Site Migration Option.....	404
List Migration Option	407
Migration Settings.....	408
Job Summary	428
SharePoint On-Premises to OneDrive Migration	429
Batch File.....	433
Items to migrate.....	436
Site Migration Option.....	437
List Migration Option	440
Migration Settings.....	442
Job Summary	448
OneDrive Migration.....	449
Batch File.....	453
Items to migrate	456
Site Migration Option	457
List Migration Option.....	460
Migration Settings	461
Domain Mapping	462
User Mapping	463

Job Scheduler.....	465
Performance Tuner.....	466
Job Summary	467
How to Guide.....	468
Import Document Versions	469
Create Document Sets	474
Function Builder.....	478
Rename Documents in File System.....	491
Adding new terms in Managed Metadata column in SharePoint.....	492
Profile Manager	494
Site Traversal Options.....	498
List Traversal Options	499
Library Traversal Options	501
Folder Traversal Options	503
Site Migration Options	504
List Migration Options	506
Library Migration Options	507
Folder Migration Options	508
Filter Conditions.....	509
Folders & File Renaming Rules	514
Reference.....	517
Batch file structure	518
File Structure for Metadata Update	521
Metadata file structure	529
Error Messages and Resolution.....	537
Troubleshooting for On-premise task	544
Troubleshooting for Online tasks	545

Dockit Introduction

- [How to install Dockit Server Agent?](#)
- [Change Application Data folder location?](#)
- [How to uninstall Dockit?](#)
- [How to purchase?](#)
- [How to activate the software?](#)
- [Technical support](#)

Install Dockit Server Agent

Dockit Server Agent must be installed on a Windows Server running Microsoft SharePoint (2019 / 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 2019 / 2016 / 2013

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

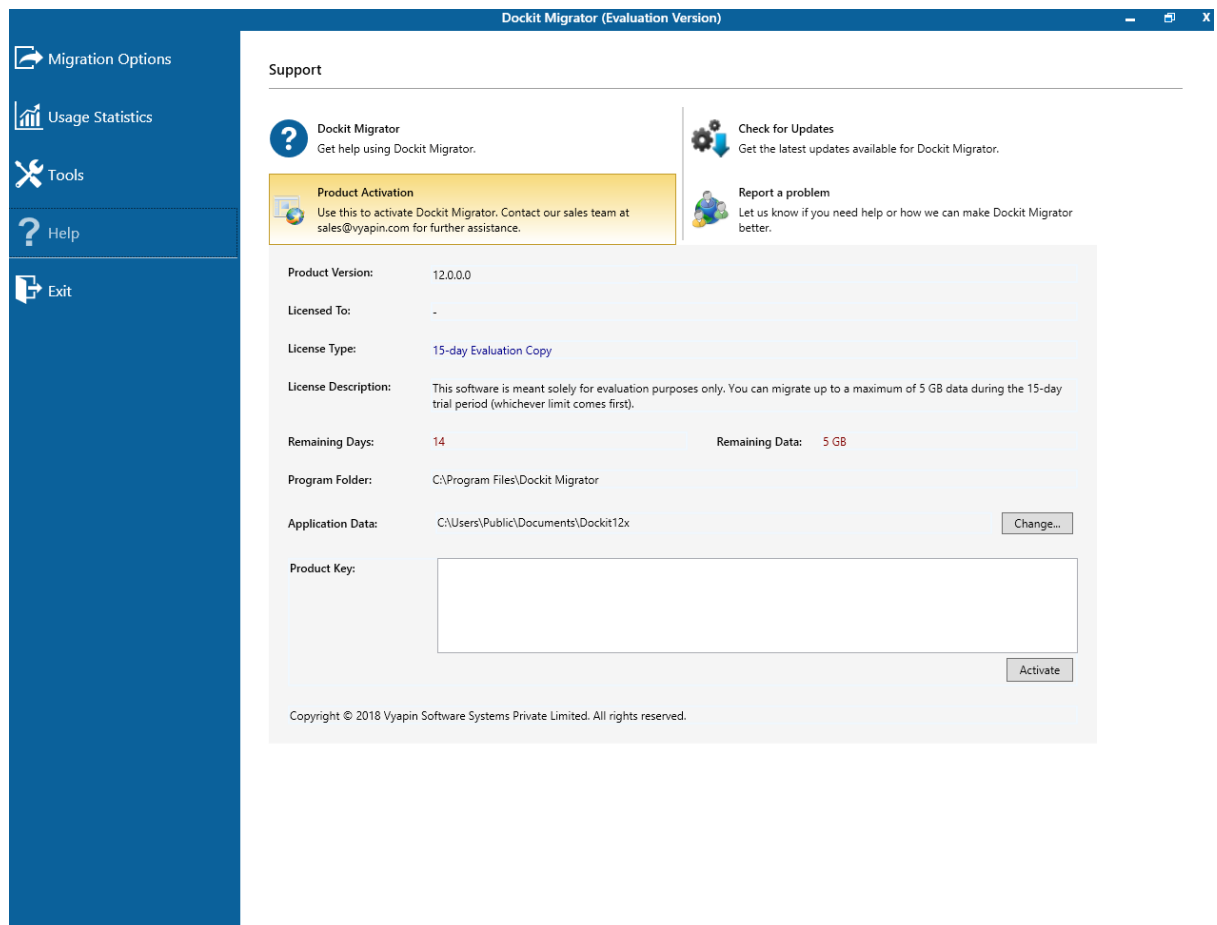
If necessary, reset IIS, by using IISRESET /no force for the changes to take place in SharePoint server.

You can check the existence of Dockit Server Agent component in target SharePoint server using [Server Agent Test Tool](#) available under 'Tools' menu of Dockit Migrator main screen.

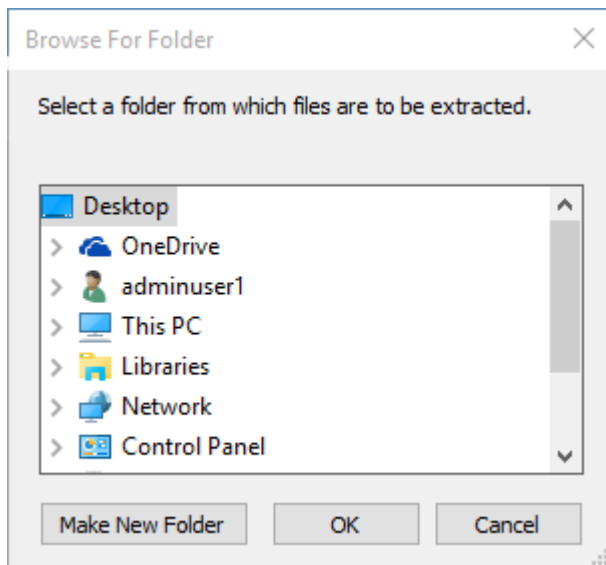
Change Application Data folder location

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

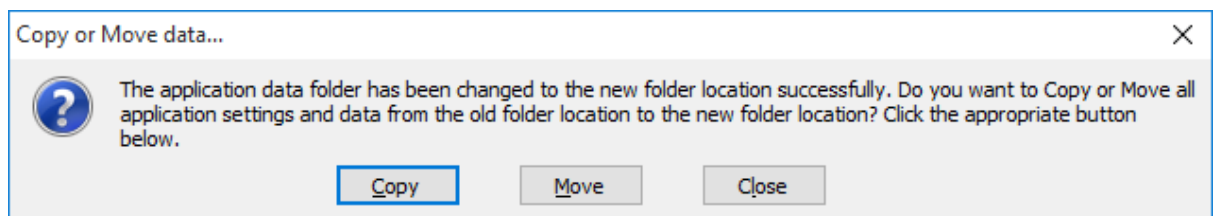
1. Select Product Activation option from Help menu
2. The Product Activation page appears as shown below:



3. Click Change button to change Application Data folder location of Dockit application. The Browse For Folder 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.

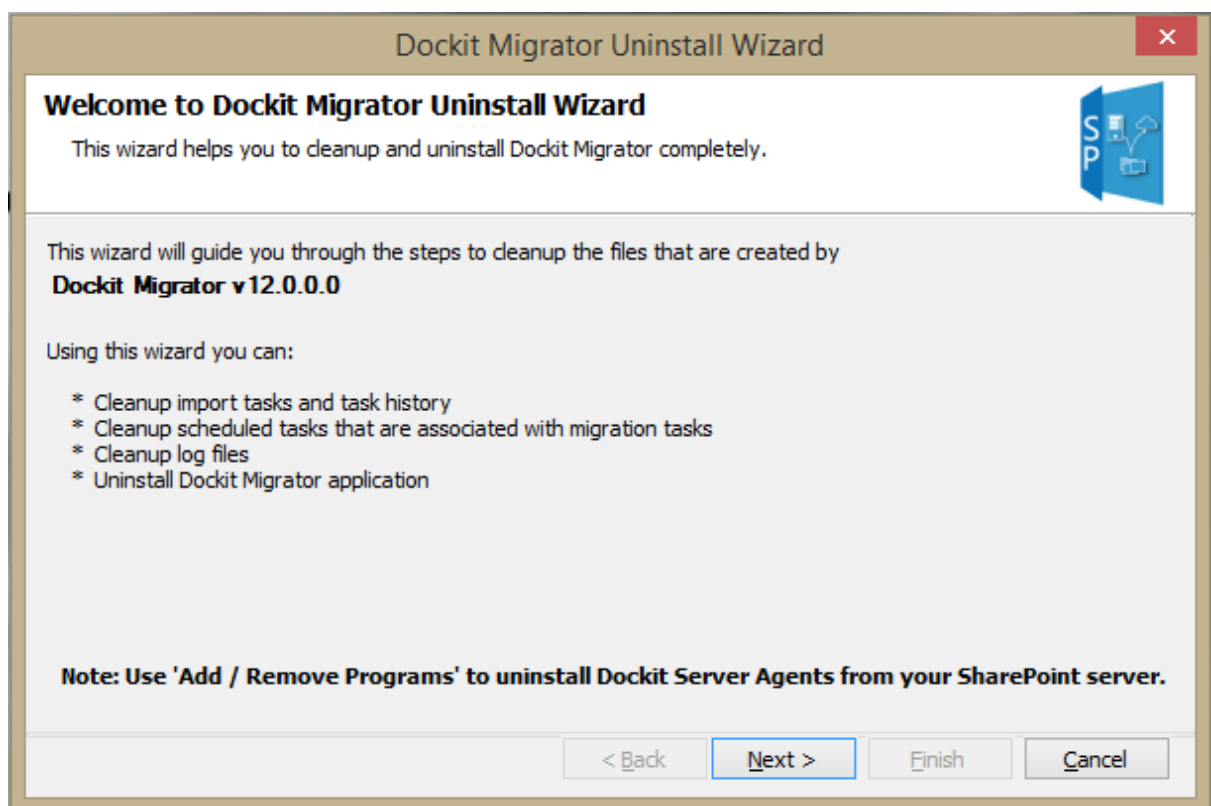
Use this wizard to clean up the files / profiles that are created by Dockit Migrator application selectively and uninstall Dockit completely from the machine.

Note:

You need to uninstall Dockit Server Agent You need to uninstall Dockit Server Agent component separately from your SharePoint Server 2019 / 2016 / 2013 / 2010 / 2007 using Control Panel.

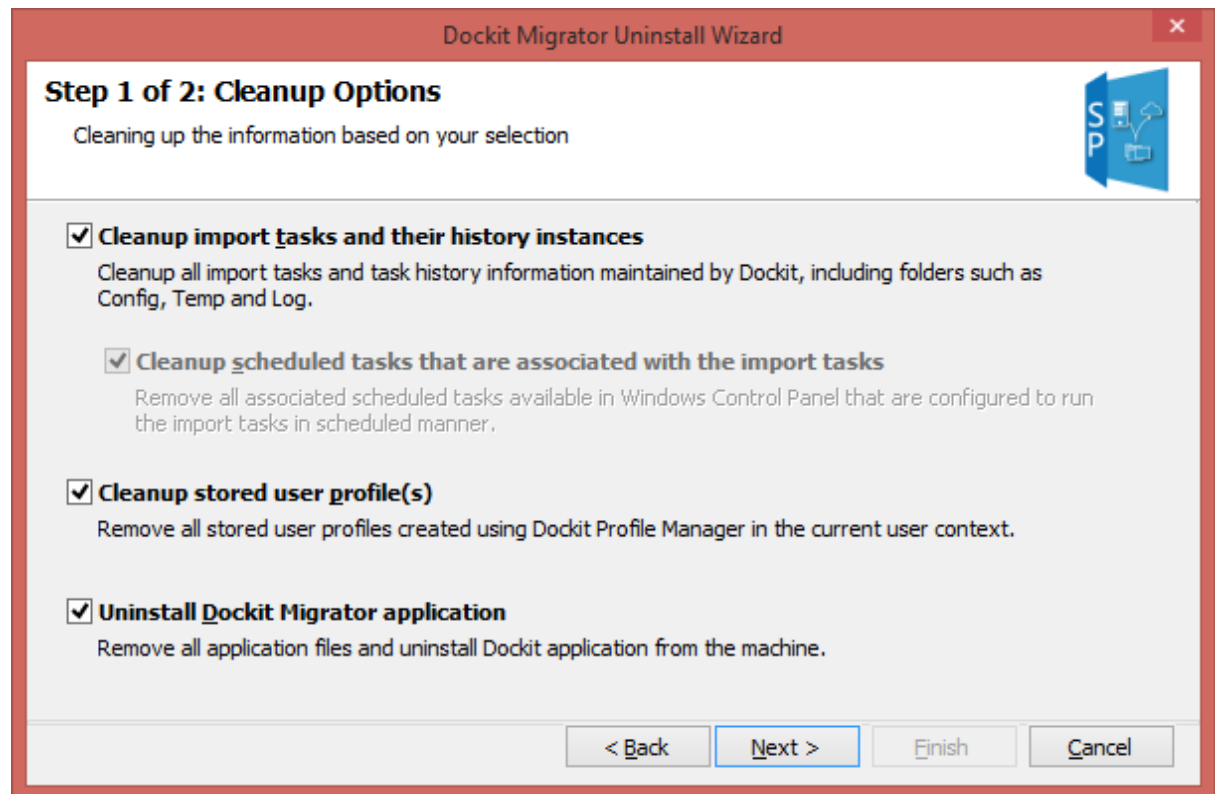
1. Launch the uninstall wizard by clicking Start -> Programs -> Dockit Migrator -> Dockit Uninstall Wizard.

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



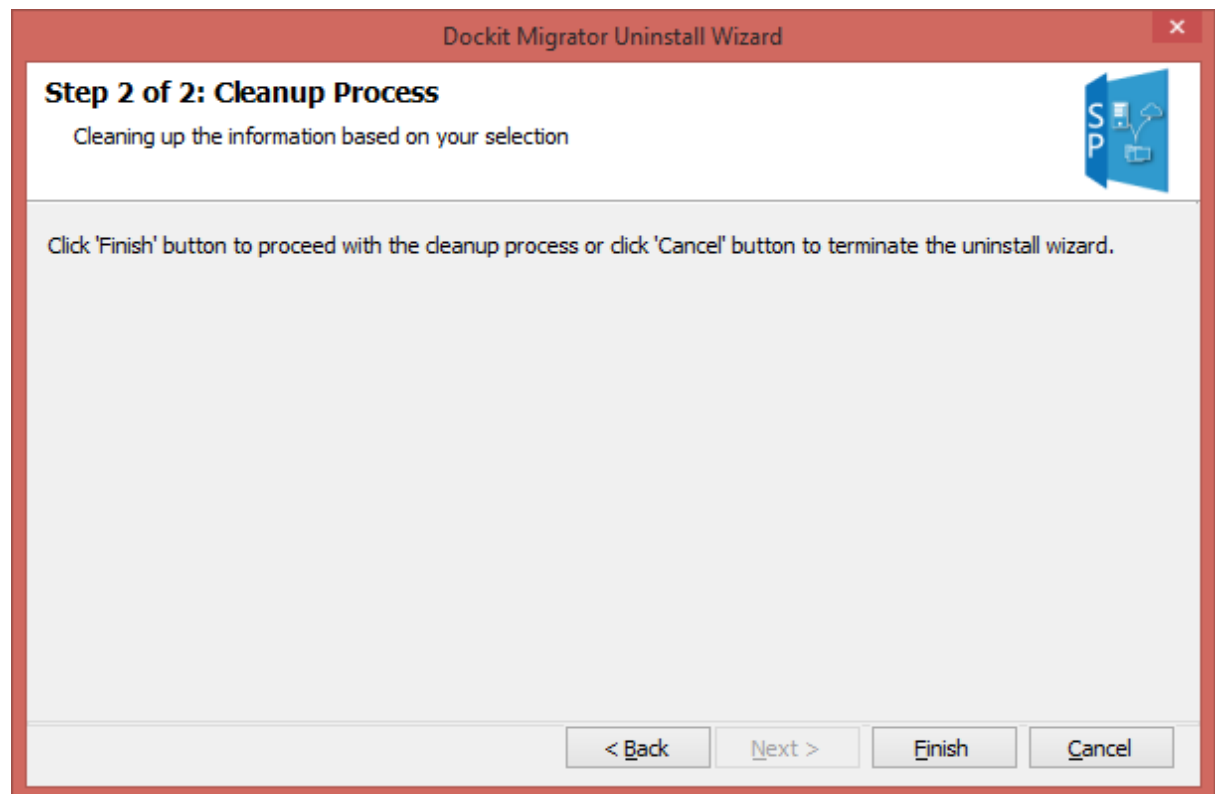
Click **Next** to proceed.

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

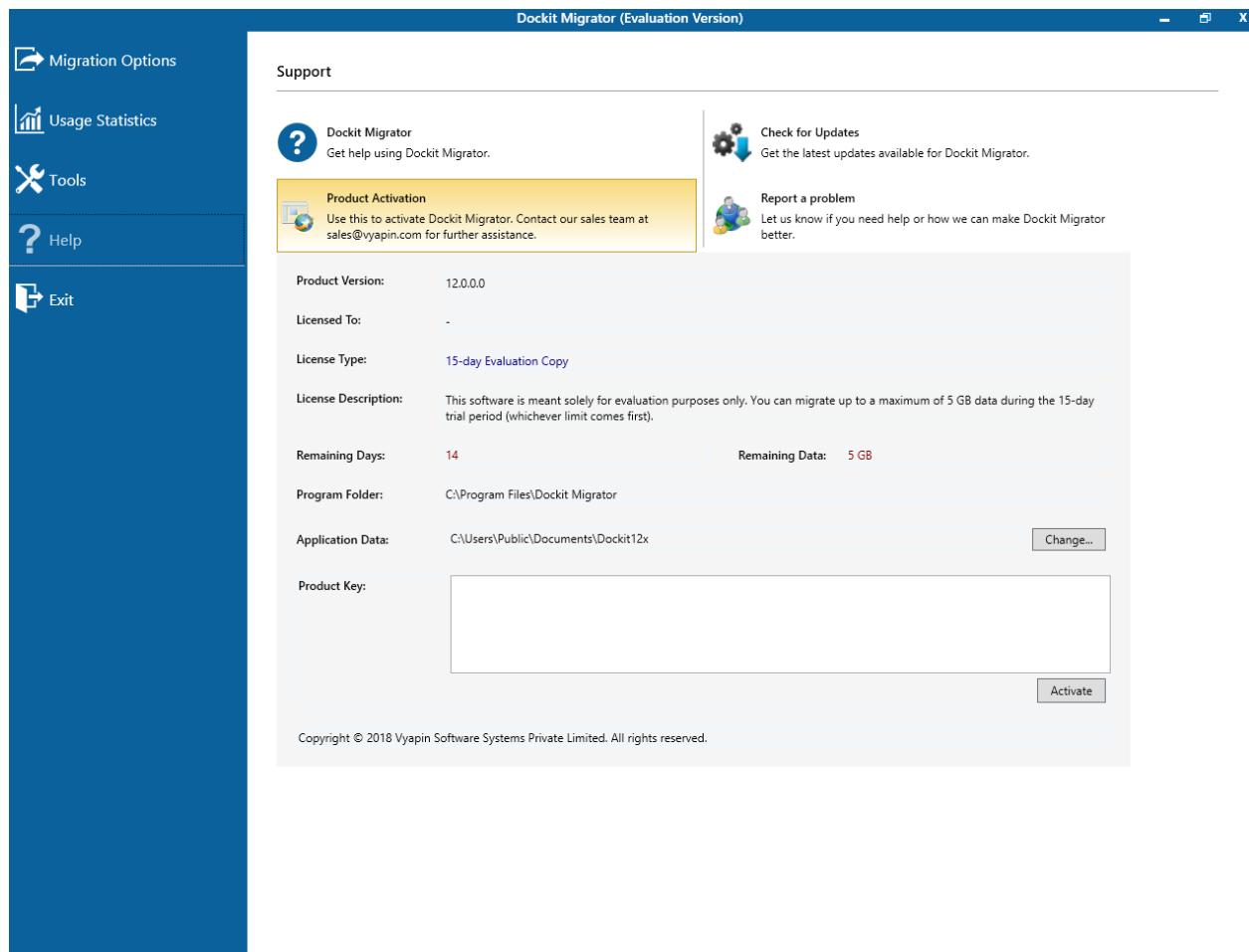
How to purchase?

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

How to Activate the Software?

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

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



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

Technical Support

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

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

- 1) Version of Dockit that you are evaluating or you have registered with us. (Version information could be found in the "About Dockit" dialog in "Help" tab.
- 2) Additional services or resource consuming processes/applications (like anti-virus) running in the background on Dockit installed computer, as well as the destination Microsoft SharePoint Servers.
- 3) Hardware configuration of the computer where Dockit is installed.
- 4) "DockitErrorLog.txt" available in the common application data path of Dockit (e.g., *<Application Data Folder>\Dockit12x\Log\DockitErrorLog.txt*).
- 5) Dockit error logs and activity log files (ActivityLog.txt, ActivityErrors.txt, MetadataErrors.txt and DockitErrorLog.txt) stored in the application data path. For example:

<Application Data Folder>\Dockit12x\TaskHistory\<taskname>\<timestamp>..

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

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

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

Dockit Migrator (Evaluation Version)

Support

Dockit Migrator
Get help using Dockit Migrator.

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

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

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

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

Salutation* First Name* Last Name*

E-Mail*

Company* User Status*
Evaluation Copy

Product* Version*
Dockit Migrator 12.0.0.0

Operating System* Service Pack*
Microsoft Windows 8.1 Pro

Problem Description*

File Attachment(s)

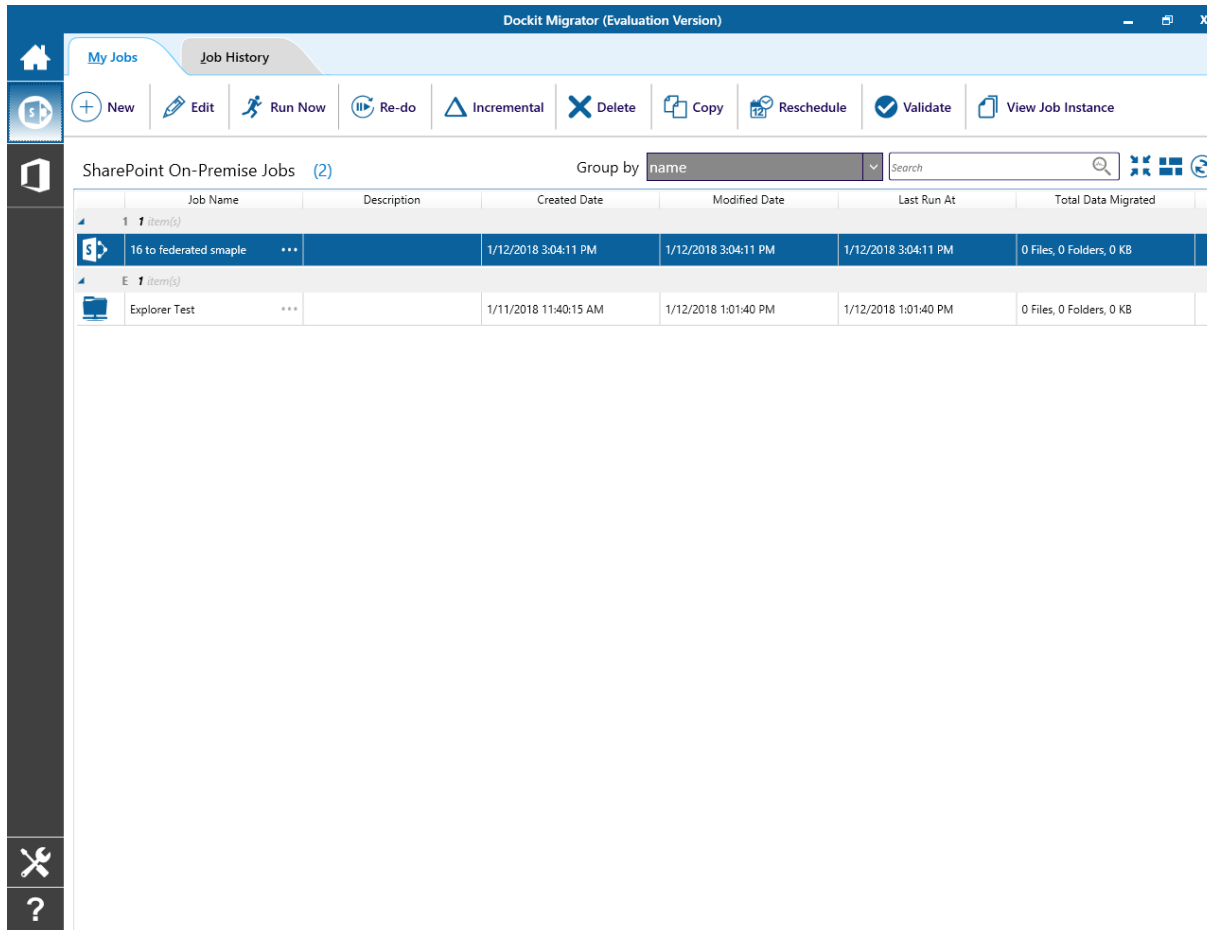
Send Browse

Dockit Task Manager

- [Task Manager](#)
- [Create a new task \(On-premise migration\)](#)
- [Create a new task \(Online migration\)](#)
- [Edit an existing task \(On-premise migration\)](#)
- [Edit an existing task \(Online migration\)](#)
- [Run a task \(On-premise migration\)](#)
- [Run a task \(Online migration\)](#)
- [Re-do Task](#)
- [Incremental Task](#)
- [Delete an existing task](#)
- [Copy task](#)
- [Reschedule a task](#)
- [Manage categories](#)
- [Cleanup history](#)
- [View Job Instance](#)
- [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.



 - refers 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**.

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

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

Dockit Migrator (Evaluation Version)

My Jobs >> Job Instances [16 to federated smaple] >> View Activity- [9/25/2017 11:07:04 AM]

0 Failed0 Ignored1 Migrated

Source	Target	Activity Date	Status	Remarks
http://planet.vsslab.local/tile/dms/dms_doc_lib	https://ems351957.sharepoint.com/newsfeed		Completed	

Statistics

Job Name16 to federated smaple

Start Time9/25/2017 11:07:04 AM

End Time9/25/2017 11:08:14 AM

Elapsed Time00:01:10

Items in Source0 webs, 1 lists, 0 items

Completed0 webs, 1 lists, 0 items

Ignored0 webs, 0 lists, 0 items

Errors0 webs, 0 lists, 0 items

StatusCompleted

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

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

Task History:

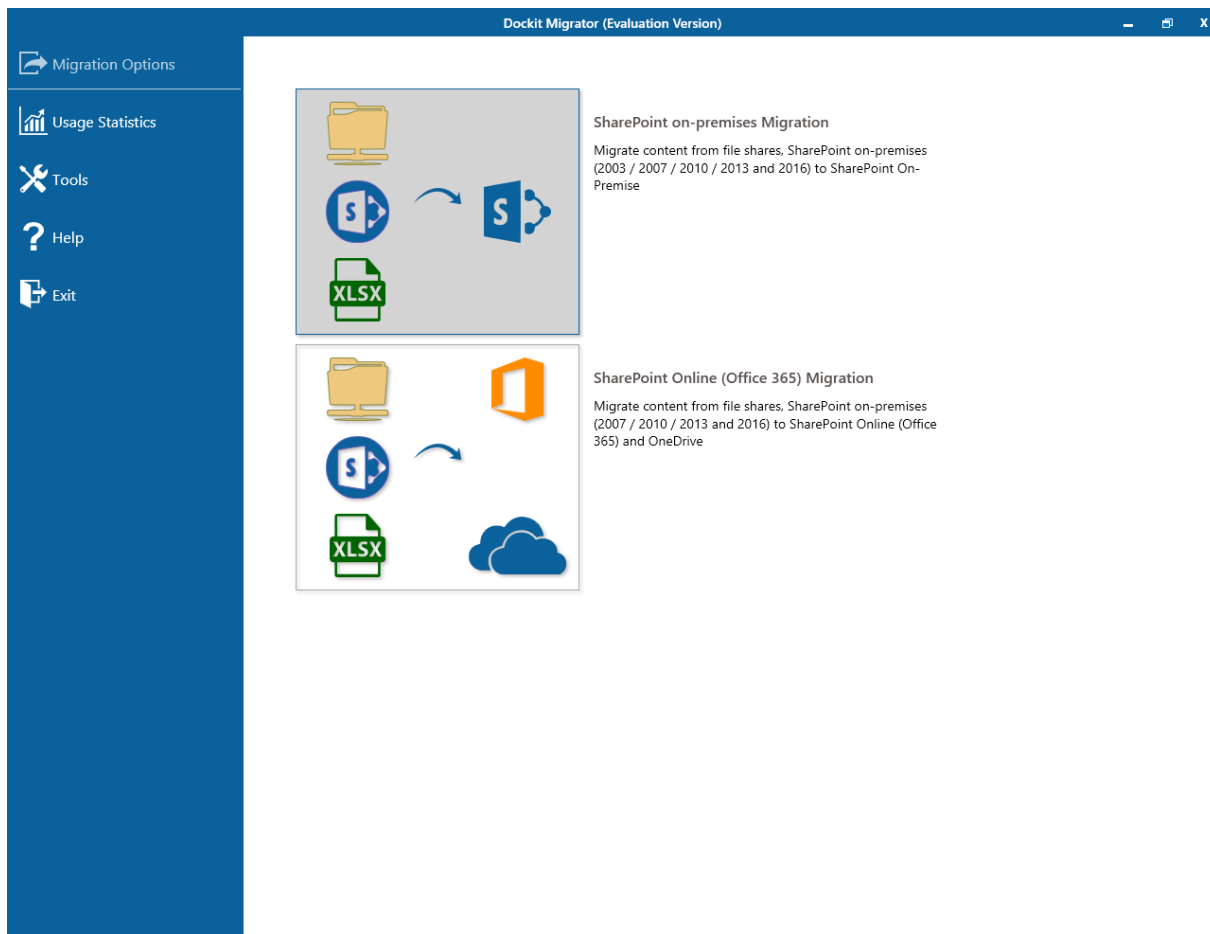
Task History pane maintains every task run information as a list. It displays the required information about task execution status. It displays Task's Start Time, End Time, Elapsed Time and Remarks.

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

Create New Task on SharePoint On-Premise Migration

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

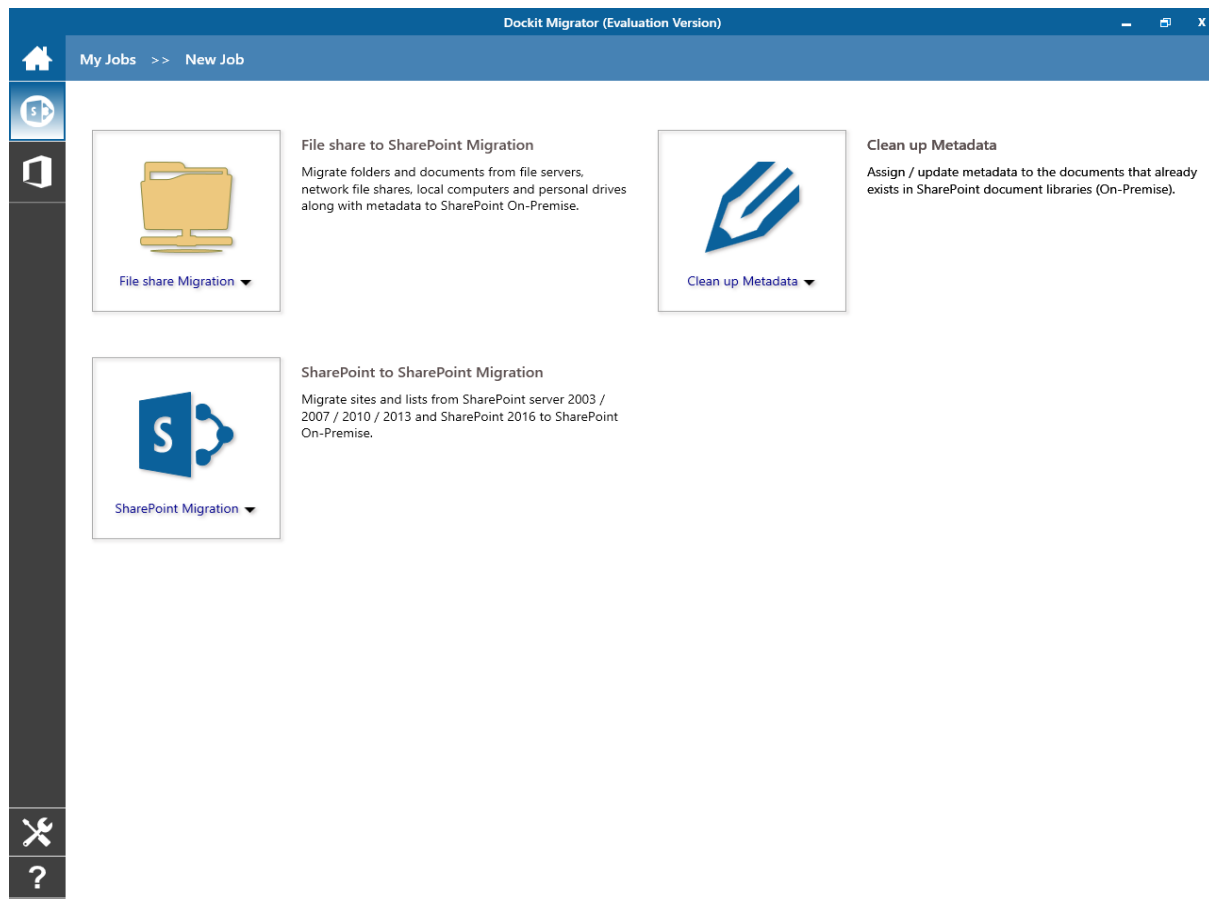
Click **SharePoint On-Premise Migration** from Migration Options menu of Dockit main screen.



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

The screenshot displays the 'Dockit Migrator (Evaluation Version)' application window. The 'My Jobs' tab is active, showing a list of jobs under the heading 'SharePoint On-Premise Jobs (2)'. The interface includes a top navigation bar with a home icon, a 'My Jobs' tab, and a 'Job History' tab. Below the tabs is a toolbar with icons for 'New', 'Edit', 'Run Now', 'Re-do', 'Incremental', 'Delete', 'Copy', 'Reschedule', 'Validate', and 'View Job Instance'. A 'Create a new job (Alt+N)' button is also present. The main area shows a table of jobs with columns: Job Name, Description, Created Date, Modified Date, Last Run At, and Total Data Migrated. Two jobs are listed: '16 to federated smaple' and 'Explorer Test'. The 'Explorer Test' job is selected, and its details are shown in a large empty box below the table.

Job Name	Description	Created Date	Modified Date	Last Run At	Total Data Migrated
16 to federated smaple		1/12/2018 3:04:11 PM	1/12/2018 3:04:11 PM	1/12/2018 3:04:11 PM	0 Files, 0 Folders, 0 KB
Explorer Test		1/11/2018 11:40:15 AM	1/12/2018 1:01:40 PM	1/12/2018 1:01:40 PM	0 Files, 0 Folders, 0 KB



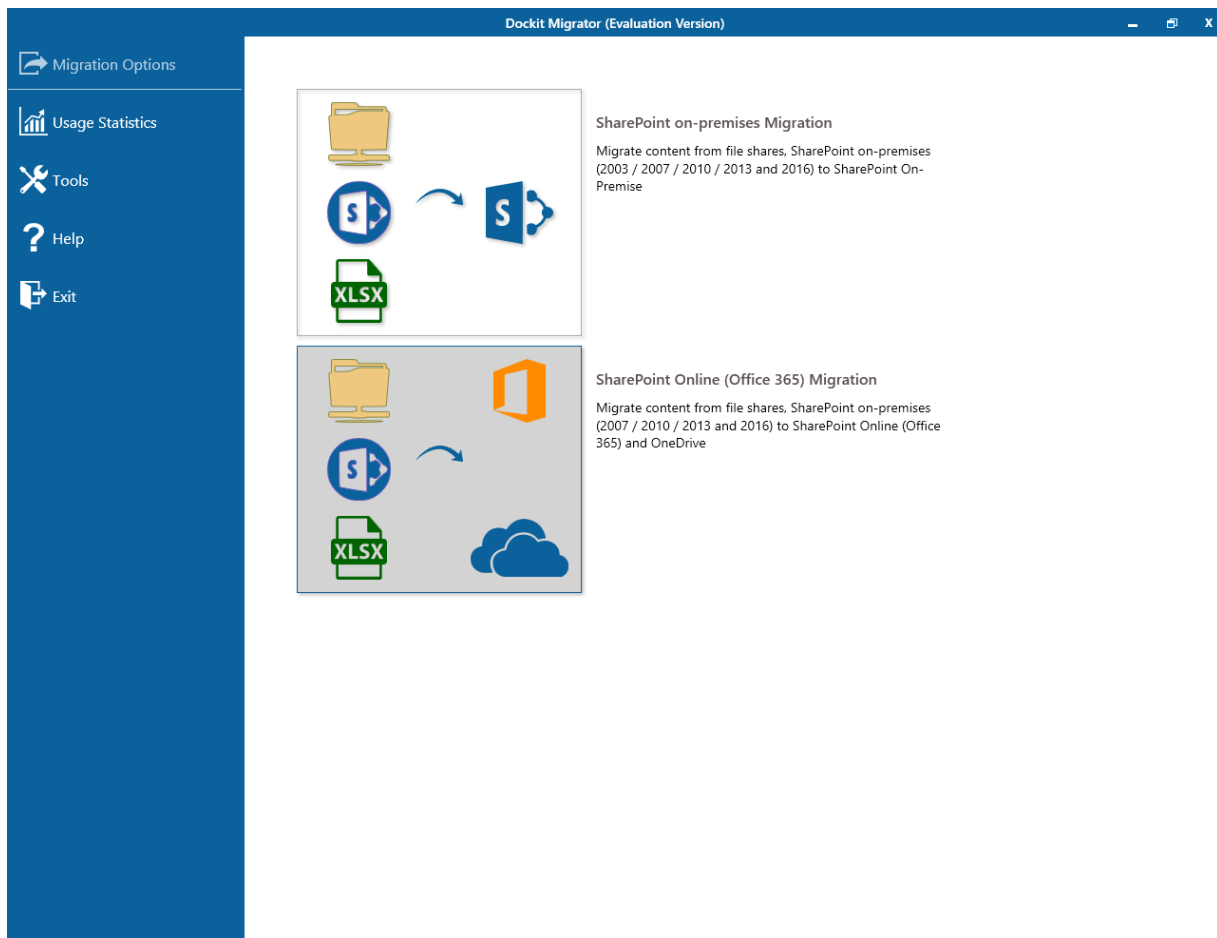
Click the links below for more information:

- a. Create a task to [File share To SharePoint Migration](#)
- b. Create a task to [SharePoint To SharePoint Migration](#)
- c. Create a task to [Clean Up Metadata](#)

Create New Task on SharePoint Online (Office 365) Migration

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

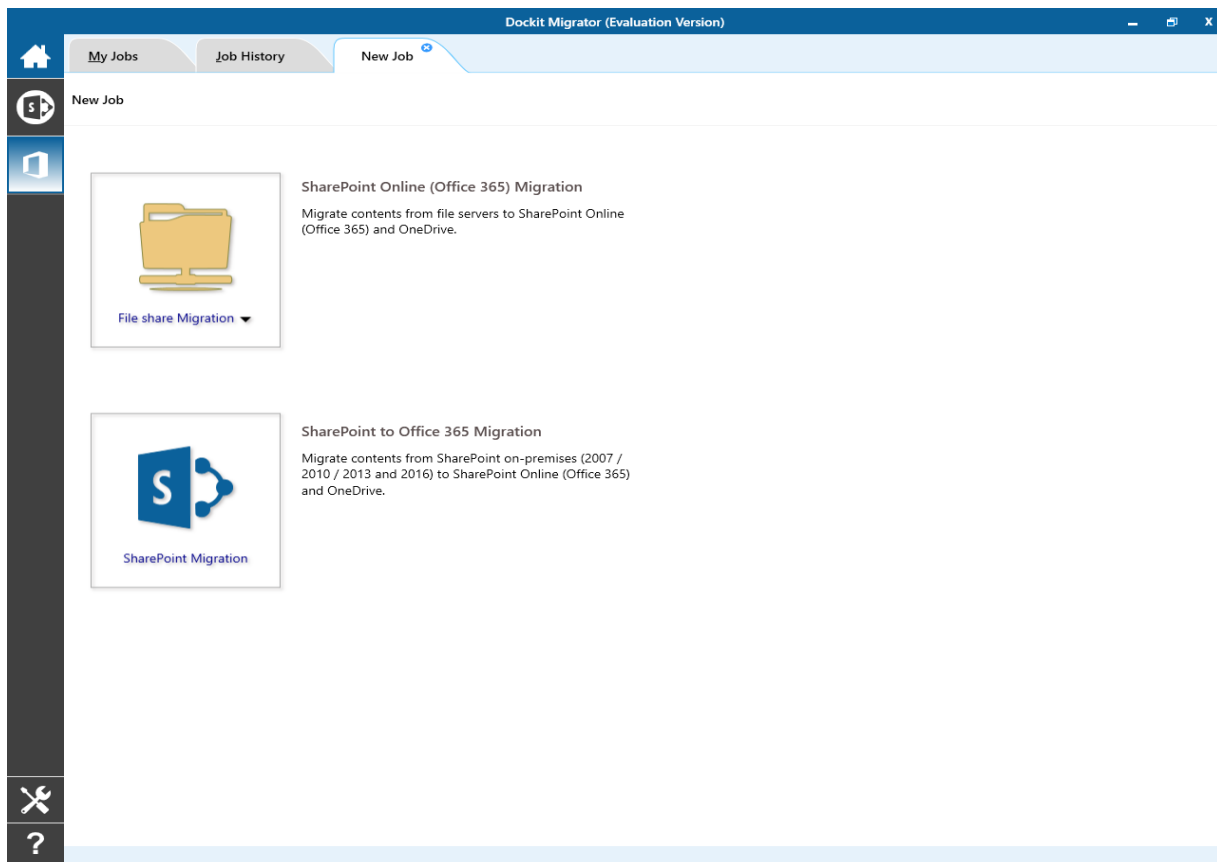
Click **SharePoint Online Migration** from Migration Options menu of Dockit main screen.



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

The screenshot shows the 'Docket Migrator (Evaluation Version)' application window. The 'My Jobs' tab is active, displaying a list of jobs under the heading 'SharePoint Online Jobs (2)'. The interface includes a top navigation bar with 'My Jobs' and 'Job History' tabs, and a toolbar with buttons for '+ New', 'Edit', 'Run', 'Delete', 'Validate', and 'View Job Instance'. The job list table has columns for Job Name, Description, Created Date, Modified Date, and Last Run At. Two jobs are listed: 'FS Explorer 1 Test' and 'FS Expo Test'. The 'FS Explorer 1 Test' job was created on 1/12/2018 at 5:35:55 PM and last ran on 1/12/2018 at 5:36:14 PM. The 'FS Expo Test' job was created on 1/12/2018 at 5:43:55 PM and last ran on 1/19/2018 at 6:43:12 PM. The interface also features a sidebar with icons for home, search, and settings, and a bottom status bar indicating '2 items'.

Job Name	Description	Created Date	Modified Date	Last Run At
FS Explorer 1 Test	...	1/12/2018 5:35:55 PM	1/12/2018 5:36:14 PM	1/12/2018 5:36:14 PM
FS Expo Test	...	1/12/2018 5:43:55 PM	1/19/2018 6:43:12 PM	1/19/2018 6:43:12 PM



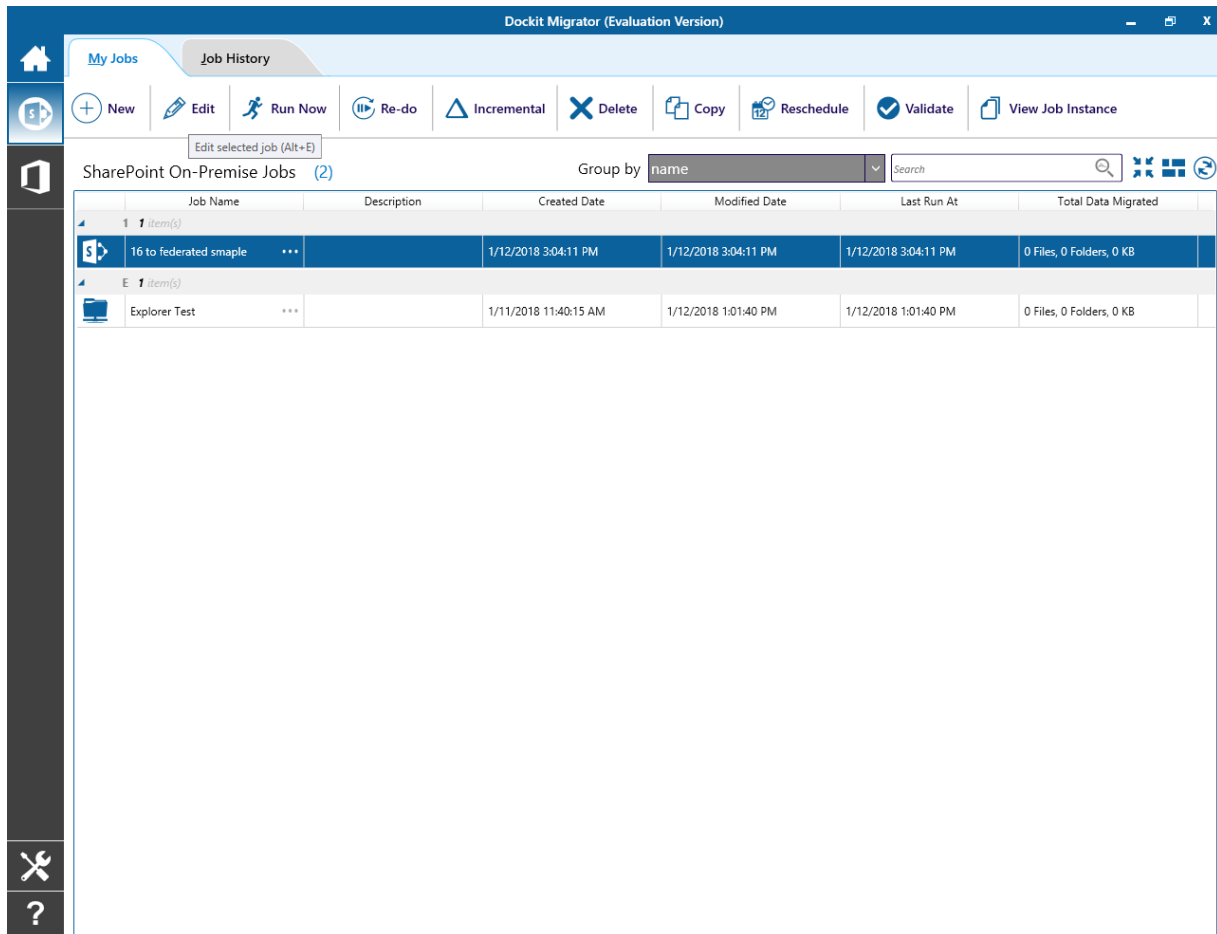
Click the links below for more information:

- a. Create a task to [SharePoint Online \(Office 365\) Migration](#)
- b. Create a task to [SharePoint to Office 365 Migration](#)

Edit Task for SharePoint On-Premise Migration

To edit an existing task:

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

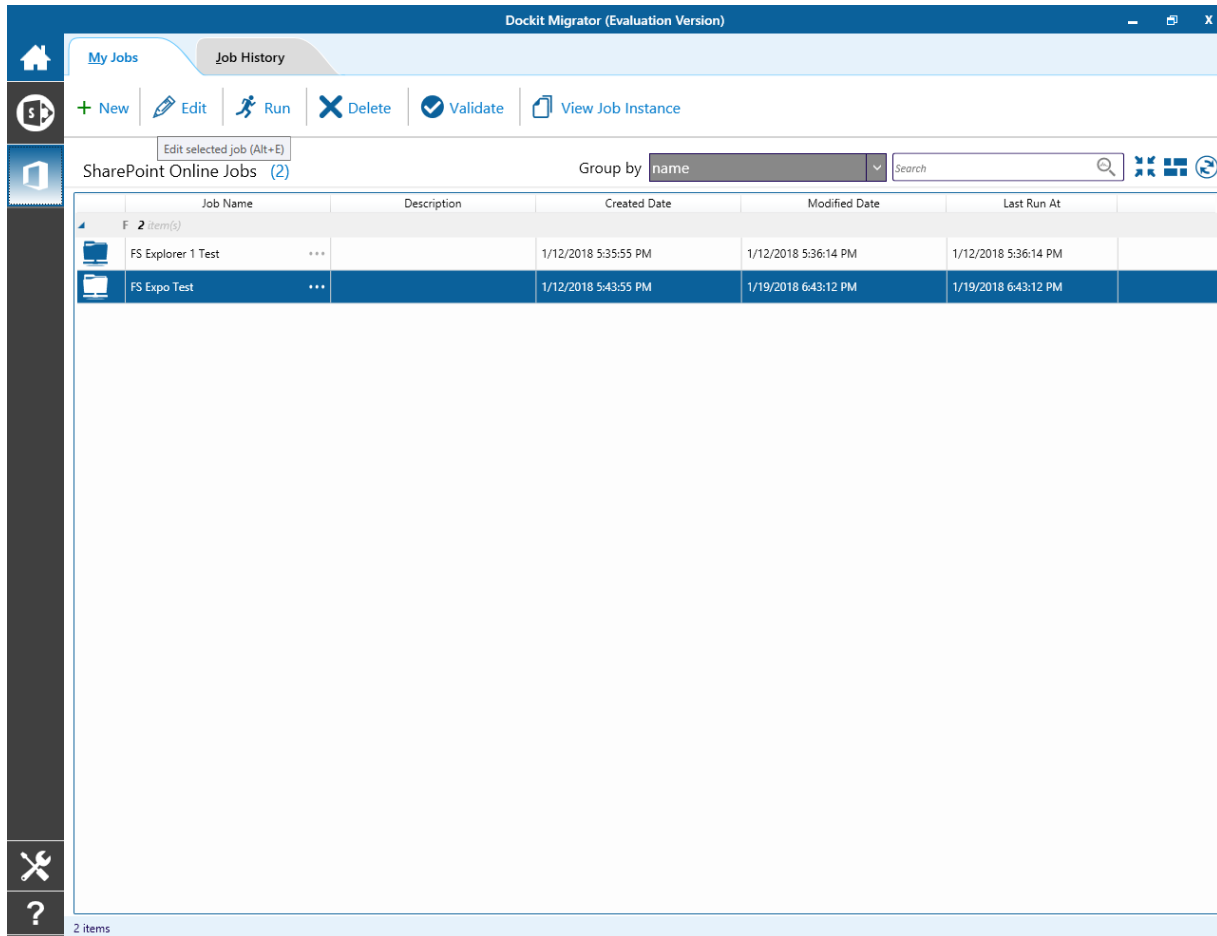


3. **Dockit Task Wizard** will load the selected task settings and appears as seen in Create New Task wizard. However, some of the options may be disabled when editing a task.

Edit Task for SharePoint Online (Office 365) Migration

To edit an existing task:

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

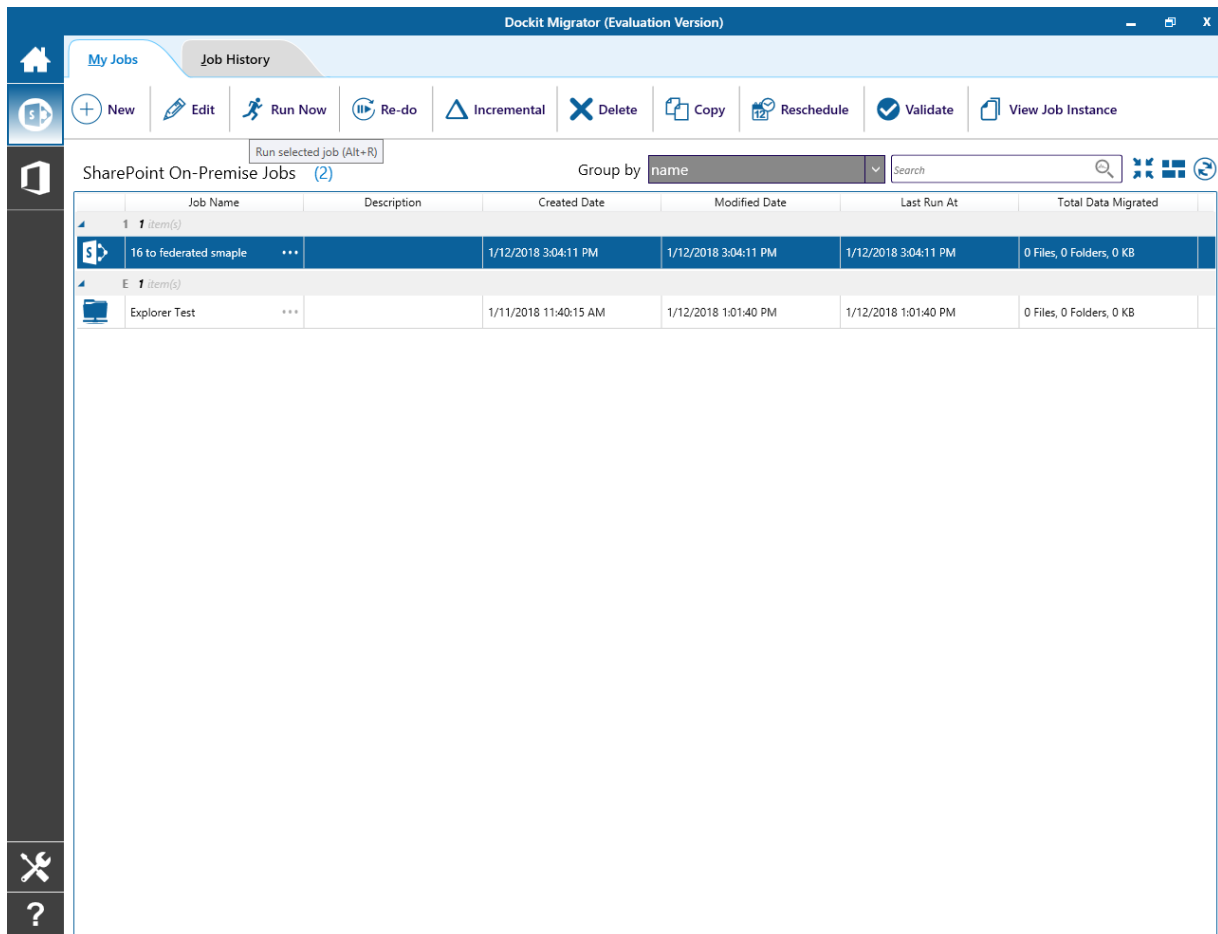


3. **Dockit Task Wizard** will load the selected task settings and appears as seen in Create New Task wizard. However, some of the options may be disabled when editing a task.

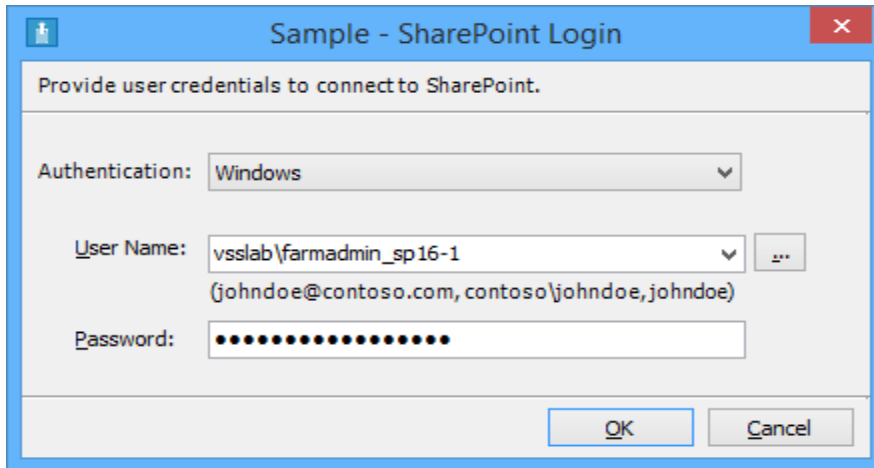
Run a Task on SharePoint On-Premise Migration

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

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

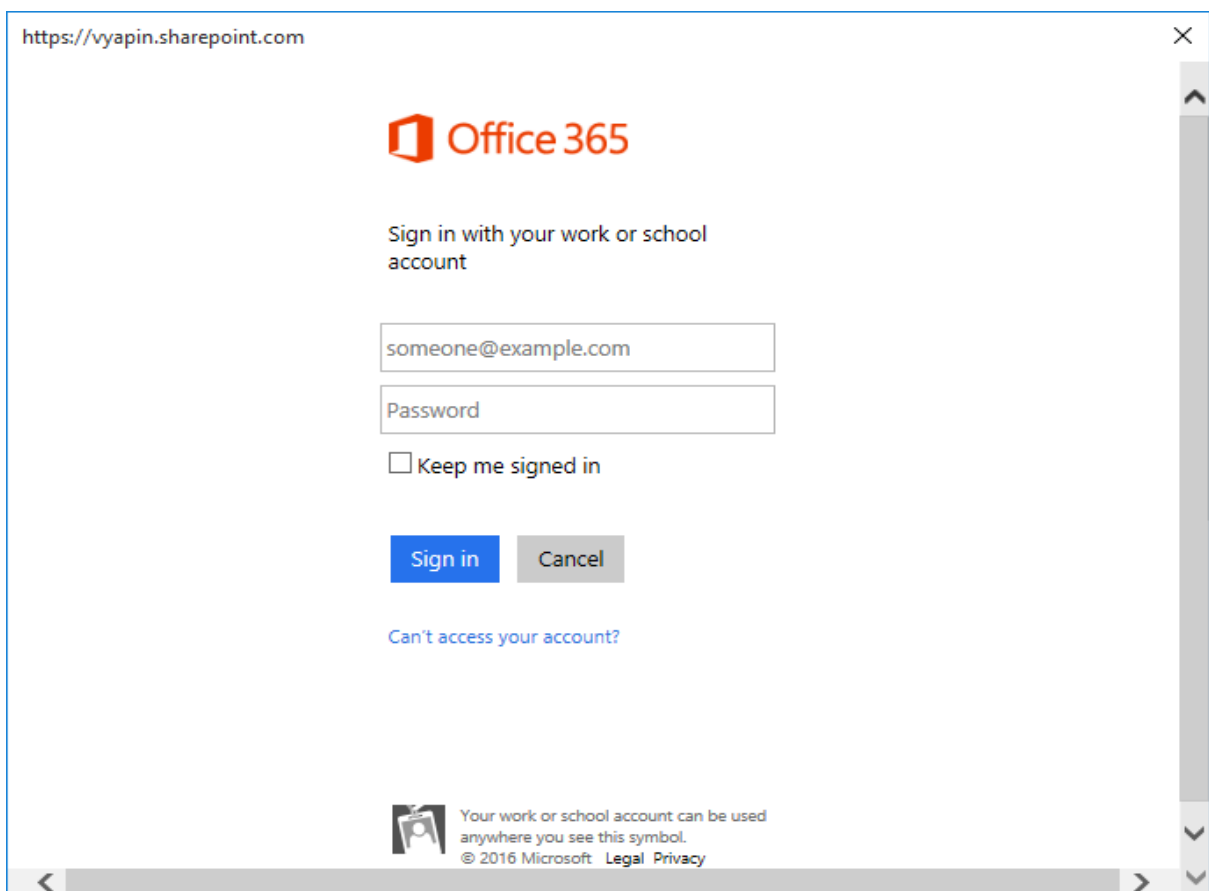


3. The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.



A screenshot of a Windows dialog box titled "Sample - SharePoint Login". The dialog has a blue title bar with a close button. The main area is light gray and contains the text "Provide user credentials to connect to SharePoint." Below this, there is a dropdown menu for "Authentication" set to "Windows". Underneath, the "User Name:" field shows a dropdown with "vsslab\\farmadmin_sp16-1" selected, and a list of suggestions: "(johndoe@contoso.com, contoso\\johndoe, johndoe)". The "Password:" field is a text box filled with black dots. At the bottom right, there are "OK" and "Cancel" buttons.

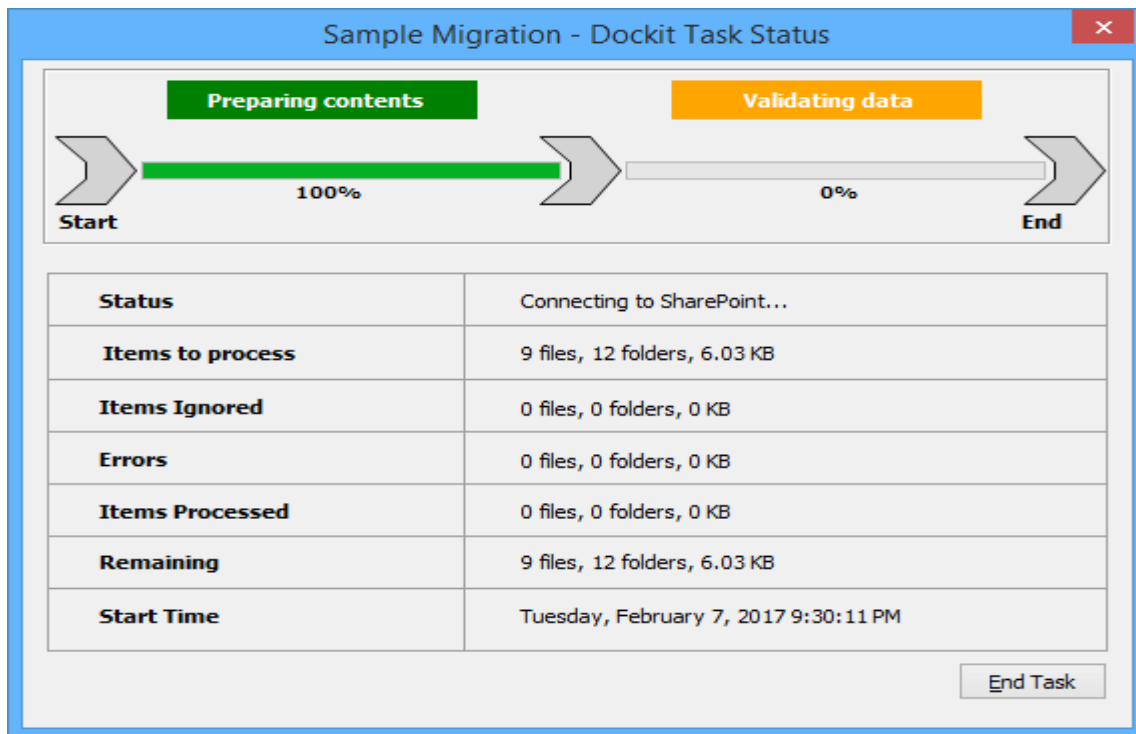
For **Federated authentication (Web Single Sign-on)** credential based import task. The Web Login Dialog to connect to SharePoint will appear as shown below:



A screenshot of a web browser window showing the Office 365 login page. The address bar shows "https://vyapin.sharepoint.com". The page features the Office 365 logo and the text "Sign in with your work or school account". Below this, there are input fields for "someone@example.com" and "Password". A checkbox labeled "Keep me signed in" is present. At the bottom, there are "Sign in" and "Cancel" buttons. A link "Can't access your account?" is also visible. At the very bottom, there is a small icon and text: "Your work or school account can be used anywhere you see this symbol. © 2016 Microsoft Legal Privacy".

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

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



Runtime statistics:

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

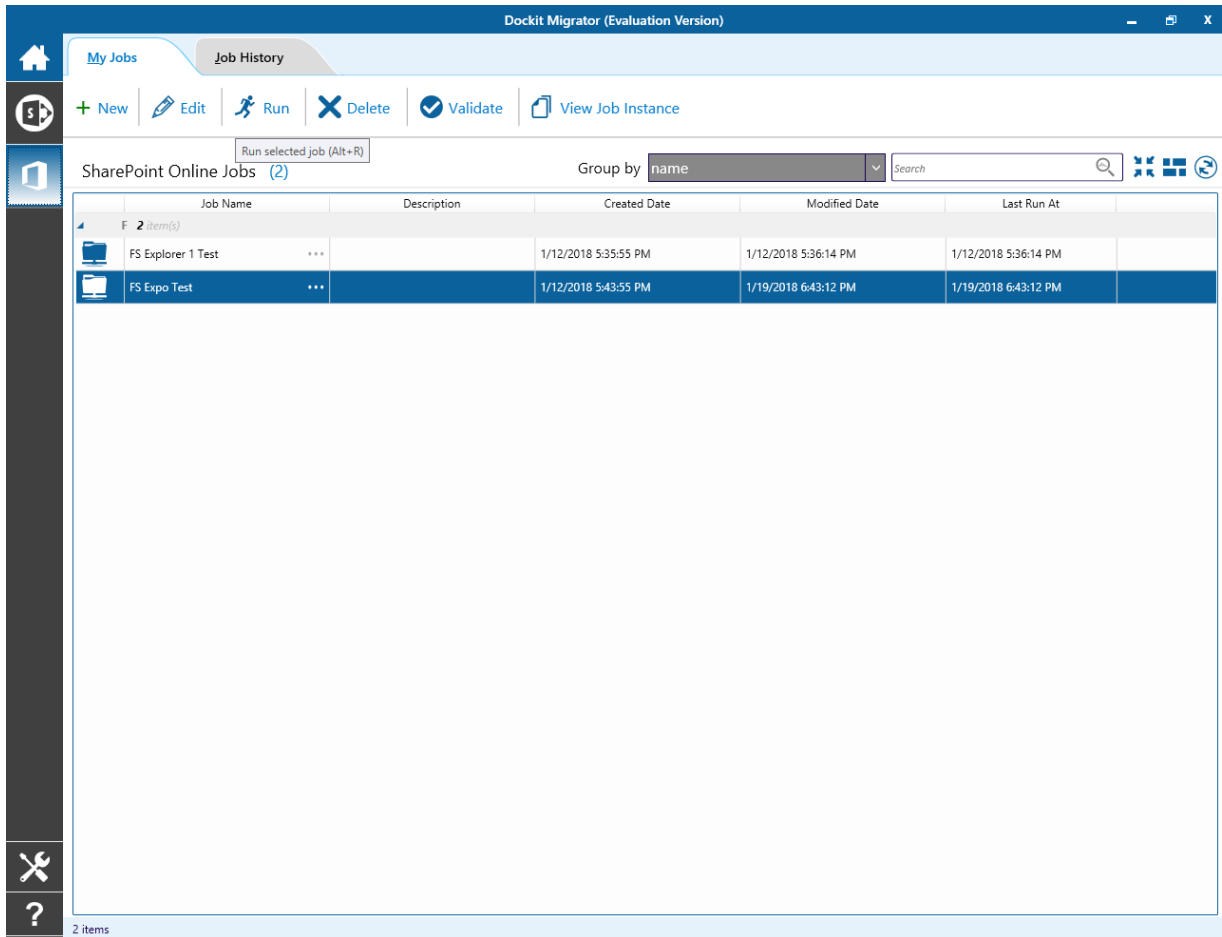
You can also use Dockit command line feature that allows you to instantiate a task from DOS command prompt any time after an import task has been created using Dockit's task wizard.

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

Run a Task on SharePoint Online (Office 365) Migration

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

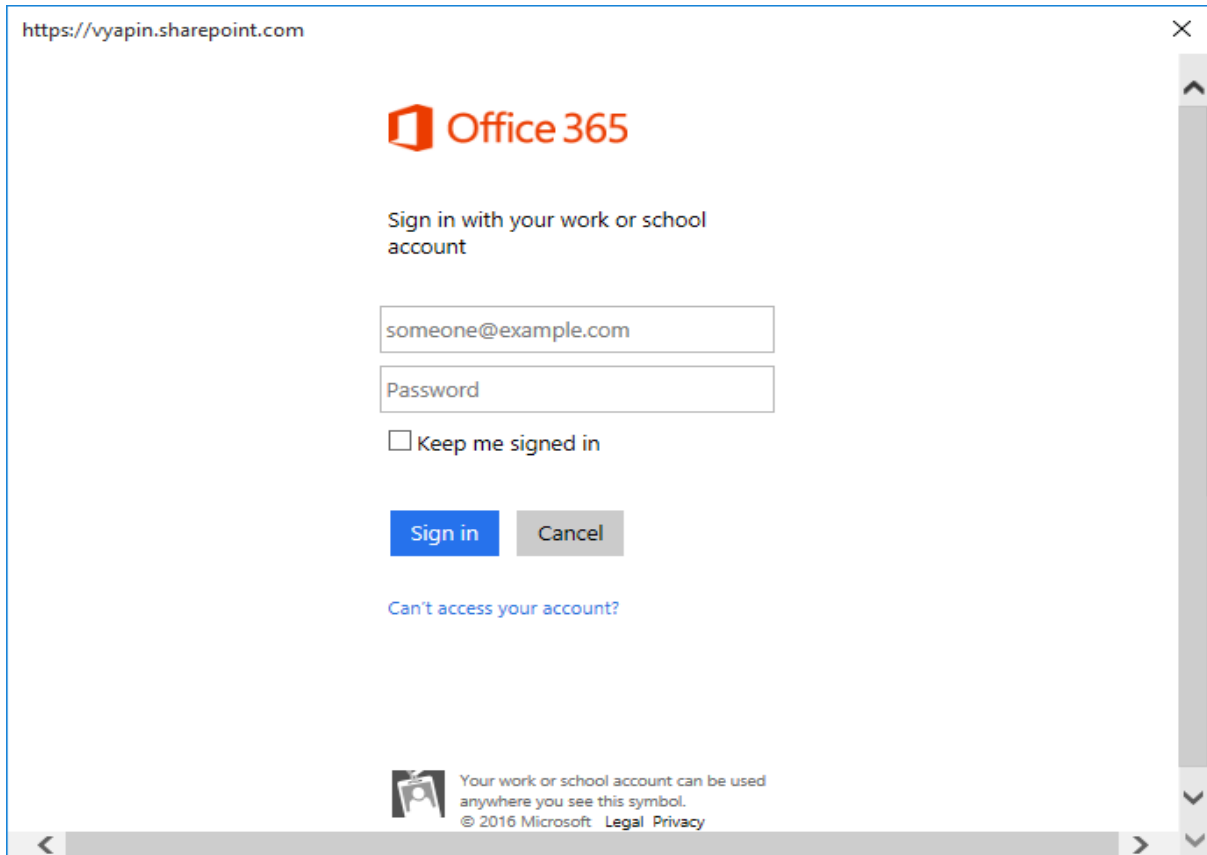
1. Select a task from **Task List** pane.
2. Click **Run Now** from Home menu of Dockit main screen.



The screenshot displays the Dockit Migrator (Evaluation Version) application window. The interface includes a top navigation bar with 'My Jobs' and 'Job History' tabs. Below the navigation bar is a toolbar with icons for '+ New', 'Edit', 'Run', 'Delete', 'Validate', and 'View Job Instance'. A 'Run selected job (Alt+R)' button is also visible. The main area shows a list of 'SharePoint Online Jobs' with columns for Job Name, Description, Created Date, Modified Date, and Last Run At. Two jobs are listed: 'FS Explorer 1 Test' and 'FS Expo Test'. The 'FS Expo Test' job is highlighted in blue. A sidebar on the left contains icons for a home page, a folder, a document, a gear, and a question mark. The bottom status bar indicates '2 items'.

Job Name	Description	Created Date	Modified Date	Last Run At
FS Explorer 1 Test	...	1/12/2018 5:35:55 PM	1/12/2018 5:36:14 PM	1/12/2018 5:36:14 PM
FS Expo Test	...	1/12/2018 5:43:55 PM	1/19/2018 6:43:12 PM	1/19/2018 6:43:12 PM

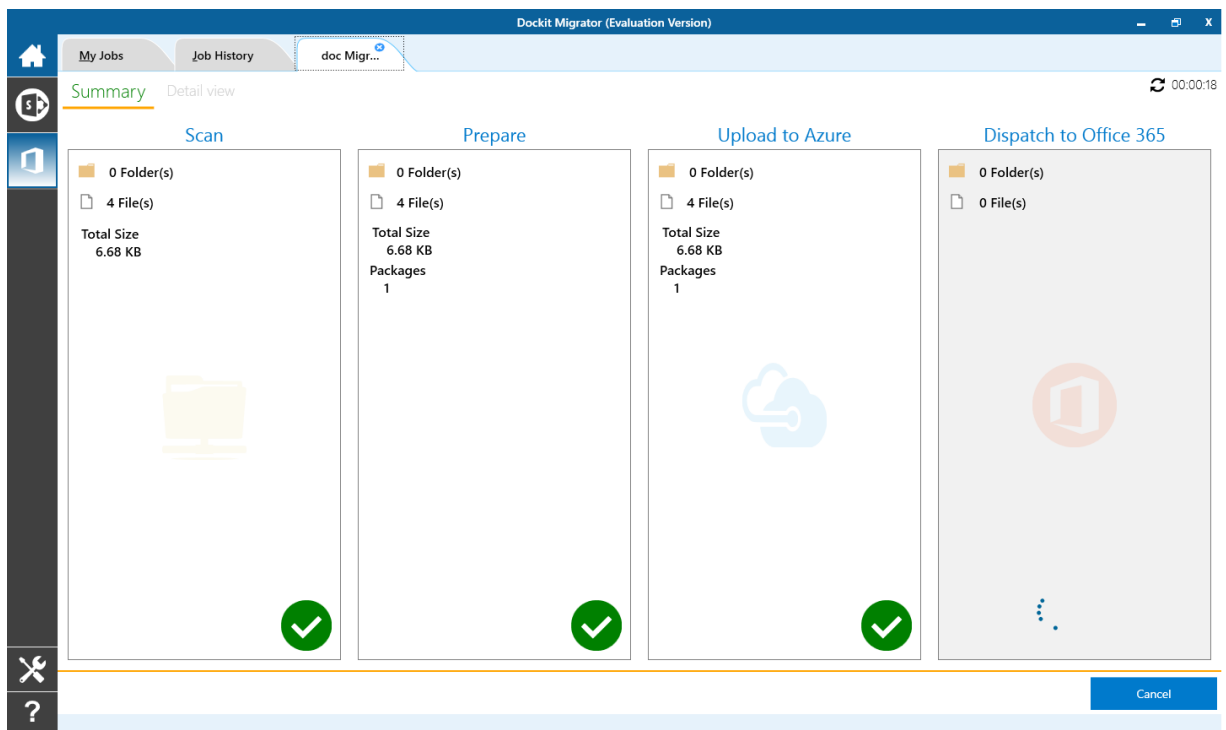
3. For **Federated authentication (Web Single Sign-on)** credential based import task. The Web Login Dialog to connect to SharePoint will appear as shown below:



The image shows a web browser window with the address bar displaying "https://vyapin.sharepoint.com". The main content area features the Office 365 logo at the top. Below the logo, the text "Sign in with your work or school account" is displayed. There are two input fields: the first contains the email address "someone@example.com" and the second is labeled "Password". Below these fields is a checkbox labeled "Keep me signed in". At the bottom of the sign-in section are two buttons: a blue "Sign in" button and a grey "Cancel" button. Below the buttons is a link that says "Can't access your account?". At the very bottom of the dialog, there is a small icon of a person with a checkmark, followed by the text "Your work or school account can be used anywhere you see this symbol." and "© 2016 Microsoft Legal Privacy". The browser window has standard navigation buttons (back, forward, home, search) and a scrollbar on the right side.

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

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



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

Re-do Migration

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

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

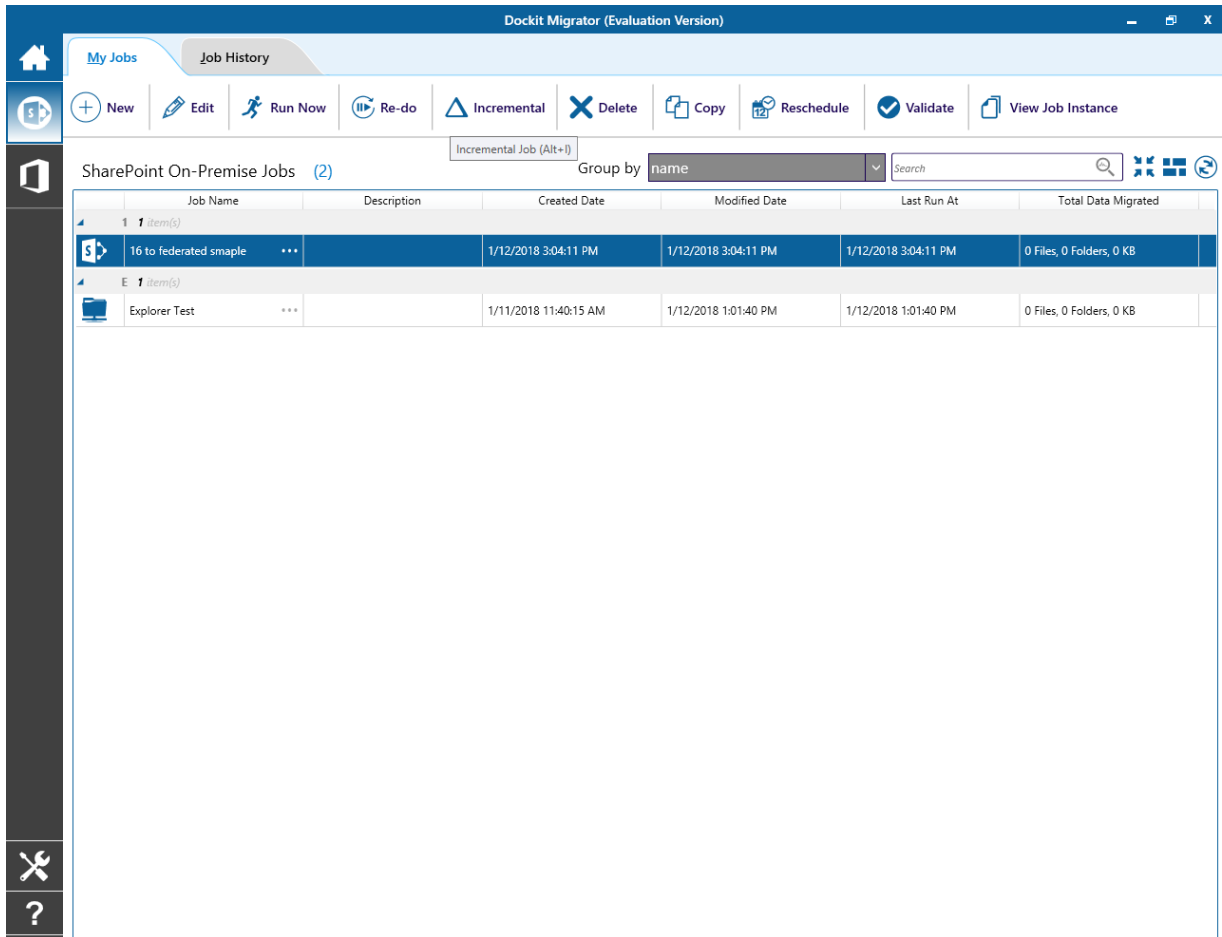
The screenshot shows the Dockit Migrator (Evaluation Version) application window. The 'My Jobs' tab is active, displaying a list of jobs under the 'SharePoint On-Premise Jobs' category. The 'Re-do' button is visible in the top toolbar. The job list includes two entries: '16 to federated smaple' and 'Explorer Test', both with a status of '0 Files, 0 Folders, 0 KB'.

Job Name	Description	Created Date	Modified Date	Last Run At	Total Data Migrated
16 to federated smaple		1/12/2018 3:04:11 PM	1/12/2018 3:04:11 PM	1/12/2018 3:04:11 PM	0 Files, 0 Folders, 0 KB
Explorer Test		1/11/2018 11:40:15 AM	1/12/2018 1:01:40 PM	1/12/2018 1:01:40 PM	0 Files, 0 Folders, 0 KB

Incremental Migration (On Premise)

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

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



The screenshot displays the Dockit Migrator (Evaluation Version) application. The interface includes a top navigation bar with a home icon and a 'My Jobs' tab. Below the navigation bar is a toolbar with buttons for New, Edit, Run Now, Re-do, Incremental, Delete, Copy, Reschedule, Validate, and View Job Instance. The main content area shows a list of 'SharePoint On-Premise Jobs' with a table containing columns for Job Name, Description, Created Date, Modified Date, Last Run At, and Total Data Migrated. The table lists two jobs: '16 to federated smaple' and 'Explorer Test'. The 'Incremental Job (Alt+I)' button is visible above the table.

Job Name	Description	Created Date	Modified Date	Last Run At	Total Data Migrated
16 to federated smaple	...	1/12/2018 3:04:11 PM	1/12/2018 3:04:11 PM	1/12/2018 3:04:11 PM	0 Files, 0 Folders, 0 KB
Explorer Test	...	1/11/2018 11:40:15 AM	1/12/2018 1:01:40 PM	1/12/2018 1:01:40 PM	0 Files, 0 Folders, 0 KB

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

Incremental Migration / One-way Sync

Specify the option to perform the incremental migration / one-way sync

☒ Sites and Lists modified or newly created in source location, since last migration using Dockit

☐ Sites and Lists modified or newly created in source location ▼ days

Reference Template (to avoid list item duplicates) Allow Duplicates ▼

OK Cancel

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

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

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

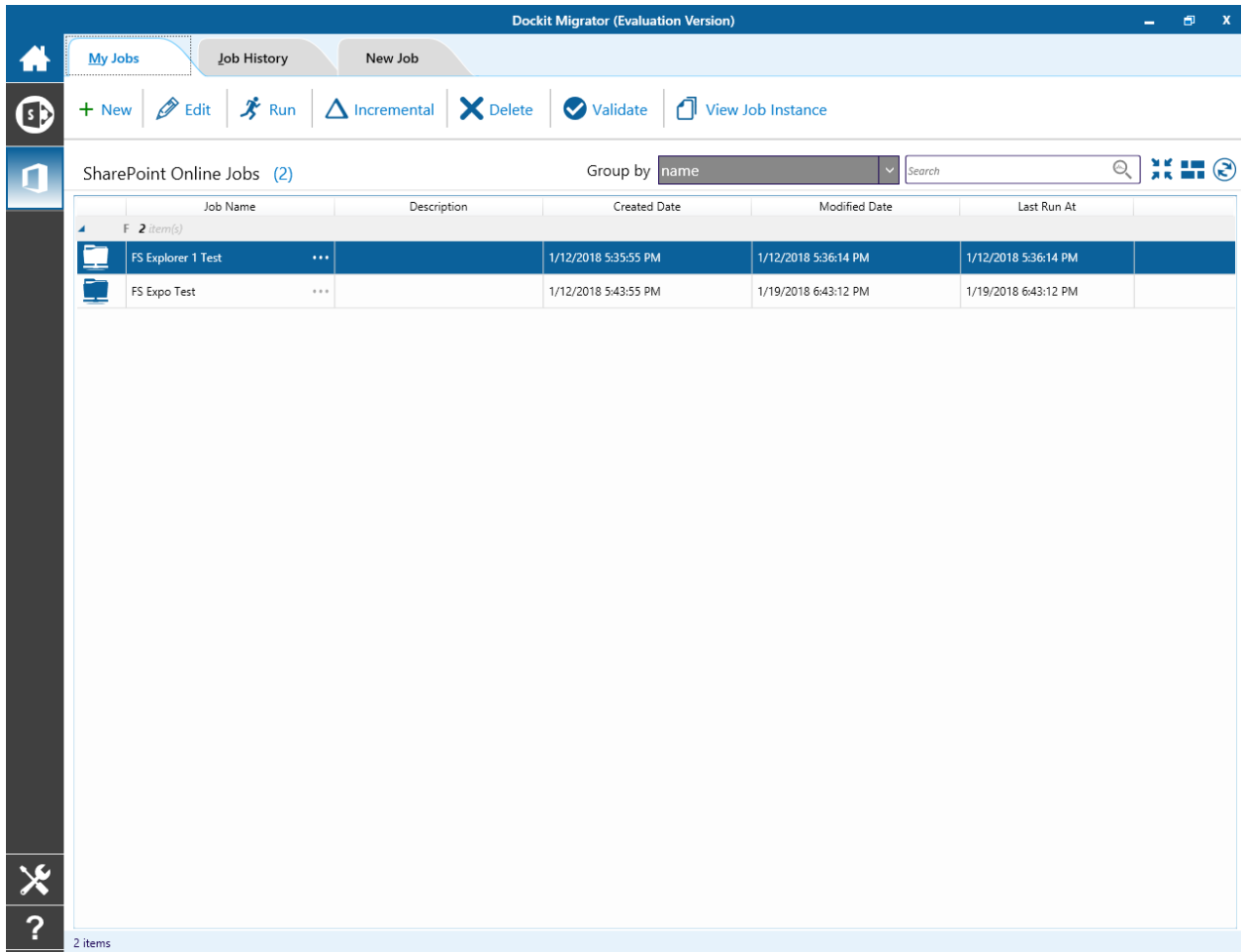
'This Week' 'Last 7 days' 'This Month' 'Last Week' 'Last 14 days' 'Last Month' 'Today' 'Yesterday' 'Last N Days'

3. Click **OK** will proceed.

Incremental Migration (Online)

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

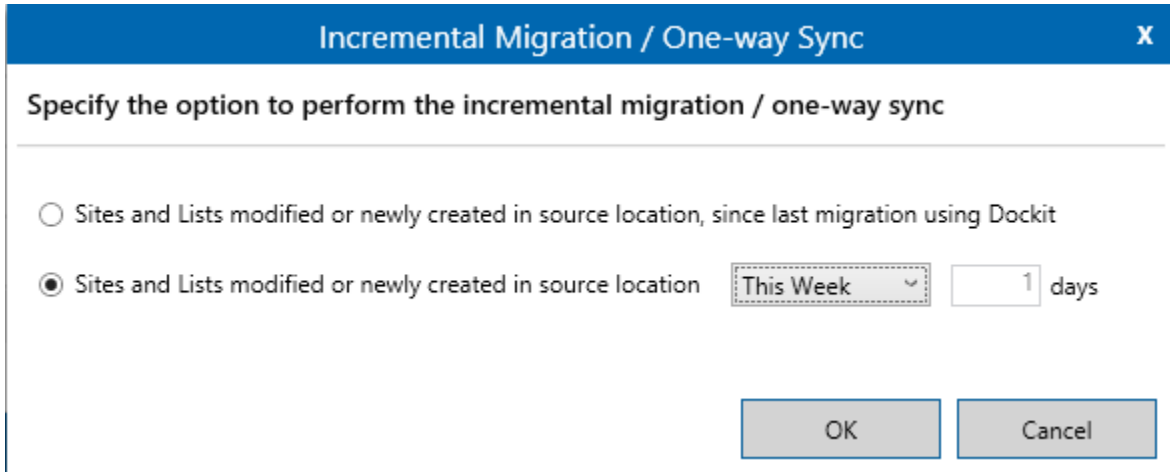
1. Click 'Incremental Migration' button from **Home** menu of Dockit main screen.



The screenshot displays the Dockit Migrator (Evaluation Version) application. The interface includes a top navigation bar with tabs for 'My Jobs', 'Job History', and 'New Job'. Below this is a toolbar with buttons for '+ New', 'Edit', 'Run', 'Incremental', 'Delete', 'Validate', and 'View Job Instance'. The main content area shows a list of 'SharePoint Online Jobs (2)'. The jobs are grouped by 'name' and displayed in a table with columns: Job Name, Description, Created Date, Modified Date, and Last Run At. The table contains two items: 'FS Explorer 1 Test' and 'FS Expo Test'.

Job Name	Description	Created Date	Modified Date	Last Run At
FS Explorer 1 Test		1/12/2018 5:35:55 PM	1/12/2018 5:36:14 PM	1/12/2018 5:36:14 PM
FS Expo Test		1/12/2018 5:43:55 PM	1/19/2018 6:43:12 PM	1/19/2018 6:43:12 PM

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



Incremental Migration / One-way Sync

Specify the option to perform the incremental migration / one-way sync

☐ Sites and Lists modified or newly created in source location, since last migration using Dockit

☒ Sites and Lists modified or newly created in source location This Week 1 days

OK Cancel

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

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

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

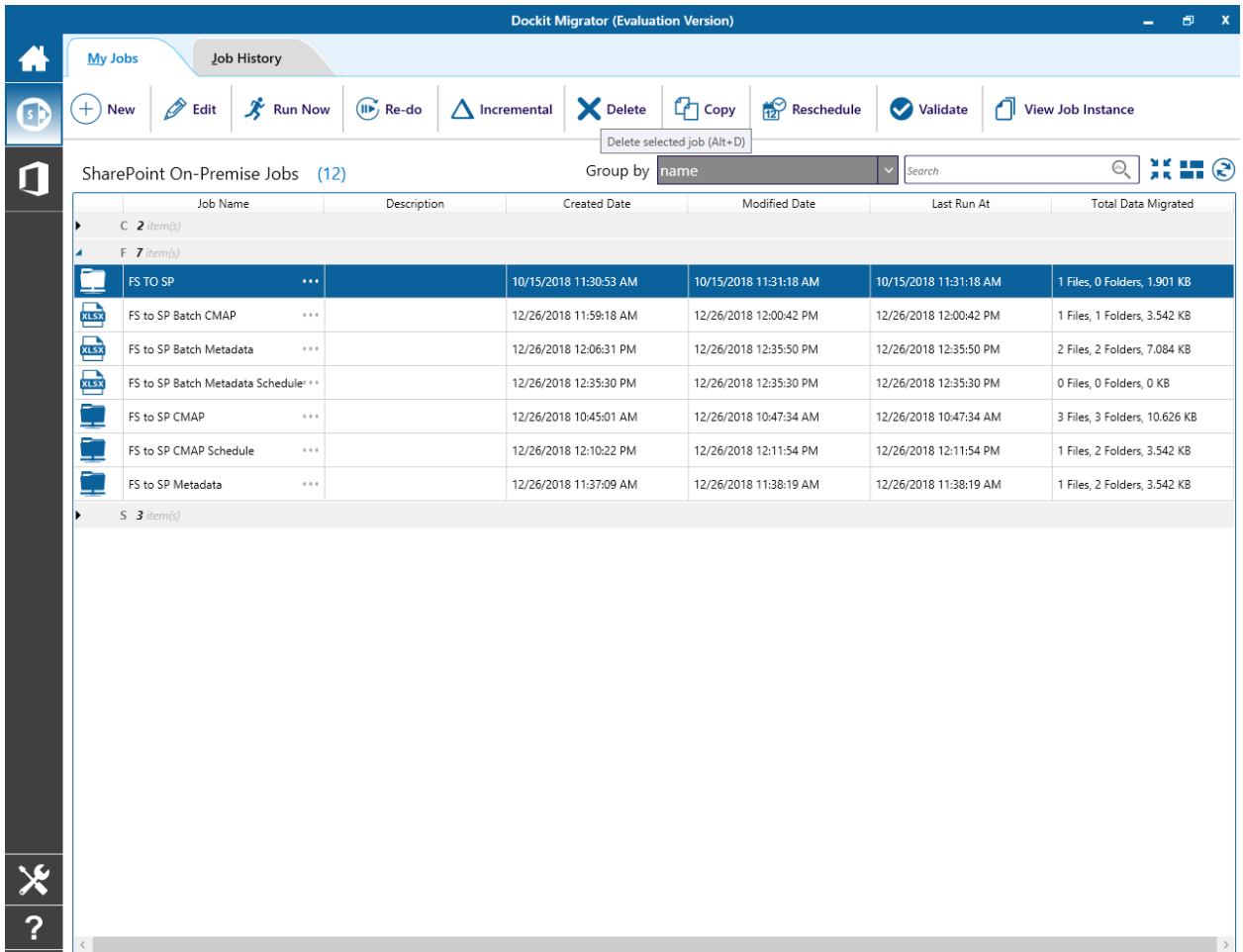
'This Week' 'Last 7 days' 'This Month' 'Last Week' 'Last 14 days' 'Last Month' 'Today' 'Yesterday' 'Last N Days'

3. Click **OK** will proceed.

Delete an existing task

To delete a Dockit import task:

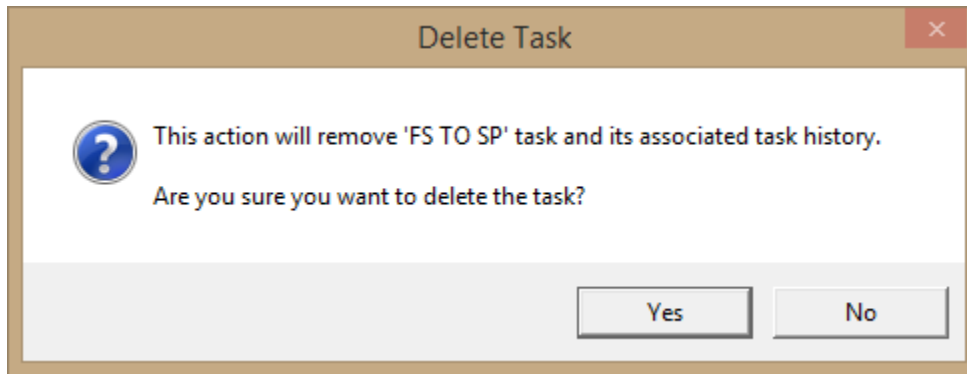
1. Select a desired task from **Task List**.
2. Click **Delete Task** from Home menu of Dockit main screen.



The screenshot displays the Dockit Migrator (Evaluation Version) application window. The interface includes a top navigation bar with 'My Jobs' and 'Job History' tabs. Below this is a toolbar with icons for New, Edit, Run Now, Re-do, Incremental, Delete, Copy, Reschedule, Validate, and View Job Instance. A 'Delete selected job (Alt+D)' tooltip is visible over the Delete icon. The main content area shows a list of 'SharePoint On-Premise Jobs' (12 total). The jobs are grouped by 'name' and displayed in a table with columns: Job Name, Description, Created Date, Modified Date, Last Run At, and Total Data Migrated. The jobs are categorized into three groups: C (2 items), F (7 items), and S (3 items). The 'F' group contains the following jobs:

Job Name	Description	Created Date	Modified Date	Last Run At	Total Data Migrated
FS TO SP	***	10/15/2018 11:30:53 AM	10/15/2018 11:31:18 AM	10/15/2018 11:31:18 AM	1 Files, 0 Folders, 1,901 KB
FS to SP Batch CMAP	***	12/26/2018 11:59:18 AM	12/26/2018 12:00:42 PM	12/26/2018 12:00:42 PM	1 Files, 1 Folders, 3,542 KB
FS to SP Batch Metadata	***	12/26/2018 12:06:31 PM	12/26/2018 12:35:50 PM	12/26/2018 12:35:50 PM	2 Files, 2 Folders, 7,084 KB
FS to SP Batch Metadata Schedule	***	12/26/2018 12:35:30 PM	12/26/2018 12:35:30 PM	12/26/2018 12:35:30 PM	0 Files, 0 Folders, 0 KB
FS to SP CMAP	***	12/26/2018 10:45:01 AM	12/26/2018 10:47:34 AM	12/26/2018 10:47:34 AM	3 Files, 3 Folders, 10,626 KB
FS to SP CMAP Schedule	***	12/26/2018 12:10:22 PM	12/26/2018 12:11:54 PM	12/26/2018 12:11:54 PM	1 Files, 2 Folders, 3,542 KB
FS to SP Metadata	***	12/26/2018 11:37:09 AM	12/26/2018 11:38:19 AM	12/26/2018 11:38:19 AM	1 Files, 2 Folders, 3,542 KB

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

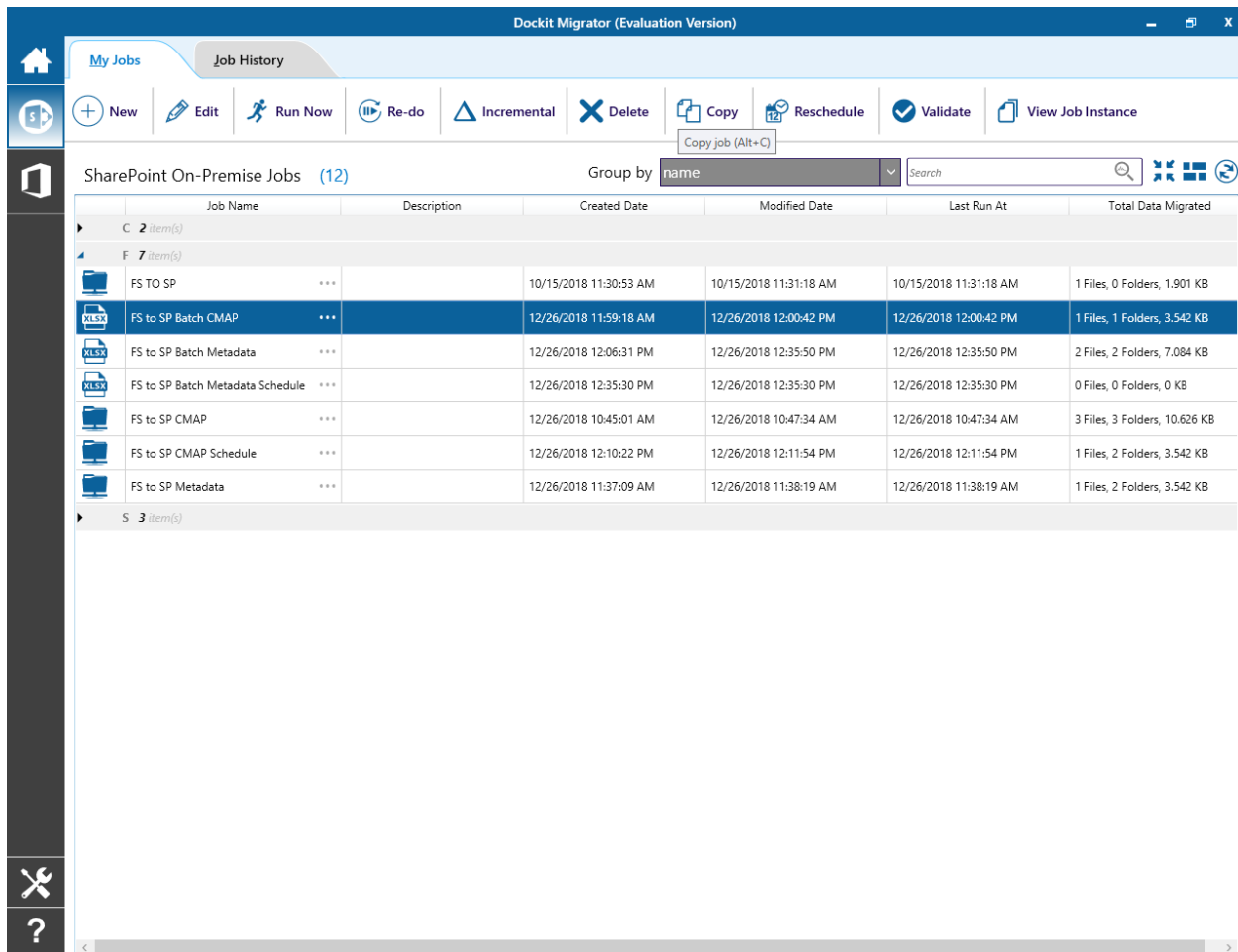


Note: Deleting a task will permanently delete the selected task and its task history items.

Copy an existing task

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

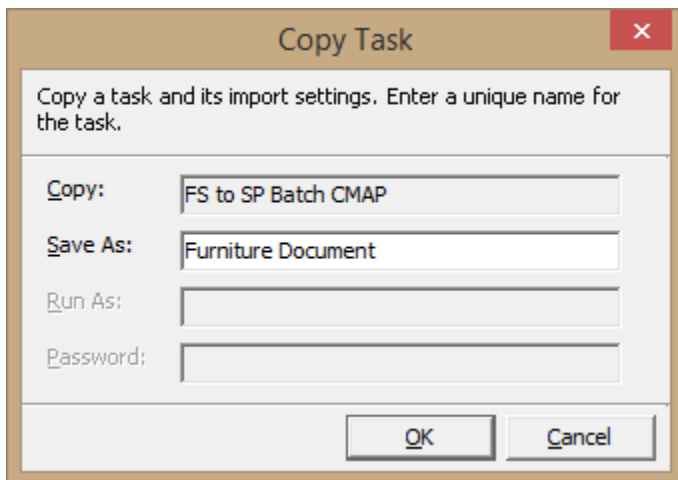
1. Select a desired task from the Task List.
2. Click **Copy Task** from Home menu of Dockit main screen.



The screenshot displays the Dockit Migrator (Evaluation Version) application window. The interface includes a top navigation bar with 'My Jobs' and 'Job History' tabs. Below this is a toolbar with various action buttons: New, Edit, Run Now, Re-do, Incremental, Delete, Copy, Reschedule, Validate, and View Job Instance. A 'Copy job (Alt+C)' tooltip is visible over the 'Copy' button. The main area shows a list of 'SharePoint On-Premise Jobs' (12 items). The list is grouped by 'name' and includes columns for Job Name, Description, Created Date, Modified Date, Last Run At, and Total Data Migrated. The 'Copy' button is highlighted in the toolbar.

Job Name	Description	Created Date	Modified Date	Last Run At	Total Data Migrated
FS TO SP	***	10/15/2018 11:30:53 AM	10/15/2018 11:31:18 AM	10/15/2018 11:31:18 AM	1 Files, 0 Folders, 1,901 KB
FS to SP Batch CMAP	***	12/26/2018 11:59:18 AM	12/26/2018 12:00:42 PM	12/26/2018 12:00:42 PM	1 Files, 1 Folders, 3,542 KB
FS to SP Batch Metadata	***	12/26/2018 12:06:31 PM	12/26/2018 12:35:50 PM	12/26/2018 12:35:50 PM	2 Files, 2 Folders, 7,084 KB
FS to SP Batch Metadata Schedule	***	12/26/2018 12:35:30 PM	12/26/2018 12:35:30 PM	12/26/2018 12:35:30 PM	0 Files, 0 Folders, 0 KB
FS to SP CMAP	***	12/26/2018 10:45:01 AM	12/26/2018 10:47:34 AM	12/26/2018 10:47:34 AM	3 Files, 3 Folders, 10,626 KB
FS to SP CMAP Schedule	***	12/26/2018 12:10:22 PM	12/26/2018 12:11:54 PM	12/26/2018 12:11:54 PM	1 Files, 2 Folders, 3,542 KB
FS to SP Metadata	***	12/26/2018 11:37:09 AM	12/26/2018 11:38:19 AM	12/26/2018 11:38:19 AM	1 Files, 2 Folders, 3,542 KB

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.



The image shows a 'Copy Task' dialog box with a title bar and a close button. The main text area contains the instruction: 'Copy a task and its import settings. Enter a unique name for the task.' Below this, there are four labeled text input fields: 'Copy:' with the value 'FS to SP Batch CMAP', 'Save As:' with the value 'Furniture Document', 'Run As:', and 'Password:'. At the bottom right, there are two buttons labeled 'OK' and 'Cancel'.

Field	Value
Copy:	FS to SP Batch CMAP
Save As:	Furniture Document
Run As:	
Password:	

Reschedule Task

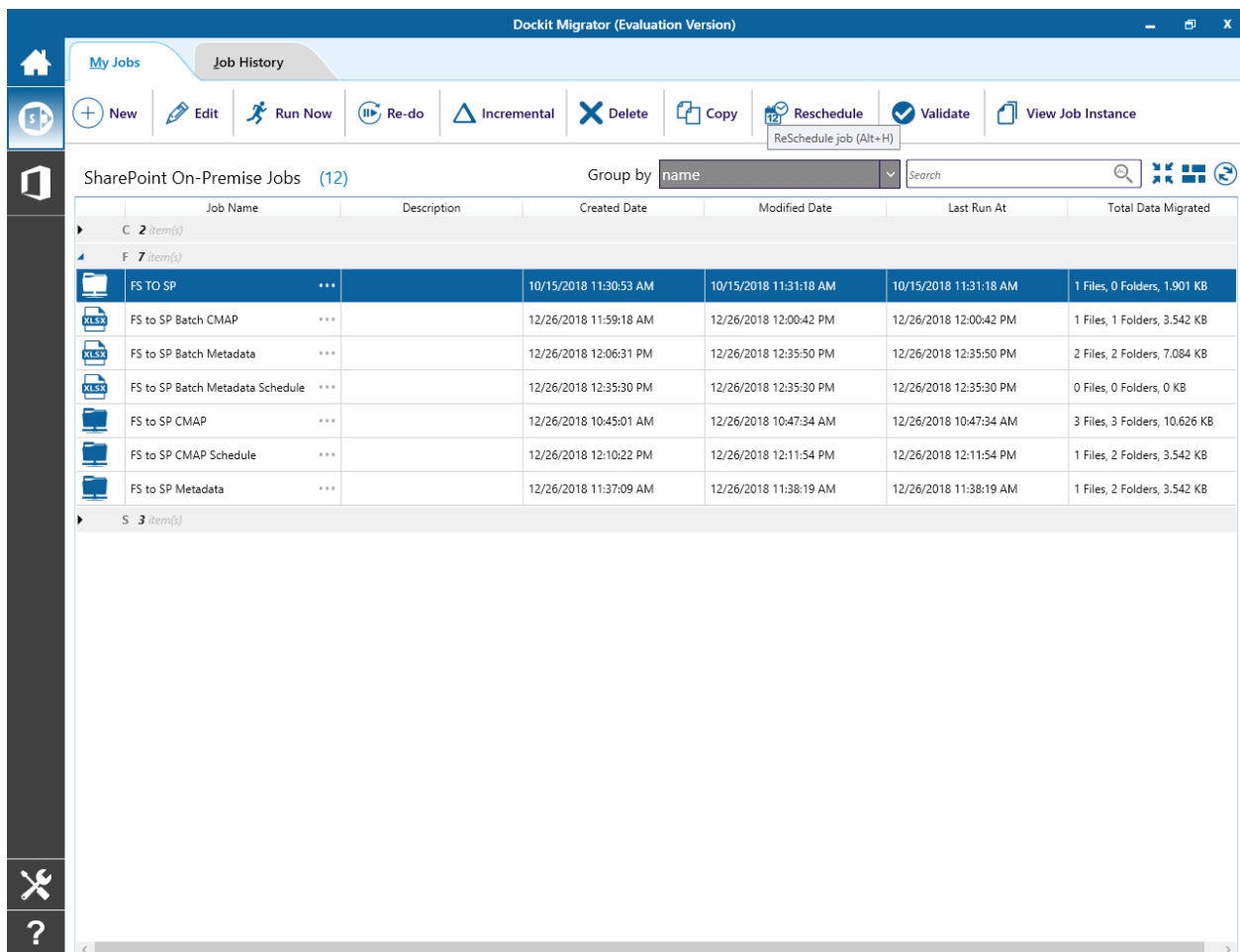
Use this tool to Reschedule Task in Windows Task Scheduler interface to automatically run the import tasks at scheduled intervals.

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

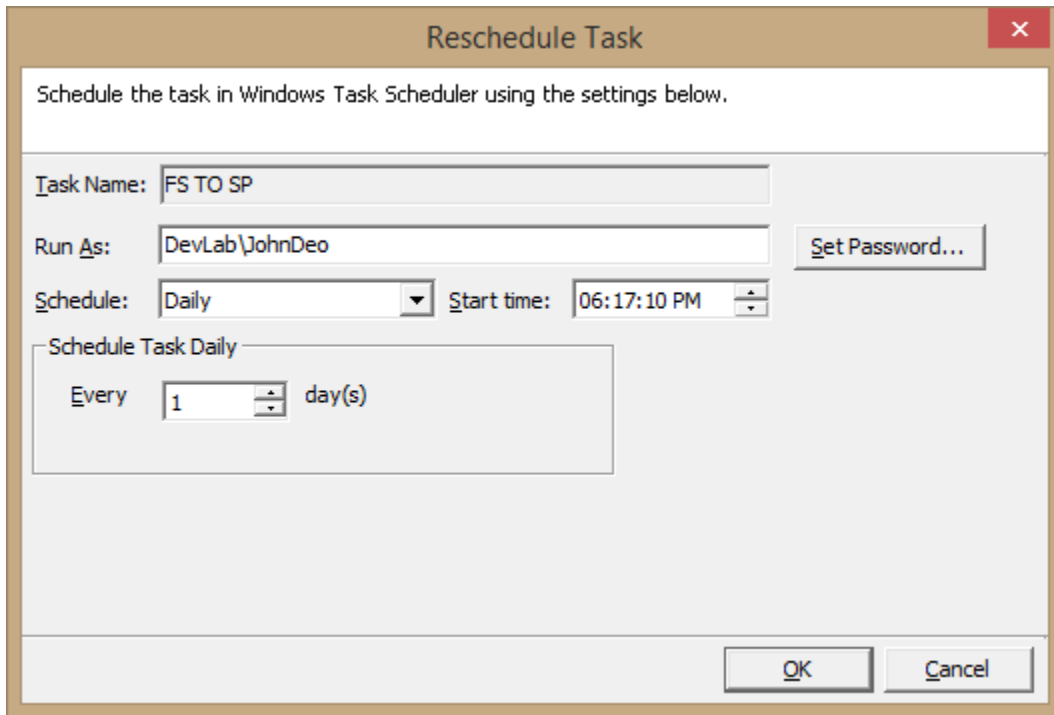
- To Reschedule that Task that was accidentally deleted and is required to be created again with the same schedule settings
- To Reschedule Task when the Dockit import tasks are migrated from an old computer to a new computer

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.



The image shows a 'Reschedule Task' dialog box with a title bar and a close button. The main area contains the following fields and controls:

- Task Name:** A text box containing 'FS TO SP'.
- Run As:** A text box containing 'DevLab\JohnDeo'.
- Set Password...** A button to the right of the 'Run As' field.
- Schedule:** A dropdown menu currently set to 'Daily'.
- Start time:** A time selection box showing '06:17:10 PM'.
- Schedule Task Daily:** A section containing 'Every' followed by a spinner box set to '1' and the text 'day(s)'.
- OK** and **Cancel** buttons at the bottom right.

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

Validate Task

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

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

To Validate a Dockit Migrator task:

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



Validate

Dockit Migrator (Evaluation Version)

My Jobs Job History

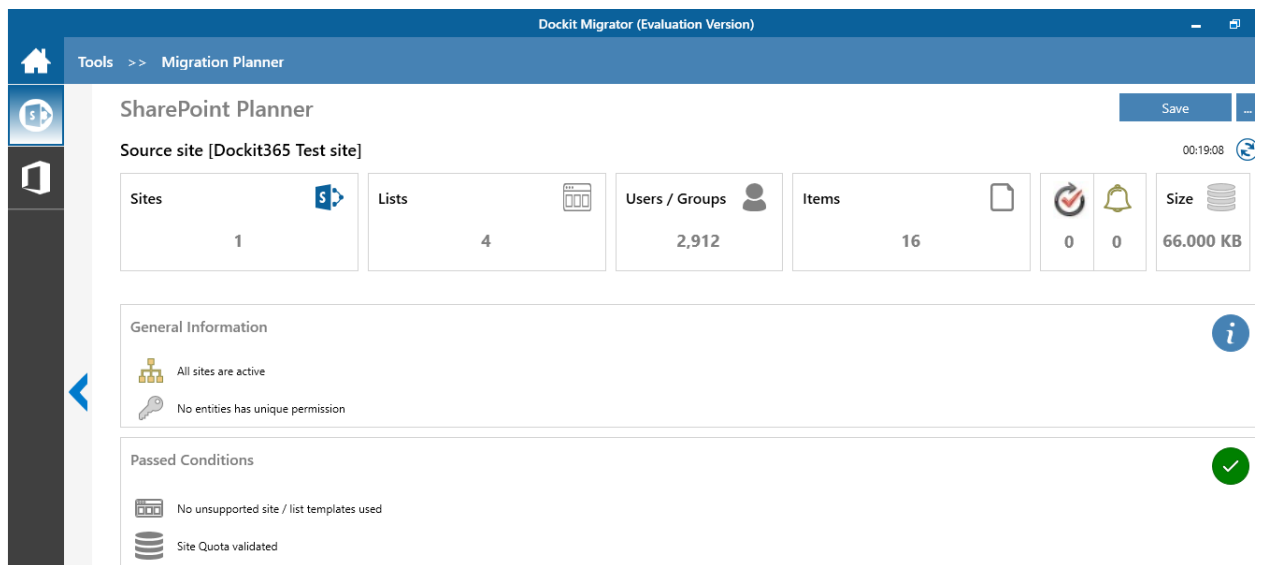
New Edit Run Now Re-do Incremental Delete Copy Reschedule **Validate** View Job Instance

SharePoint On-Premise Jobs (2) Group by name Search Validate Job (Alt+v)

	Job Name	Description	Created Date	Modified Date	Last Run At	Total Data Migrated
S 1 item(s)						
	Site Level Migration	...	8/9/2018 3:11:50 PM	8/9/2018 3:11:51 PM	8/9/2018 3:11:51 PM	0 Webs, 0 Lists, 0 Items
V 1 item(s)						
	Values Assign	...	8/9/2018 3:12:58 PM	8/9/2018 3:12:58 PM	8/9/2018 3:12:58 PM	0 Files, 0 Folders, 0 KB

⚙️ ?

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



4. Validates the following items:

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

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

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

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

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

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

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

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

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

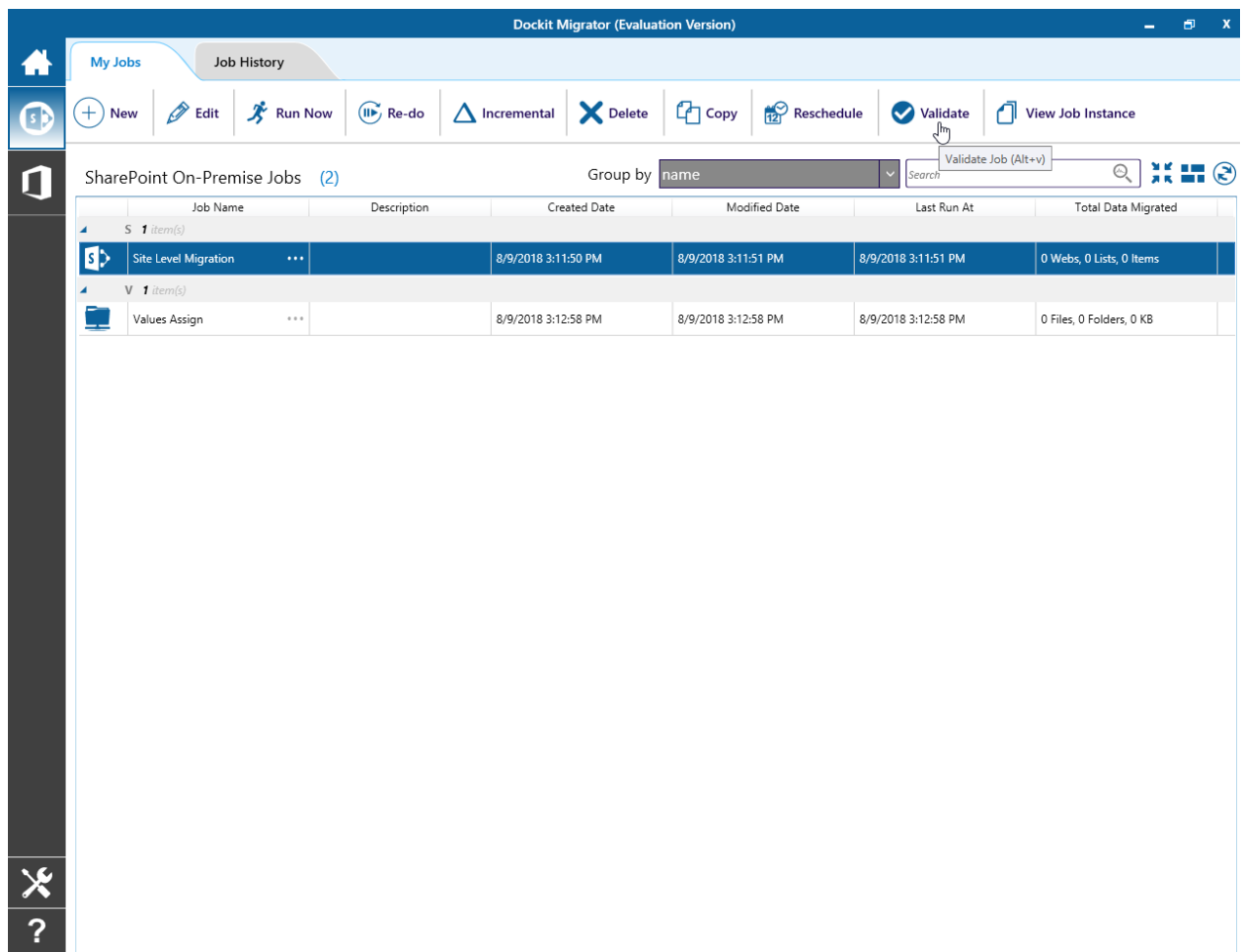
Validate Task for File Share Migration (SharePoint OnPremises and SharePoint Online)

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

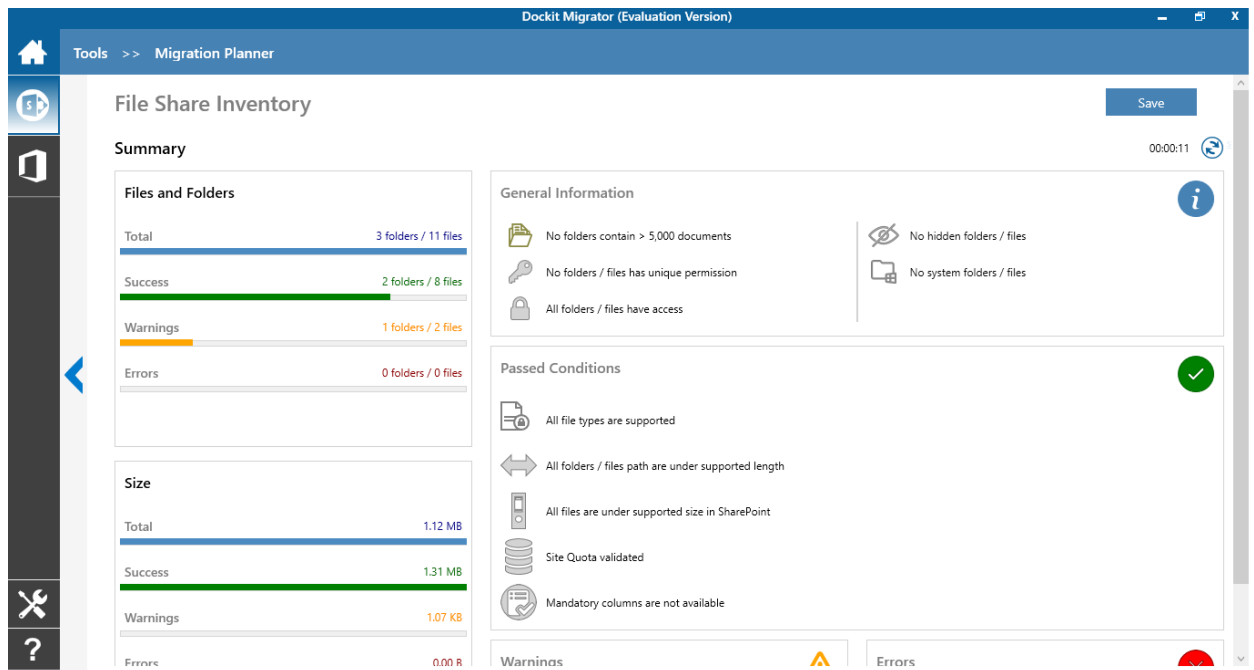
To Validate a Dockit Migrator task:

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

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



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



- Validates the following items:

Checking Existence: Checks existence of source and target locations.

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

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

URL length: Checks folder / file URL length.

Column: Checks availability of columns in target SharePoint.

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

Mandatory Column: Checks the mandatory column values are valid.

Function: Verifies the functions (if any).

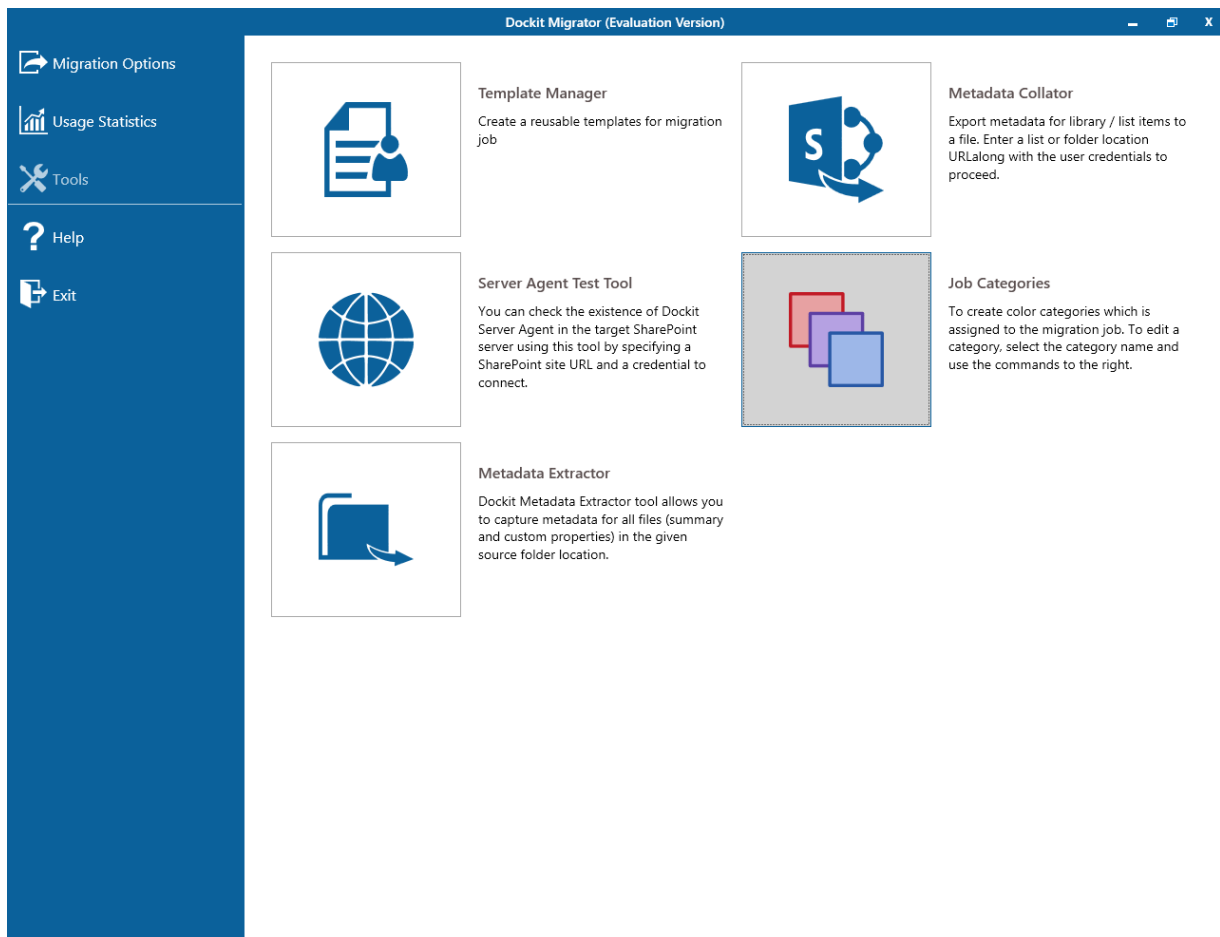
Permission level: Checks the existence of permission levels and users in target SharePoint.

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

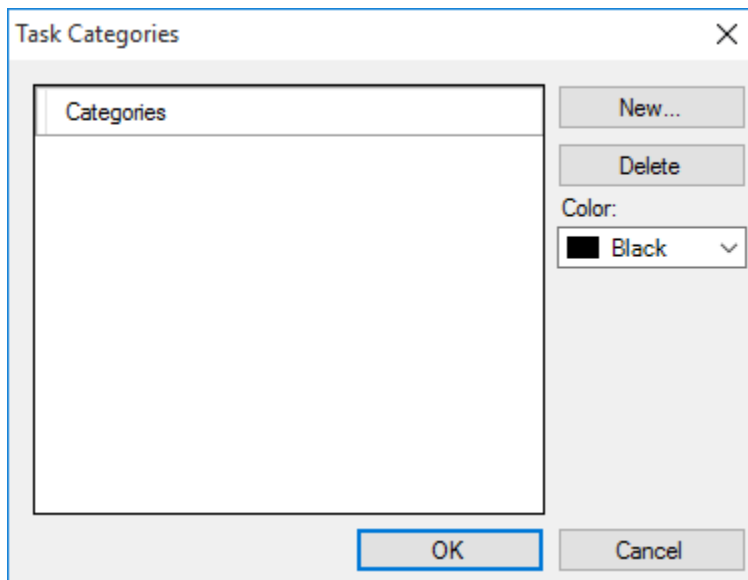
Manage Categories

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.



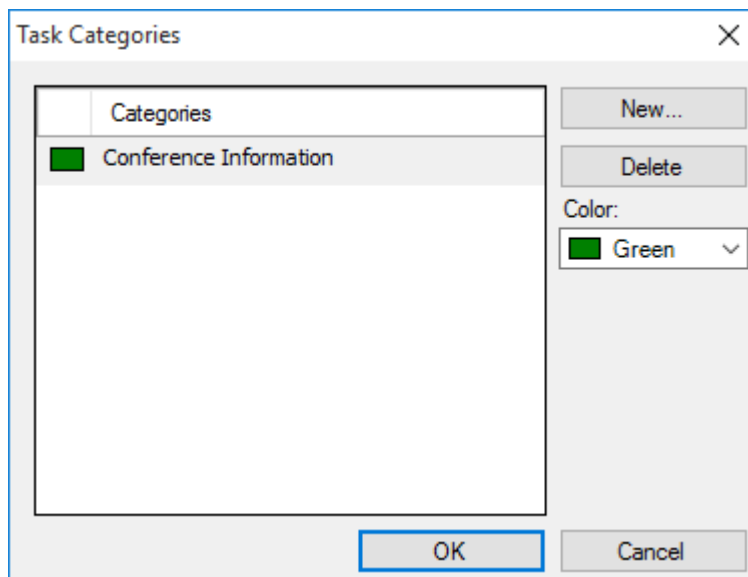
2. The **Task Categories** dialog will be shown as below:



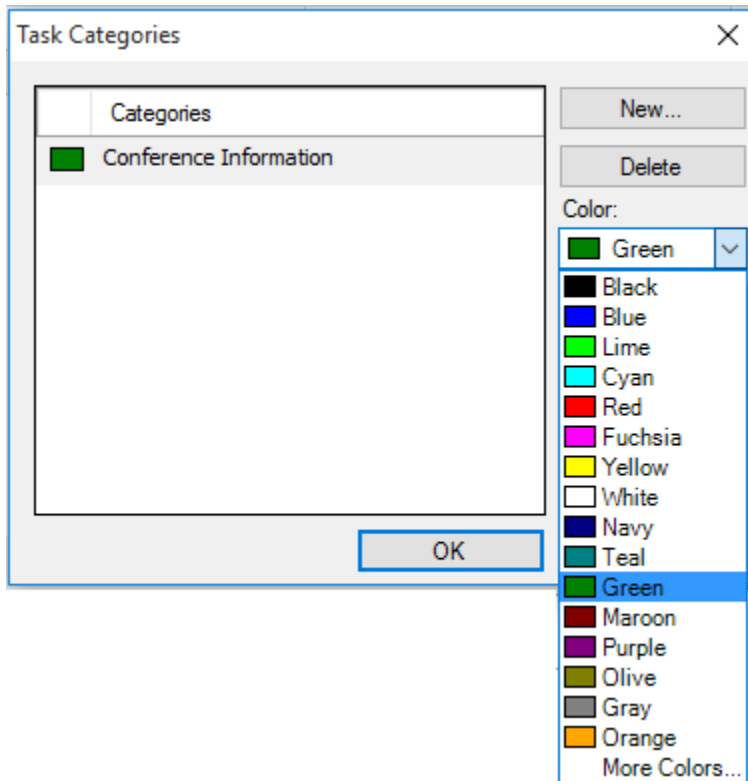
3. In order to add a category, click **New...** button and provide the information about category in the **New Category** dialog as shown below:

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:



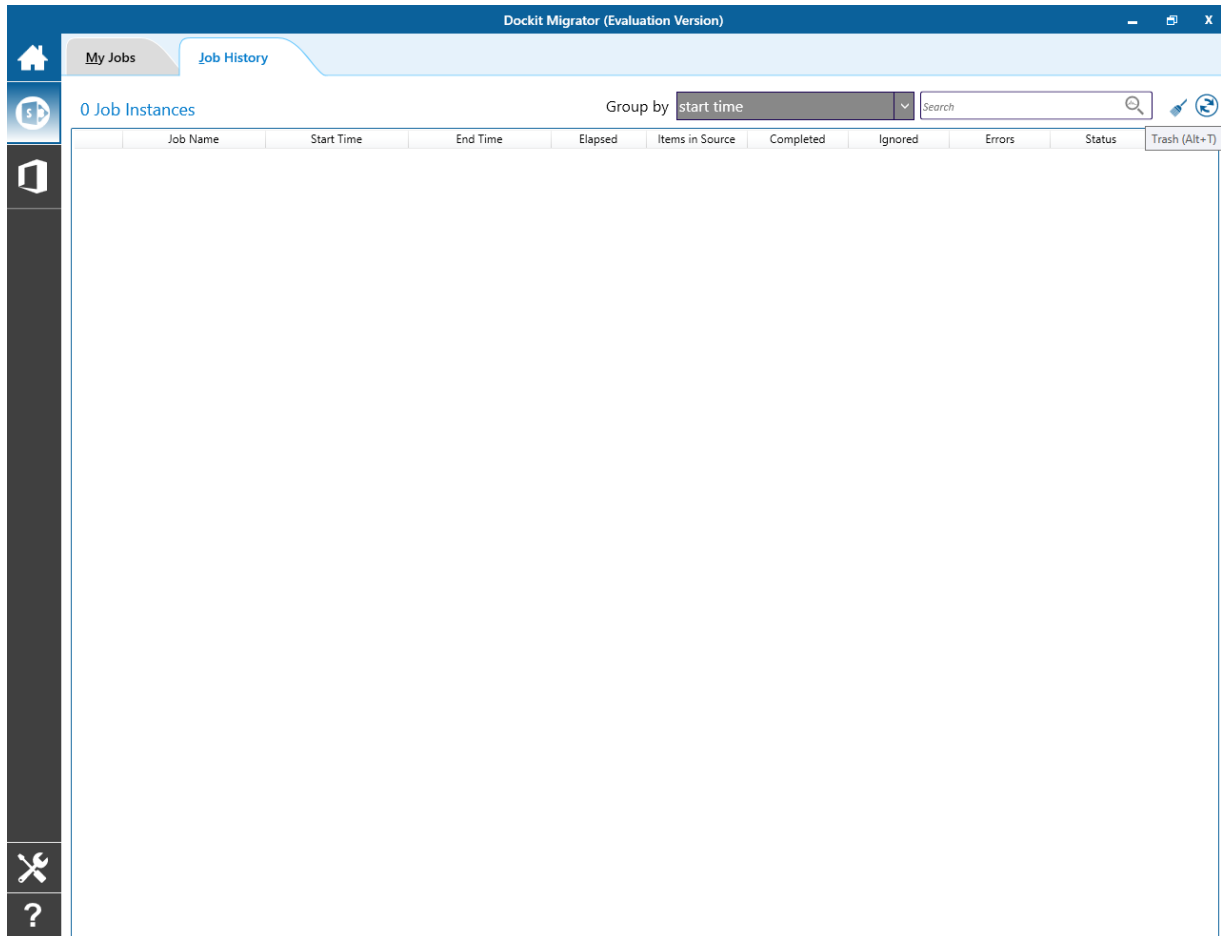
Click **OK** to enable the feature.

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

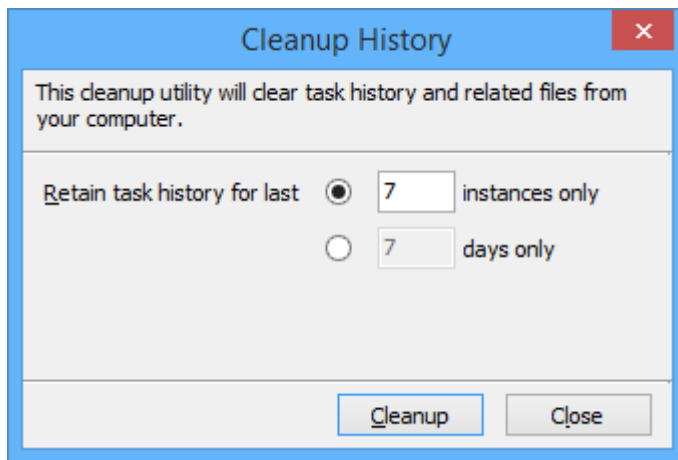
Cleanup history

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.

View Job Instance

To view and manage task status of a selected task:

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

Dockit Migrator (Evaluation Version)

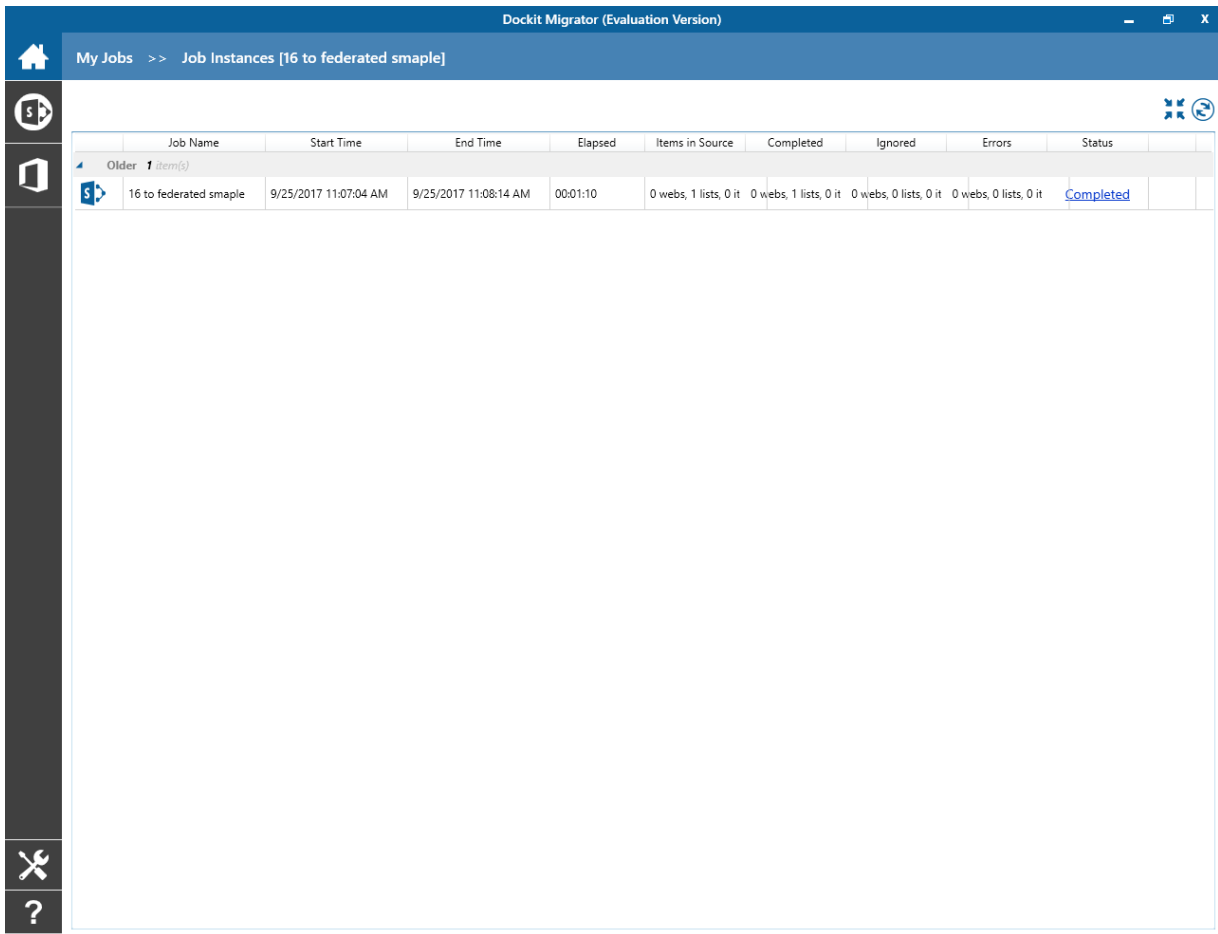
My Jobs Job History

New Edit Run Now Re-do Incremental Delete Copy Reschedule Validate View Job Instance

SharePoint On-Premise Jobs (2) Group by name Search

	Job Name	Description	Created Date	Modified Date	Last Run At	Total Data Migrated
1 1 Item(s)	16 to federated smaple	***	1/12/2018 3:04:11 PM	1/12/2018 3:04:11 PM	1/12/2018 3:04:11 PM	0 Files, 0 Folders, 0 KB
E 1 Item(s)	Explorer Test	***	1/11/2018 11:40:15 AM	1/12/2018 1:01:40 PM	1/12/2018 1:01:40 PM	0 Files, 0 Folders, 0 KB

- The **Job Instance** page appears as shown below:



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

- 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.
- Refresh:** Reloads the task history entries and updates the newly run tasks (if any).
- Open Log Folder:** Opens the folder that contains the activity log of the currently selected task history item.
- View activity log:** Displays activity log of the currently selected task history item.
- Remove:** Removes the currently selected task history entry and its associated log folders and files.
- Remove all:** Removes all task history entries and their associated log folders and files that are currently displayed.
- 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 the Task List pane.
2. The history of task will be displayed at right-bottom of Dockit main window as shown below.

Task History								Refresh	Open Log Folder	View Activity Log	Remove
Start Time	End Time	Elapsed Time	Items in Source	Completed	Ignored	Errors	Remarks				
1/30/2017 8:02:53 PM	1/30/2017 8:12:38 PM	00:09:45	1 files, 0 folders, 10.9 KB	0 files, 0 folders, 0 KB	0 files, 0 folders, 0 KB	0 files, 0 folders, 0 KB	Terminated: canceled by user	Retry			

3. 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.

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

- a. [View activity log](#)
- b. [Manage task status](#)
- c. [Retry](#)

Dockit Tools

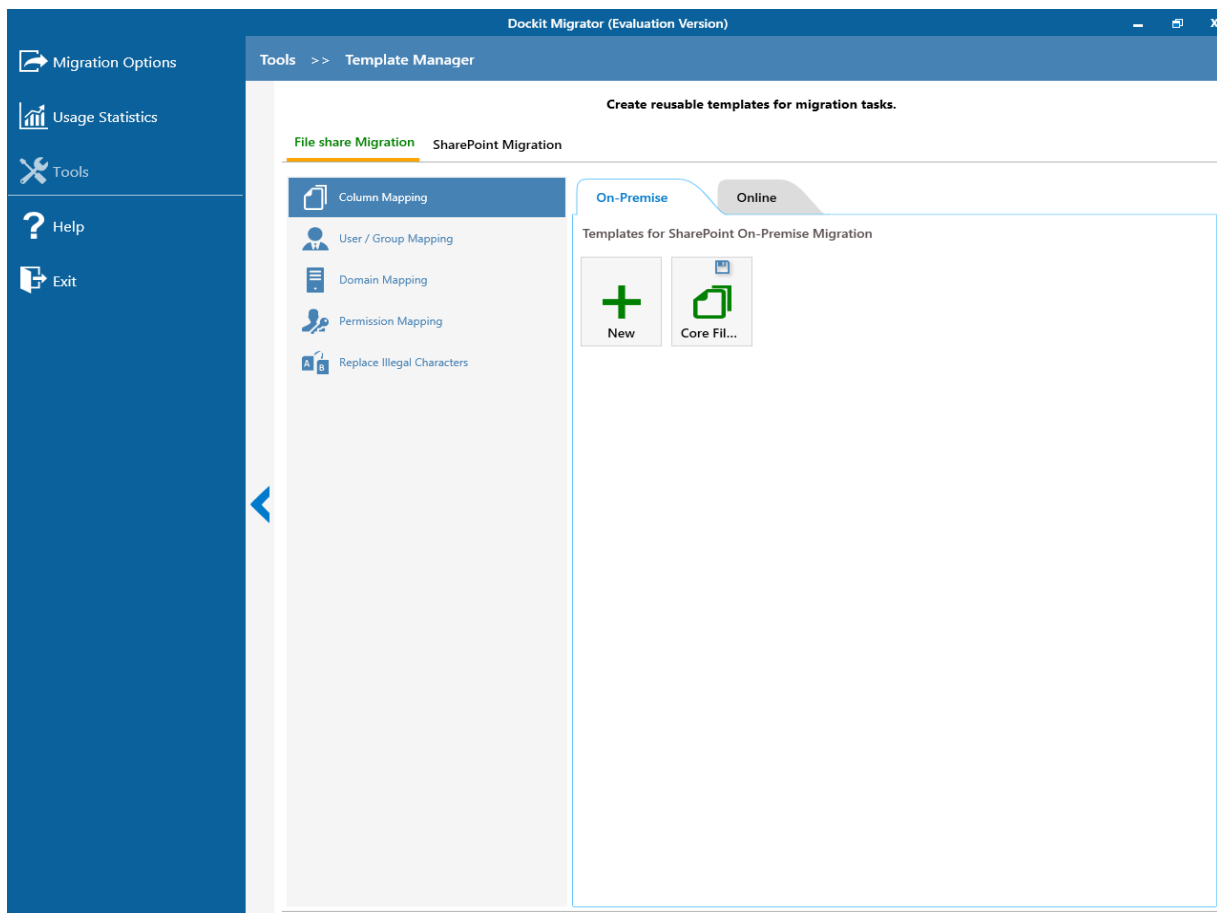
- [Manage Templates](#)
- [Server Agent Test Tool](#)
- [Metadata Extractor](#)
- [Metadata Collator](#)

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

Then Template Manager page will appear as shown below:



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



See the following sections for more information

[Column Mapping](#)

[Domain Mapping](#)

[User / Group Mapping](#)

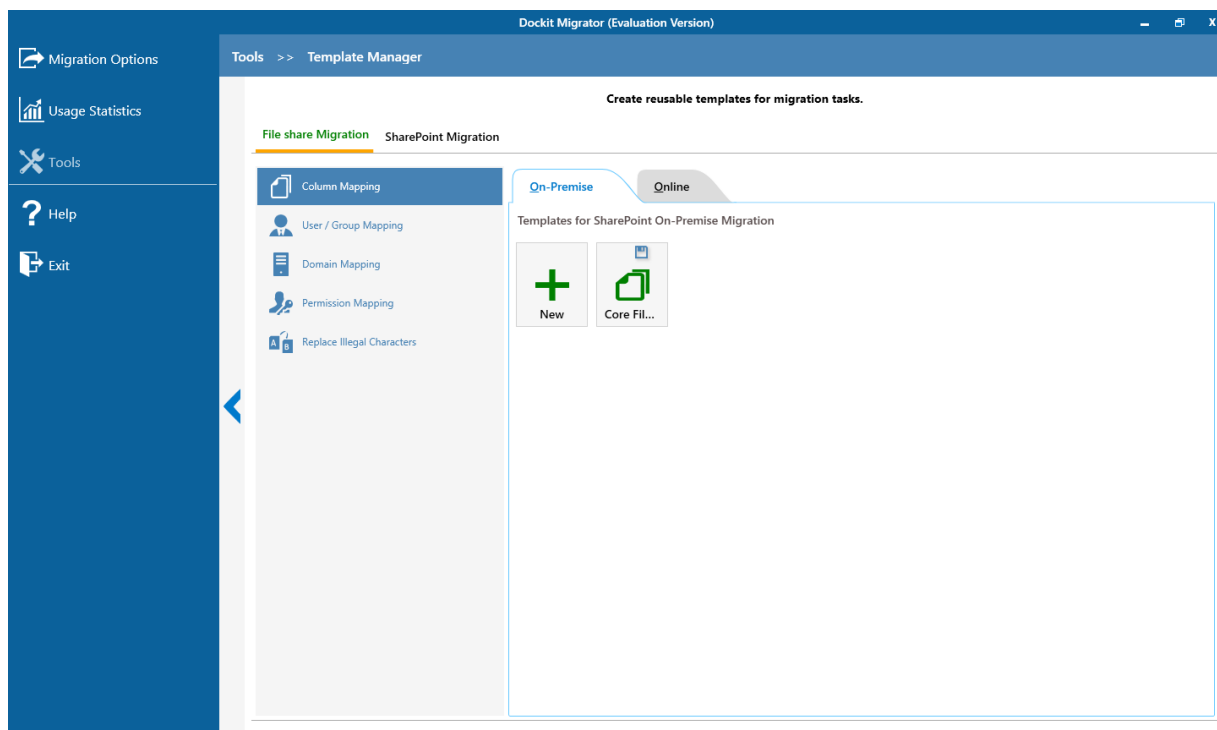
[Permission Mapping](#)

[Folder and File Renaming rules](#)

Column Mapping Template

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

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



Column Mapping Template view

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

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

Column Mapping Pane

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

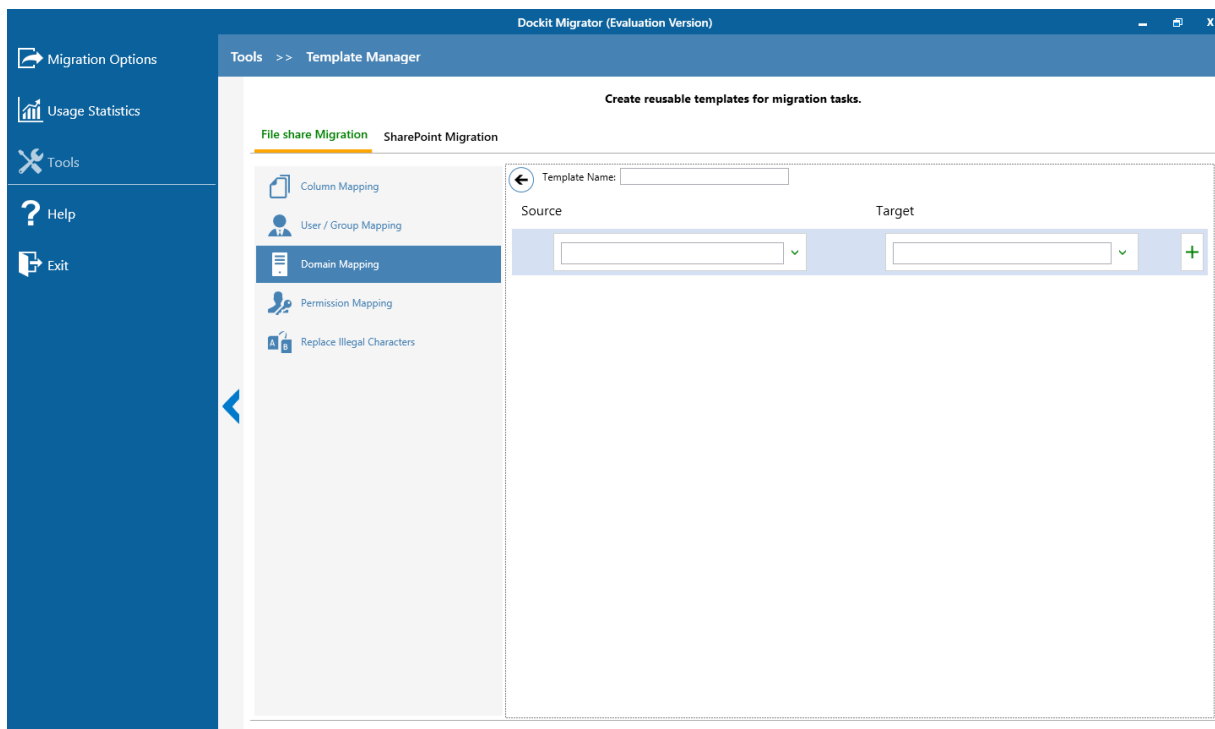
Source Column	Target Column	Default Value
 Name ...	Name	-
 Data Created ...	Data Created	-
 Date Modified ...	Date Modified	-
...		+

Domain Mapping Template

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

To create a new domain mapping template

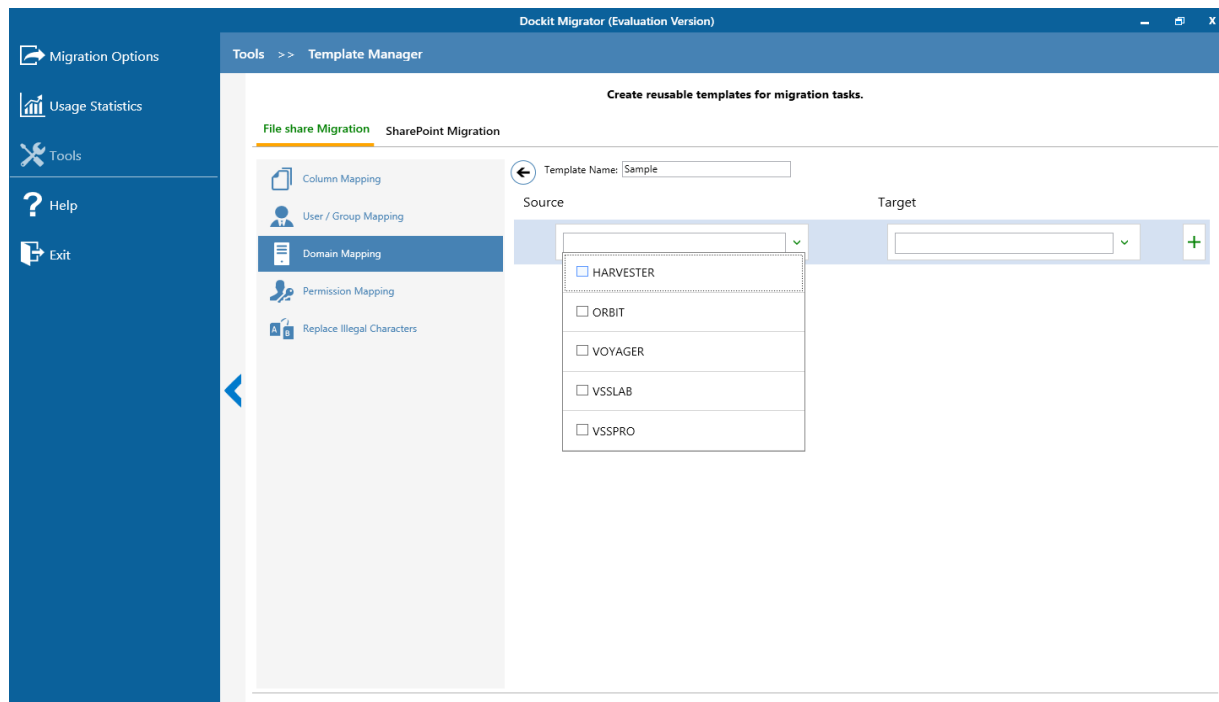
Select New from the Templates Tools pane. The new template pane will appear and enter a unique template name for the template as shown below:



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.

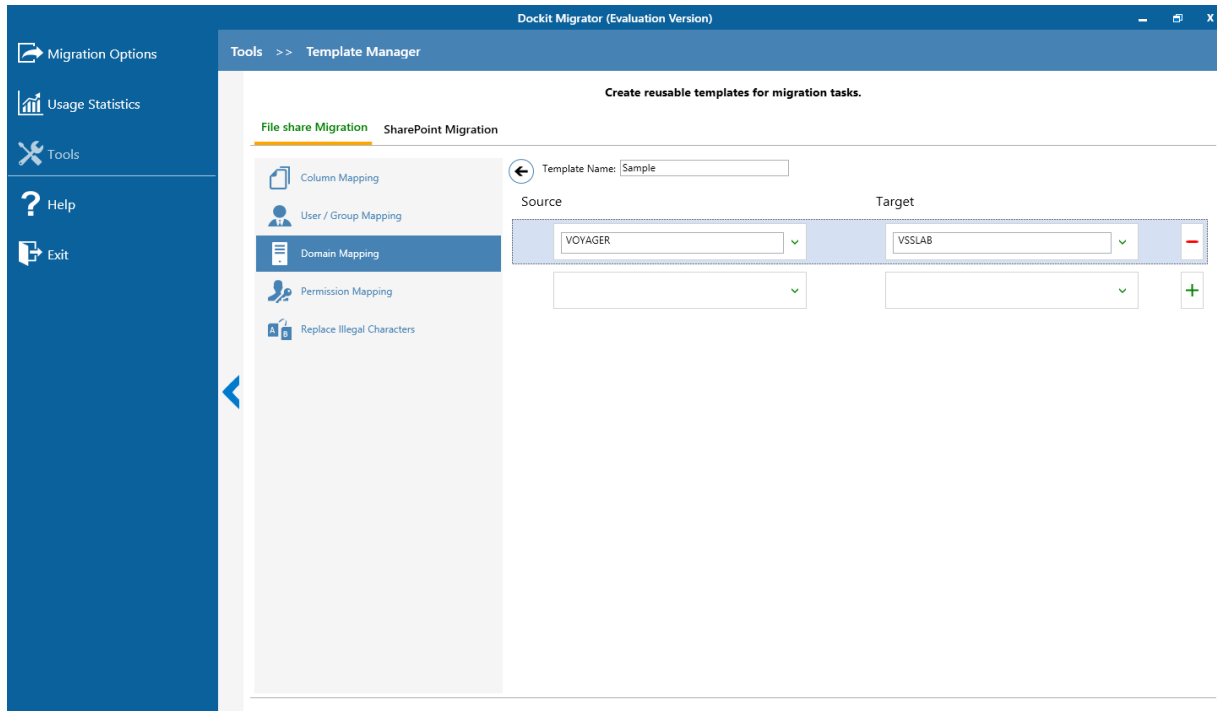


Then you have to select the appropriate source domain (s) from the source domain list and select the target domain to map from the list of available target domains. Then finally click Map button to map the domains.

You can also have the option to enter the domain names of your own in the respective textboxes and finally click **+** button to map. Docket 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.

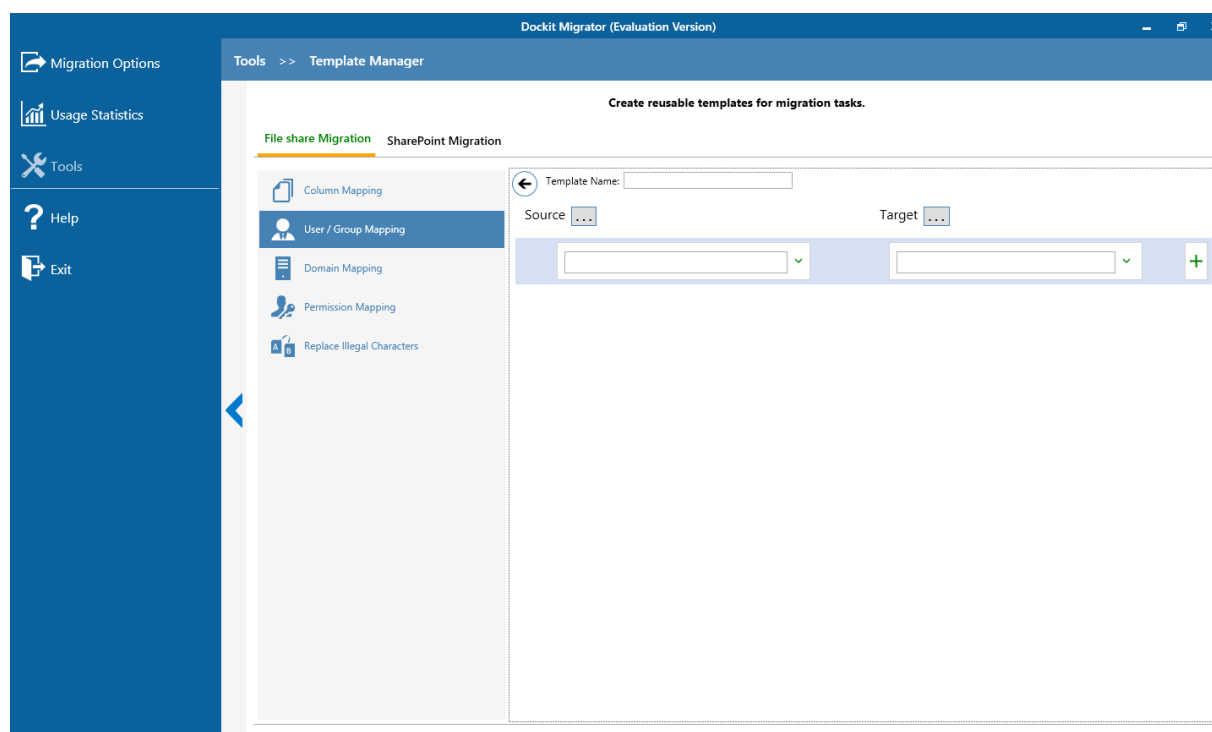
Once you click **+** button, selected domains are mapped and the mapped data is displayed in the domain mapping pane as shown below:



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:



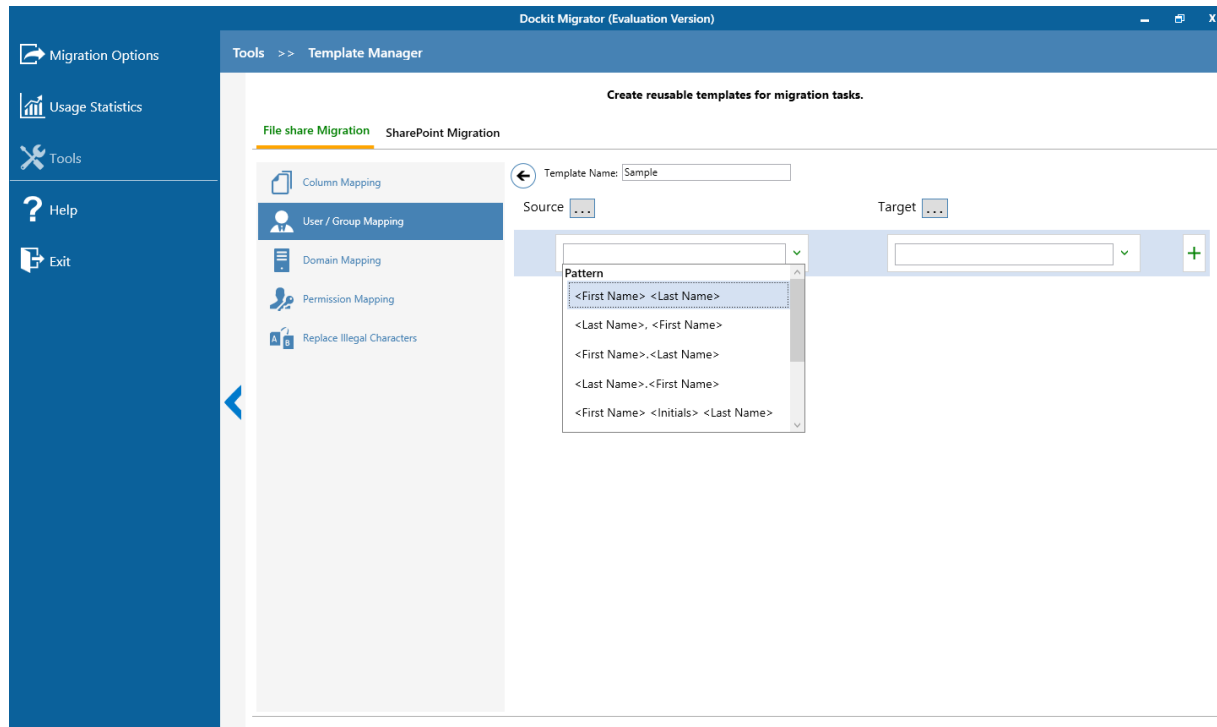
User / group Mapping Template consists of following panes to configure user / group mapping:

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.

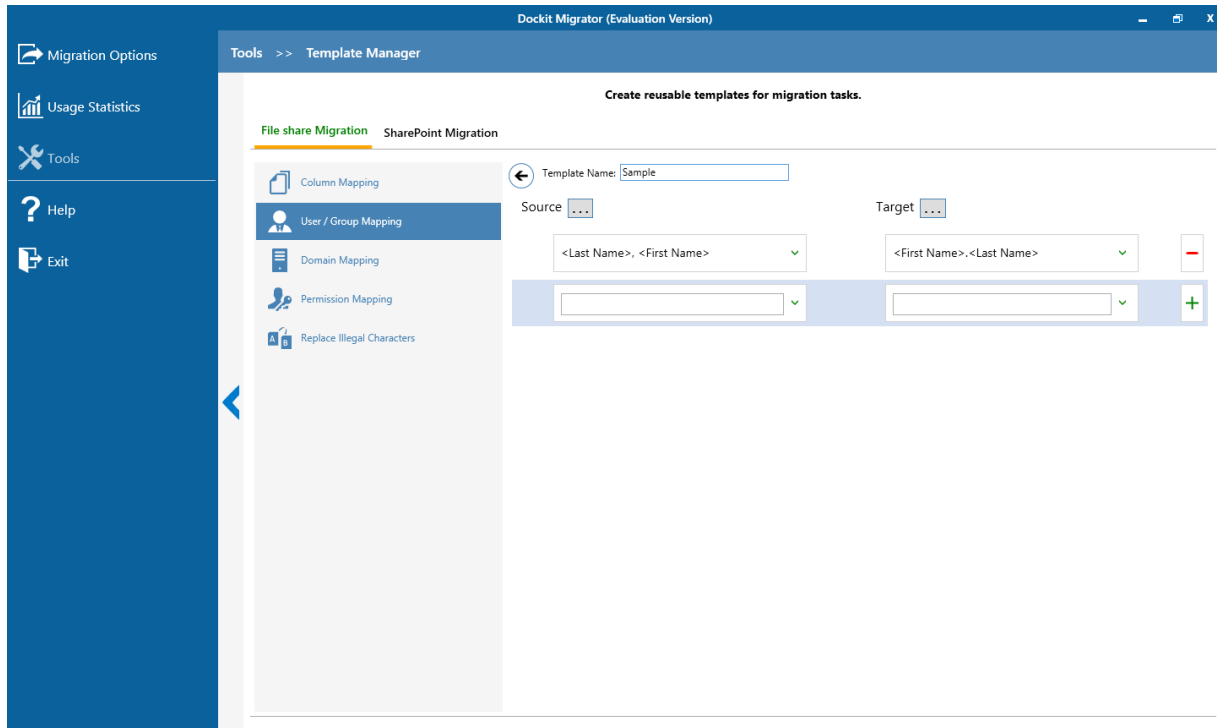


Once you select the option and provide the appropriate inputs, the list of source users / groups displayed on the source users / groups list pane as shown below:



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.

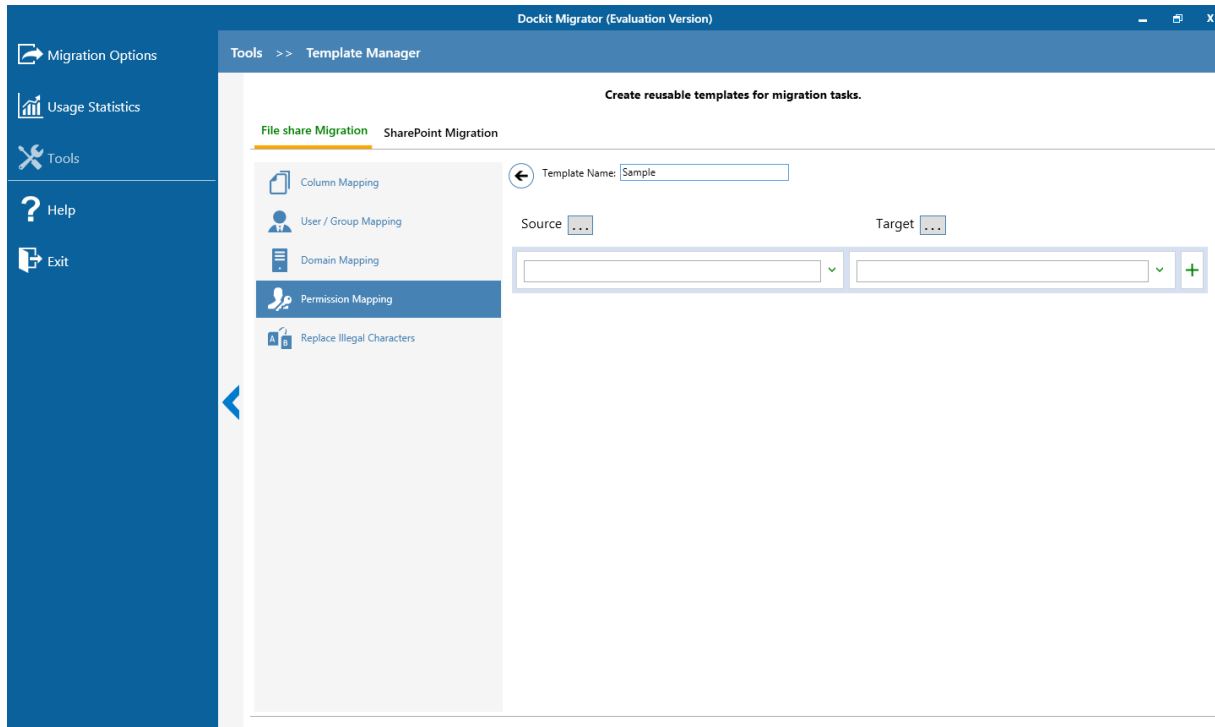
You can also have the option to enter the user / group names of your own in the respective textboxes and finally click **+** button to map. Once you click **+** button, selected user / group are mapped and the mapped data is displayed in the user / group mapping pane as shown below:



Permission Mapping Template

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

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



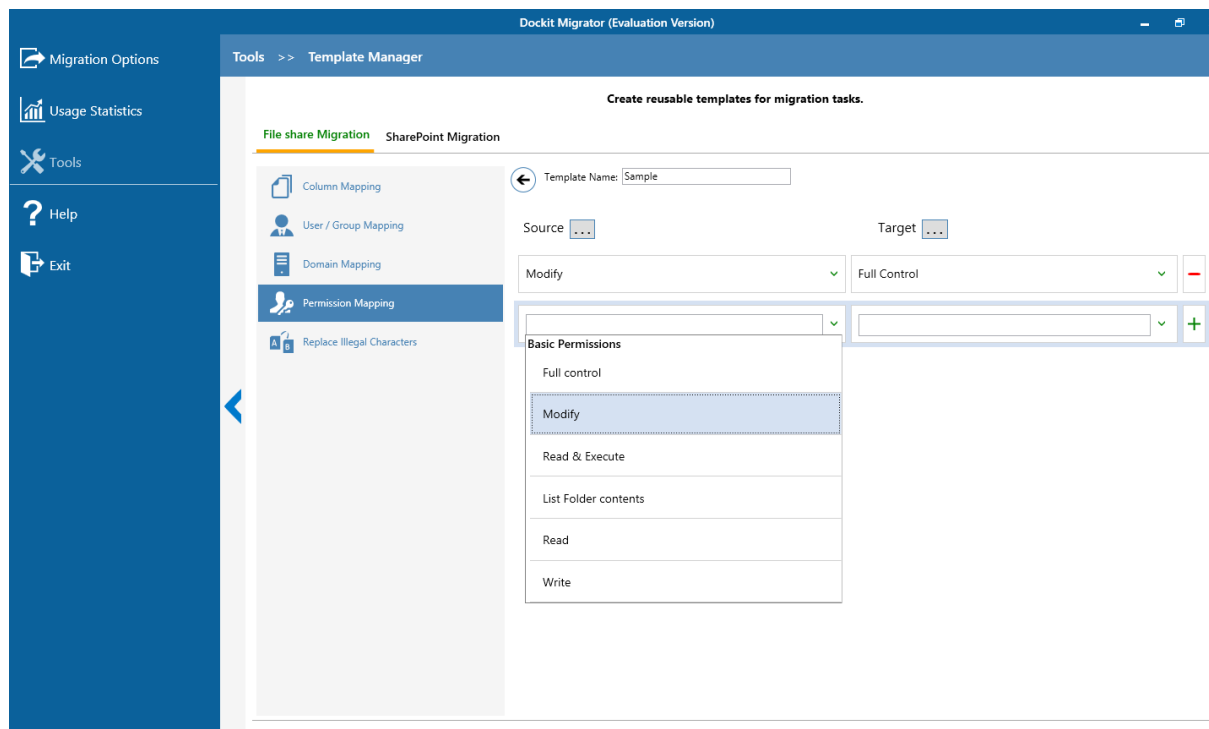
Permission Mapping Template consists of following panes to configure permissions mapping:

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.



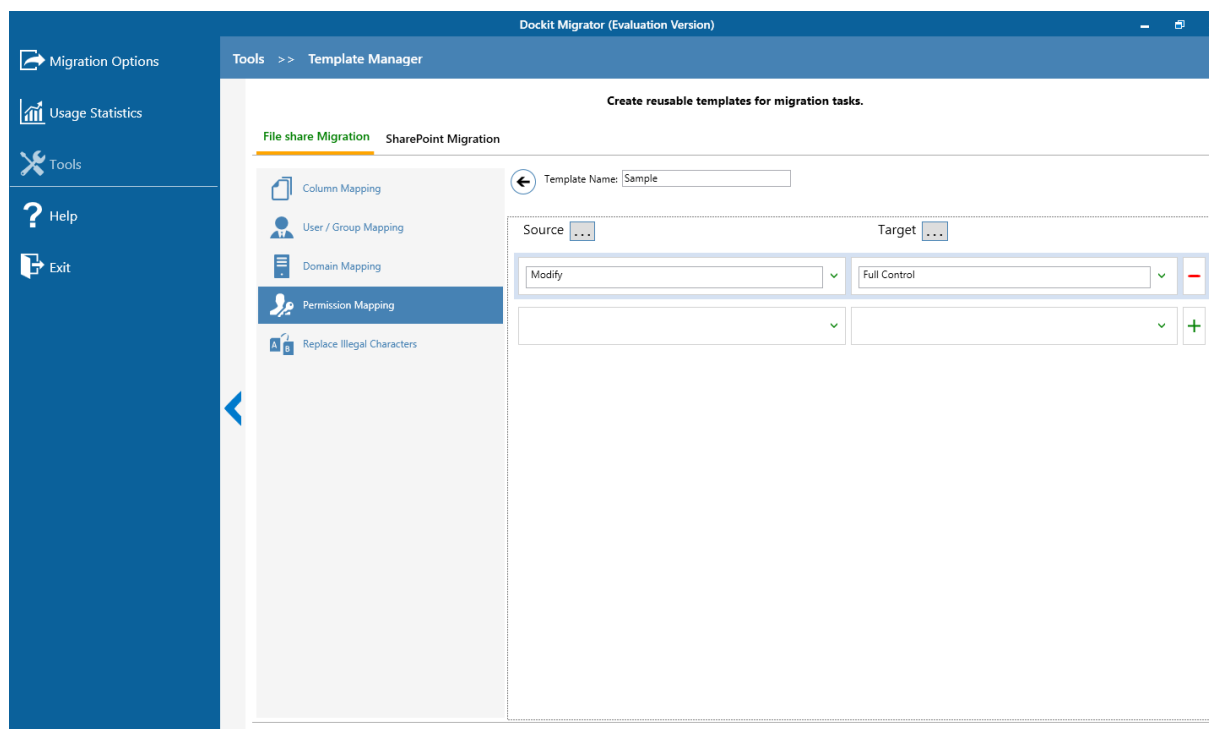
Once you select the option and provide the appropriate inputs, the list of source permissions displayed on the source permissions list pane as shown below:



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.

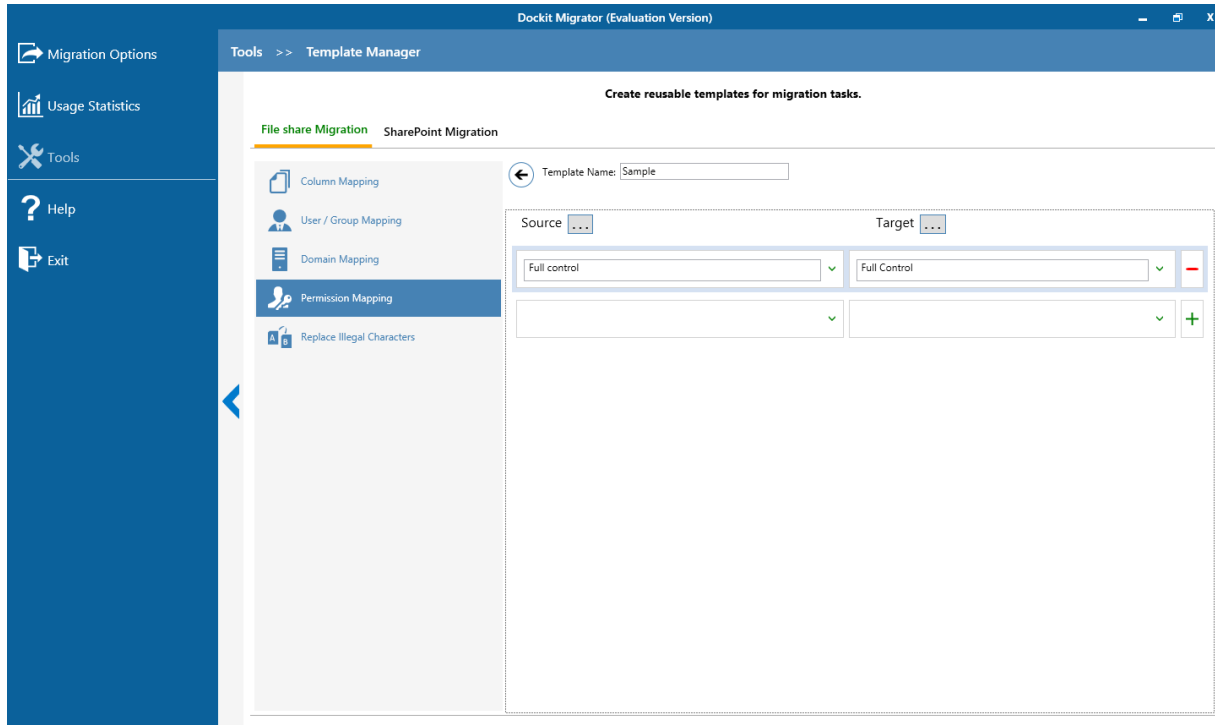


Once you select the option and provide the appropriate inputs, the list of target permissions displayed on the target permissions list pane as shown below:



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).

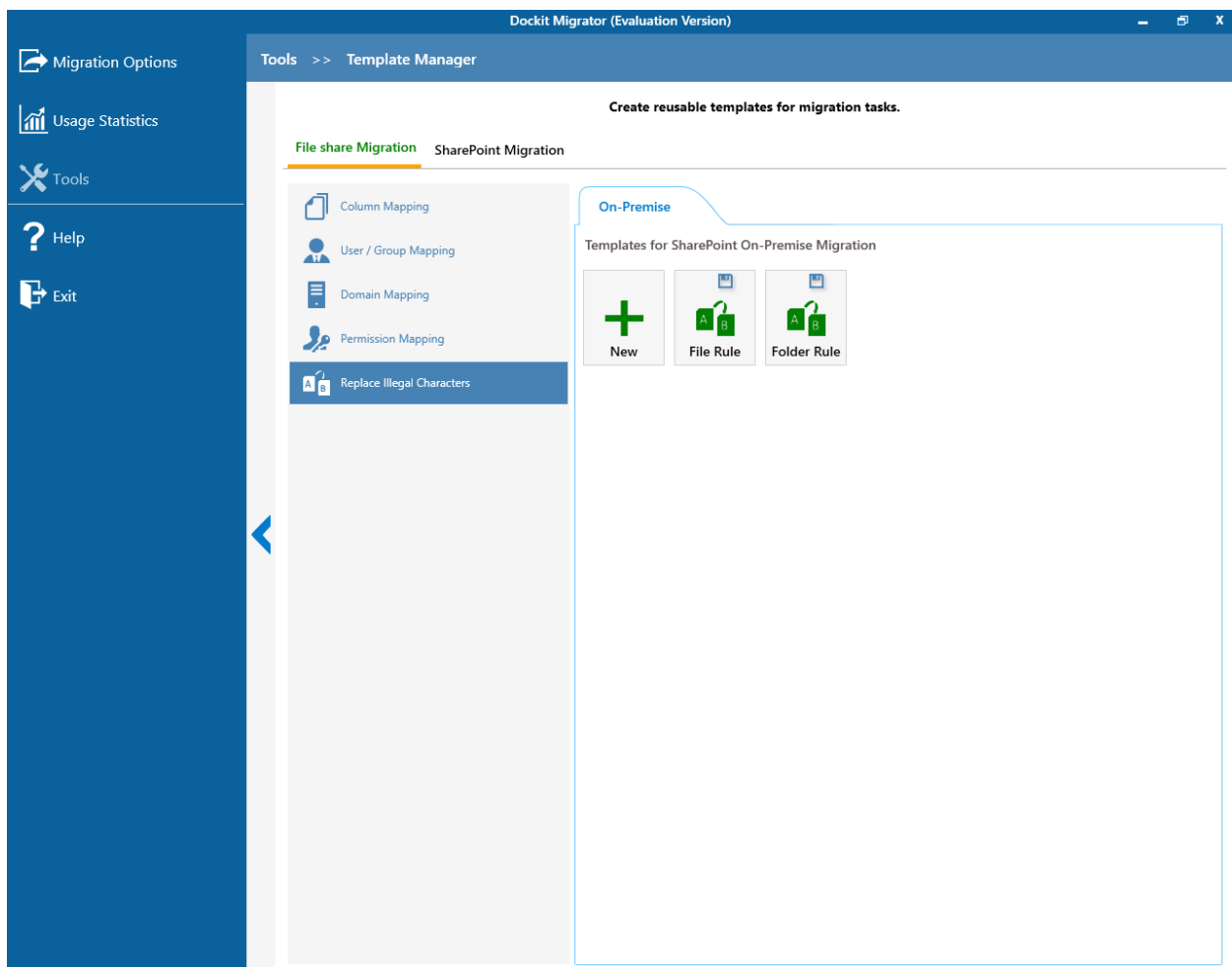
Replace Illegal Characters

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

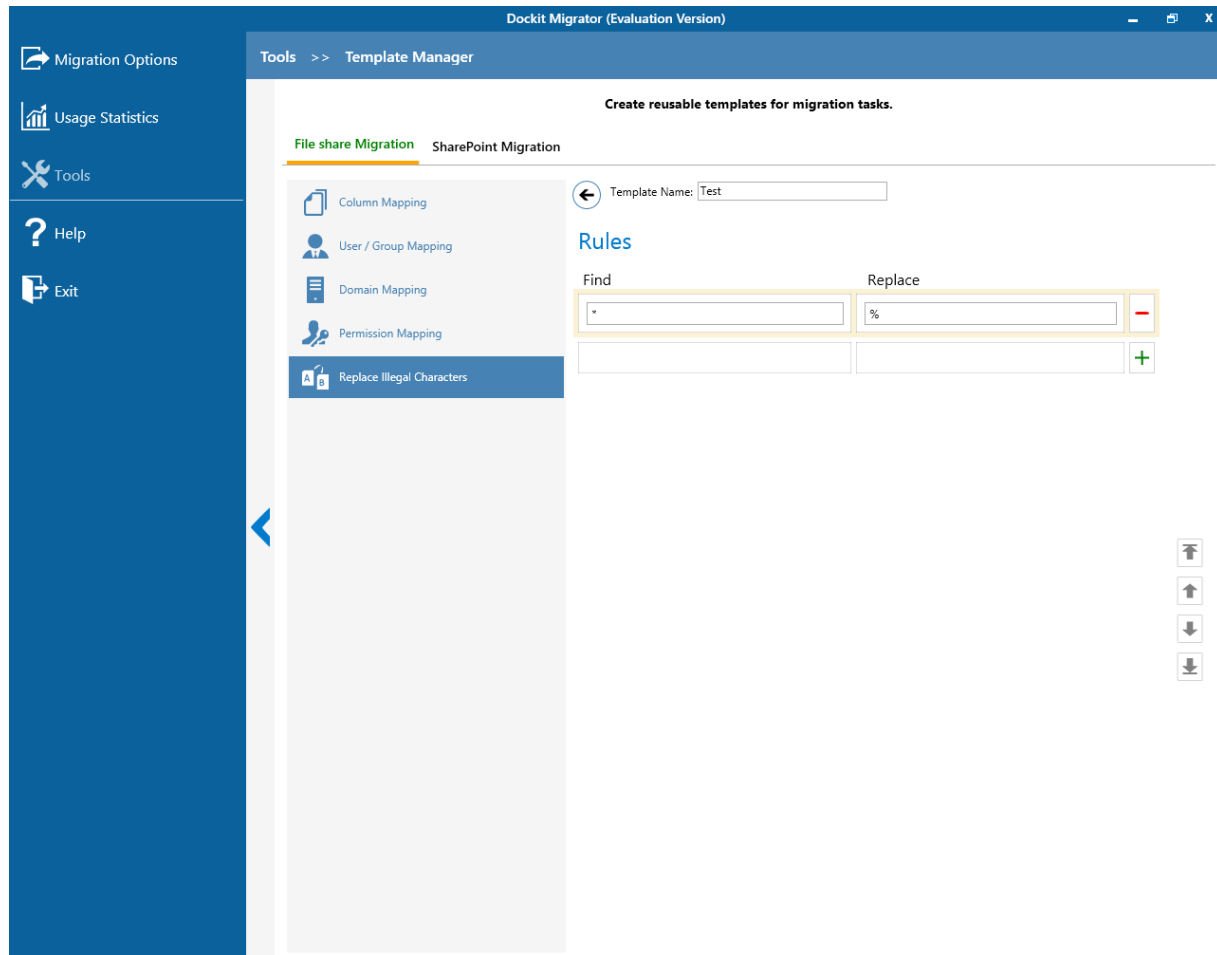
Dockit uses 'Regular Expressions' technique which enables you to create generic renaming rules in order to specify the pattern for file name conventions in Folder & File Renaming rules page. The 'regular expressions' technique is widely used in software where pattern matching is crucial.

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

1. Select New from the Templates Tools pane. The new template will appear and enter a 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 Docketit:

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

Sample Renaming Rules:

File Name	Find	Replace	Result	Remarks
SampleV1	*V1	{empty}	Sample	Truncate V1, if the file ends with V1
SampleV1	*V1	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	

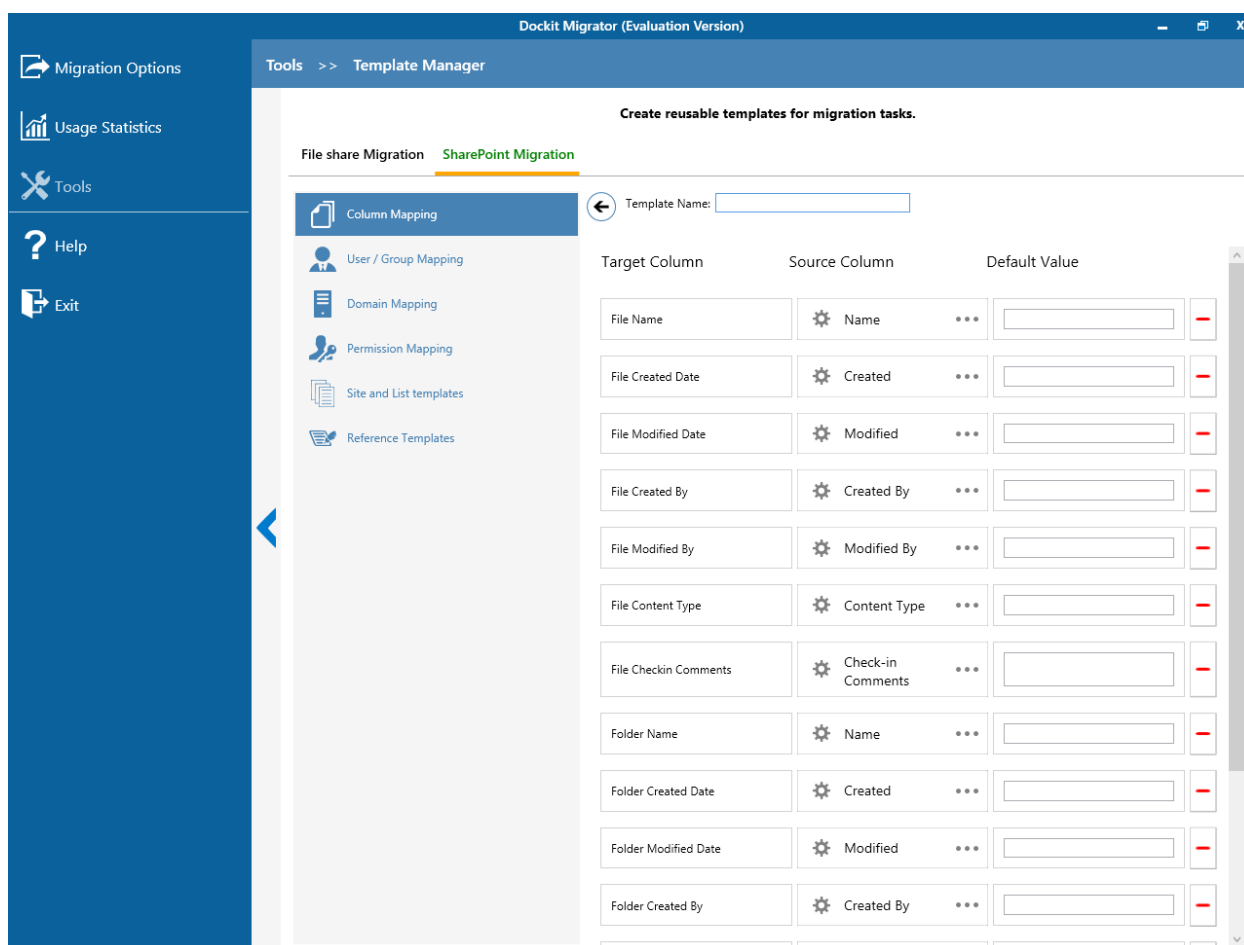
Hello<World	<	<i>{empty}</i>	HelloWorld	
Hello>World	>	<i>{empty}</i>	HelloWorld	
[Document	[	Word	WordDocument	
Word]	]	Document	WordDocument	
(File	(	Sample	SampleFile	
Sample)	)	Document	SampleDocument	

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

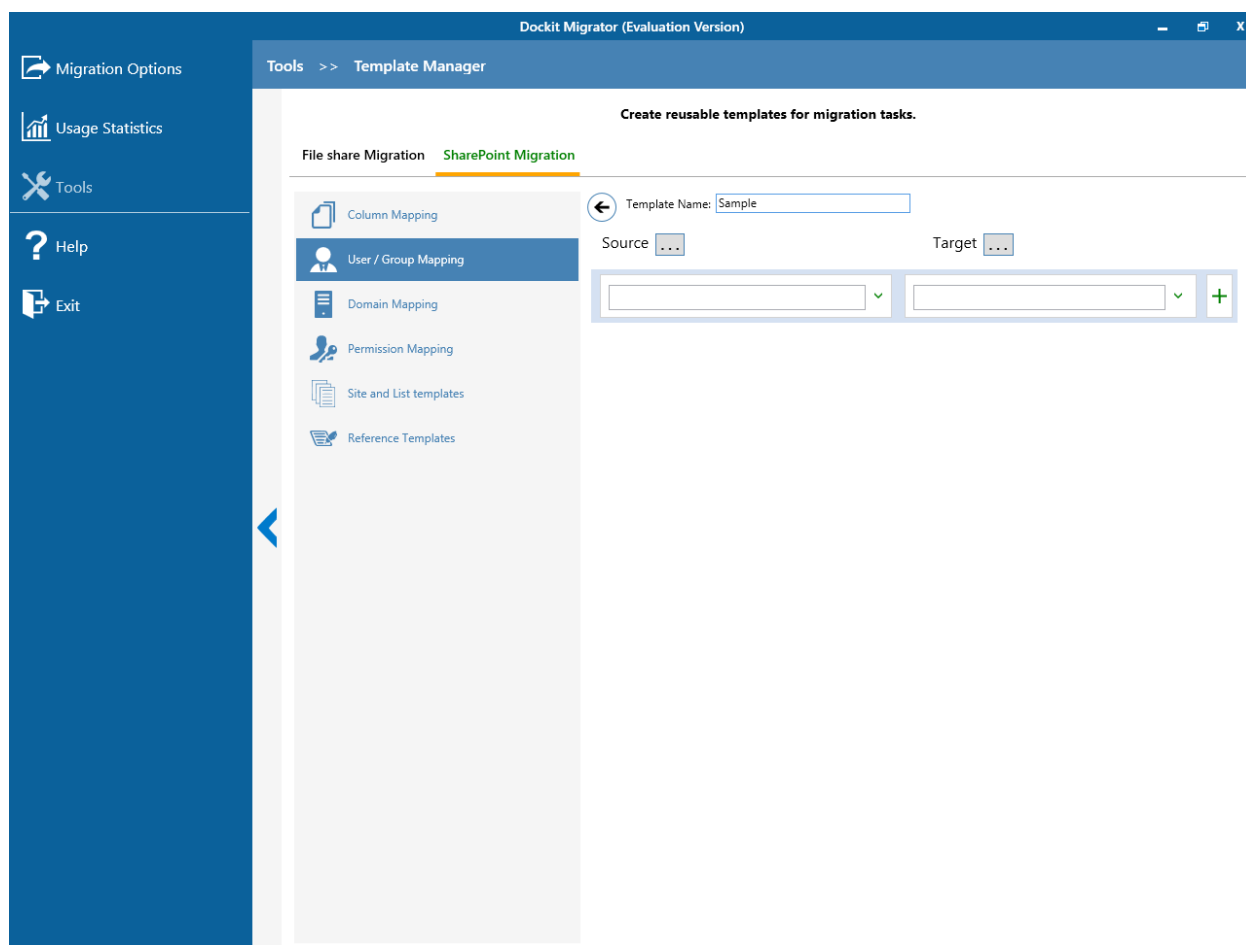
Template Name:

File Created By	Created By ...		
File Modified By	Modified By ...		
File Content Type	Content Type ...		
File Checkin Comments	Check-in Comments ...		
Folder Name	Name ...		
Folder Created Date	Created ...		
Folder Modified Date	Modified ...		
Folder Created By	Created By ...		
Folder Modified By	Modified By ...		
Folder Content Type	Content Type ...		
DB Last Update	Last Updated ...		
	...		

SharePoint Migration – User / Group Mapping Template

Dockit uses user / group mapping template to replace the unavailable users / groups with valid / new SharePoint users / groups when assigning user / groups or permissions for the folder / document during content migration from one SharePoint environment to another. You can use this mapping template for all Person or Group fields in SharePoint.

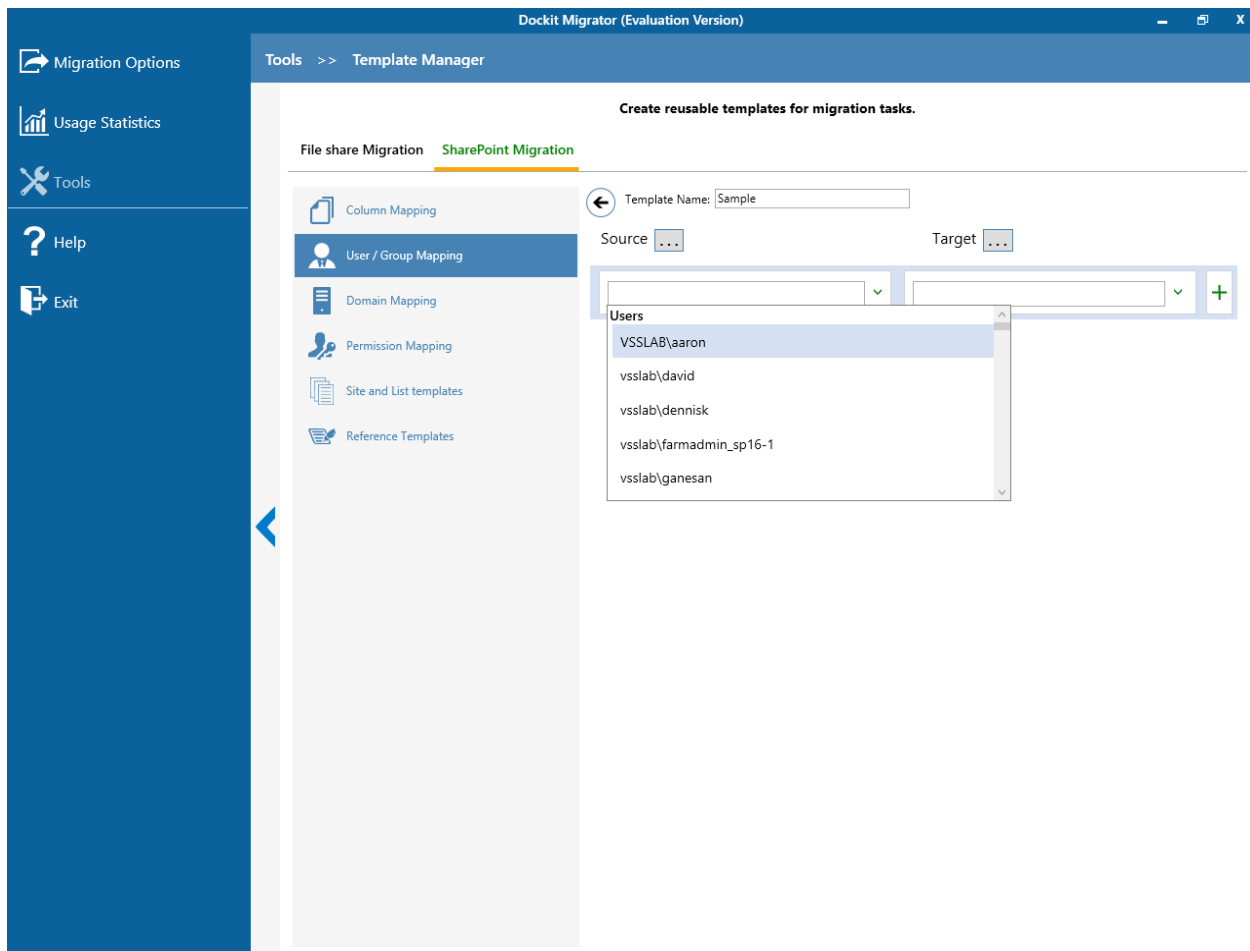
To create a new user / group mapping template, select New from the Templates Tools pane. The new template will appear and enter unique template name for the template and continue to map the user as shown below:



Dockit 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:



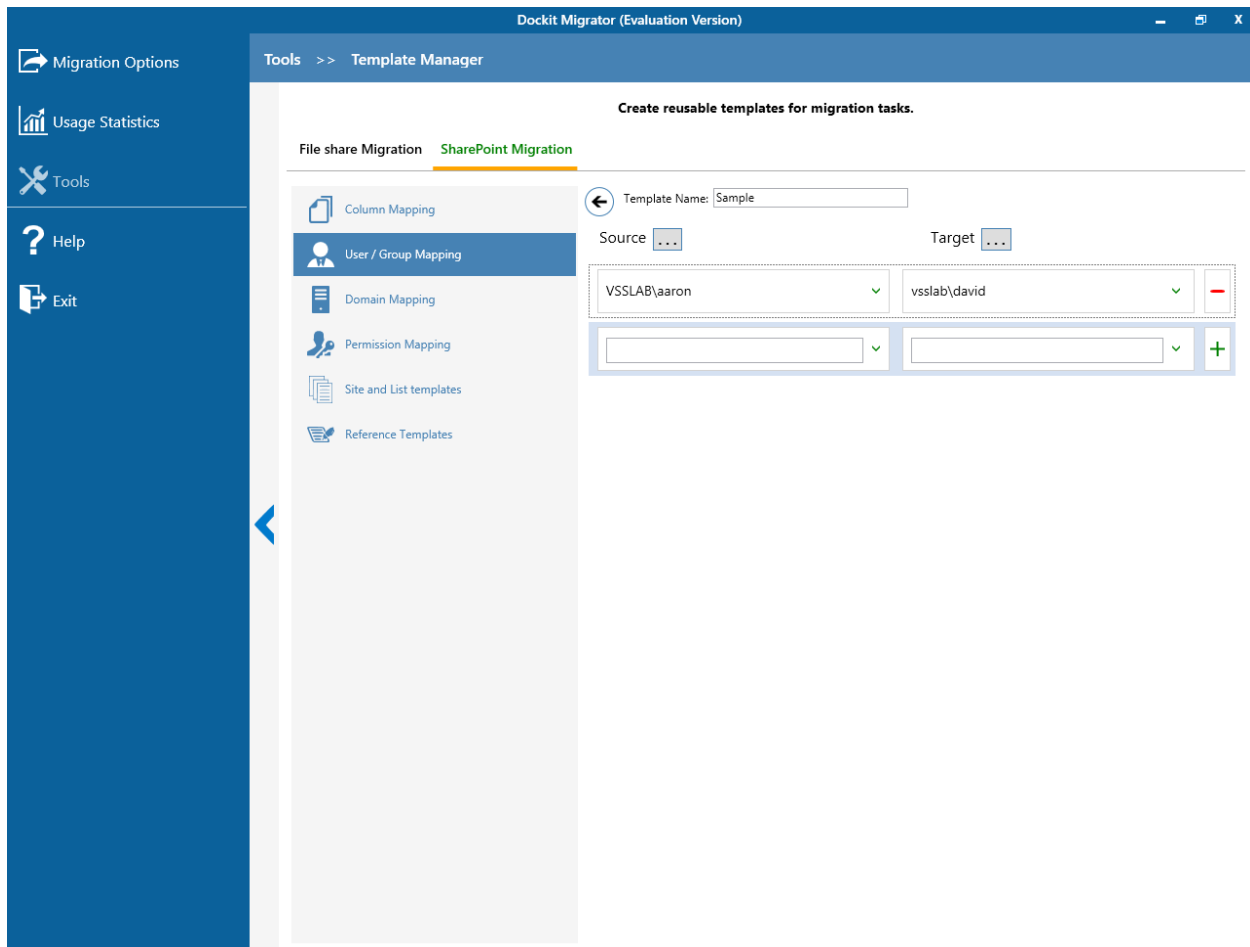
Once you select the option and provide the appropriate inputs for source and target user, the list of users / groups are displayed on the respective users / groups list pane as shown below:



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:

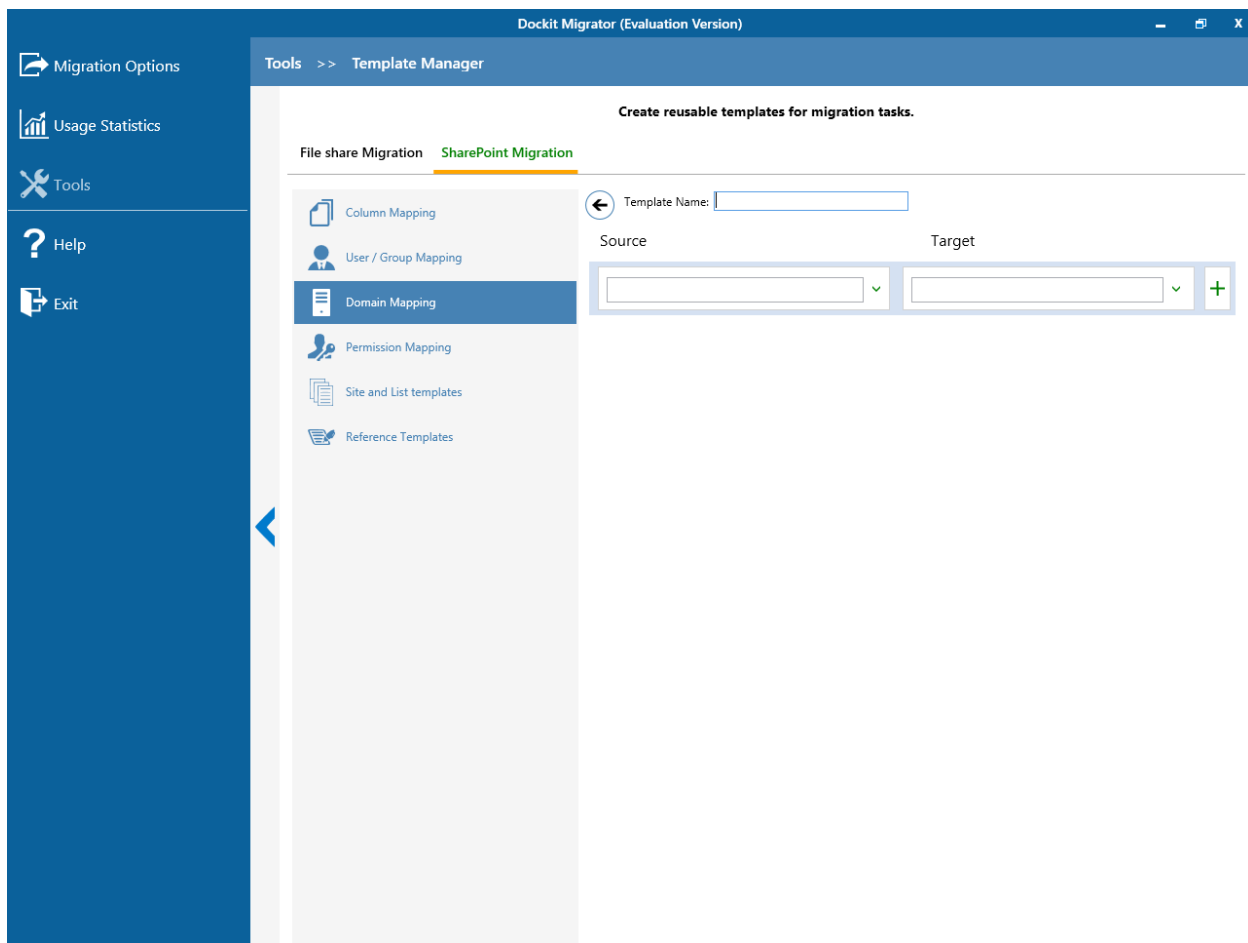


SharePoint Migration – Domain Mapping Template

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,

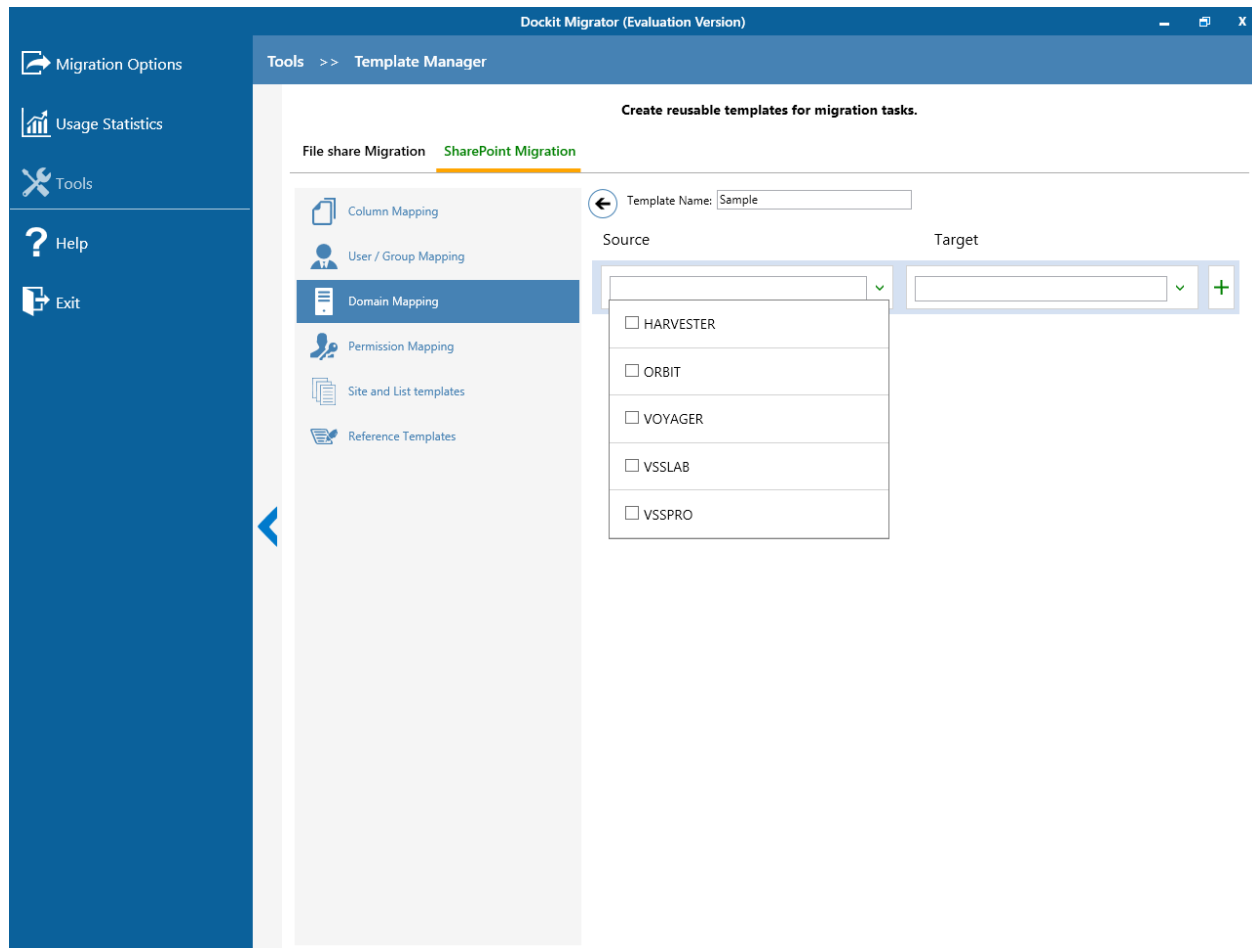
Select New from the Templates Tools pane. The new template will appear enter an unique template name for the template as shown below:



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.

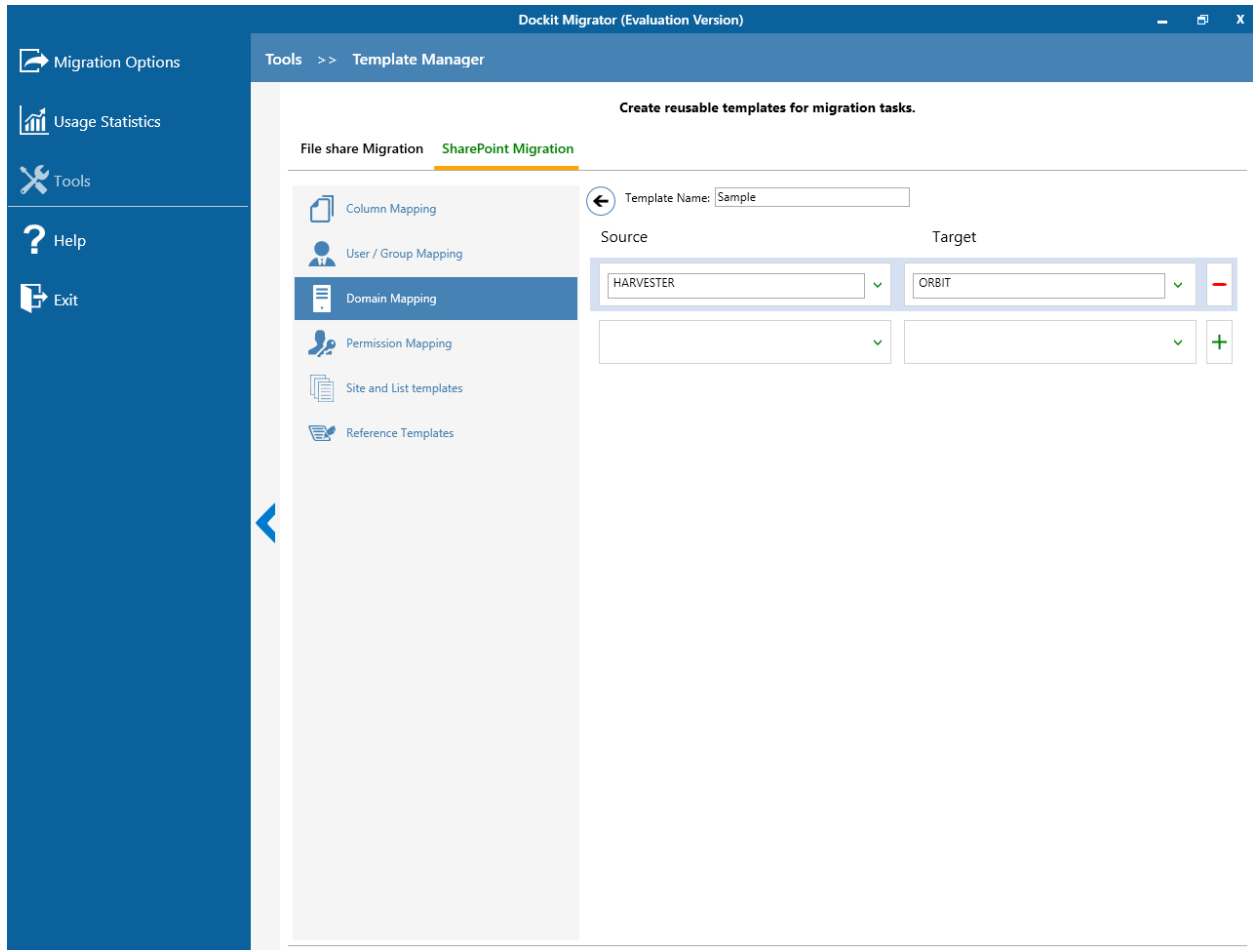


Then you have to select the appropriate source domain (s) from the source domain list and select the target domain to map from the list of available target domains. Then finally click  button to map the domains.

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.

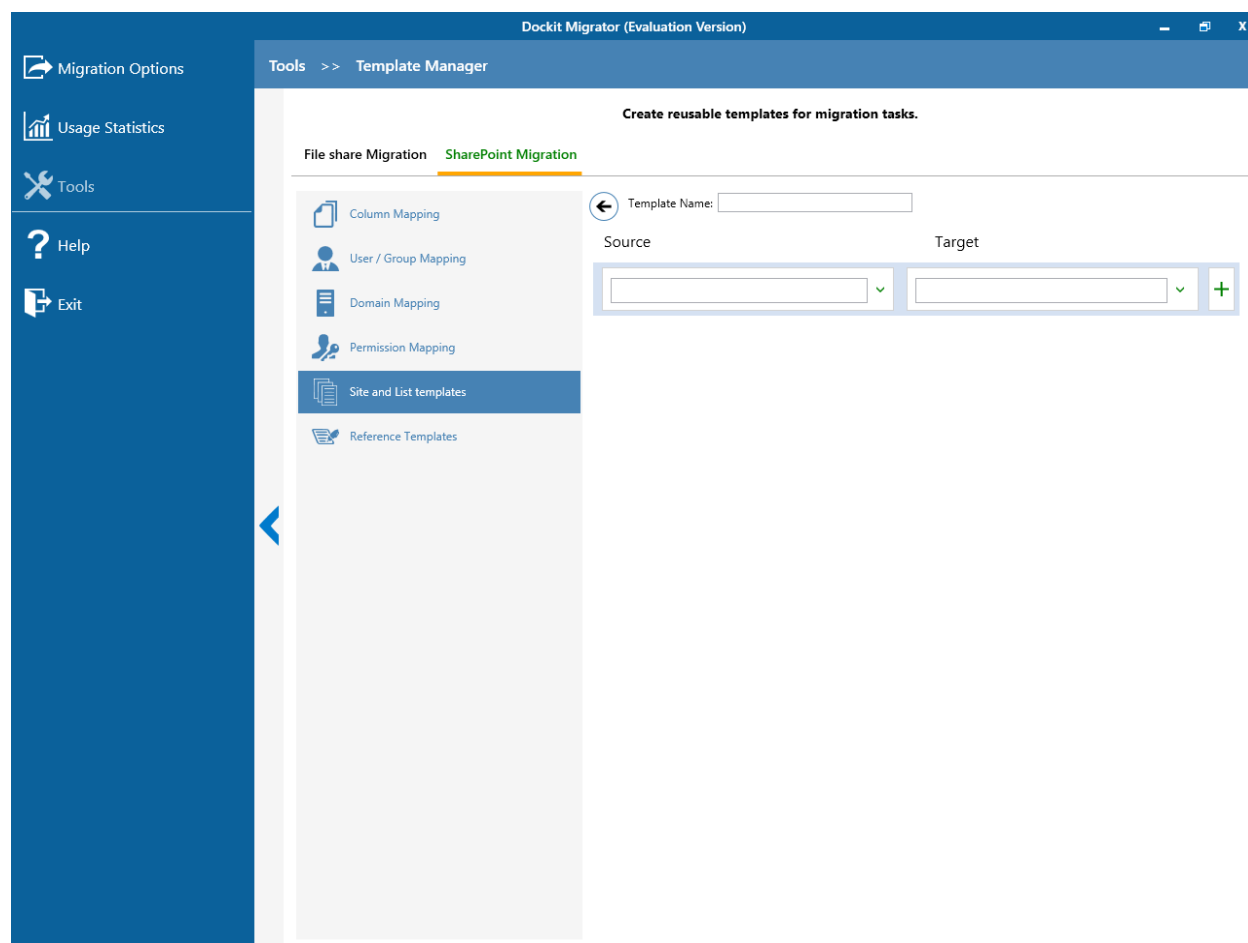
Once you click **+** button, selected domains are mapped and the mapped data is displayed in the domain mapping pane as shown below:



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.

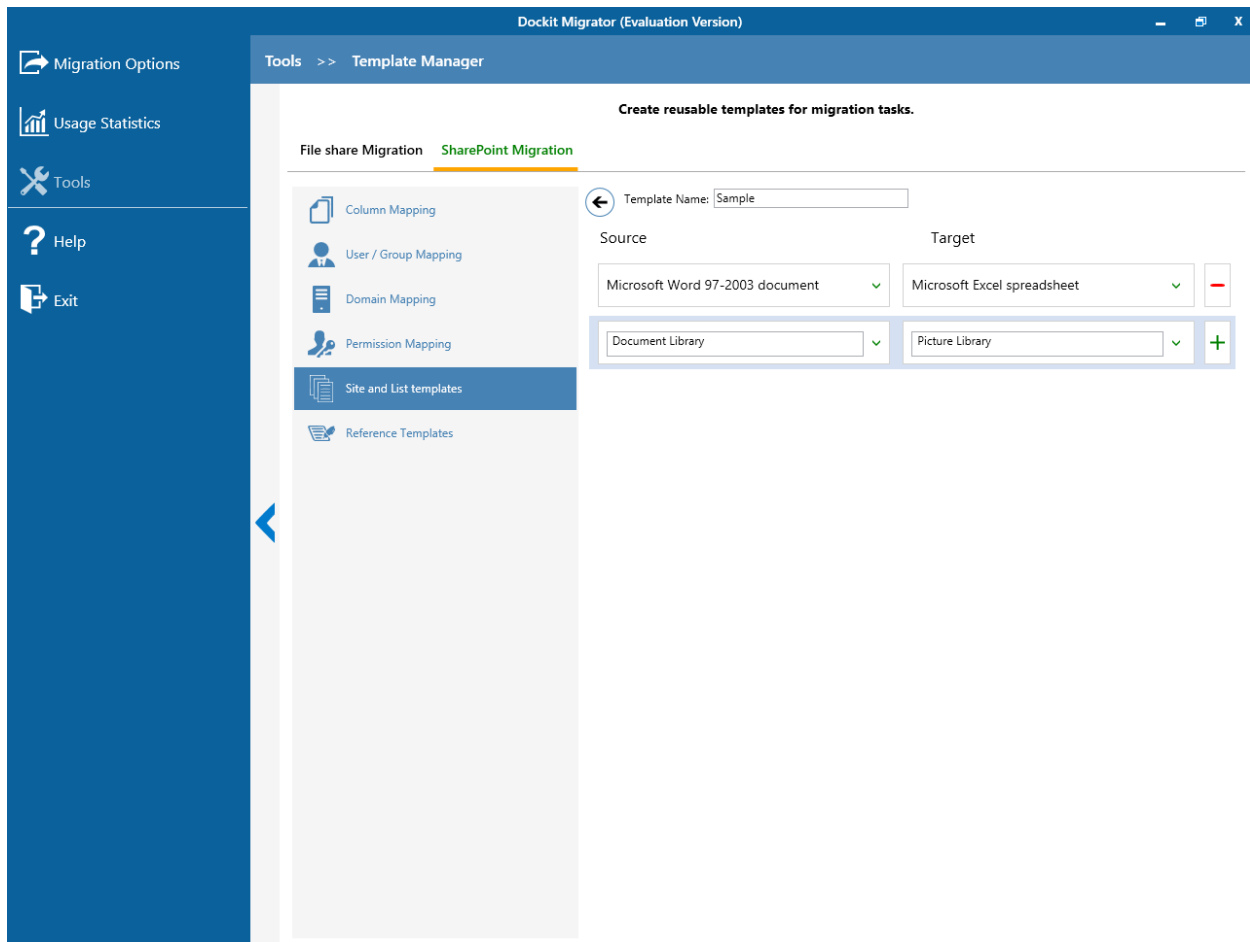
To create a new site and list template mapping, select New from the Templates Tools pane. The new template will appear and enter a unique name for the template as shown below:



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

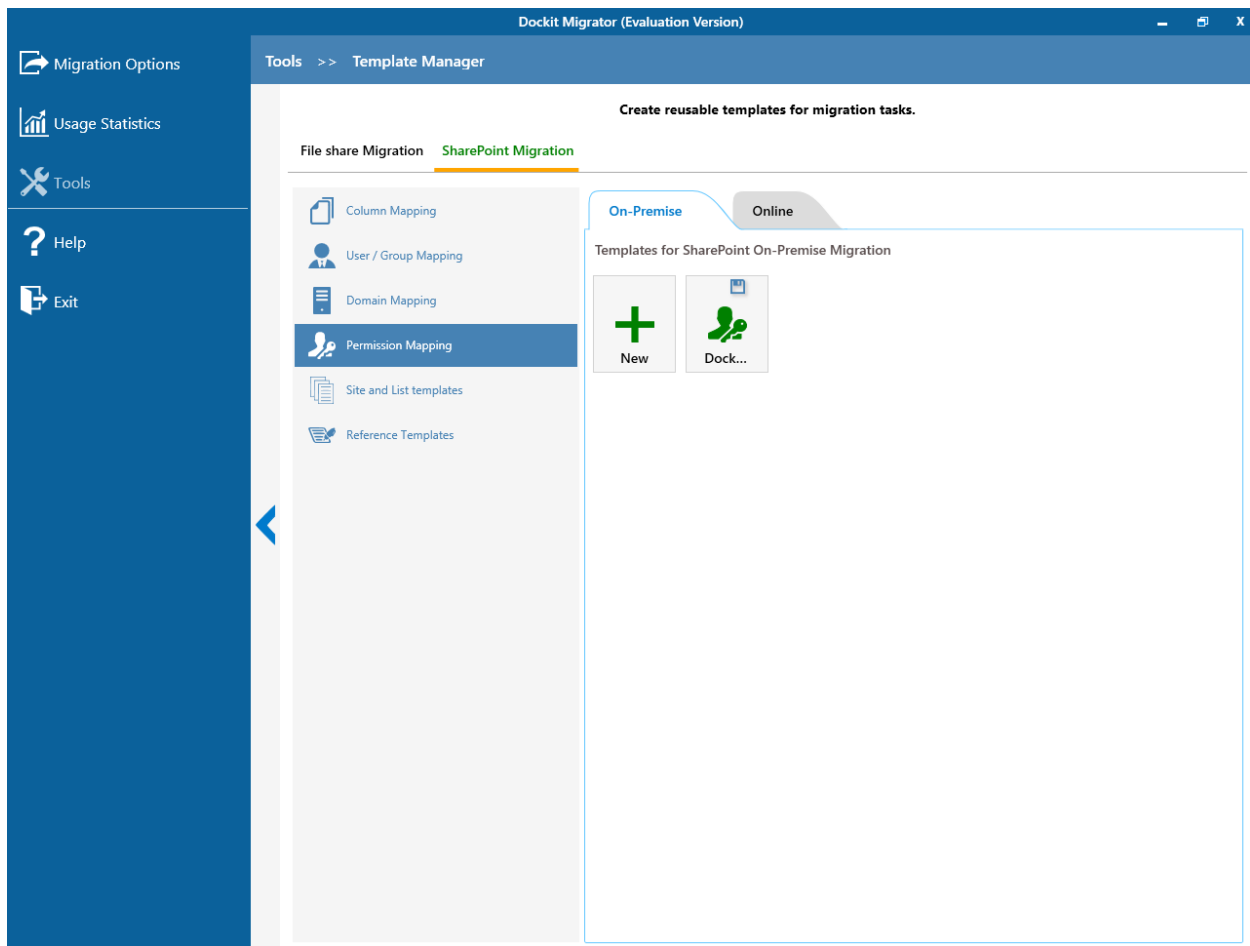
and the mapped template pair is displayed in the Site and List Template mapping pane as shown below:



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.

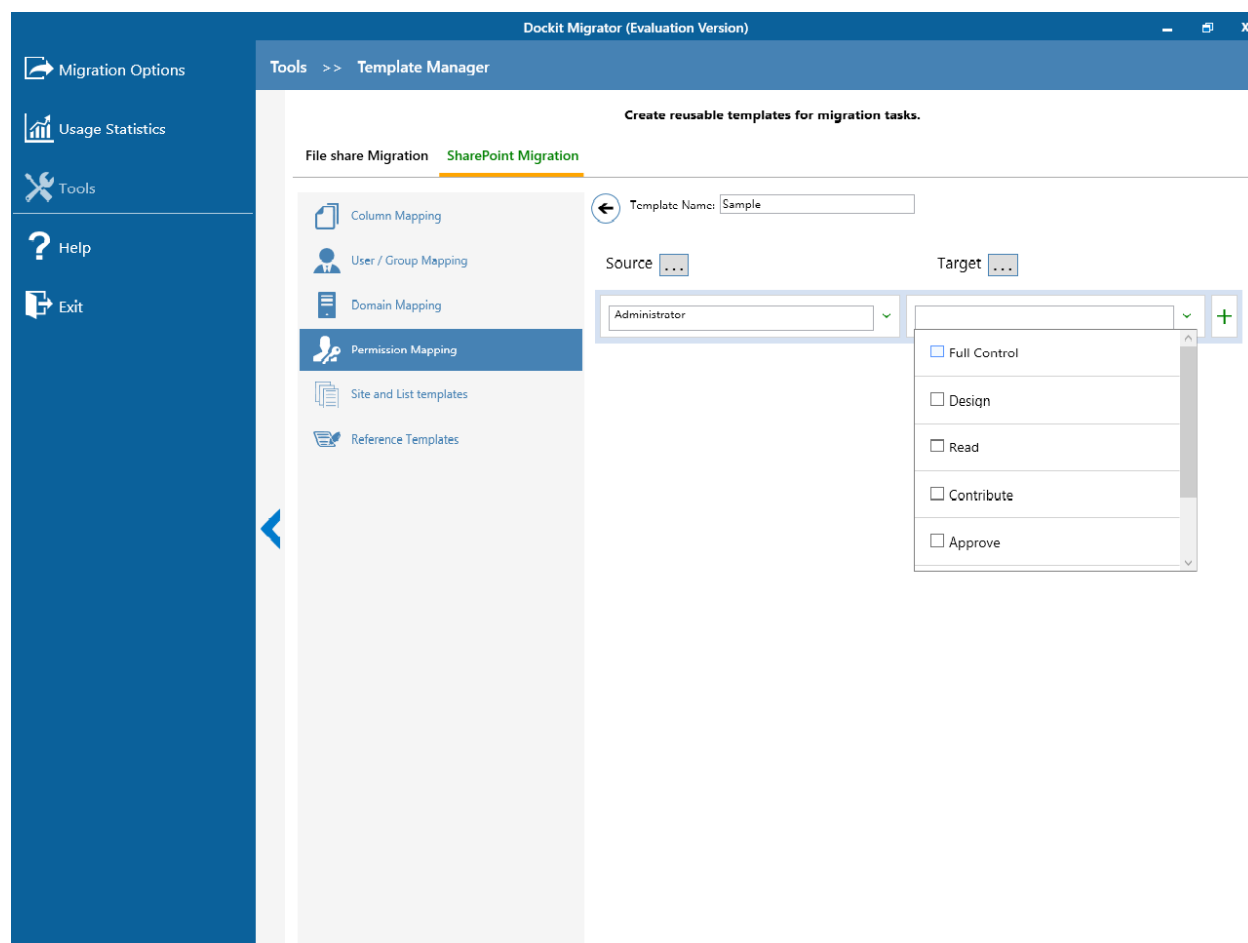
To create a new permission mapping template, Select New from the Templates Tools pane. The new template will appear and enter a unique name for the template as shown below:



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:

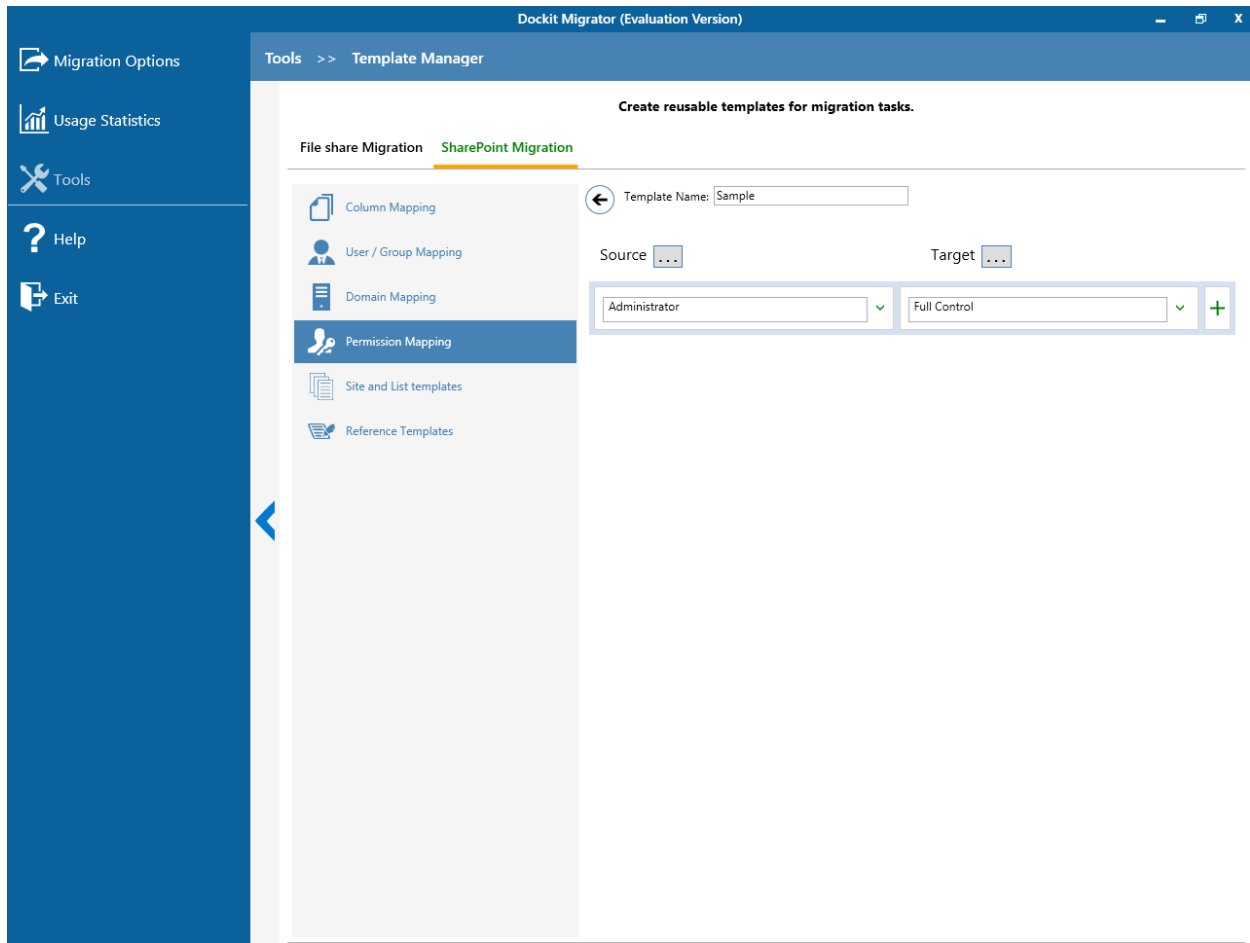


Then, you have to select the appropriate source permissions levels from the source permissions list and select equivalent target permission level(s) to replace from the list of available target permission level(s). Then finally click **+** button to map permissions.

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.

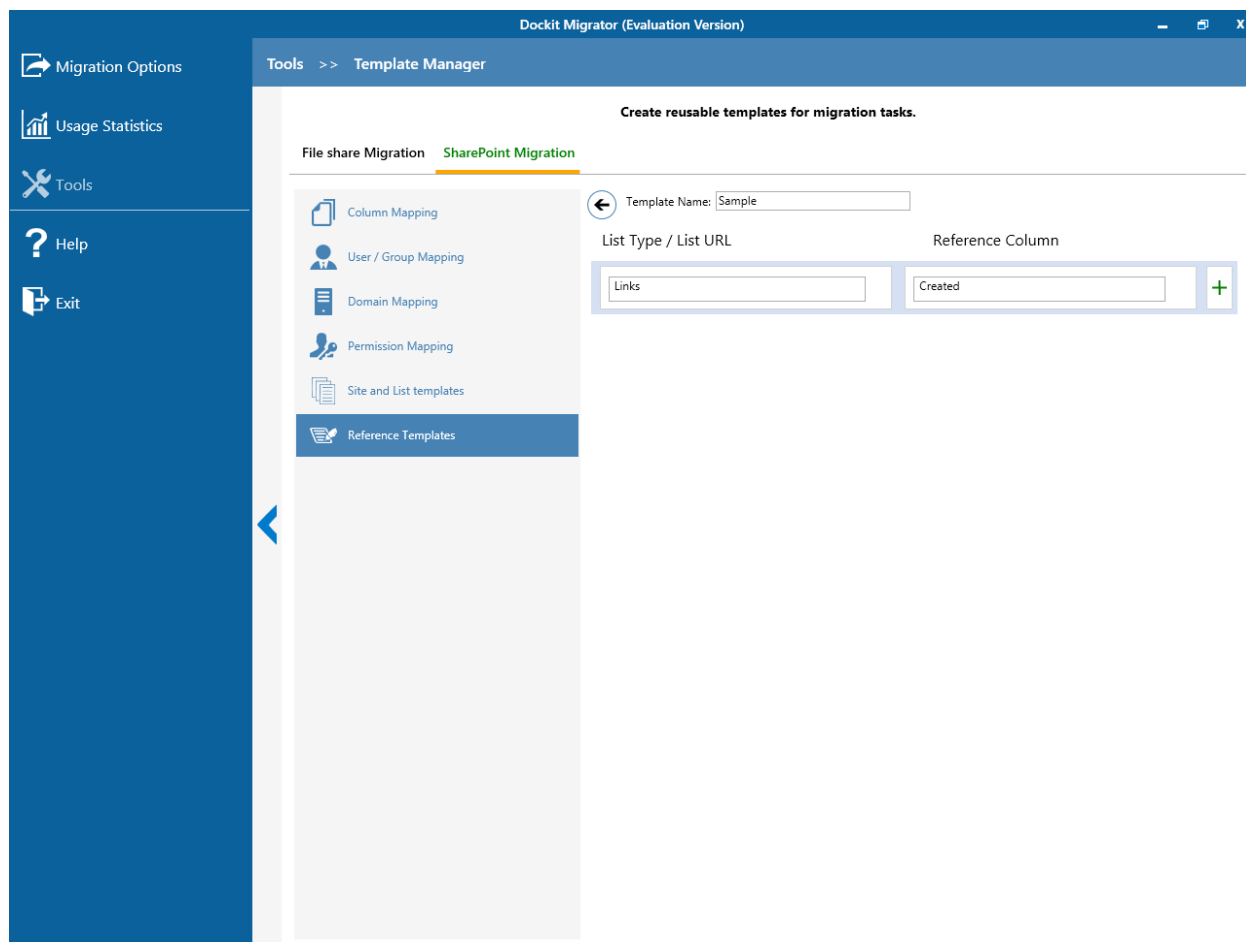
Once you click **+** button, selected permissions are mapped and the mapped data is displayed in the permissions mapping pane as shown below:



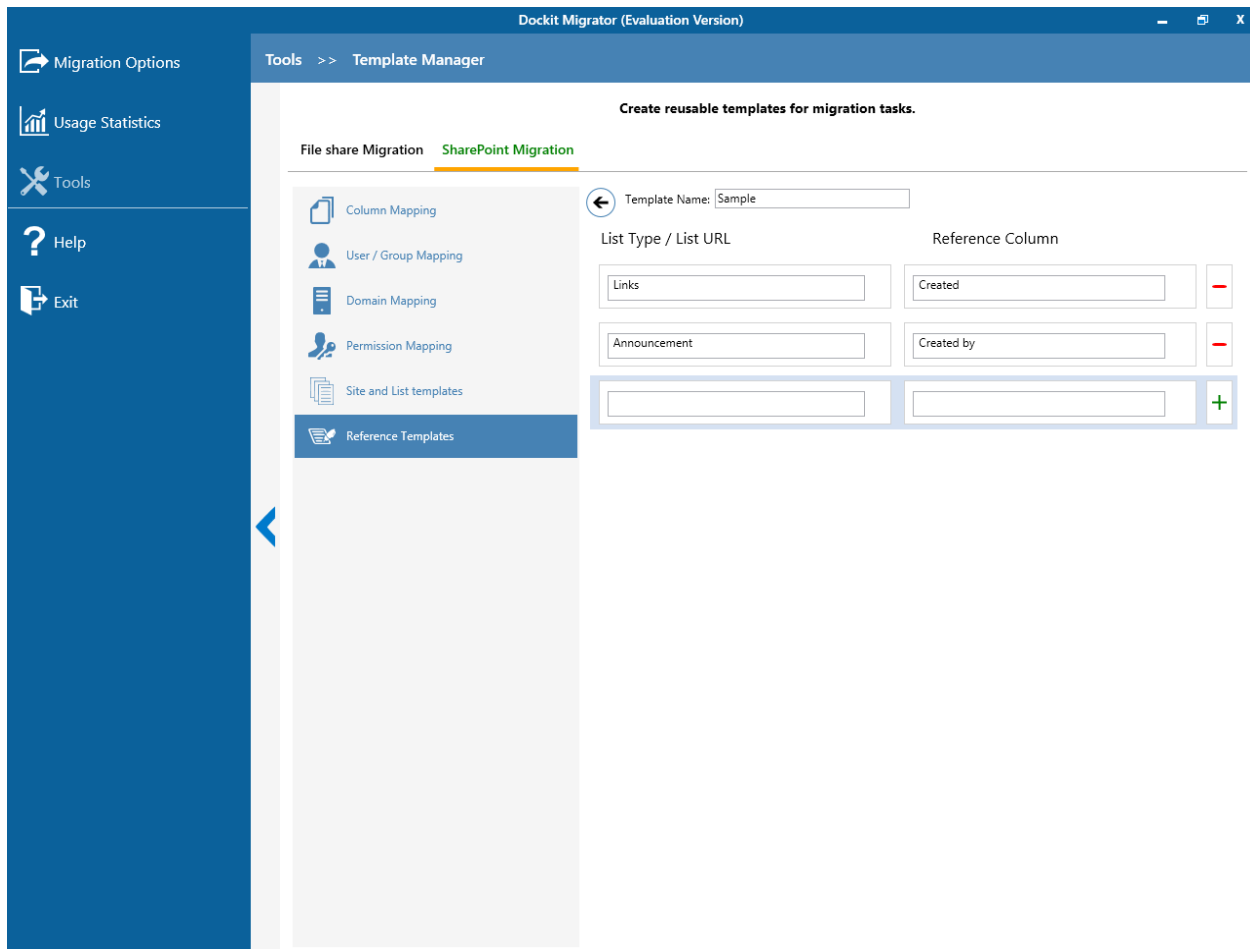
SharePoint Migration – Reference Mapping Template

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 a 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.



Docket Migrator (Evaluation Version)

Tools >> 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

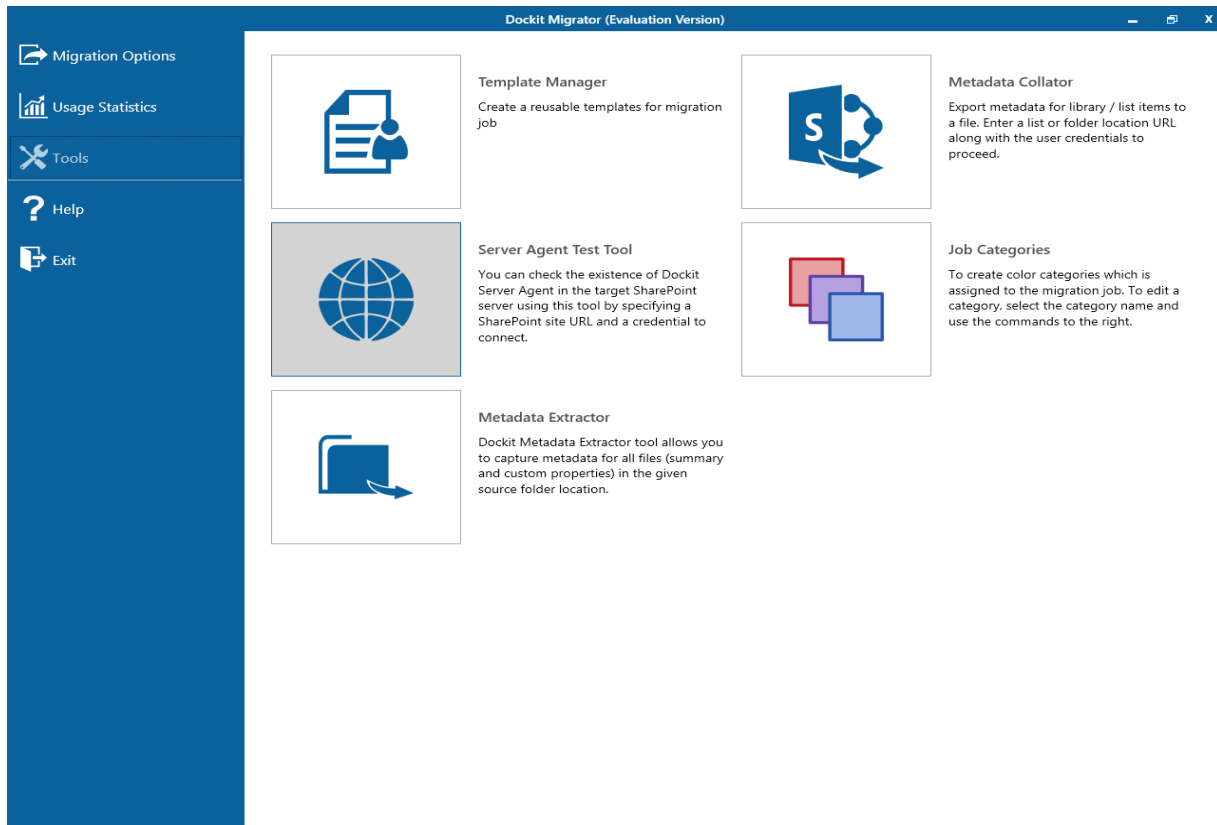
Template Name: Sample

List Type / List URL	Reference Column	
Links	Created	-
Announcement	Created by	-
		+

Server Agent Test Tool

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

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



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

Dockit Migrator (Evaluation Version)

Tools >> Check Server Agent

Dockit Server Agent is an optional server-side component that must be installed in the SharePoint Server. You can check the existence of Dockit Server Agent in the target SharePoint Server using this tool by specifying a Sharepoint site URL and a credential to connect.

Site URL :

Authentication :

User Name :

Password :

Verify

3. Specify a SharePoint URL in the URL textbox to verify **Dockit Server Agent** existence in the target SharePoint Server.
4. Connect to the SharePoint URL using the specified user credentials. Enter the user name in any ONE of the following formats: **<DOMAIN NAME>\<USER NAME>**, **UserName@DomainName**, **UserName** and its corresponding password. For example, johndoe@contoso.com, contoso\johndoe, johndoe.
5. Click **Verify** button to test the existence of **Dockit Server Agent** in the target SharePoint Server. When clicking this button, Dockit connects to the specified SharePoint server and checks the availability of **Dockit Server Agent**.

Dockit will display the Server Agent status as shown below:

Dockit Migrator (Evaluation Version)

Tools >> Check Server Agent

Dockit Server Agent is an optional server-side component that must be installed in the SharePoint Server. You can check the existence of Dockit Server Agent in the target SharePoint Server using this tool by specifying a Sharepoint site URL and a credential to connect.

Site URL :

Authentication :

User Name :

(johndoe@contoso.com, contoso\\johndoe, johndoe)

Password :

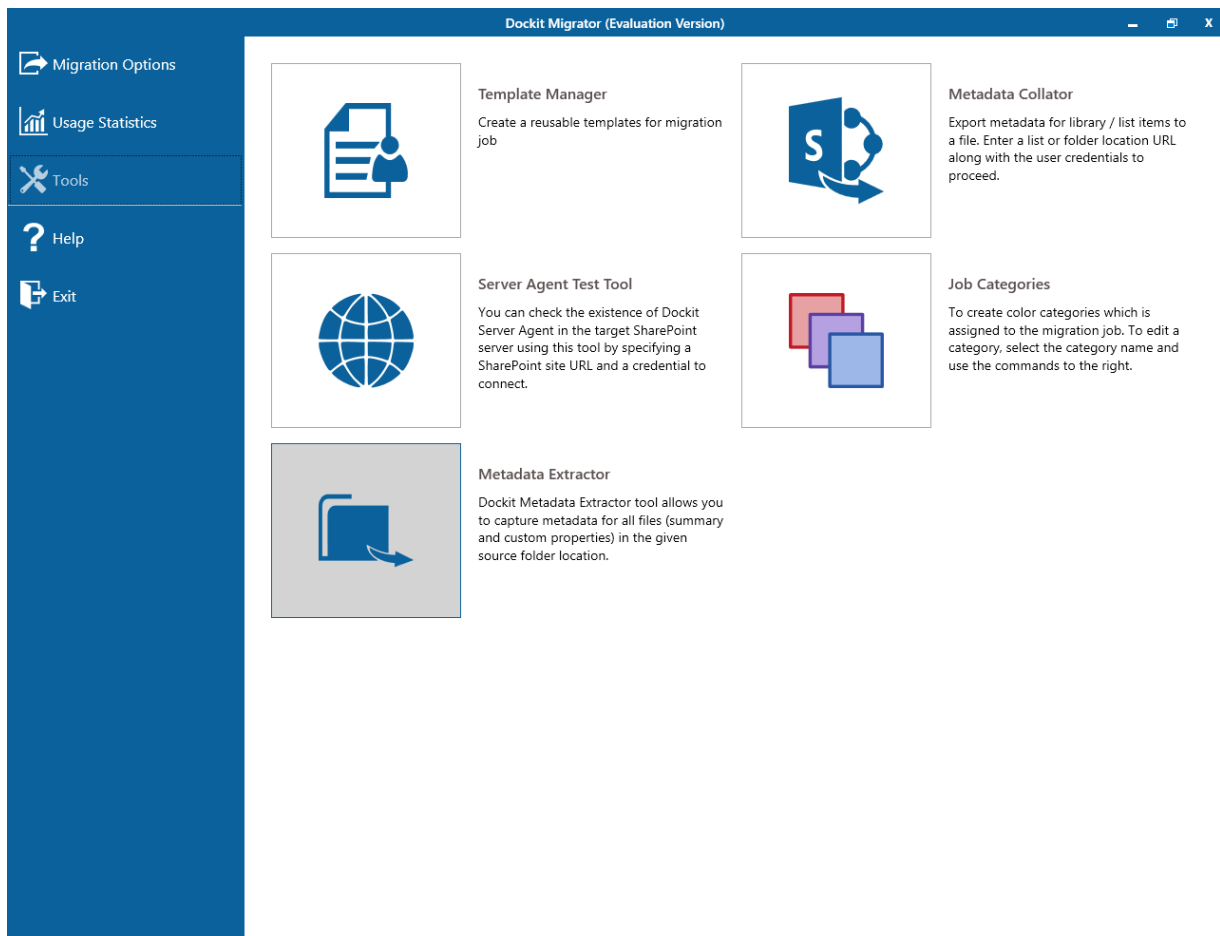
✓ Dockit Server Agent is installed in the SharePoint farm of the specified SharePoint URL. [Verify](#)

Metadata Extractor

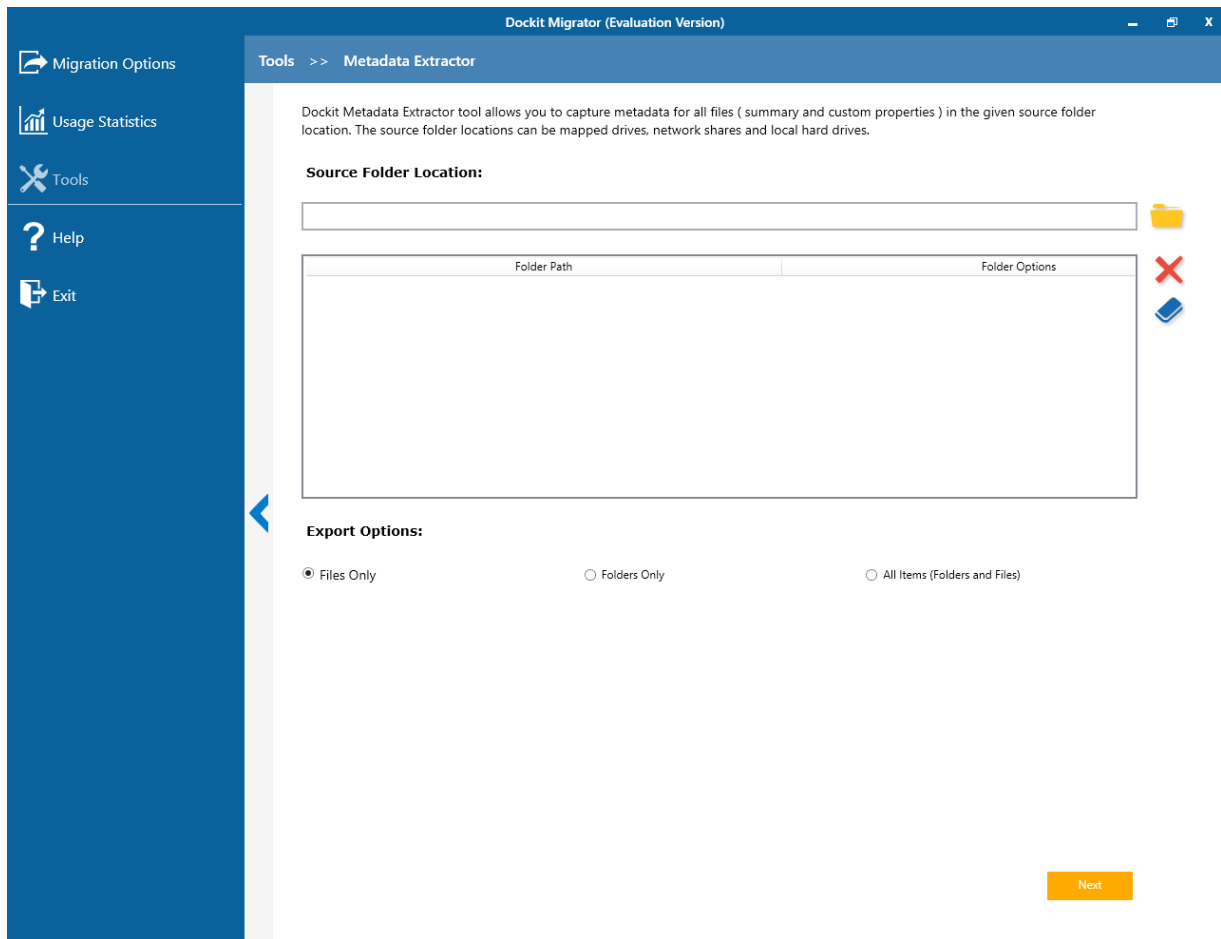
Dockit Metadata Extractor tool helps you generate an external metadata file with basic set of properties (Summary & Custom properties available in the file) in any of the Dockit supported file formats (say, CSV, TXT, Excel). Dockit Metadata Extractor tool extracts the metadata associated with the file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

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

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

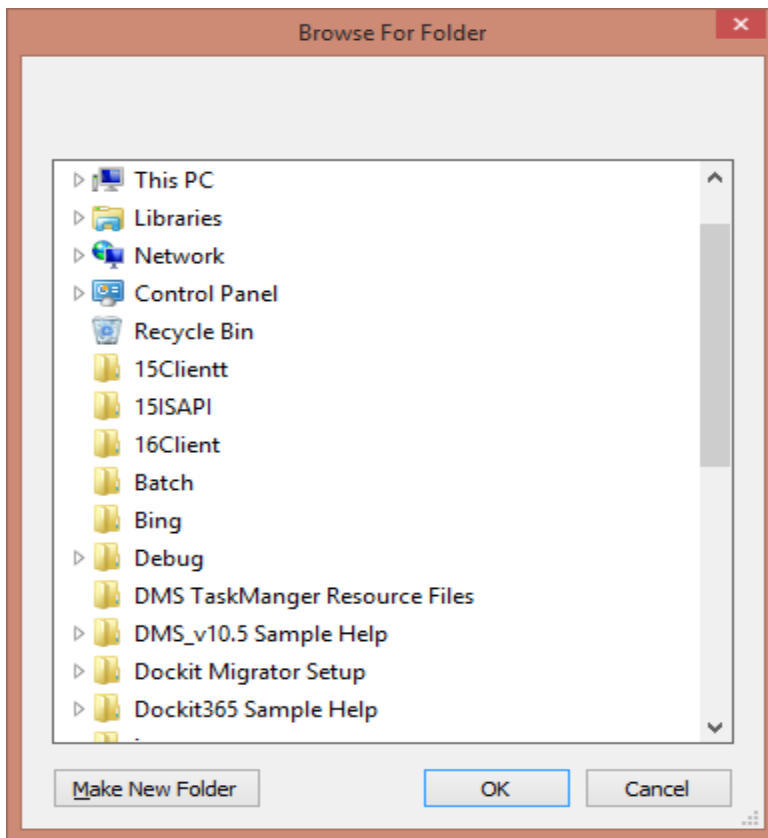


2. The **Metadata Extractor** page appears as shown below:



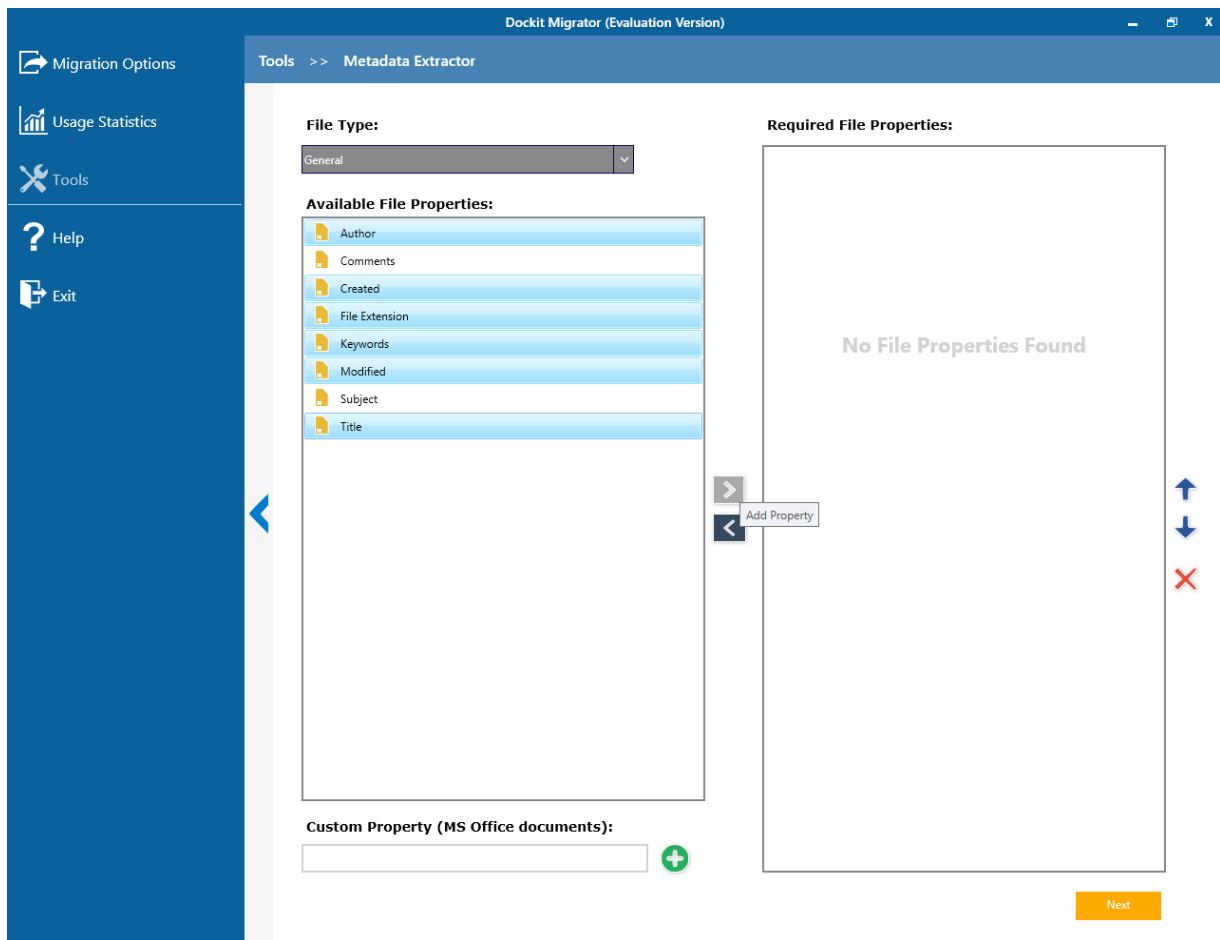
3. Specify a valid file system folder location in the **Source Folder Location** textbox. You can specify a Mapped Network location / Network Shares / local hard disk drive location in the textbox. Click **Browse** button to select the required folder using **Browse For Folder** dialog.

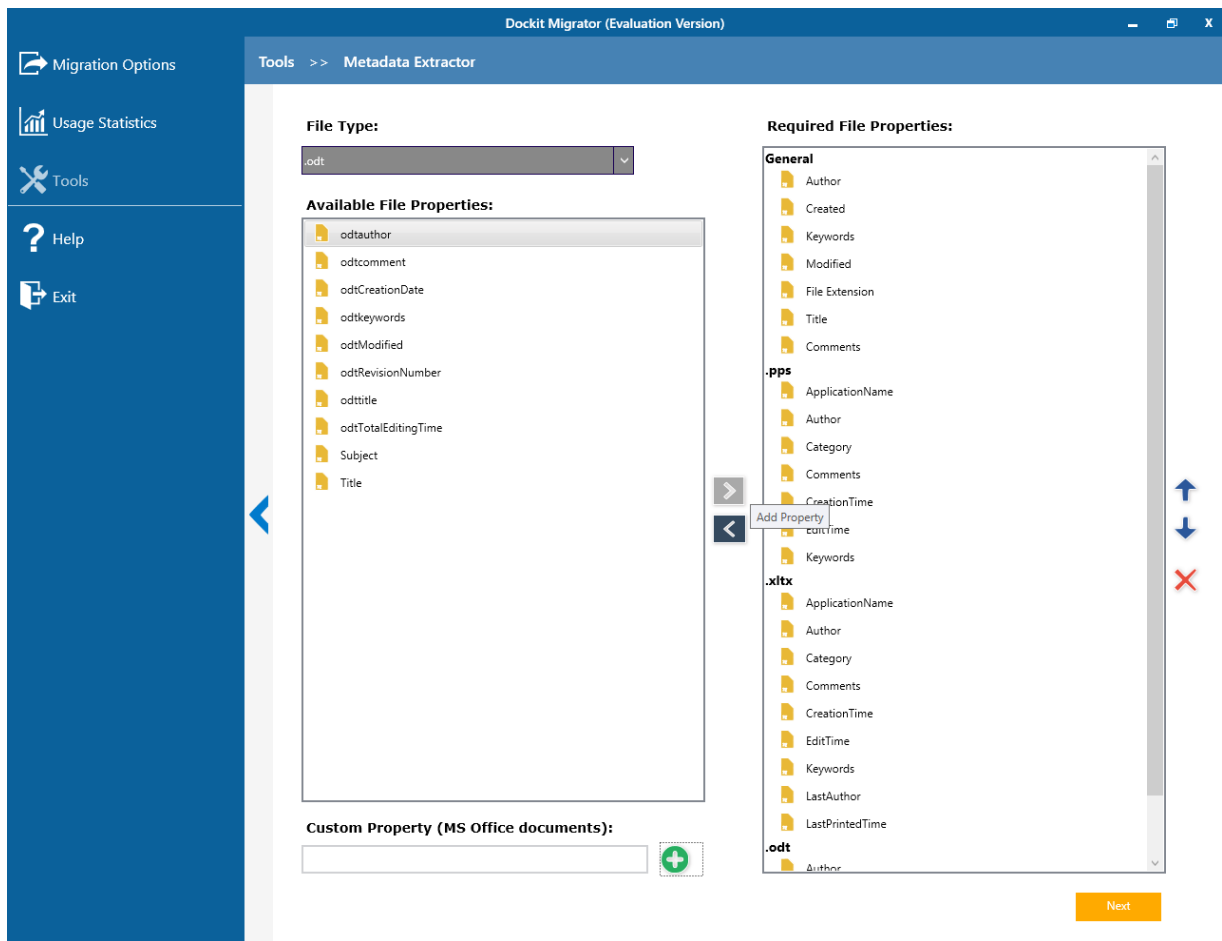
The **Browse For Folder** dialog will be shown as below:



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:





Migration Options

Usage Statistics

Tools

Help

Exit

Dockit Migrator (Evaluation Version)

Tools >> Metadata Extractor

Metadata Location:

C:\Users\Public\Documents\Dockit11x\MetadataExtractor

Metadata File Name:

SPLibrary

Metadata File Format:

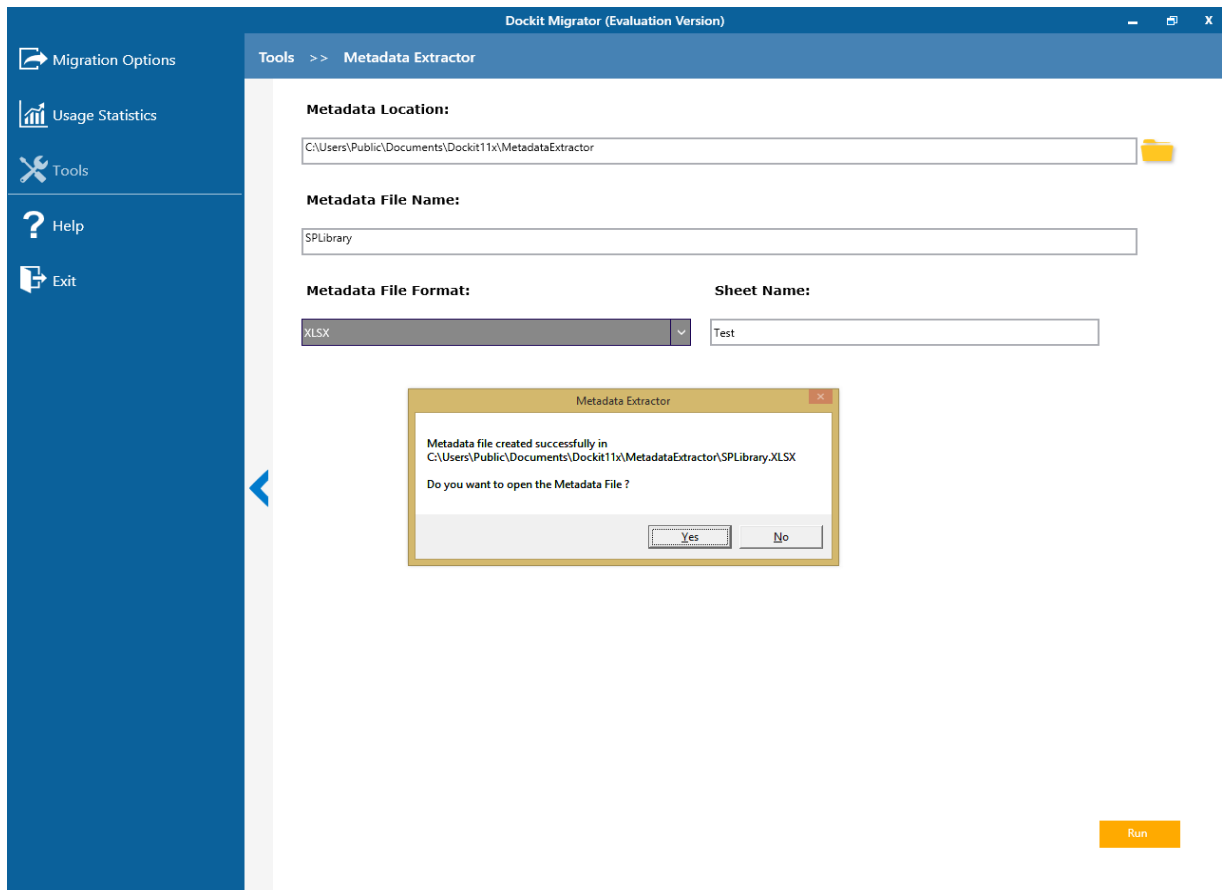
XLSX

Sheet Name:

Test

Run

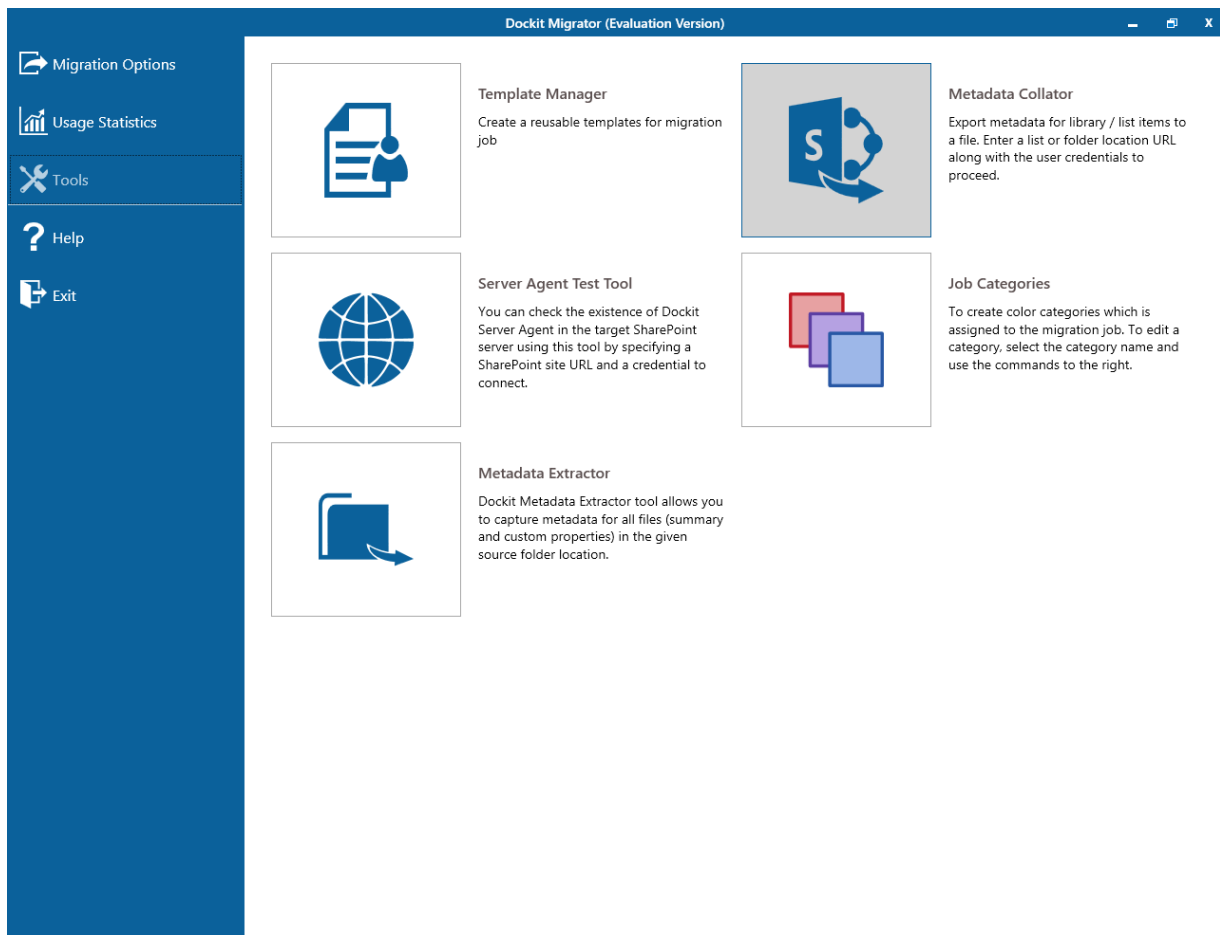
5. Click **Run** to commence extraction process. Once Metadata Extractor completes its job, it enables you to view the metadata file right away as below.



Metadata Collator

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

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



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

3. Specify a valid SharePoint List URL in the **URL** textbox. You can specify a SharePoint library / list / folder Location in the textbox (e.g., `http://sharepoint.local/demo/lists/products`). You can also specify a SharePoint online (Office 365) library / list / folder URL and click Connect. Upon clicking **Connect** button, you will be prompted for login credentials (username and password). Provide **User ID** and **Password** in the respective textboxes and click **Sign in** button to proceed.
4. Specify a valid SharePoint List URL in the **URL** textbox. You can specify a SharePoint Library / lists / folder location in the textbox (e.g., `http://sharepoint.local/demo/lists/products`).
5. 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).

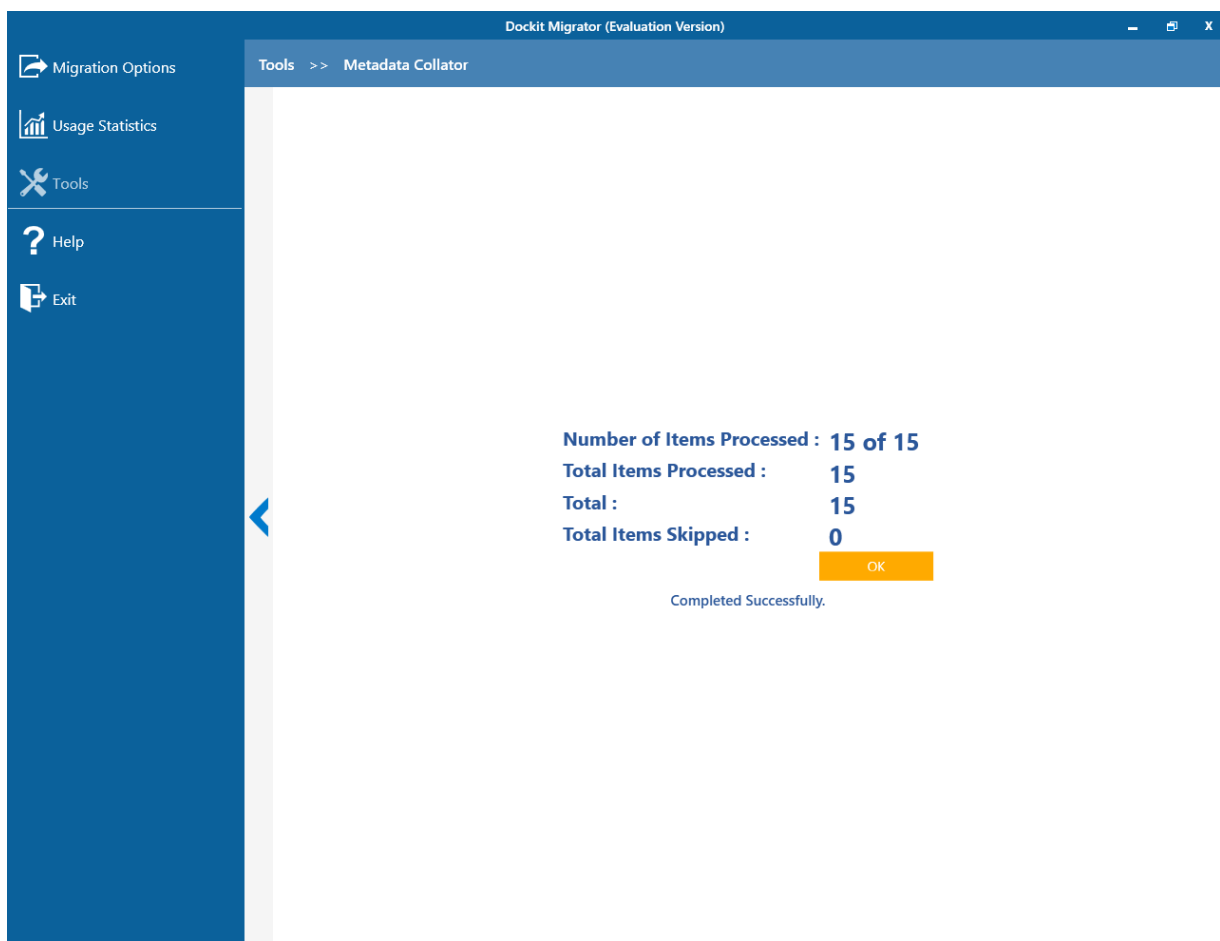
6. Select desired columns from the available columns list. The column value will be exported along with the list item URL to the metadata file.

The screenshot shows the 'Metadata Collator' window in the Dockit Migrator application. The window has a blue sidebar on the left with icons for Migration Options, Usage Statistics, Tools, Help, and Exit. The main area is titled 'Tools >> Metadata Collator'. It contains several sections: 'Options' with radio buttons for 'Export absolute URL of the items' (selected) and 'Export base URL of the items'; 'Traversal options' with a dropdown set to 'All items and folders' and a button 'Retrieves item and folder URL'; 'Version' with a dropdown set to 'Latest version'; and a large table of columns to be exported. The table has two columns: 'Column Name' and 'Column Type'. The columns listed are: Approvers Comments (Multiple lines of text), Name (File), Title (Single line of text), Version (Single line of text), Item Child Count (Lookup), Source Version (Converted Document) (Lookup), Source Name (Converted Document) (Lookup), Approval Status (ModStat), Check In Comment (Lookup), Created By (Person or Group), Modified By (Person or Group), Copy Source (Single line of text), Name (Calculated), Created (Date and Time), Modified (Date and Time), ID (Counter), Type (Calculated), File Size (Calculated), Edit (Calculated), Document ID Value (Single line of text), and Document ID (Hyperlink or Picture). At the bottom, there is an 'Export Location' field with a file explorer icon, a 'File Name' field with the value '1aa', and a 'File Extension' dropdown set to 'CSV'. A checkbox 'Open metadata file once export is complete' is checked. A yellow 'Start Export' button is in the bottom right corner.

Column Name	Column Type
Approvers Comments	Multiple lines of text
Name	File
Title	Single line of text
Version	Single line of text
Item Child Count	Lookup
Source Version (Converted Document)	Lookup
Source Name (Converted Document)	Lookup
Approval Status	ModStat
Check In Comment	Lookup
Created By	Person or Group
Modified By	Person or Group
Copy Source	Single line of text
Name	Calculated
Created	Date and Time
Modified	Date and Time
ID	Counter
Type	Calculated
File Size	Calculated
Edit	Calculated
Document ID Value	Single line of text
Document ID	Hyperlink or Picture

7. **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.
8. **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.
9. In **Export as:** option, specify valid export path in the textbox or click (...) button to specify the export file name.
10. Select option '**Open metadata file once export is complete**' to open the metadata file automatically after completing the export process.
11. Click **Start Export...** button to commence the export process.
12. After clicking **Start Export...** button, a page appears as shown below:



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

13. 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"

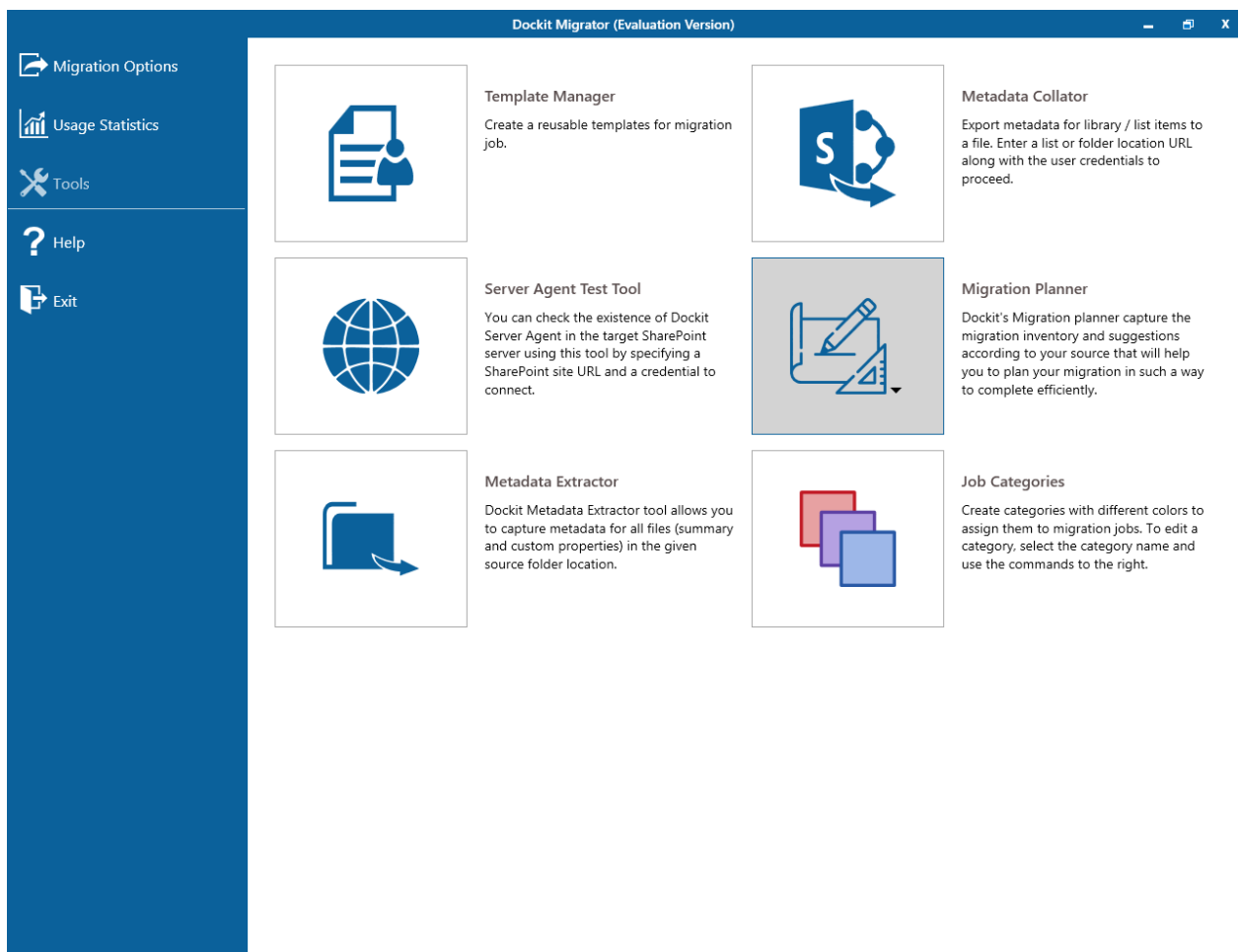
"http://sharepoint.vyapin.demo/sites/migration/lists/countries", "Australia", "Excel Sheet", "234B"

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

Migration Planner

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

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



1. Types of Migration Planner:

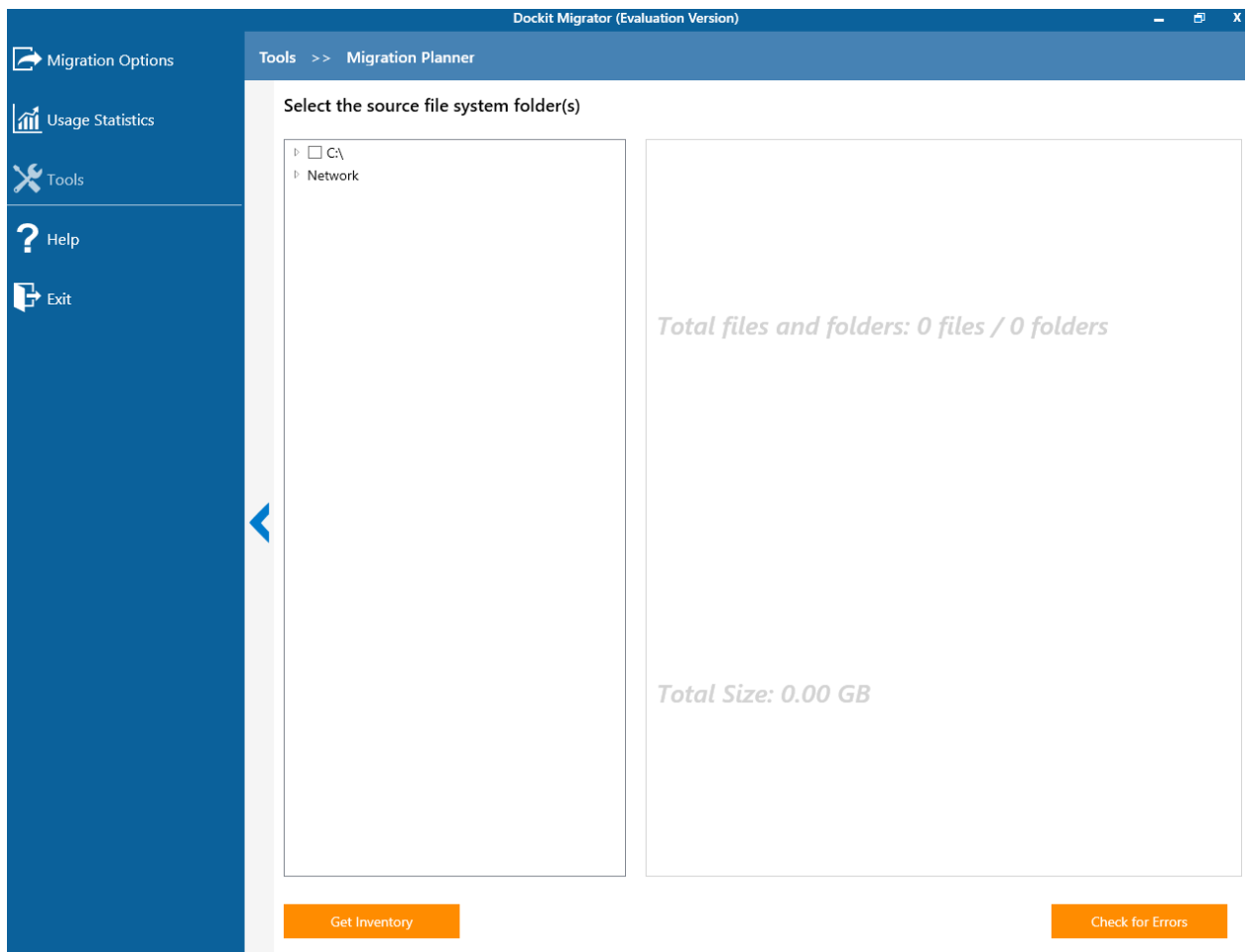
There are two types in Migration Planner, as given below:

- [File share Migration Planner](#)
- [SharePoint Migration Planner](#)

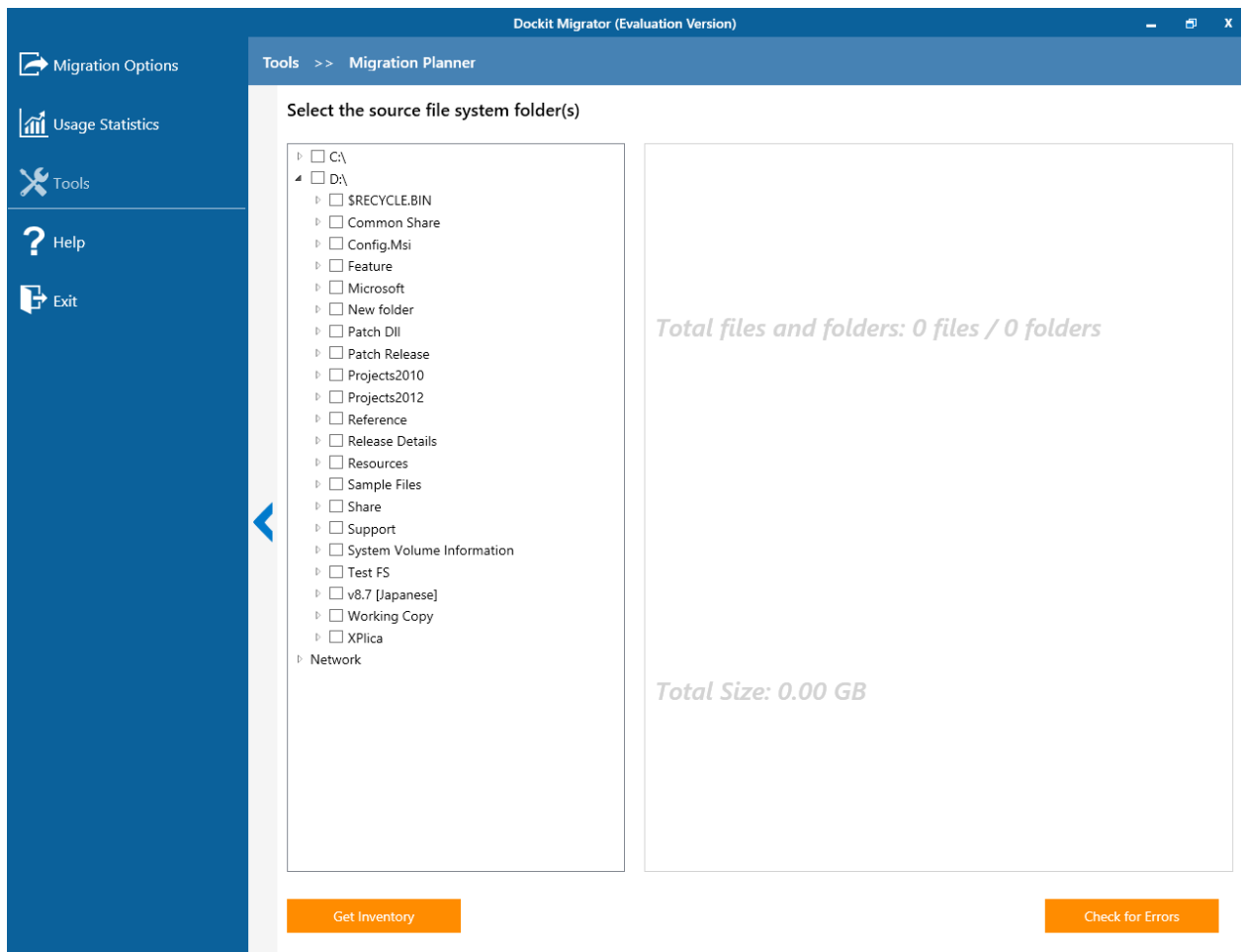
File Share Migration Planner

Plan your migration from file share to SharePoint On-premises or SharePoint online.

1. The **File share Migration Planner** page will appear as shown in the screen below:

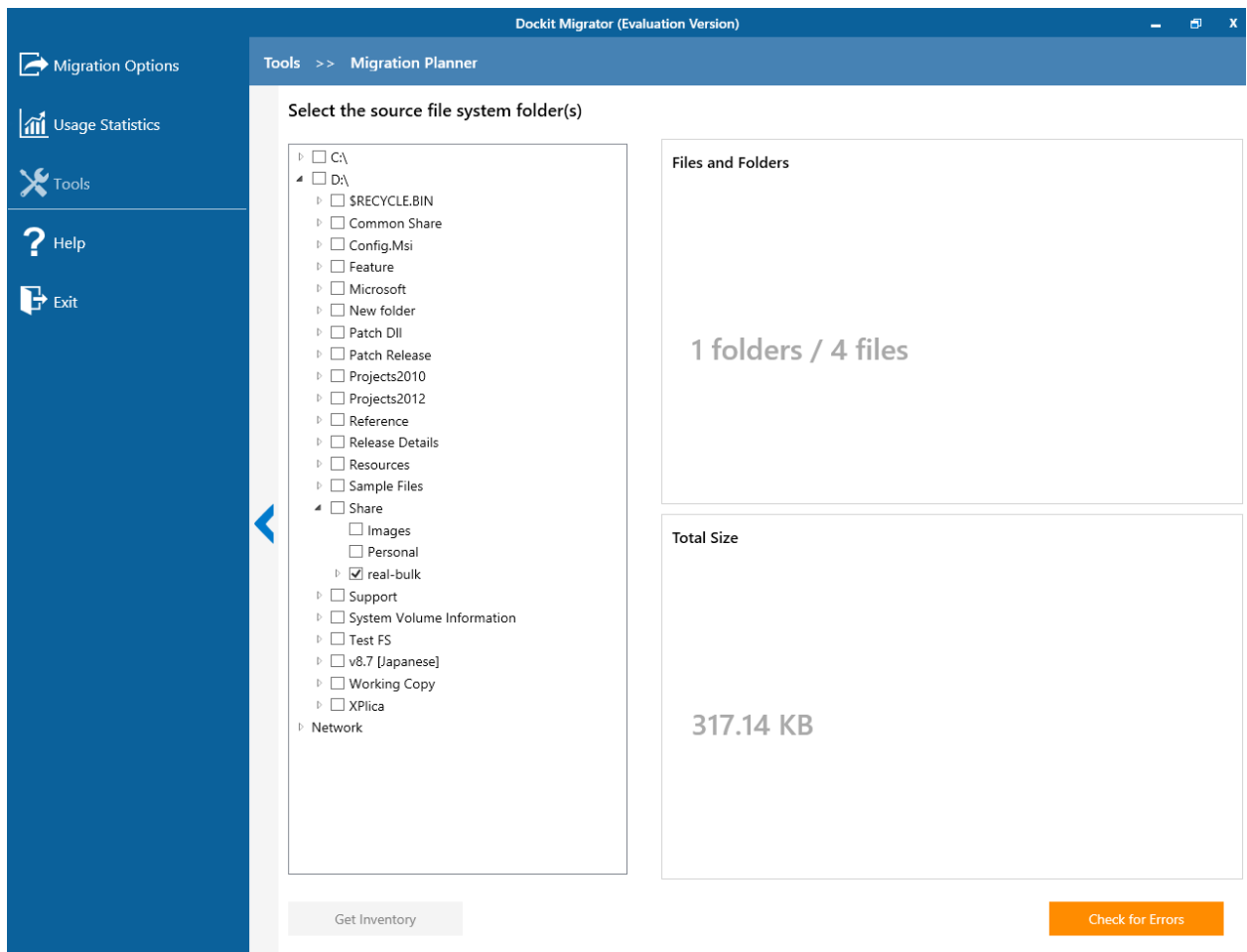


2. Select the folder(s) for which you would like to get inventory.



3. **Click 'Get Inventory'** button to display the inventory of the selected folder(s). Here, the inventory process will calculate the number of folders and files and total size of the selected folders.

4. The Inventory of the selected folder(s) is shown below.



5. After getting inventory of the selected folder(s), **click 'Check for Errors' button.**

6. The Target SharePoint site page is shown, when '**Check for Errors**' button is clicked.

Dockit Migrator (Evaluation Version)

Tools >> Migration Planner

Select target SharePoint

Site URL:

Authentication:

User Name:

Password:

Connect to SharePoint

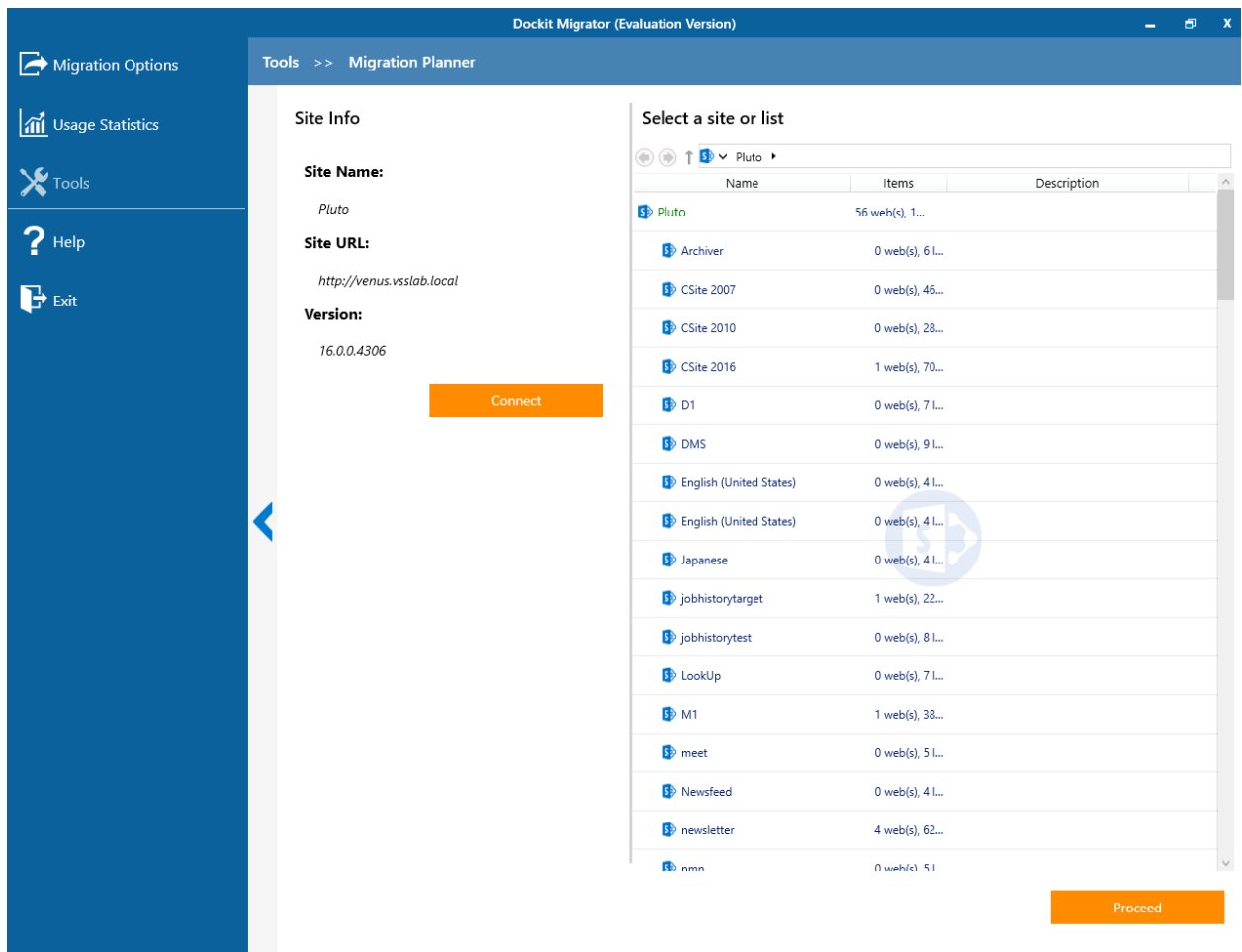
7. Enter the target site in the **Site URL** text box, to which you are going to migrate the source folder(s), and the relevant credentials and **click 'Connect to SharePoint'** button.

The screenshot shows the 'Migration Planner' window of the 'Dockit Migrator (Evaluation Version)'. The left sidebar contains navigation links: 'Migration Options', 'Usage Statistics', 'Tools', 'Help', and 'Exit'. The main area is titled 'Select target SharePoint' and contains the following fields:

- Site URL:** A dropdown menu with the value 'http://venus.vsslab.local'.
- Authentication:** A dropdown menu with the value 'Windows' and a green checkmark icon.
- User Name:** A dropdown menu with the value 'vsslab\\farmadmin_sp16-1'.
- Password:** A text box filled with 12 dots.

At the bottom right of the window, there is an orange button labeled 'Connect to SharePoint'.

8. After connecting to the given target SharePoint site, a new page is shown as below.



Click **Connect** button, if you want to reconnect to the target SharePoint site.

9. Select the required library and **click 'Proceed'** button.

The screenshot shows the 'Dockit Migrator (Evaluation Version)' interface. On the left is a navigation sidebar with options: Migration Options, Usage Statistics, Tools, Help, and Exit. The main area is titled 'Tools >> Migration Planner'. It is divided into two sections: 'Site Info' and 'Select a site or list'.

Site Info:

- Site Name:** Pluto
- Site URL:** http://venus.vsslab.local
- Version:** 16.0.0.4306

A blue arrow points to the 'Connect' button.

Select a site or list:

A dropdown menu shows 'Pluto'. Below it is a table of available libraries:

Name	Items	Description
Columns (Changed column types)	2 item(s)	
Content and Structure Reports	7 item(s)	Use the reports list to customize the queries...
Content Lib	10 item(s)	
Control Character Library	2 item(s)	
Copy Source	3 item(s)	
Customized Reports	11 item(s)	This Document library has the templates to...
DC Lib	9 item(s)	Data Connection Library
DC Lib07	5 item(s)	Data Connection Library
Development	5 item(s)	
DL	2011 item(s)	
Doc Lib	27 item(s)	
Document Library	19 item(s)	
Documents	6 item(s)	
documenttempl	2 item(s)	
Drop Off Library	0 item(s)	After their properties are filled out, files upl...
Extern List	0 item(s)	External List
Form Templates	48 item(s)	This library contains administrator-approve...
fc	1 item(s)	

A blue arrow points to the 'Development' row. A 'Proceed' button is located at the bottom right.

10. The Inventory is shown for the selected source folders as the page shown below:

The screenshot displays the 'File Share Inventory' window within the 'Docket Migrator (Evaluation Version)'. The window has a blue header bar with 'Tools >> Migration Planner' and a 'Save' button. A left sidebar contains navigation links: 'Migration Options', 'Usage Statistics', 'Tools', 'Help', and 'Exit'. The main content area is titled 'File Share Inventory' and includes a 'Summary' section with a 'Files and Folders' table showing 1,008 folders and 12,037 files, all successful. Below this is a 'Size' section showing 55.58 MB. To the right, a 'General Information' section lists four checks: 'No folders contain > 5,000 documents', 'No hidden folders / files', 'No folders / files has unique permission', and 'All folders / files have access'. A 'Passed Conditions' section with a green checkmark lists six conditions: 'All file types are supported', 'All folders / files path are under supported length', 'All files are under supported size in SharePoint', 'All folders / files with allowed characters in SharePoint in its name', 'Site Quota validated', and 'Mandatory columns are not available'. At the bottom, 'Warnings' and 'Errors' sections both show 'No Warnings' and 'No Errors' respectively.

During inventory process, the application will verify the list of source folders and files against target SharePoint, report about the observed findings in the context of adhering to SharePoint limits:

- ✓ Invalid characters
- ✓ Supported file types
- ✓ List view threshold
- ✓ Unique permissions
- ✓ Access to folders/files
- ✓ Site Quota
- ✓ Mandatory columns

SharePoint Migration Planner

Plan your migration from SharePoint On-premises to SharePoint online.

1. The **SharePoint Migration Planner** step will appear as shown in the screen below:

The screenshot displays the 'Dockit Migrator (Evaluation Version)' application window. On the left is a dark blue sidebar with navigation icons and labels: 'Migration Options', 'Usage Statistics', 'Tools', 'Help', and 'Exit'. The main content area has a blue header bar with 'Tools >> Migration Planner'. Below this, the section is titled 'Source SharePoint Location'. It contains four input fields: 'Site URL:' (a dropdown menu), 'Authentication:' (a dropdown menu showing 'Windows' with a green checkmark), 'User Name:' (a dropdown menu showing 'vsslab\\farmadmin_sp16-1'), and 'Password:' (a text field with masked characters). At the bottom right of the main area is an orange button labeled 'Connect to SharePoint'.

2. Select the source url for which you are going to get Inventory.

The screenshot shows the 'Migration Planner' window of the 'Dockit Migrator (Evaluation Version)'. The left sidebar contains navigation links: 'Migration Options', 'Usage Statistics', 'Tools', 'Help', and 'Exit'. The main area is titled 'Source SharePoint Location' and contains the following fields:

- Site URL:** A dropdown menu with the value 'https://sun.vsslab.local/ten'.
- Authentication:** A dropdown menu with the value 'Windows' and a green checkmark icon.
- User Name:** A dropdown menu with the value 'vsslab\\farmadmin_sp10-1'.
- Password:** A text input field filled with 12 dots.

At the bottom right of the window, there is an orange button labeled 'Connect to SharePoint'.

3. Click '**Connect to SharePoint**' button to connect to SharePoint.

4. The sites, lists, libraries in the connected site will be displayed as shown below. Select any one source site / list / library and click '**Check For Inventory**' button.

The screenshot displays the 'Docket Migrator (Evaluation Version)' Migration Planner. The left sidebar contains navigation links: Migration Options, Usage Statistics, Tools, Help, and Exit. The main area is titled 'Tools >> Migration Planner' and is divided into two sections: 'Site Info' and 'Select a site or list'.

Site Info:

- Site Name:** ten
- Site URL:** https://sun.vsslab.local/ten
- Version:** 14.0.0.7171

A blue arrow points left from the 'Select a site or list' section towards the 'Site Info' section. An orange 'Connect' button is located below the site information.

Select a site or list:

A search bar at the top shows 'ten'. Below it is a table with columns: Name, Items, and Description.

Name	Items	Description
ten	1 web(s), 35...	
subten	0 web(s), 10...	
Announcements	1 item(s)	Use this list to track upcoming events, stat...
Calendar	0 item(s)	Use the Calendar list to keep informed of u...
Documents	680 item(s)	This system library was created by the Publ...
Images	0 item(s)	This system library was created by the Publ...
keyword	14 item(s)	
Links	0 item(s)	Use the Links list for links to Web pages th...
Pages	2 item(s)	This system library was created by the Publ...
Shared Documents	0 item(s)	Share a document with the team by adding...
Site Assets	0 item(s)	Use this library to store files which are inclu...
Site Pages	2 item(s)	Use this library to create and store pages o...
Team Discussion	0 item(s)	Use the Team Discussion list to hold newsg...
ten#library	11 item(s)	
ten#list	5 item(s)	
two	2 item(s)	
Workflow Tasks	0 item(s)	This system library was created by the Publ...

An orange 'Check for Inventory' button is located at the bottom right of the interface.

5. The inventory of the selected source site / list / library will be shown, as below and click **'Proceed'** button.

The screenshot shows the 'SharePoint Inventory' window in 'Docket Migrator (Evaluation Version)'. The window has a blue header bar with the title 'Tools >> Migration Planner'. On the left is a dark sidebar with icons for home, SharePoint, folder, back, and help. The main content area is titled 'SharePoint Inventory' and 'Summary'. It displays a 2x3 grid of inventory items with their counts: Sites (2), Lists (36), Items (91), Workflows (0), Alerts (0), and Users / Groups (2,483). Each item has a small icon representing it. At the bottom right, there are two buttons: 'Back' (orange) and 'Proceed' (grey). A timer '00:24:75' and a refresh icon are in the top right corner.

Category	Count
Sites	2
Lists	36
Items	91
Workflows	0
Alerts	0
Users / Groups	2,483

6. The Target SharePoint Site page is shown below. Enter target SharePoint site, relevant credentials and click '**Connect**' button.

The screenshot shows the 'Target SharePoint Location' page in the 'Dockit Migrator (Evaluation Version)' application. The interface has a blue sidebar on the left with navigation options: 'Migration Options', 'Usage Statistics', 'Tools', 'Help', and 'Exit'. The main content area is titled 'Tools >> Migration Planner' and contains the 'Target SharePoint Location' section. This section includes four input fields: 'Site URL:' (a dropdown menu), 'Authentication:' (a dropdown menu with 'Windows' selected), 'User Name:' (a dropdown menu with 'vsslab\\farmadmin_sp16-1' selected), and 'Password:' (a text field with masked characters). A blue arrow points to the left sidebar. At the bottom right, there is an orange 'Connect' button.

Target SharePoint Location

Site URL:

Authentication:

User Name:

Password:

Connect

7. Select the Target Site / list / library of which you are going to migrate the selected source site / list / library and **click 'Proceed'** button.

The screenshot shows the 'Migration Planner' window of the 'Dockit Migrator (Evaluation Version)'. The interface has a dark blue sidebar on the left with icons and labels for 'Migration Options', 'Usage Statistics', 'Tools', 'Help', and 'Exit'. The main area is titled 'Tools >> Migration Planner' and contains a section for 'Target SharePoint Location'. This section includes four input fields: 'Site URL' (containing 'http://venus.vsslab.local'), 'Authentication' (a dropdown menu showing 'Windows'), 'User Name' (containing 'vsslab\\farmadmin_sp16-1'), and 'Password' (masked with dots). A blue arrow icon is positioned to the left of the 'Password' field. At the bottom right of the window, there is an orange 'Connect' button.

Migration Options

Usage Statistics

Tools

Help

Exit

Tools >> Migration Planner

Target SharePoint Location

Site URL:

http://venus.vsslab.local

Authentication:

Windows

User Name:

vsslab\\farmadmin_sp16-1

Password:

.....

Connect

8. After connecting to the given target SharePoint site, a new page is shown as below.

The screenshot displays the 'Dockit Migrator (Evaluation Version)' window, specifically the 'Migration Planner' tab. The left sidebar contains navigation options: Migration Options, Usage Statistics, Tools, Help, and Exit. The main area is divided into two sections: 'Site Info' and 'Select your intended target'.

Site Info:

- Site Name:** Pluto
- Site URL:** <http://venus.vsslab.local>
- Version:** 16.0.0.4306

Select your intended target:

Name	Items	Description
Pluto		
Archiver	0 web(s), 6 I...	
CSite 2007	0 web(s), 46...	
CSite 2010	0 web(s), 28...	
CSite 2016	1 web(s), 70...	
D1	0 web(s), 4 I...	
English (United States)	0 web(s), 4 I...	
English (United States)	0 web(s), 4 I...	
Japanese	0 web(s), 4 I...	
LookUp	0 web(s), 7 I...	
M1	1 web(s), 30...	
meet	0 web(s), 5 I...	
Newsfeed	0 web(s), 4 I...	
nmn	0 web(s), 5 I...	
Resource	1 web(s), 16...	
sample	2 web(s), 33...	
site1	1 web(s), 34...	

A large blue arrow points from the 'Site Info' section towards the 'Select your intended target' section. At the bottom right, there is an orange 'Proceed' button.

9. Select any one target site / list / library and **click 'Proceed'** button.

The screenshot shows the 'Docket Migrator (Evaluation Version)' Migration Planner. The left sidebar contains 'Site Info' with the following details:

- Site Name:** Pluto
- Site URL:** <http://venus.vsslab.local>
- Version:** 16.0.0.4306

The main area is titled 'Select your intended target' and displays a table of available sites and lists. The 'West' site is selected.

Name	Items	Description
T11	0 web(s), 10...	
testingsite	0 web(s), 8 l...	
themesite	0 web(s), 4 l...	
Thunderbird	3 web(s), 11...	
wb	0 web(s), 5 l...	
Web Parts 2007	0 web(s), 82...	
West	0 web(s), 13...	
Workflow 2010	0 web(s), 50...	
All Columns - List	2 item(s)	
Announcements	2 item(s)	Use this list to track upcoming events, stat...
Application Support	17 item(s)	
Approval Documents	7 item(s)	
Attachments	2 item(s)	
Calendar	0 item(s)	Use the Calendar list to keep informed of u...
checkin 2013	2 item(s)	
Check-in Comments	3 item(s)	
Check-in Comments 10	2 item(s)	

An orange 'Proceed' button is located at the bottom right of the interface.

10. The Inventory for the selected target location will be displayed in the page as below:

SharePoint Planner Save 00:37:58

Source site [ten]

Sites 2	Lists 35	Users / Groups 338	Items 124	0 2	Size 169.606 MB
-------------------	--------------------	------------------------------	---------------------	-------------------	---------------------------

General Information

- All sites are active
- No entity has unique permission

Passed Conditions

- Site Quota validated
- All users and groups are available in target SharePoint
- Workflows are available in target SharePoint
- Views are validated and there is no mismatch in field type
- All column values are available in target SharePoint

Errors

- Features are not installed [View](#)
- Site / list templates are not available in target SharePoint [View](#)
- Content types are not available in target SharePoint [View](#)

Migration Settings Tasks

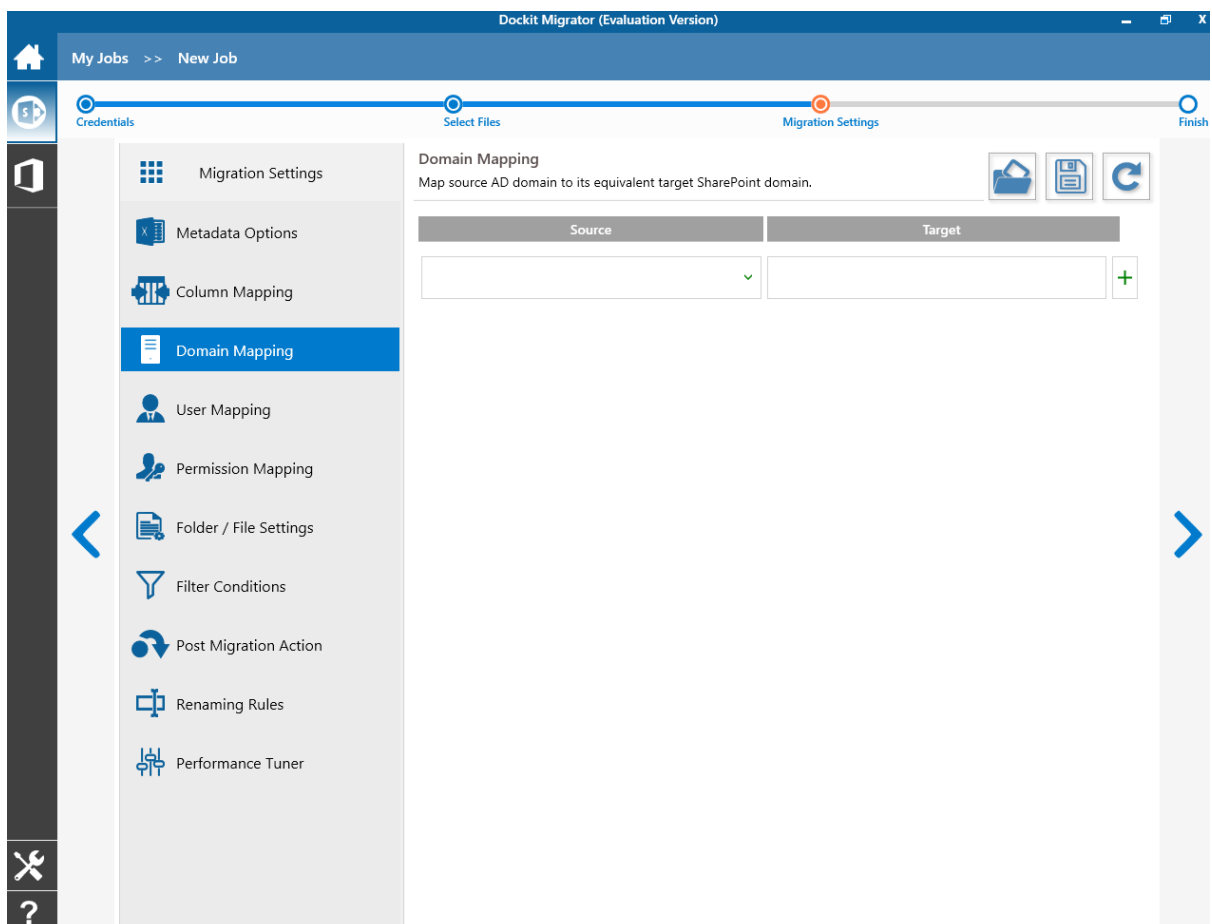
- [Column Mapping](#)
- [Domain Mapping](#)
- [User / Group Mapping](#)
- [Permission Mapping](#)
- [Site And List Mapping](#)
- [Renaming Rules](#)
- [Folder / File Settings](#)
- [Post Migration Action](#)
- [Document Status](#)
- [Handling Duplicate Records](#)

Domain Mapping

Dockit uses domain mapping to replace the unavailable domain with valid domain while assigning metadata, permissions (users / groups) for the folder / file during content migration from file share/SharePoint to SharePoint.

You can also map domains by using 'Domain Mapping Template' for repeated use.

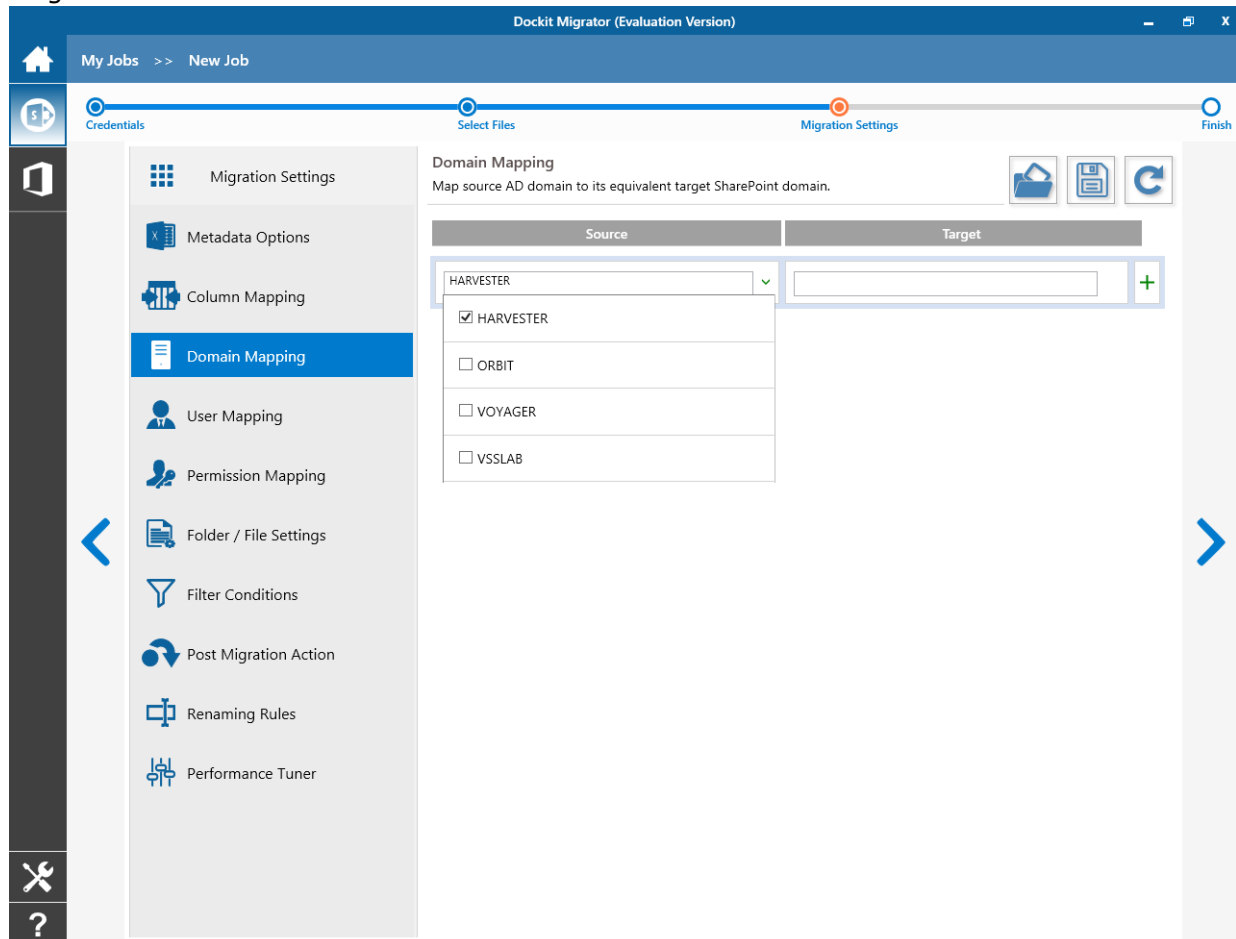
1. To create a new domain mapping, select **Domain Mapping**. A default page will appear as shown below:



2. Domain Mapping consists of following sections:

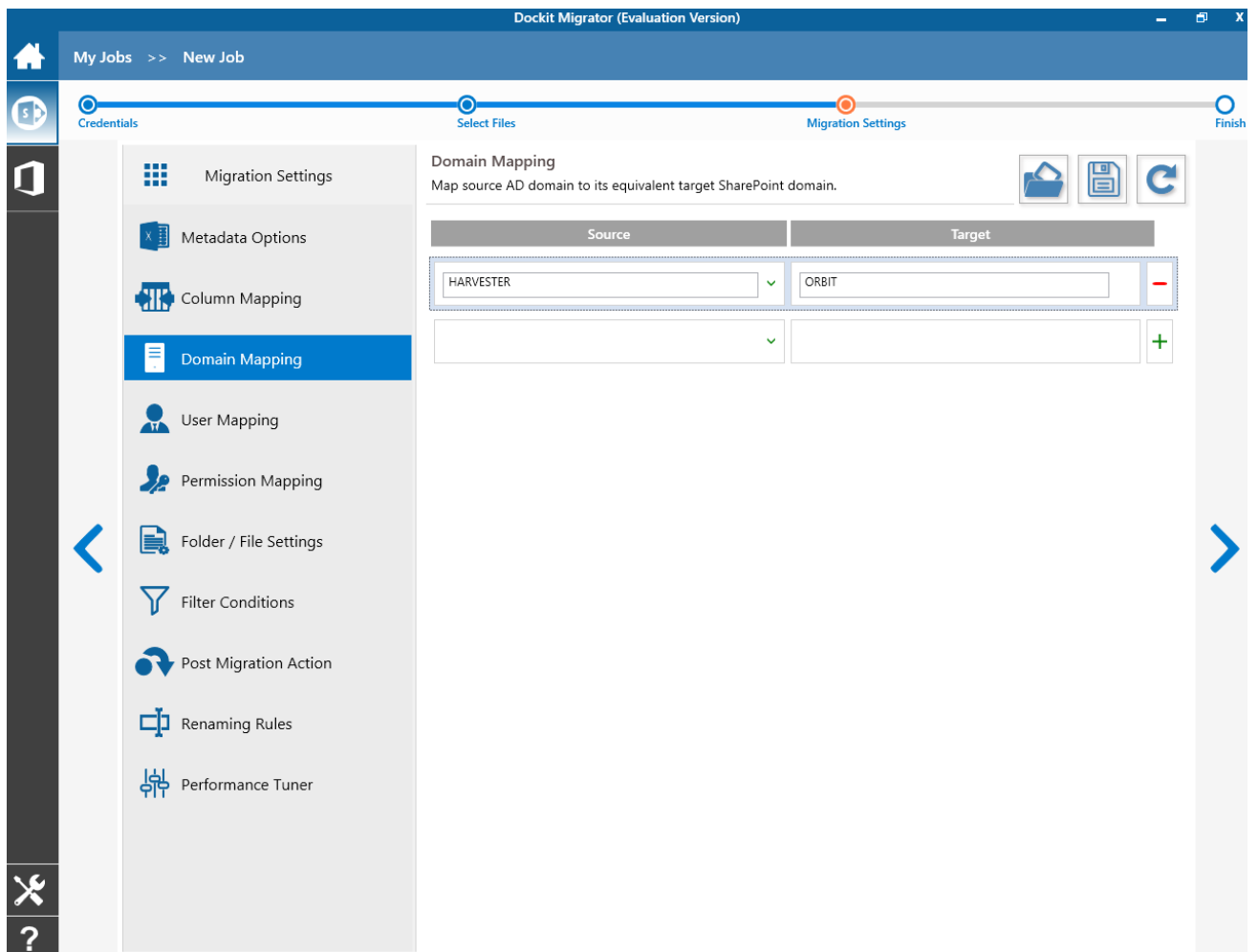
- Source - Name of the source file share / SharePoint domain, which has to be mapped.
- Target – Name of the target SharePoint domain, which will be mapped against the given source domain.

3. You can load the list of domains available with the network by clicking . Once you click , it will display the list of available domains in the network in both source and target domain sections as shown below.



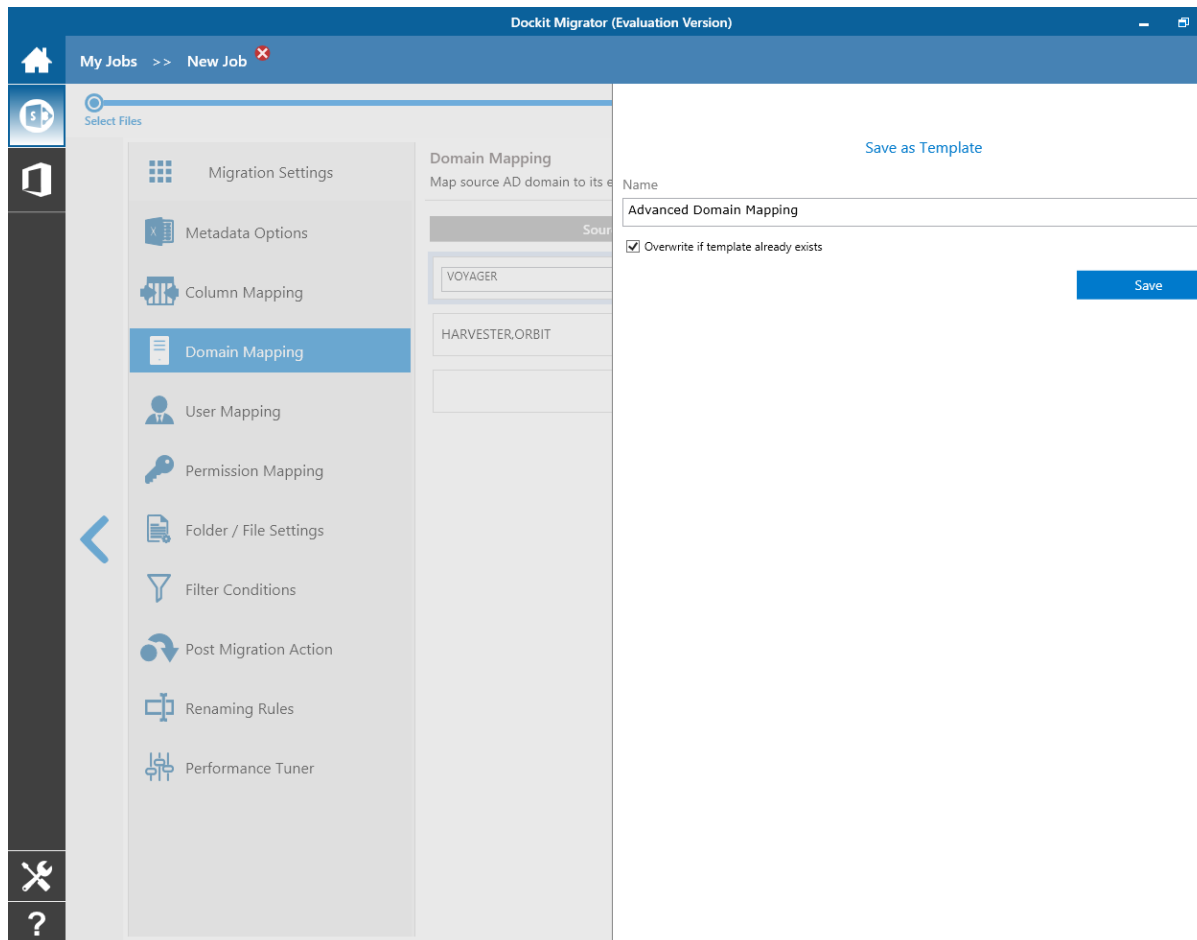
4. You can select the appropriate source domain(s) from the source domain list and the target domain to map from the list of available target domains.
5. You can also enter the domain names in the respective textboxes and finally click  button to map. Docket allows you to enter either domain names or UPN suffixes under the text boxes. For example research, contoso.onmicrosoft.com etc...
6. Note: As for entering free texts, multiple source domains can be entered separated by comma.

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





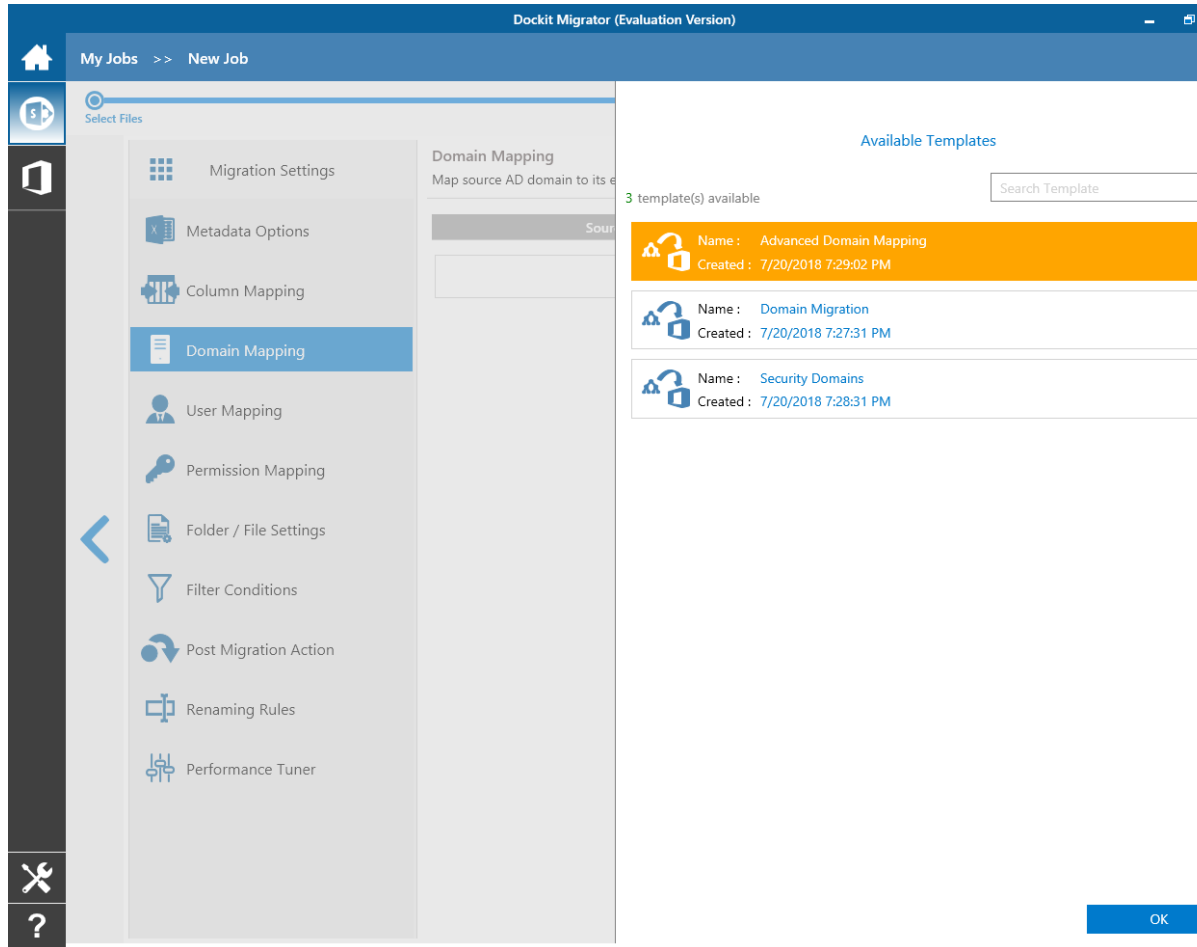
8. Once you finish mapping the domains, you can click  to save as new template. This option enables you to save the configured domain mapping as templates for reuse in other migration tasks.



9. Once you save a template, you can load from the saved templates to use in this task.



Click to load available domain mapping templates.



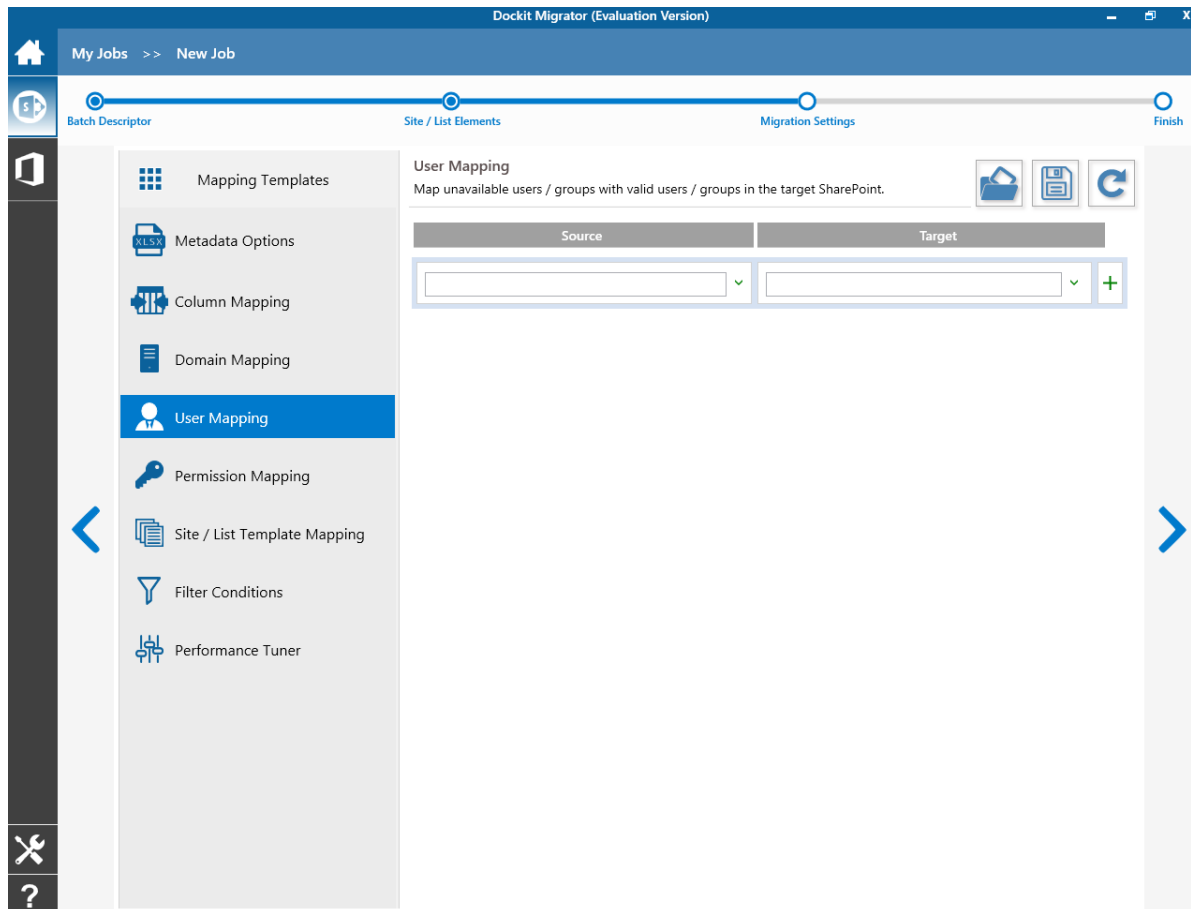
10. **Click** to load the application default settings.

11. Click **Next** to proceed.

User / Group Mapping

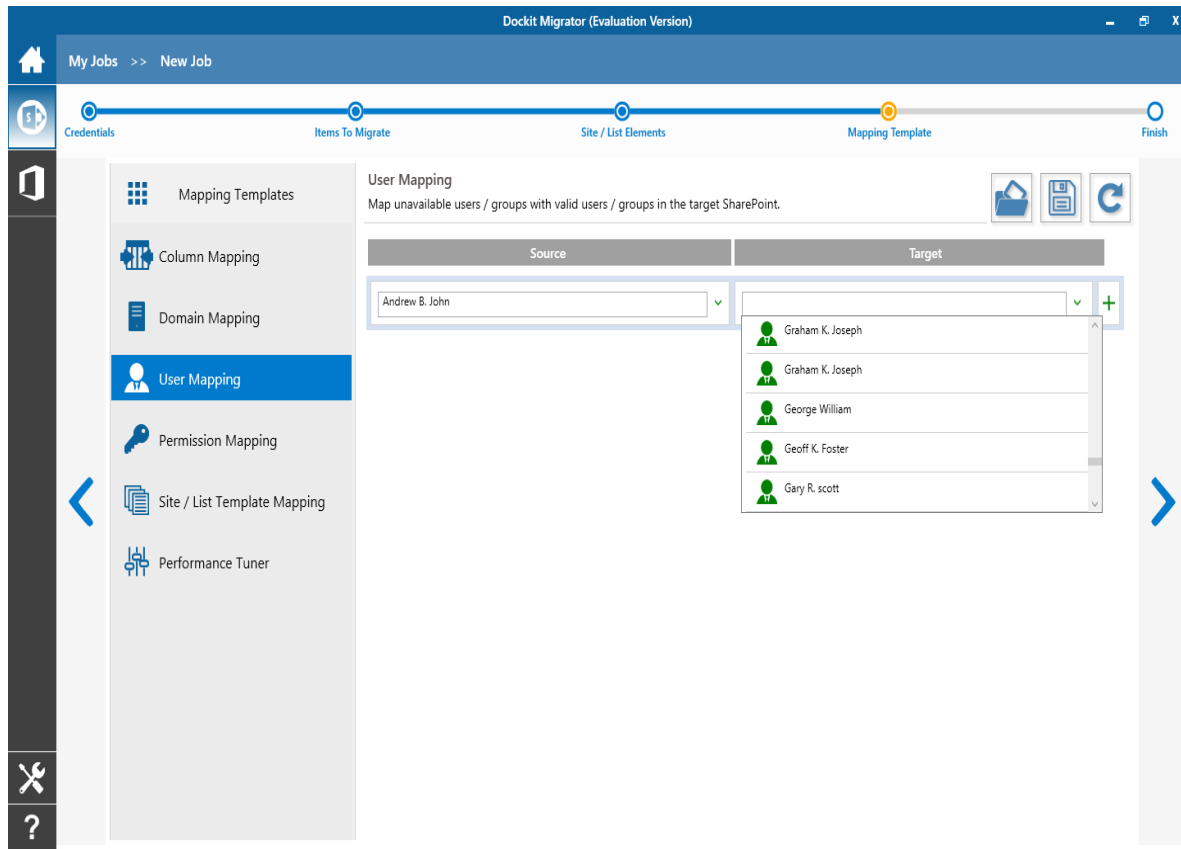
Dockit uses user / group mapping to replace the unavailable users / groups with valid / new SharePoint users / groups when assigning user / groups or permissions for the folder / document during content migration from one SharePoint environment to another. You can use this mapping for all **Person or Group** fields in SharePoint.

1. To create a new user / group mapping, select **User / Group Mapping**. A default page will appear as shown below:

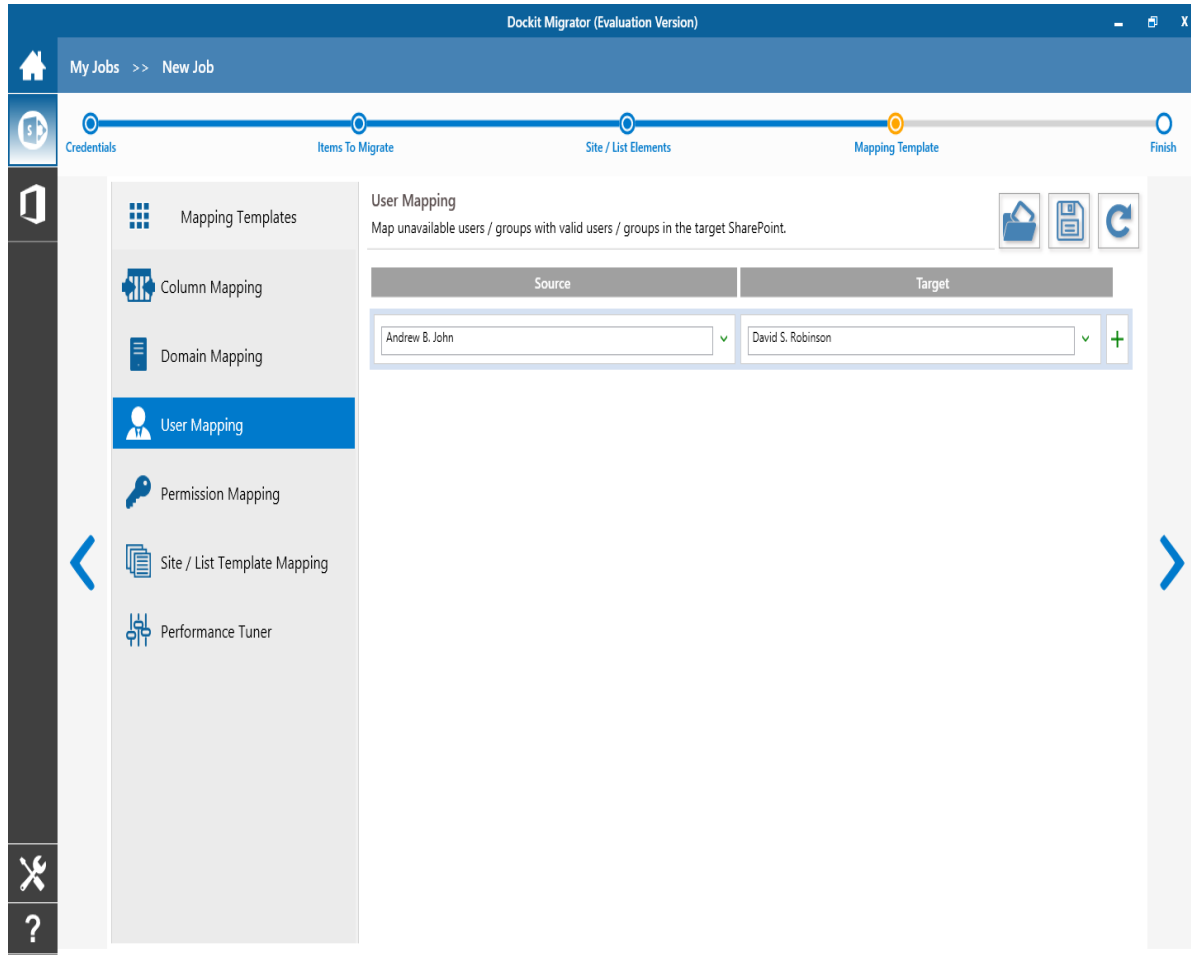


2. User / Group Mapping consists of the following sections:
 - Source – Name of the source file share / SharePoint domain user or group, which has to be mapped.
 - Target – Name of the target SharePoint domain user or group, which will be mapped against the given source domain user or group.

3. You can load the list of Users / Groups available in the network by clicking . Once you click , it will display the list of available users/groups in the network in both source and target users/groups sections as shown below.

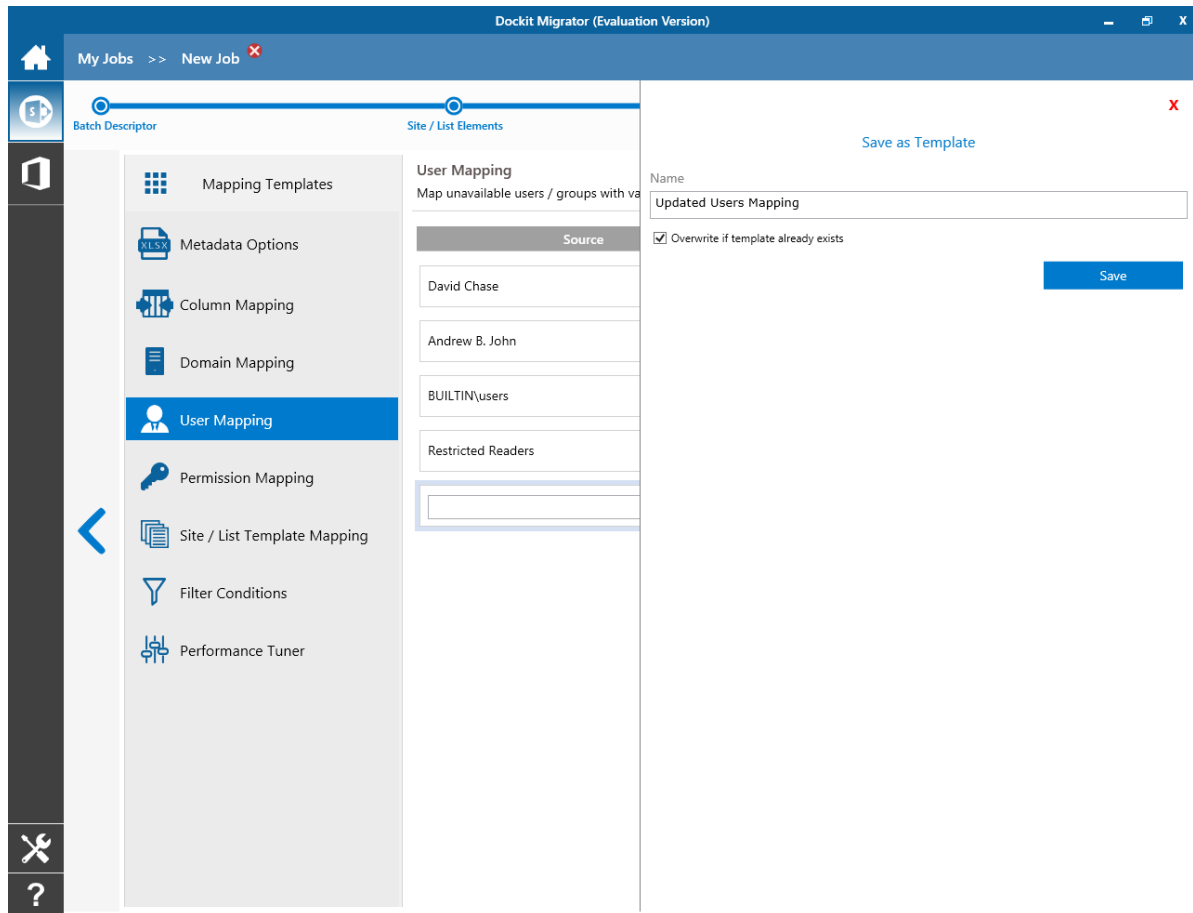


4. You can select the appropriate source users / groups from the source users / groups list and select the target user / group to map the list of available target users / groups. You can also enter the user / group names in the respective textboxes. Finally, click **+** button to map the users / groups.





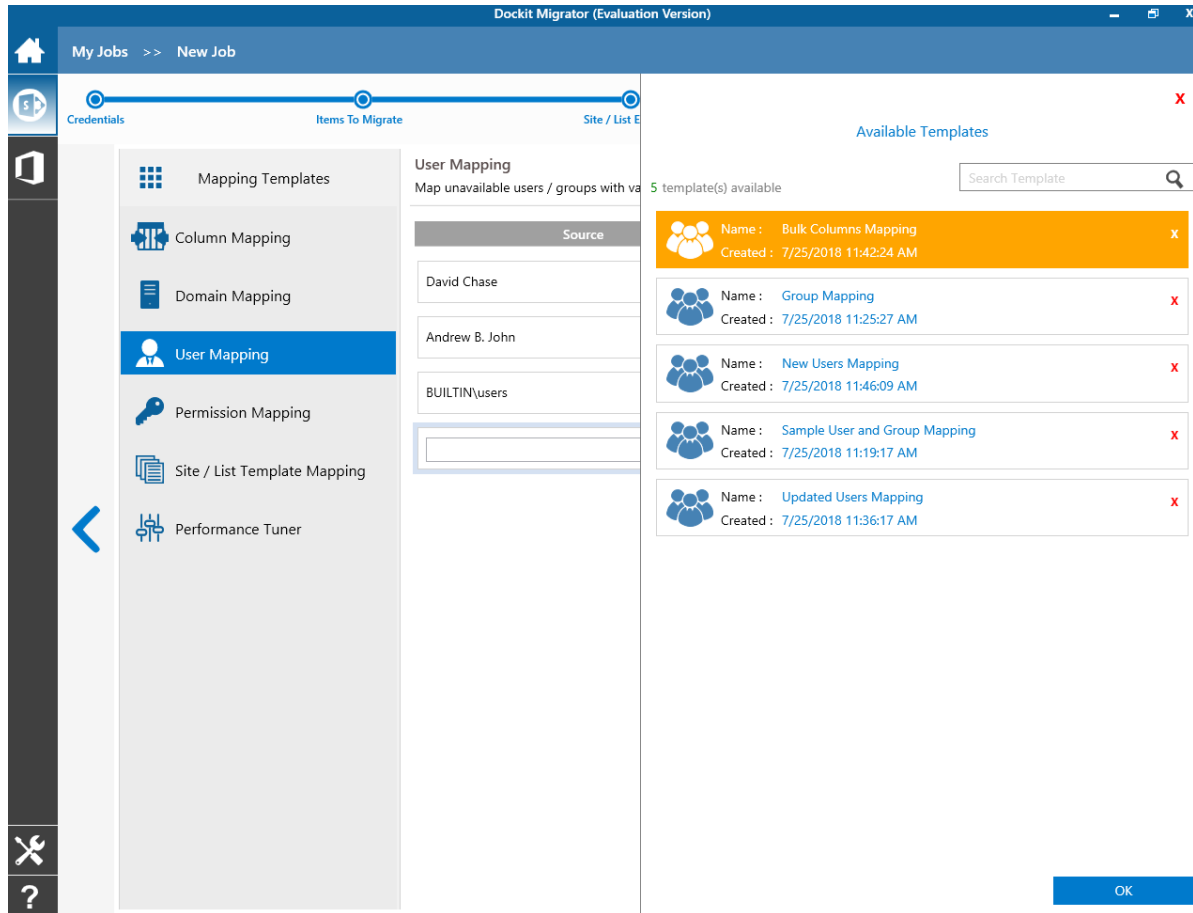
5. Once you finished mapping the Users / Groups, you can click  to save as new template. This option enables you to save the configured User / Group mapping as templates for reuse in other migration tasks.



6. Once you save a template, you can load from the saved templates to use in this task.



- Click to load available User / Group mapping templates.

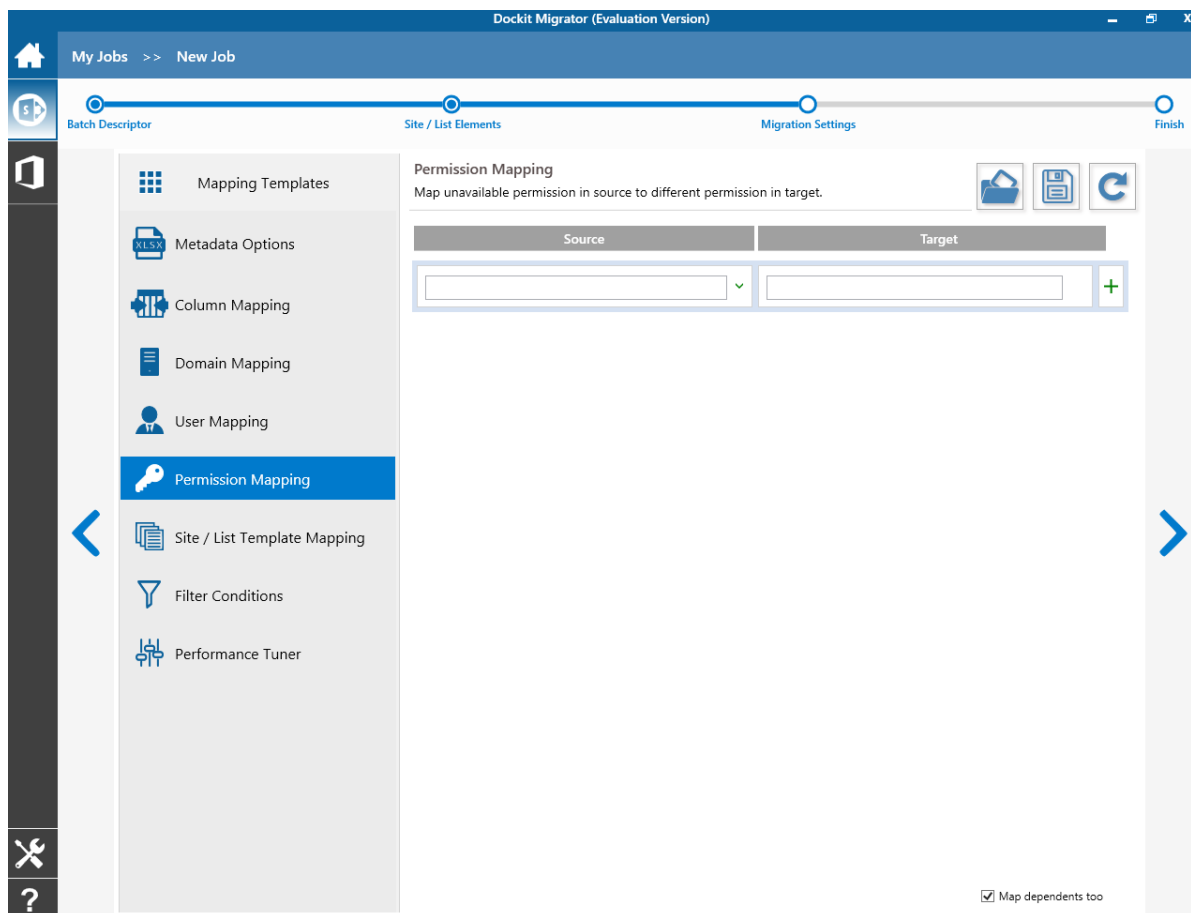


- Click to load the application default settings.

- Click **Next** to proceed.

Permission Mapping

1. Dockit uses permission mapping to assign new permission levels or replace unavailable NTFS permissions / permission levels with valid permission levels when migrating permissions for file share / site / list / folder / item during content migration from file share/SharePoint to SharePoint.
2. You can also map permissions by using 'Permission Mapping Template' for repeated use.
3. To create a new permission mapping, select **Permission Mapping**. A default page will appear as shown below:



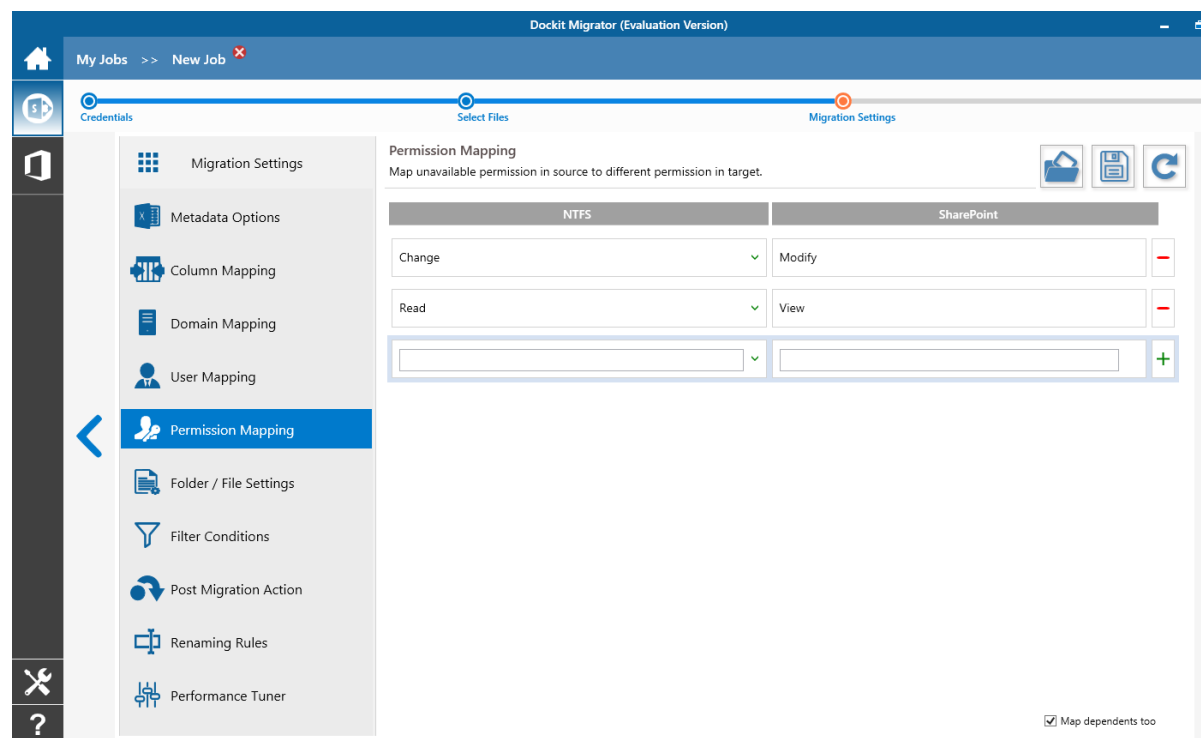
4. Permission Mapping consists of following sections:

5. **File share migration:**

- NTFS – Name of the source file share / NTFS permission, which has to be mapped.
- SharePoint – Name of the target SharePoint permission level, which will be mapped against the given source permission.

6. For NTFS permissions:

- You can load the list of permissions associated with the added file share folders, by clicking . Once you click , it will display the list of available permissions in NTFS section as shown below:

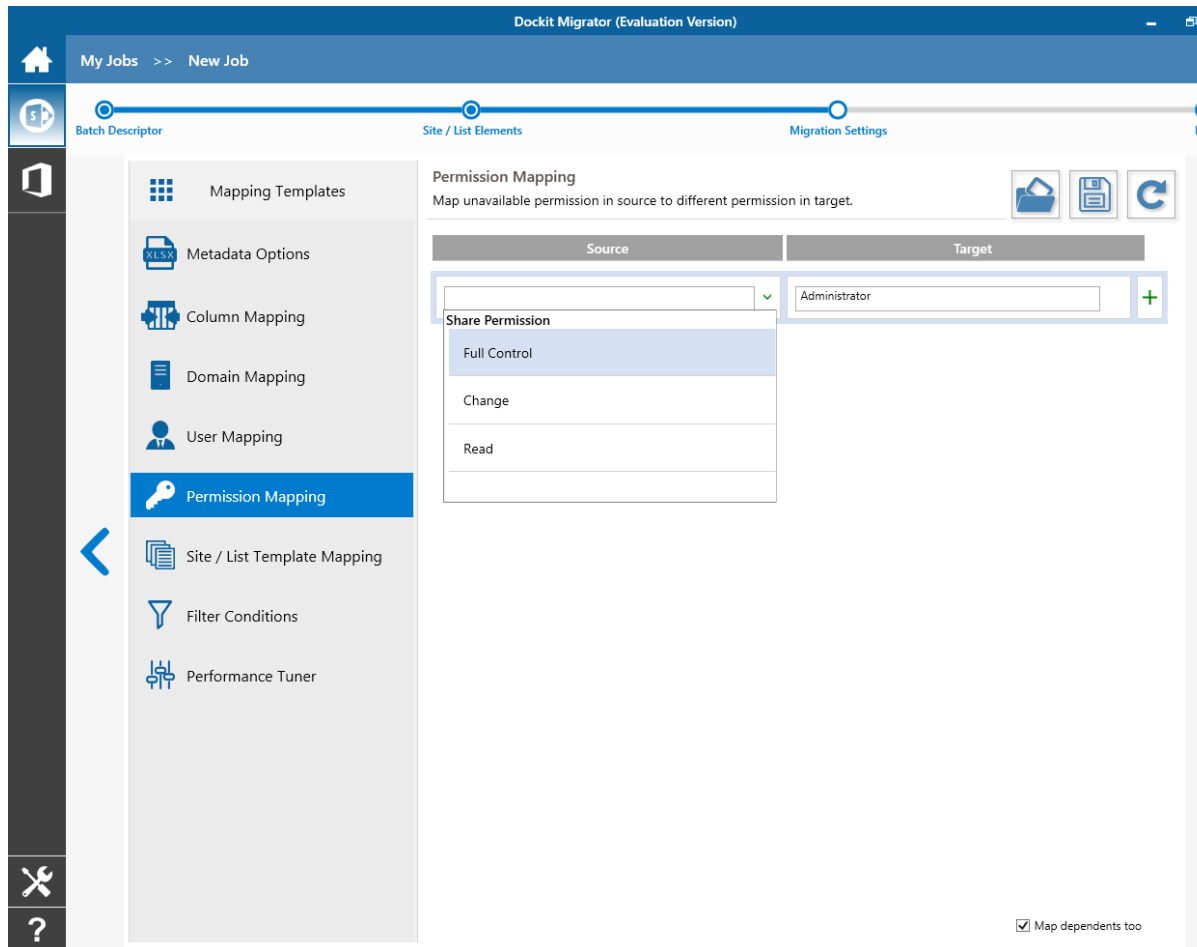


7. **SharePoint migration:**

- Source – Name of the source SharePoint permission level, which has to be mapped.
- Target – Name of the target SharePoint permission level, which will be mapped against the given source permission.

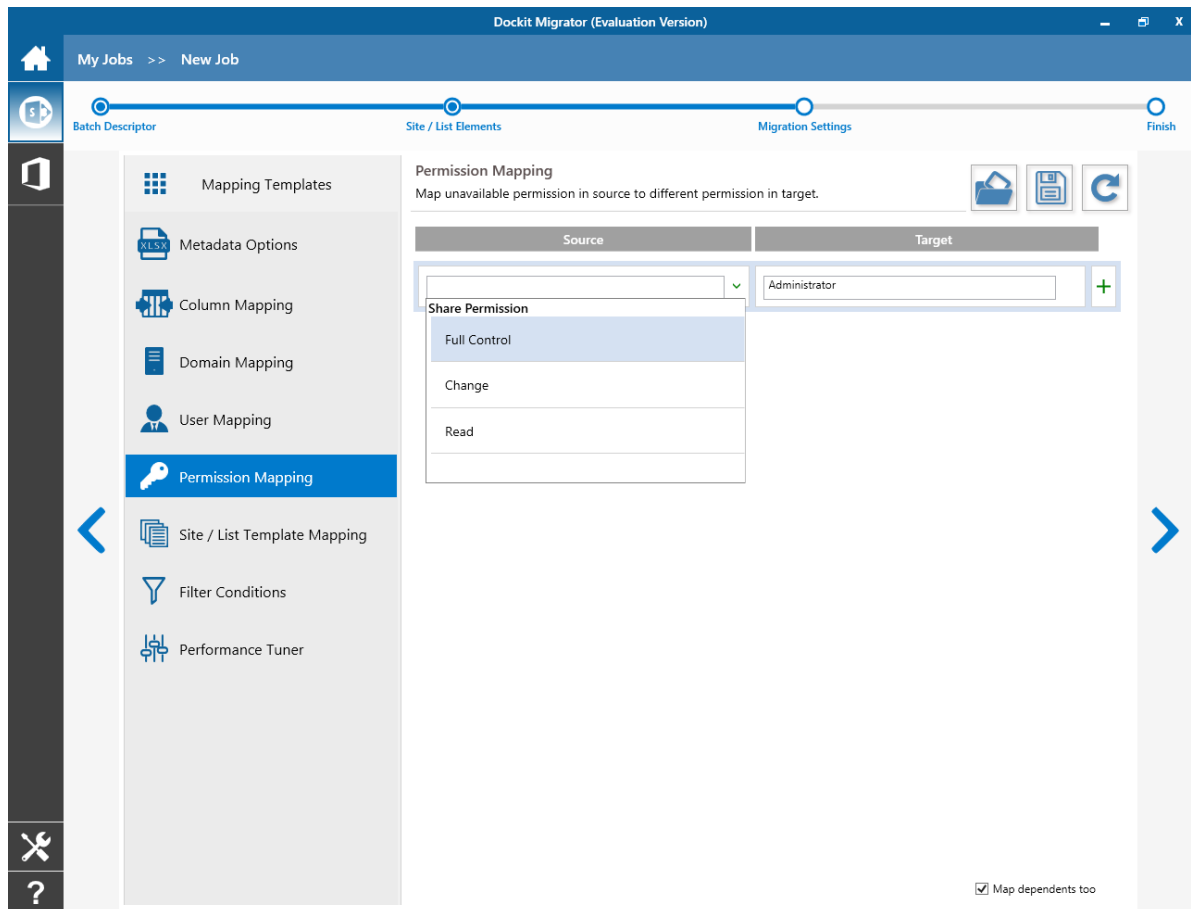
8. For source SharePoint permissions:

- You can load the list of permissions available in the given source SharePoint site, by clicking . Once you click , it will show Connect button. You can enter credentials to connect to source SharePoint. Once connected, it will display the list of available permissions in the source SharePoint site as shown below:



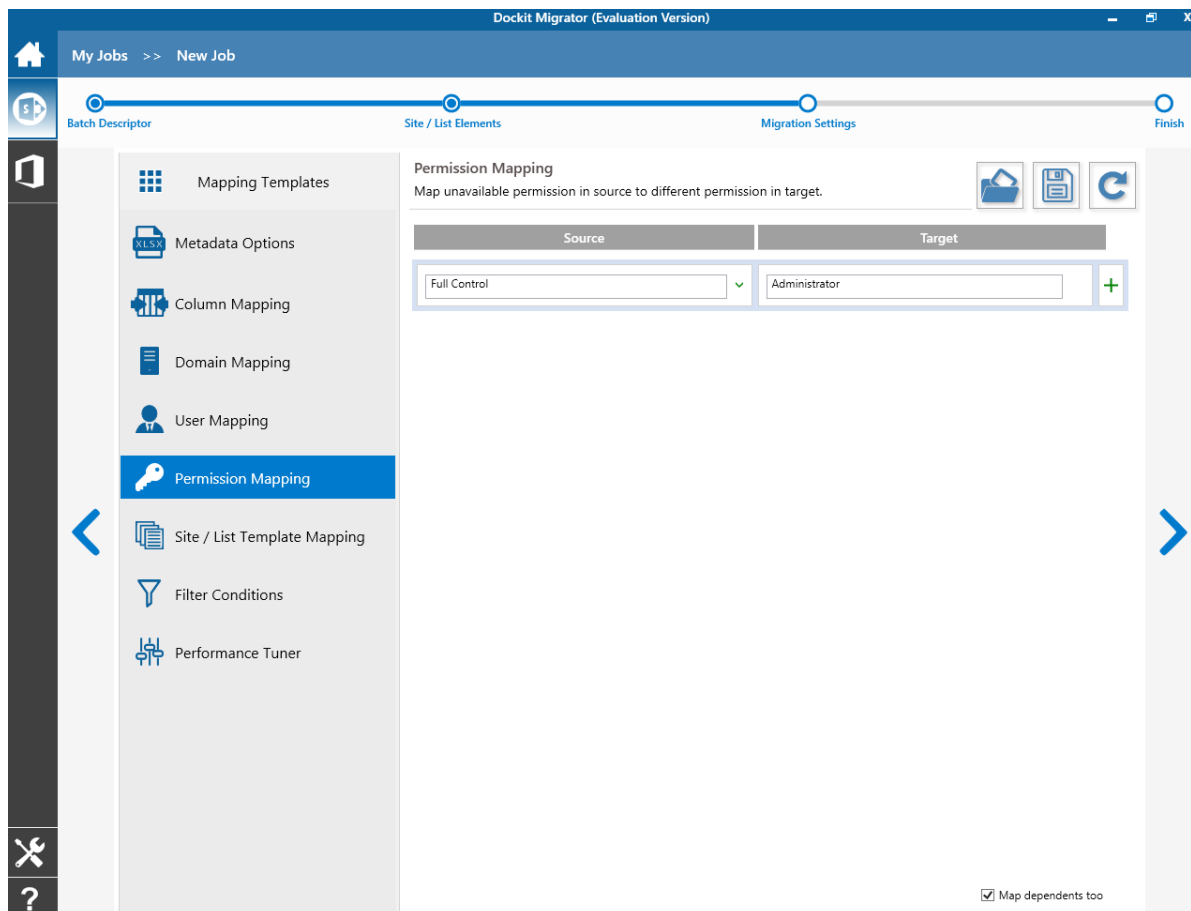
9. **Note:** As for entering free texts, multiple source permissions can be entered separated by comma.

10. In both the cases, for target SharePoint permissions, you have to enter the target permission level in the SharePoint textbox and finally click **+** button to map.



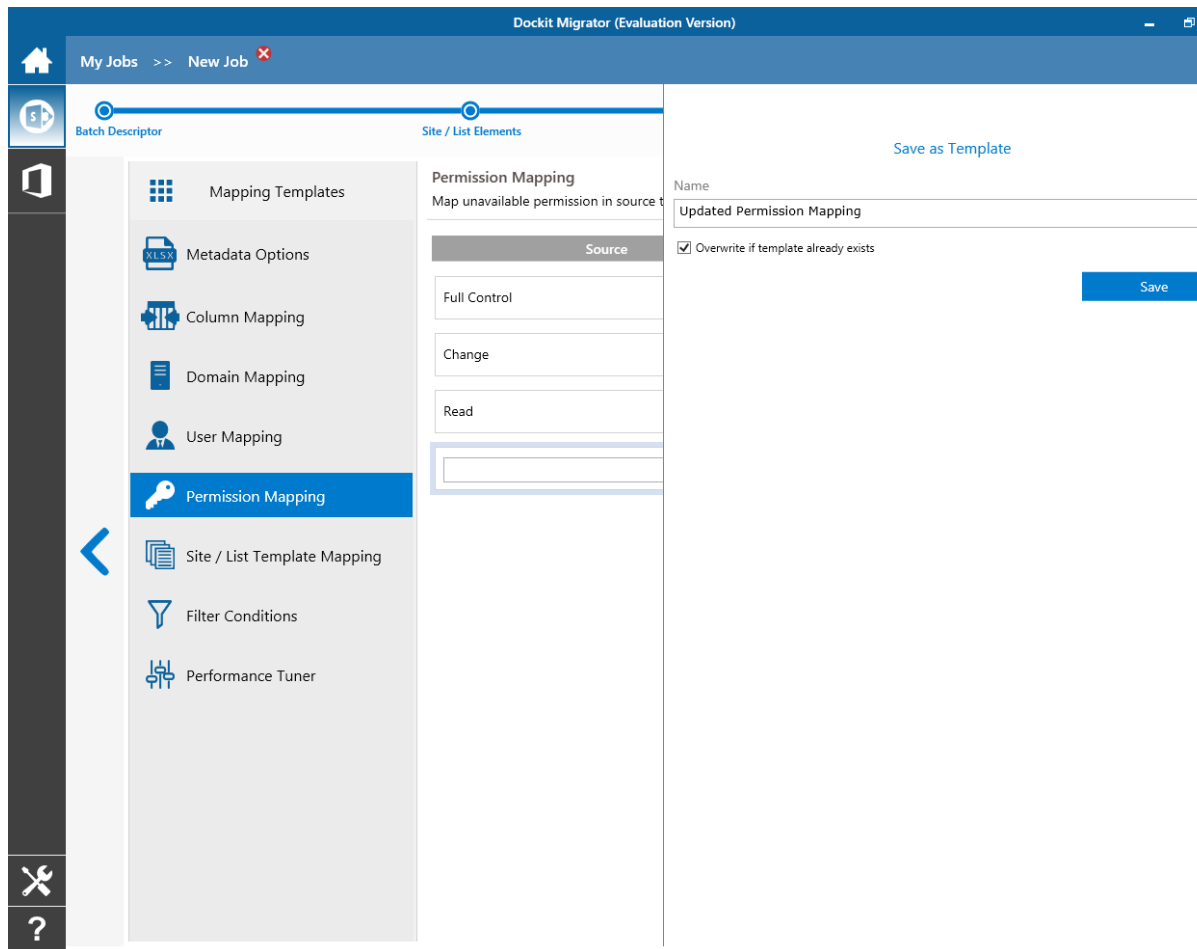
11. After selecting the appropriate source NTFS permissions / SharePoint permission levels from the source permissions list and the equivalent target permission level(s), click **+** button to map permissions.

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





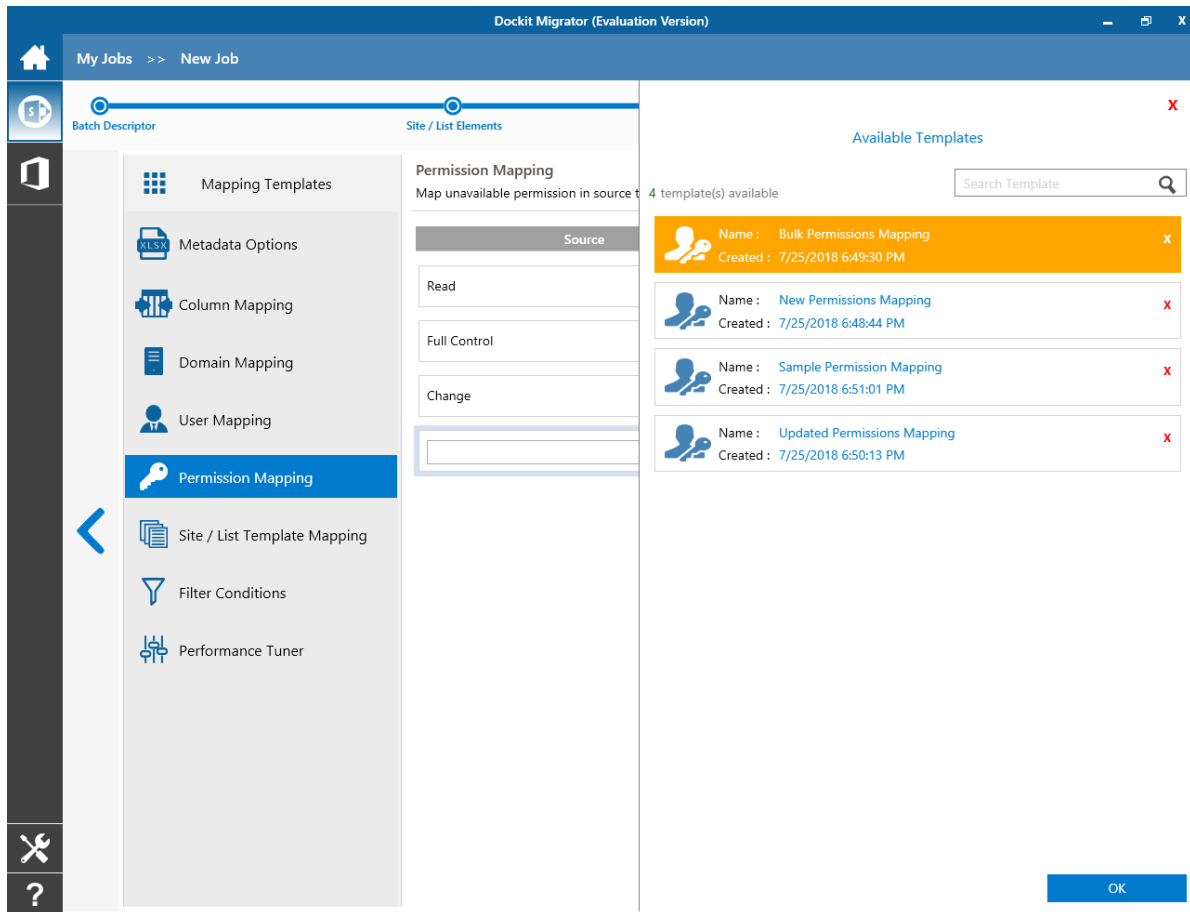
13. Once you finish mapping the permissions, you can click  to save as new template. This option enables you to save the configured permission mapping as templates for reuse in other migration tasks.



14. Once you save a template, you can load from the saved templates to use in this task.



15. Click to load available permission mapping templates.

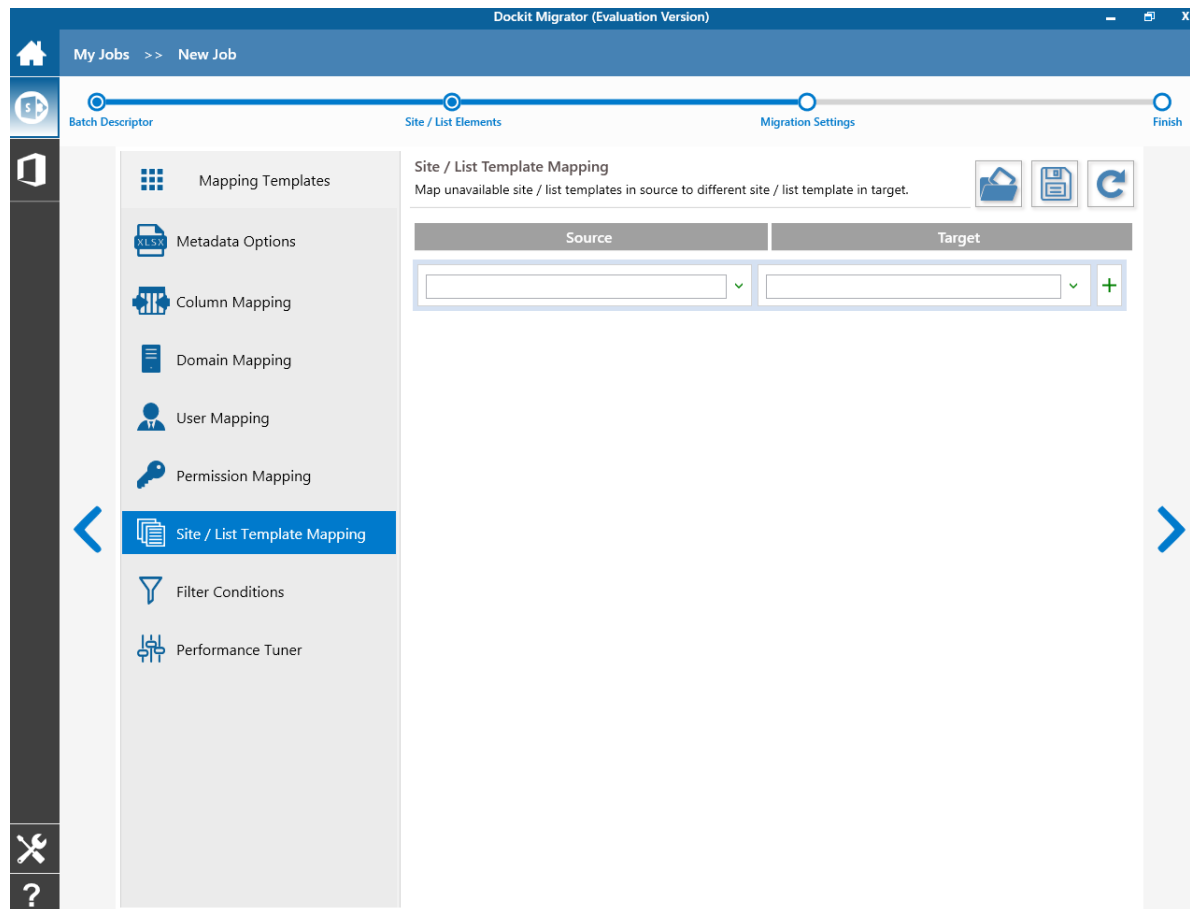


16. Click to load the application default settings.

17. Click **Next** to proceed.

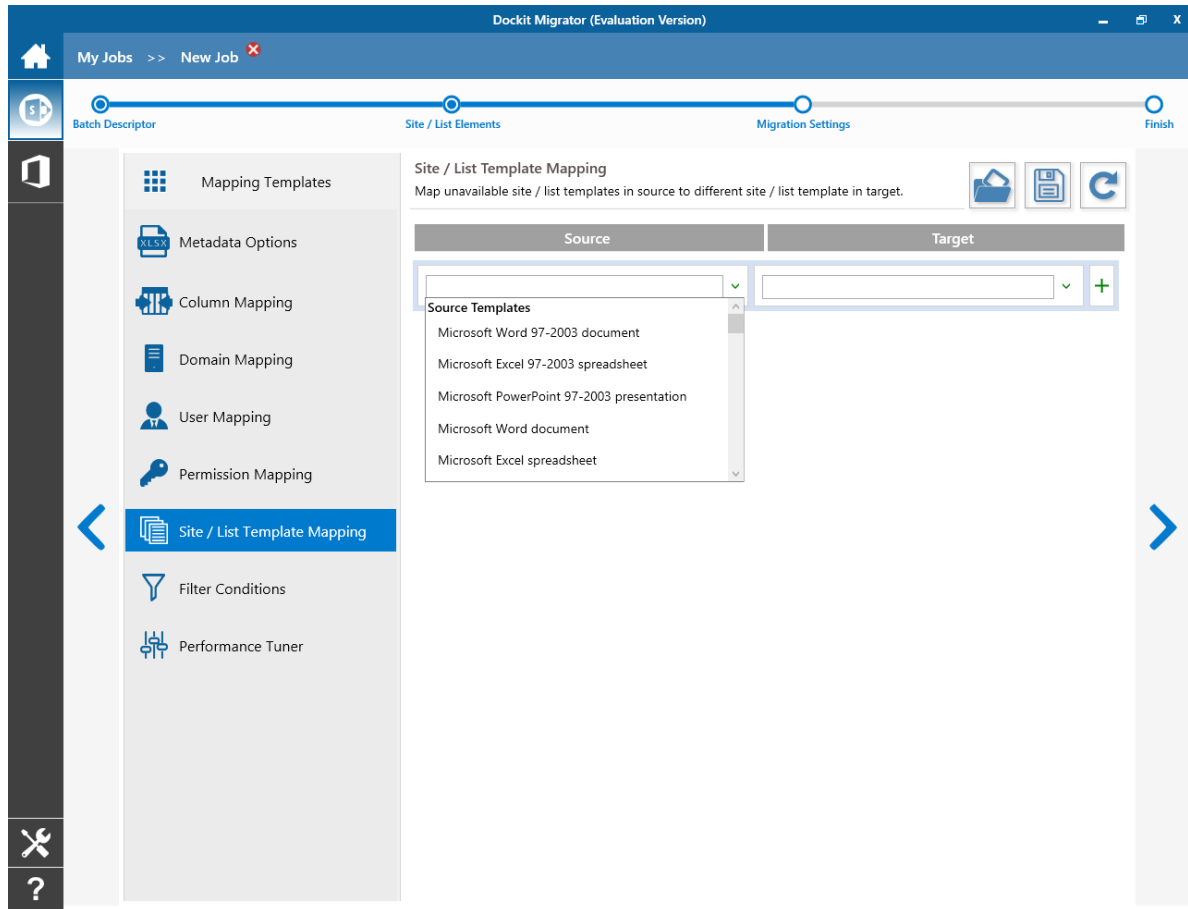
Site and List Mapping

1. Dockit uses site and list template mapping to create the site / lists by replacing the unavailable site / list template with valid / new SharePoint site / list template when creating unavailable sites / lists during content migration from one SharePoint environment to another.
2. You can also map site and list templates by using 'Site / List Mapping Template' for repeated use.
3. To create a new site / list mapping, select **Site / List Mapping**. A default page will appear as shown below:



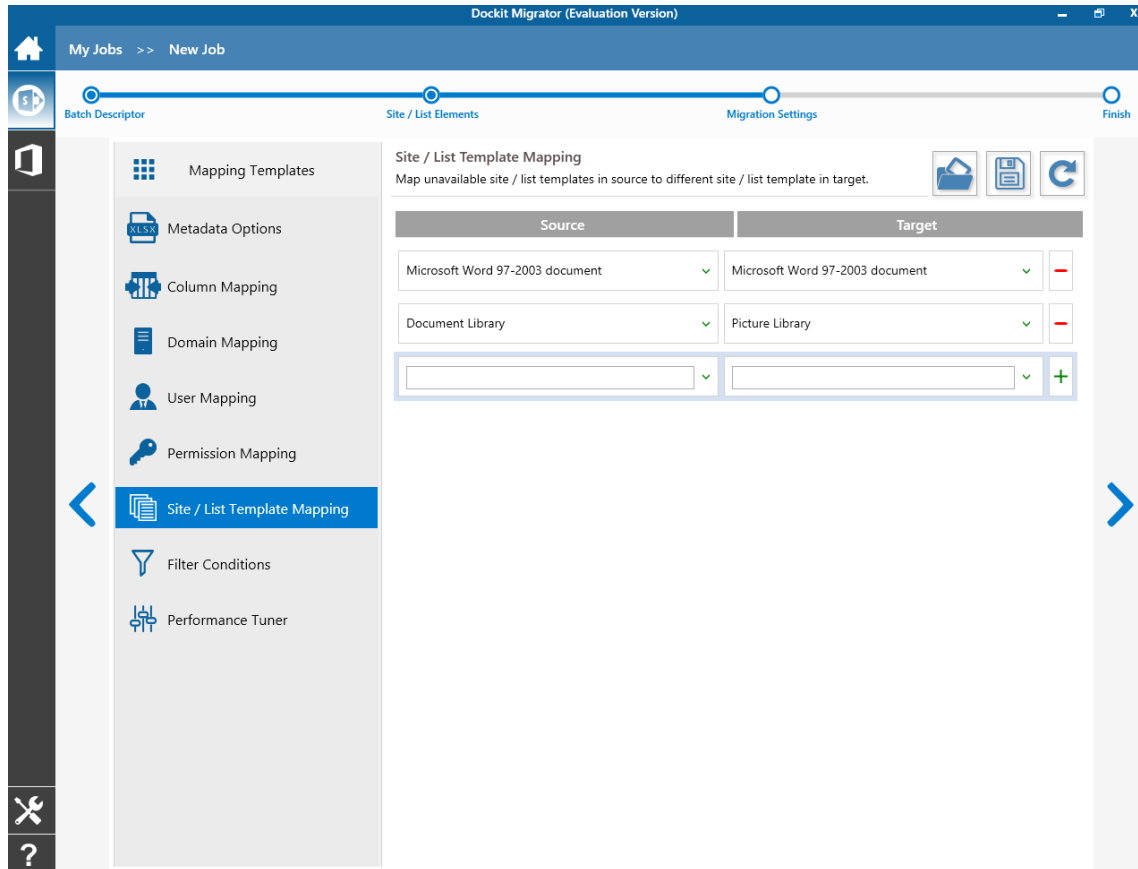
4. Site / List Mapping consists of the following sections:
5. Source - Name of the source SharePoint Site / List template, which has to be mapped.
6. Target - Name of the target SharePoint Site / List template, which will be mapped against the given source template.

7. You can load the list of site and list templates normally available in a SharePoint site (application defaults) by clicking . Once you click , it will display the list of site and list templates in both source and target template sections as shown below.



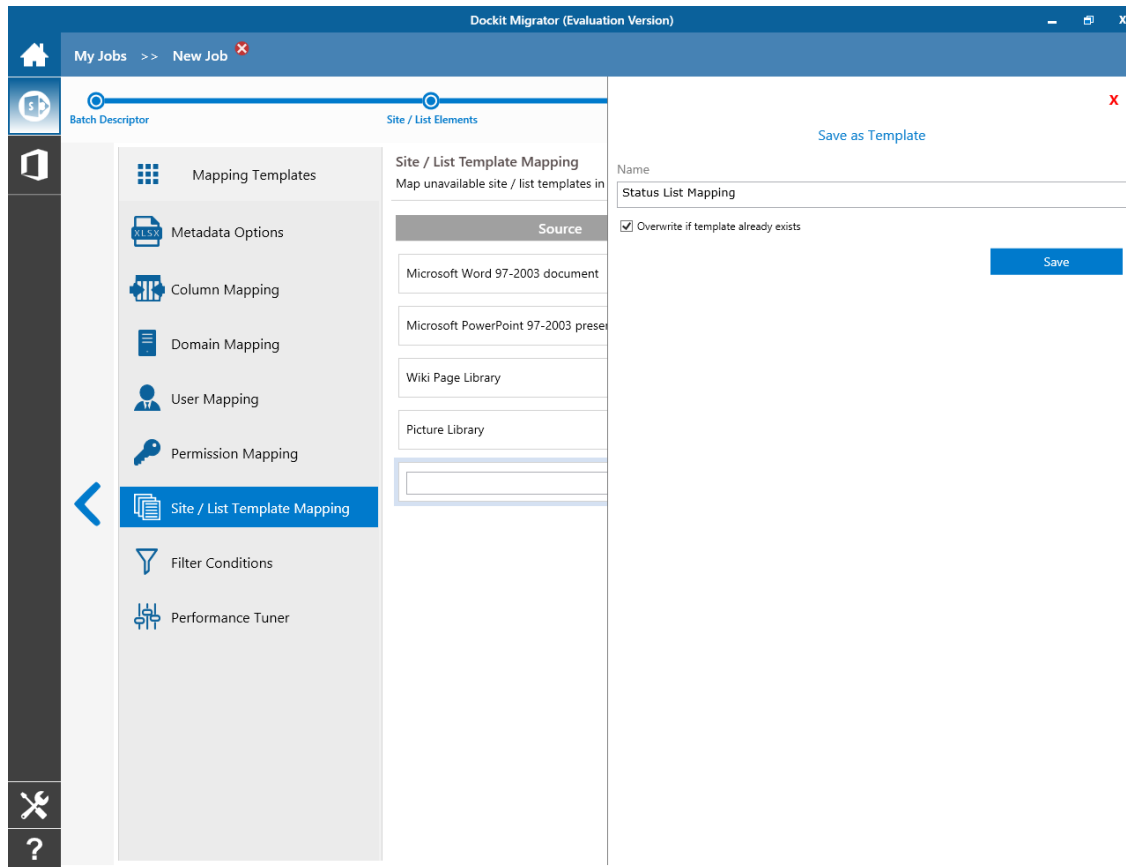
8. You can select the appropriate source template(s) from the source template list and the target template to map from the list of available target template list.
9. **Note:** As for entering free texts, multiple source templates can be entered separated by comma.
10. You have to select the appropriate source from the source list and target from the target list. Finally, click  button to map both source and target together. You can also specify the site / list URL in the source URL / Template Name textbox along with the new name in the Target Name textbox.

11. You also have the option to enter the names in the respective combo boxes and finally, click **+** button to map. Once you click **+** button, selected source and target Sites / Lists are mapped and the mapped pair is displayed in the Site and List mapping pane as shown below:





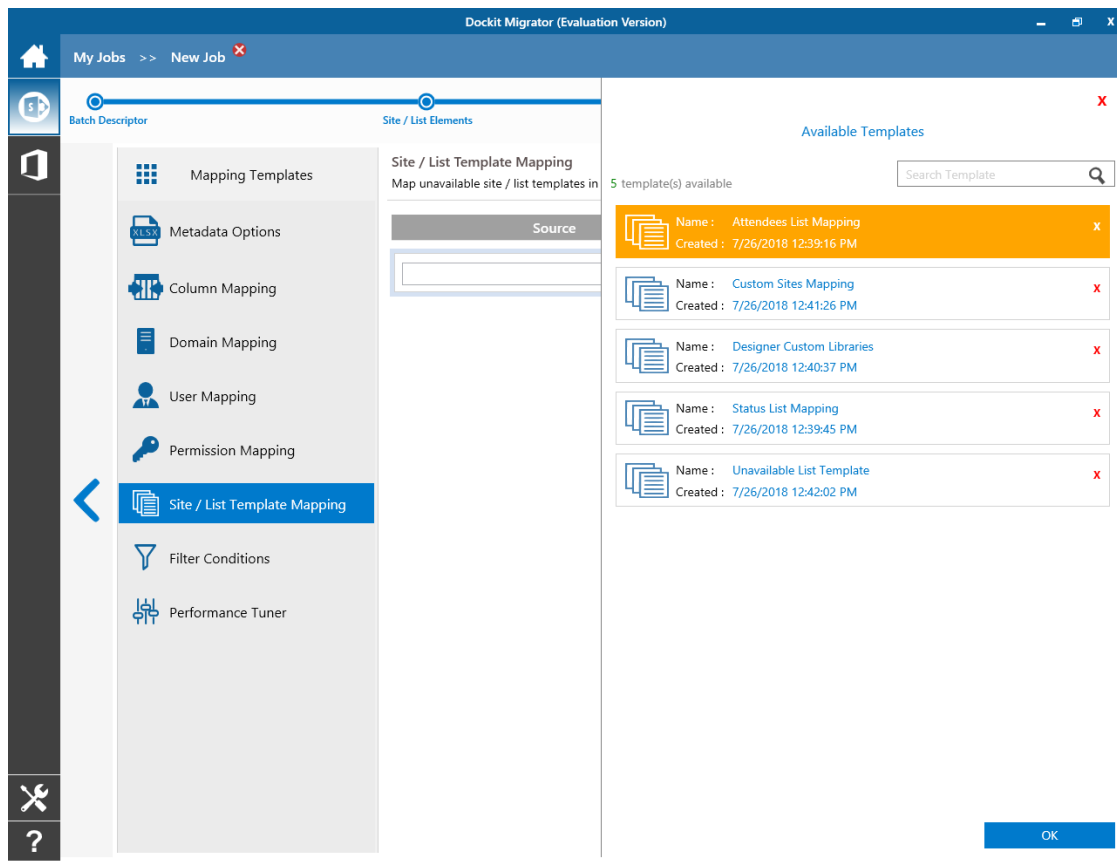
12. Once you finish mapping the templates, you can click  to save as new template. This option enables you to save the configured Site / List mapping as templates for reuse in other migration tasks.



13. Once you save a template, you can load from the saved templates to use in this task.



14. **Click** to load available Site / List mapping templates.



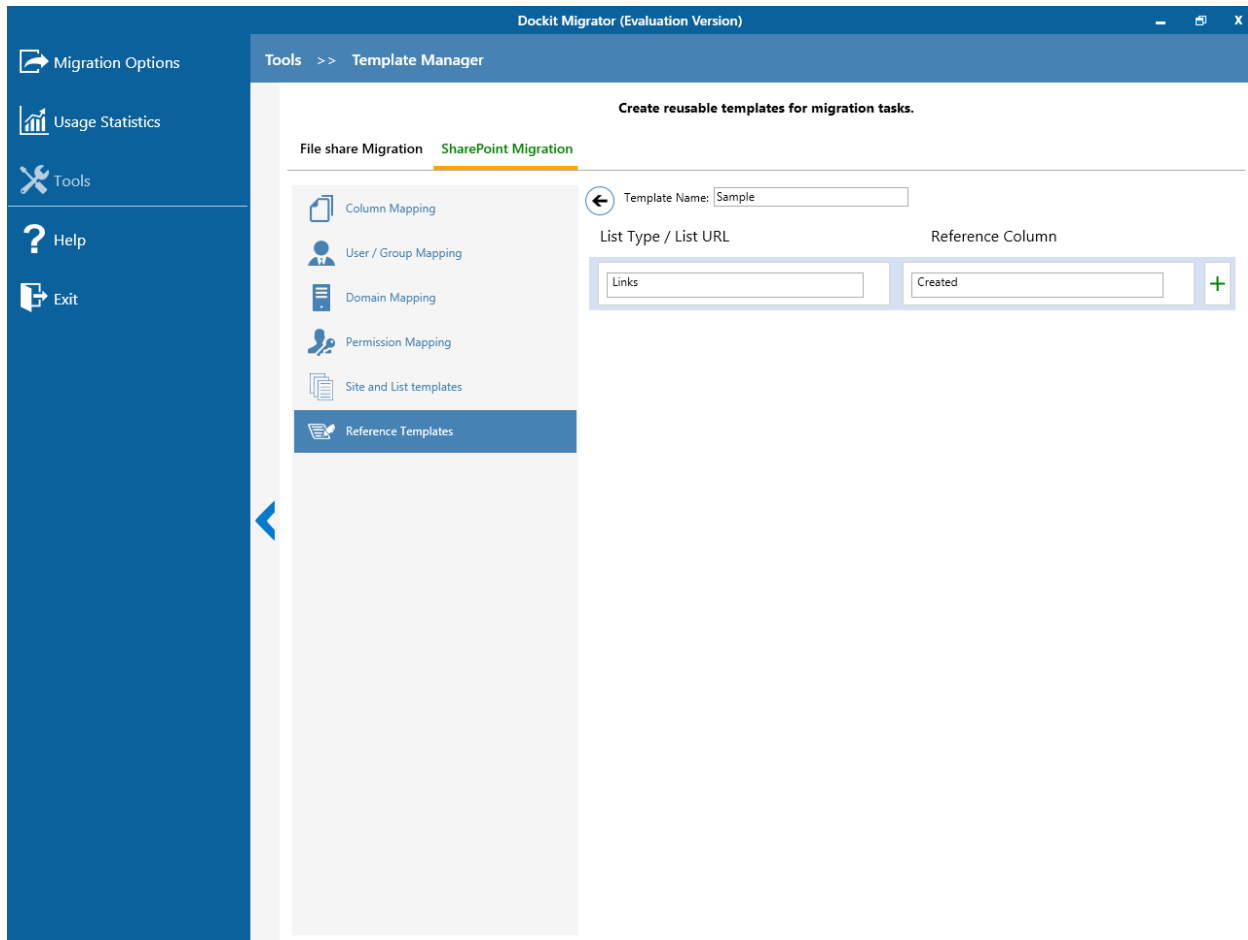
15. **Click** to load the application default settings.

16. Click **Next** to proceed.

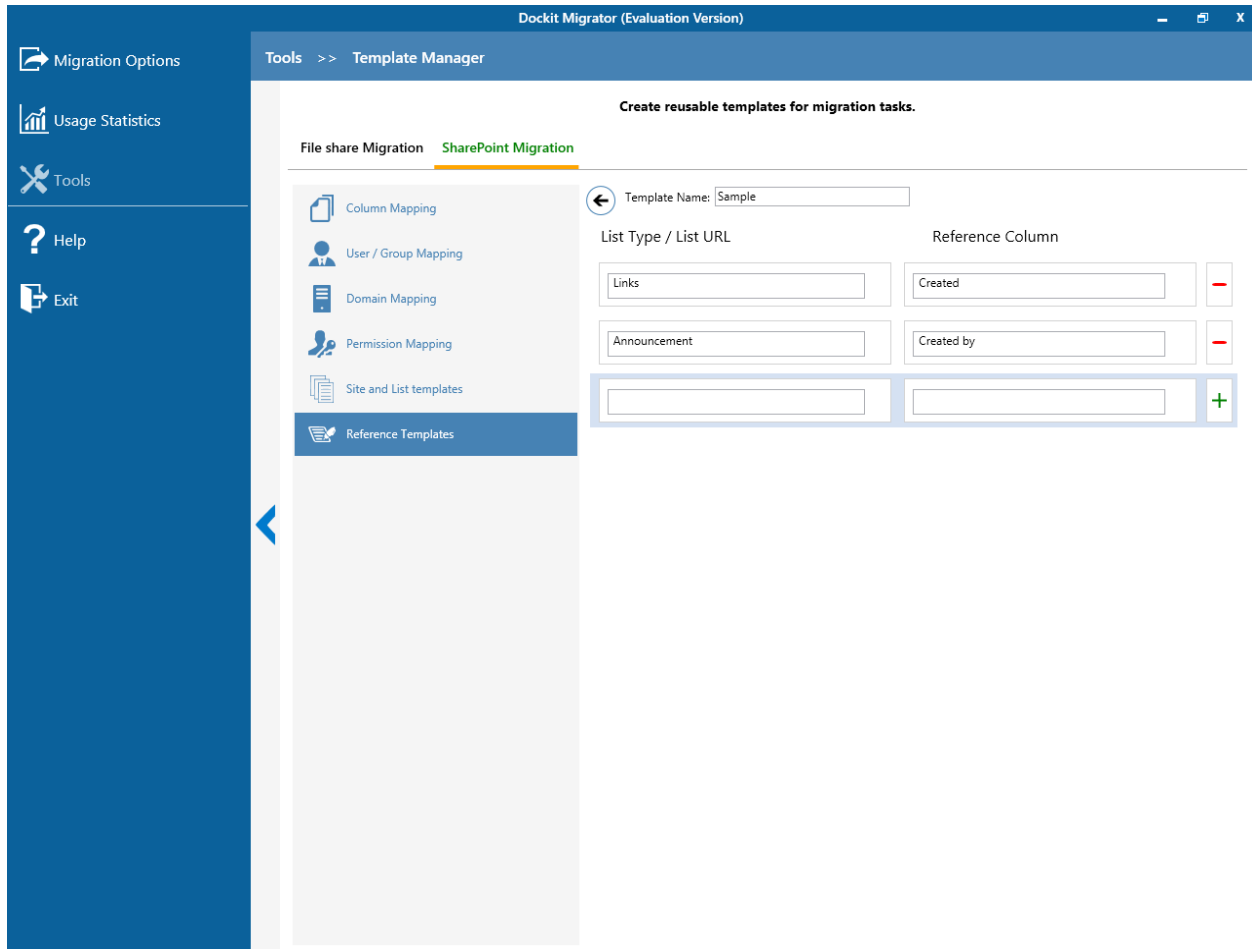
Reference Mapping Template

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 a 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.



Docket Migrator (Evaluation Version)

Tools >> 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

Renaming rules

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

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

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

The renaming rules page will appear as shown below:

Docket Migrator (Evaluation Version)

My Jobs >> Edit Job [10]

Select Files Migration Settings Finish

Migration Settings

Metadata Options

Column Mapping

Domain Mapping

User Mapping

Permission Mapping

Folder / File Settings

Filter Conditions

Post Migration Action

Renaming Rules

Performance Tuner

Renaming Rules

Replace invalid characters in file or folder names to valid character(s) during migration.

File

Find	Replace	
#	-	-
%	-	-
		+

Folder

Find	Replace	
#	-	-
%	-	-
*_Files	_Files_	-
		+

Truncate file name, max length (including file extension)

256

Truncate folder name, max length

320

Back Next Finish Cancel

Folder Renaming Rule :

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

Truncate folder names:

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

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

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

File Renaming Rule:

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

Truncate file names:

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

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

Sample renaming rules:

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

Hello_World	*_World	{empty}	Hello	Truncate _World, if file name ends with _World
SampleV1	v?	{empty}	Sample	Truncate V and the file name character following it (immediately succeeding character), if the file names contains V and followed by any one character .
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*	<i>{empty}</i>	SampleVersion	Truncate the word 'File' in any position in the file name.
Sample.Matrix	\.	Dot	SampleDotMatrix	Example of escape sequence for .
Sample?File	\?	Text	SampleTextFile	Example of escape sequence for ?
Hello*World	*	<i>{empty}</i>	HelloWorld	Example of escape sequence for *
Sample\$	\\$	Dollar	SampleDollar	Example of escape sequence for \$
Sample^File	\^	<i>{empty}</i>	SampleFile	Example of escape sequence for ^
Sample+Document	\+	Plus	SamplePlusDocument	Example of escape sequence for +

Hello<World	\<	{empty}	HelloWorld	Example of escape sequence for <
Hello>World	\>	{empty}	HelloWorld	Example of escape sequence for >
[Document	\[	Word	WordDocument	Example of escape sequence for [
Word]	\]	Document	WordDocument	Example of escape sequence for]
(File	\(	Sample	SampleFile	Example of escape sequence for (
Sample)	\)	Document	SampleDocument	Example of escape sequence for)

6. The following are valid wildcard characters that can be used to create naming rules in Docket:

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

Sample Renaming Rules:

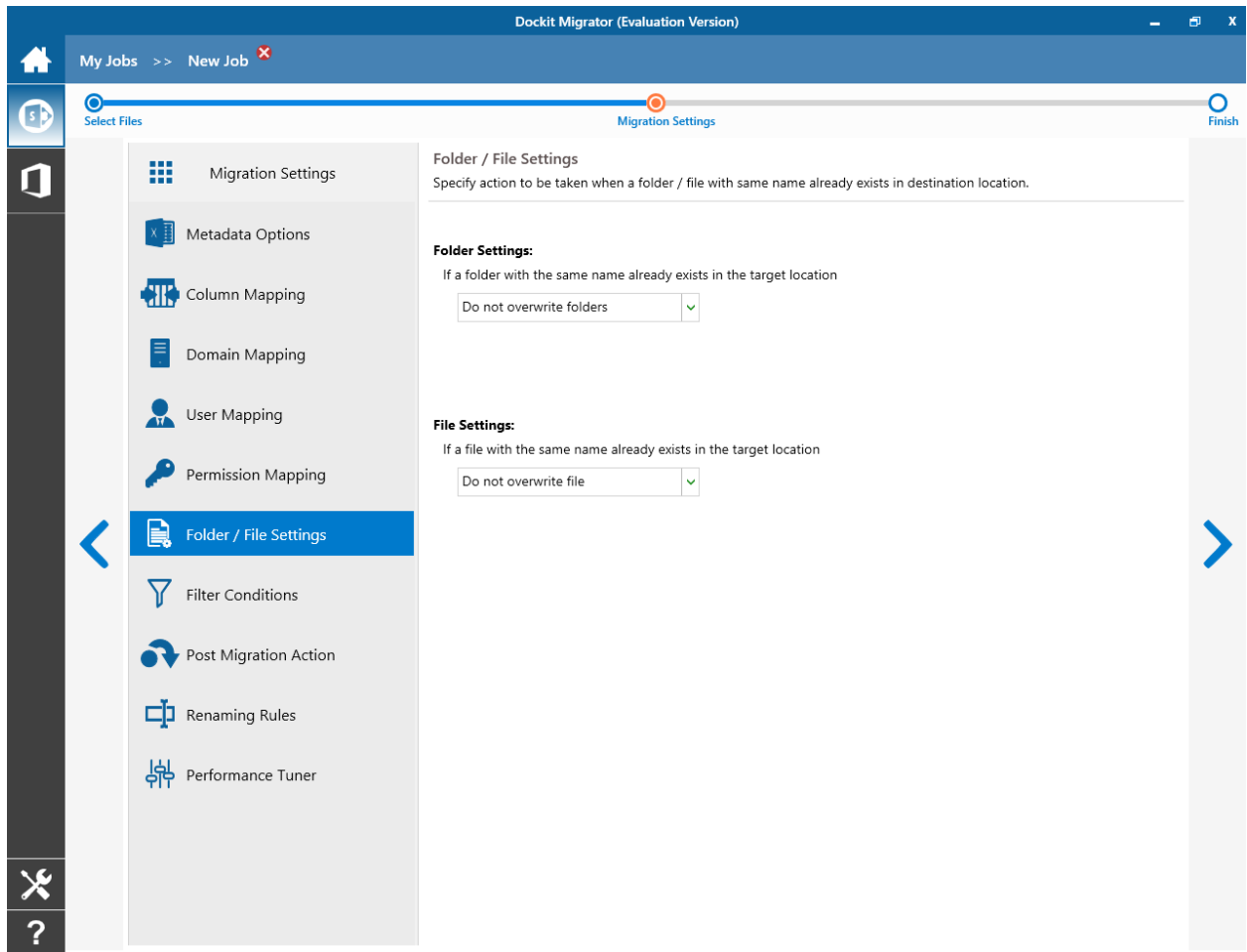
File Name	Find	Replace	Result	Remarks
SampleV1	*V1	{empty}	Sample	Truncate V1, if the file ends with V1
SampleV1	*V1	A	SampleA	Replace V1 with A, if the file name ends with V1
Hello_World	*_World	{empty}	World	Truncate Hello_, if the file name starts with Hello_
Hello_World	*_World	{empty}	Hello	Truncate _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	>	<i>{empty}</i>	HelloWorld	
[Document	[	Word	WordDocument	
Word]	]	Document	WordDocument	
(File	(	Sample	SampleFile	
Sample)	)	Document	SampleDocument	

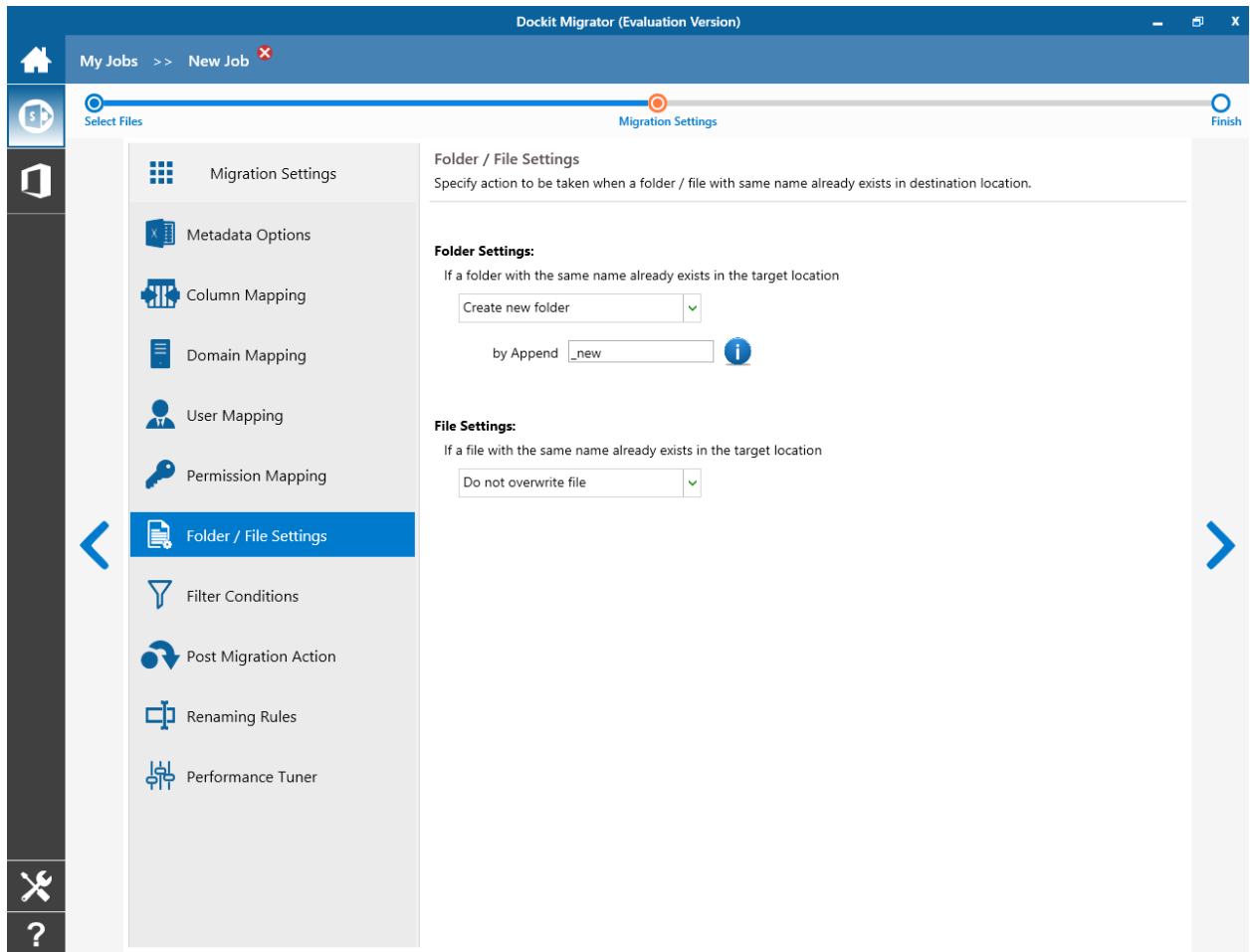
Folder / File Settings

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

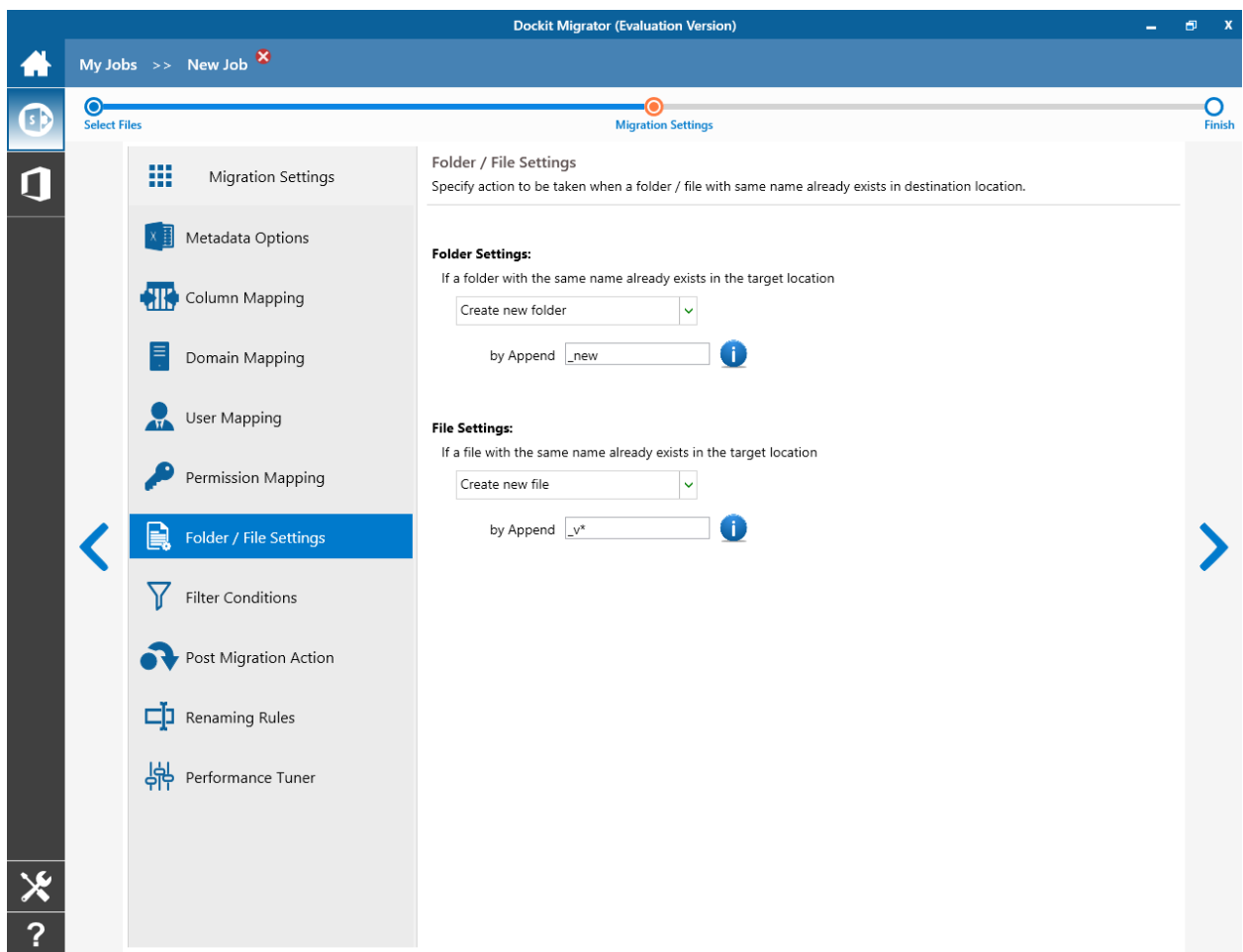
1. The **Folder / File Settings** page will appear as shown below:



2. Select any one of the following options given below:
- Do not overwrite** - Skips the folder without overwriting.
 - Overwrite folder** - Deletes the folder from the destination location (along with its version history) and imports the source folder.
 - 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.



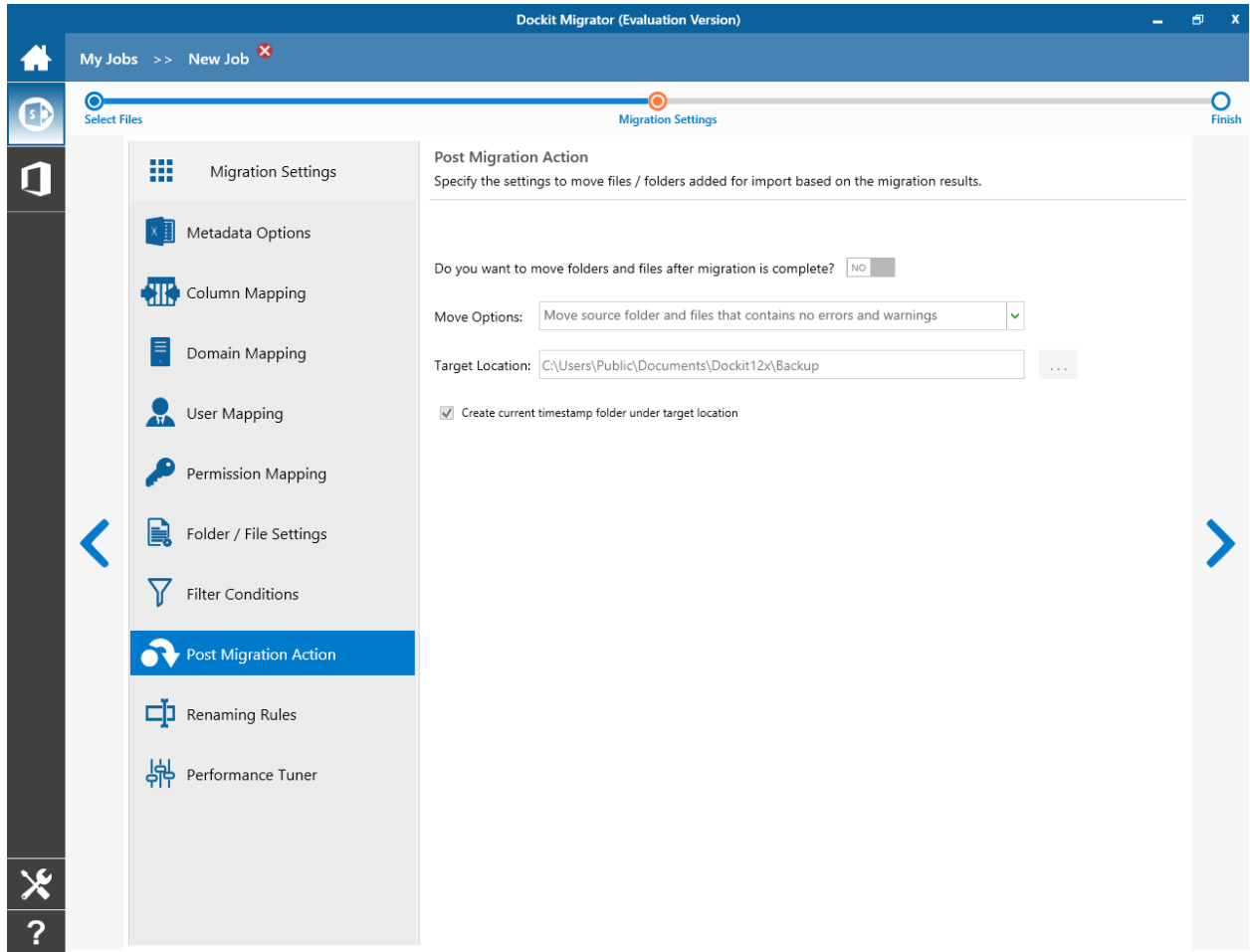
3. Select any one of the following options given below:
- Do not overwrite** - Skips the file without overwriting.
 - Overwrite file** - Deletes the file from the destination location (along with its version history) and imports the source file.
 - Create as new file** - Creates a new file by appending 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.
 - 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:
 - Leave as is** - Skip the file.
 - Overwrite current version** - Undo Checkout the file and add the source file as new version.
 - Check-in file & create new version** - Check-in the file and add the source file as a new version.



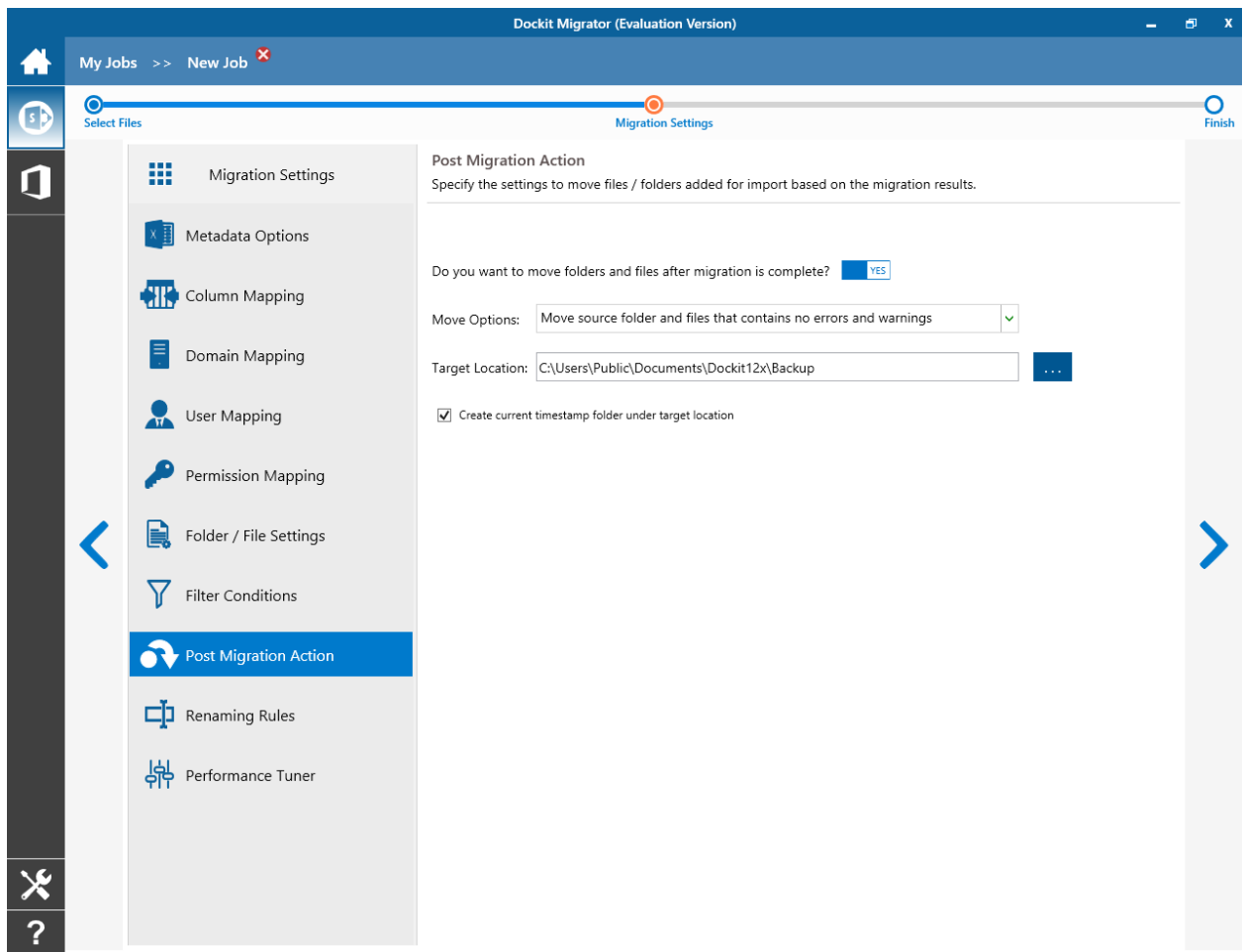
4. Click **Next** to proceed.

Post Migration Action

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



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

File Version 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 **File Version Status** page will appear as shown below:

The screenshot shows the 'File Version Status' configuration page in the Dockit Migrator application. The interface includes a top navigation bar with 'My Jobs' and 'New Job' links, and a progress bar with 'Metadata File', 'Migration Settings', and 'Finish' stages. A left sidebar contains icons for 'Migration Settings', 'Column Mapping', 'Filter Conditions', and 'File Version Status' (which is currently selected). The main content area is titled 'File Version Status' and contains the following text: 'Specify document status to be set while updating metadata value.' Below this, there are two sections of radio button options. The first section, 'Versioning', has two options: 'Update metadata values and create new version' (which is selected) and 'Update metadata values in the last version, without creating a new version'. The second section, 'If the file is checked-out by either current user or other user', has three options: 'Leave as is' (selected), 'Overwrite current version', and 'Check-in and create new version'. Navigation arrows are visible on the left and right sides of the main content area.

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:

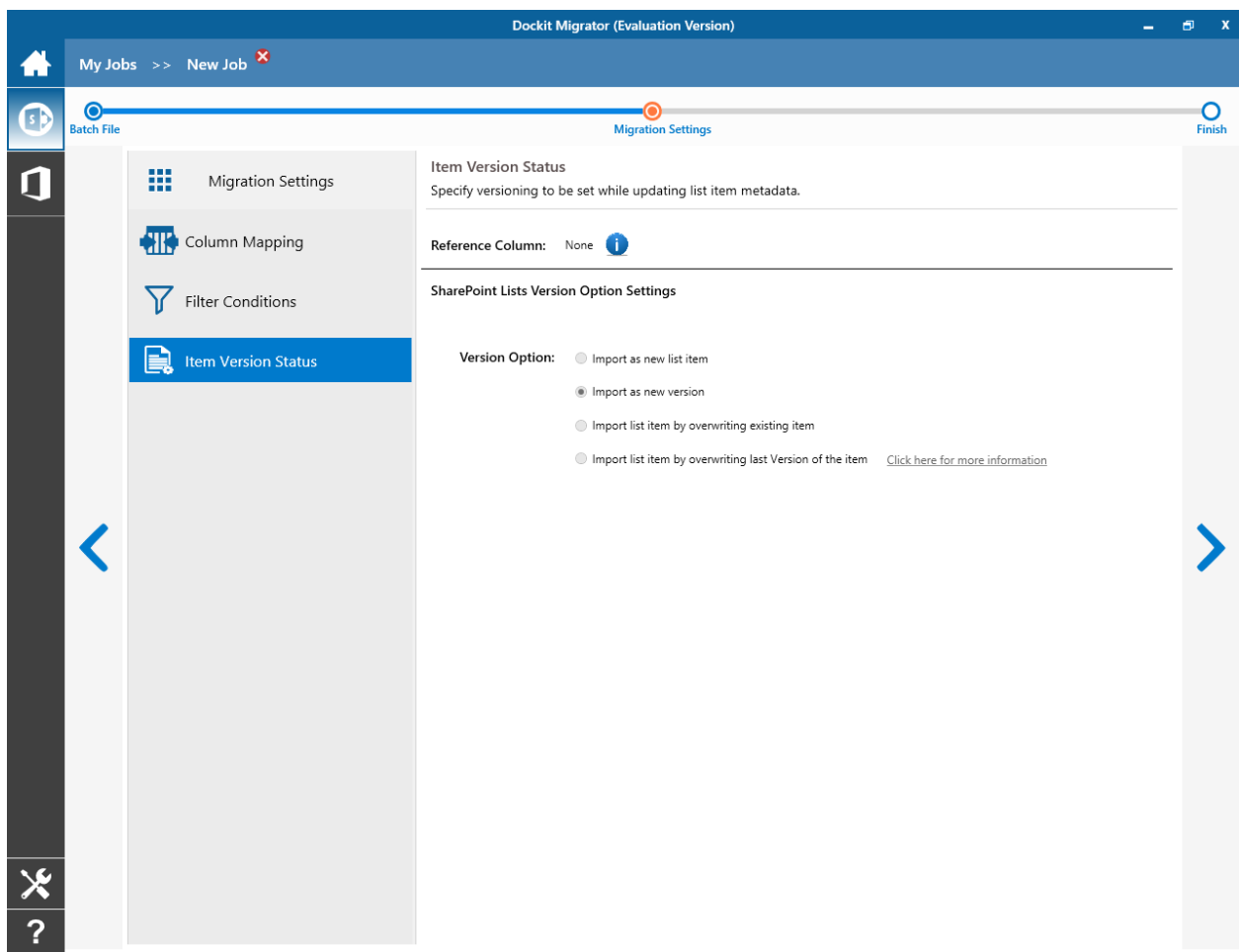
- a) *Dockit Server Agent* component is installed in the target SharePoint server (such as Office 365).
- b) *Content Approval* is enabled and the content approval status is set to Approved for the documents that are migrated to SharePoint.
- c) *Major and Minor* versioning is used in the target SharePoint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

Item Version Status

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

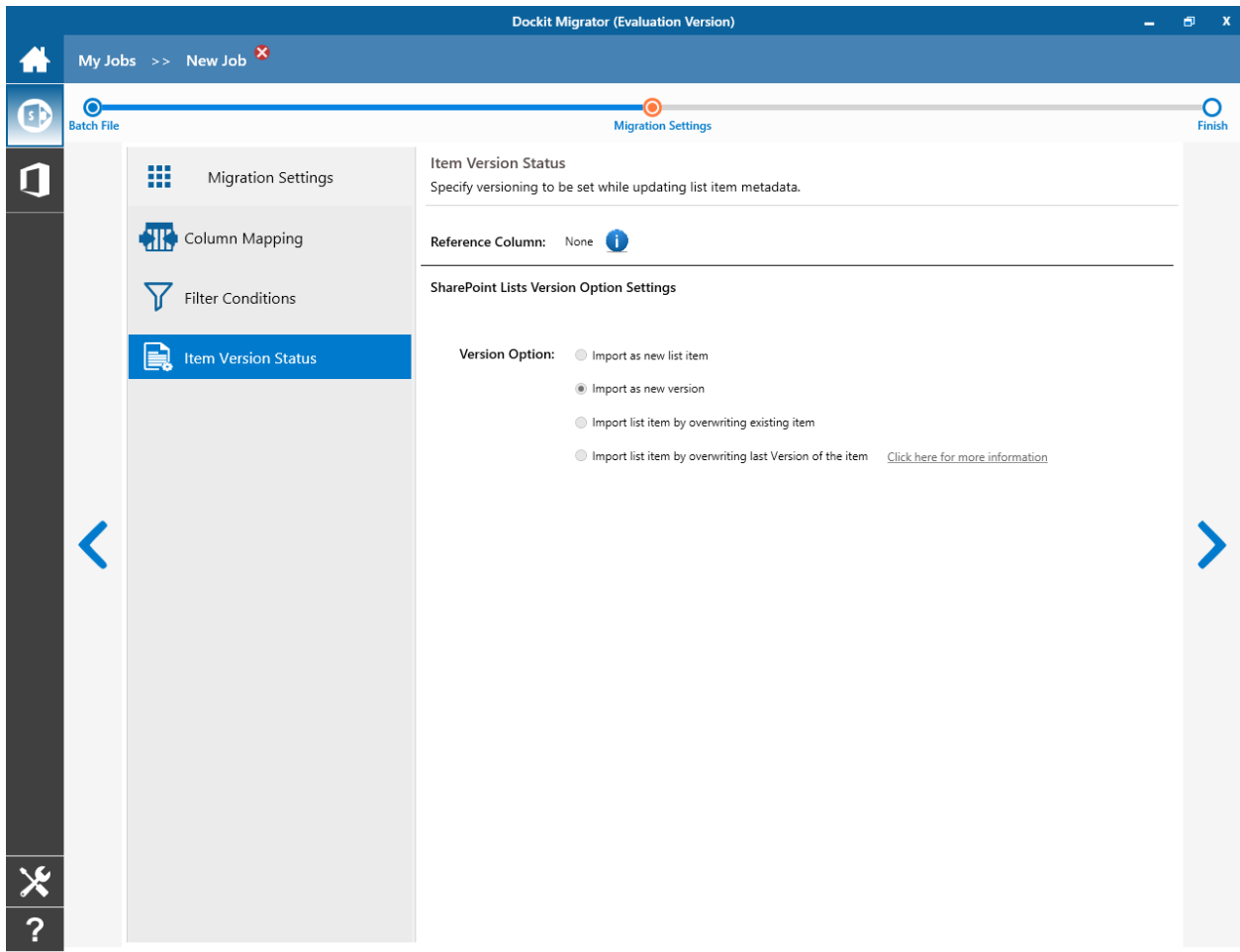
Note: If you opt to overwrite the last version of a list item during the update operation, Dockit requires **Dockit Server Agent** component to be installed in the Windows Server 2003 (or) Windows Server 2008 (or) Windows Server 2012 running Microsoft Office SharePoint Server 2007 or Windows SharePoint 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 **Item Version Status** page will appear 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.

Dockit Features

- [On Premise](#)
- [Online](#)

On Premise

- [File Share to SharePoint Migration](#)
- [SharePoint to SharePoint Migration](#)
- [Clean Up Metadata](#)

File Share to SharePoint Migration

Explorer mode

[Metadata file structure](#)

[Step 1: SharePoint destination location](#)

[Step 2: Items to import](#)

[Step 3: Migration Settings](#)

[Step 4: Task Schedule Settings](#)

Batch File mode

[Batch file structure](#)

[Metadata file structure](#)

[Step 1: Batch File Options](#)

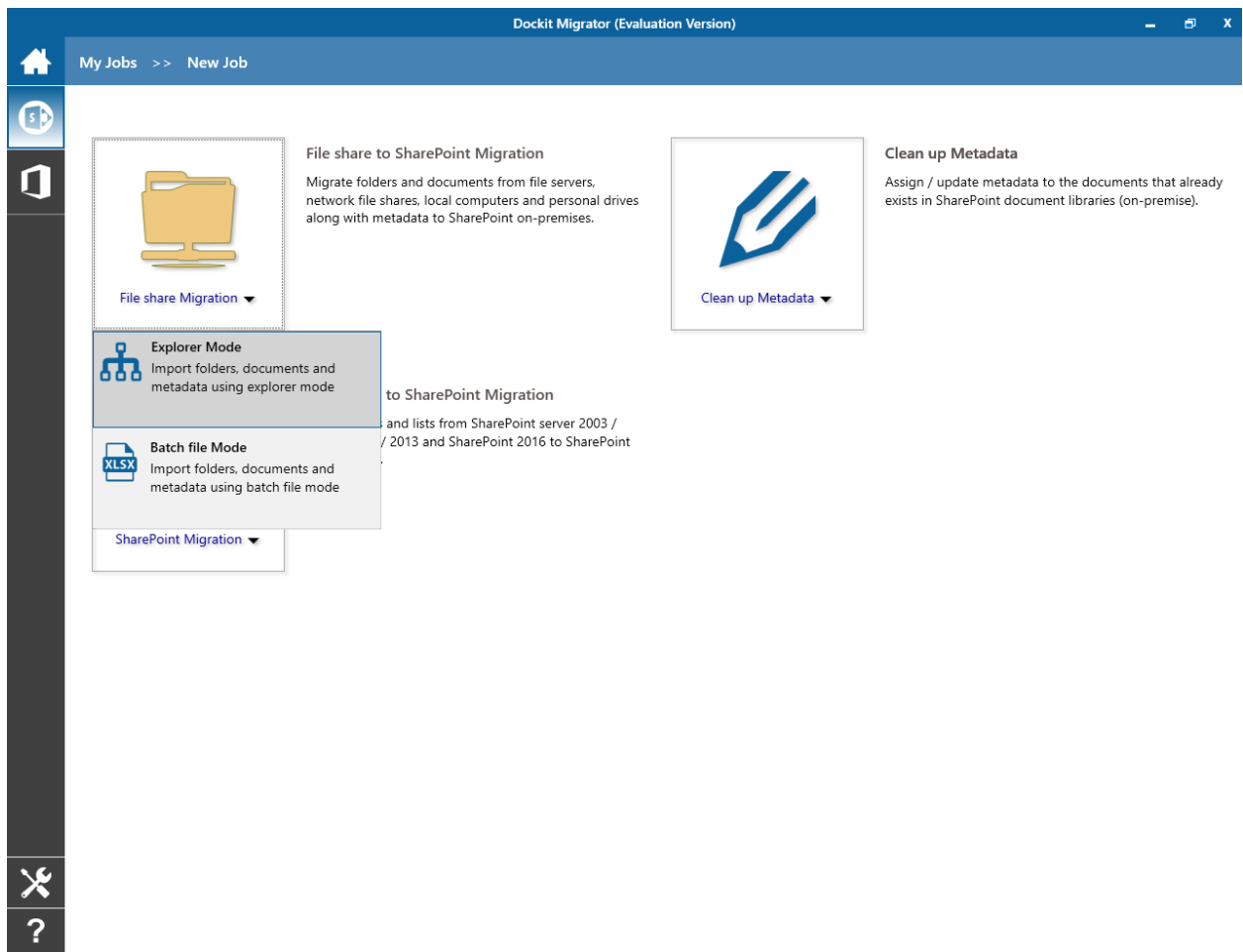
[Step 2: Migration Settings](#)

[Step 3: Task Schedule Settings](#)

Explorer mode (Create Task)

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

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



2. Specify the [SharePoint Destination Location](#).
3. Select [Items to Import](#).
4. Specify [Migration Settings](#).
5. Specify [Task Schedule Settings](#).
6. 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.

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 ';'. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists.	"Windows 7; Windows Vista; Windows 2003; Windows XP"
Lookup (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists.	"Windows 7"

	Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	
Lookup (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ','. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Stock Details; Accounts; Product Details"
People or Group (Single Value)	User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. Do not use multiple values unless the equivalent column defined in SharePoint can accept multiple values. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\Administrator" "BUILTIN\Administrator" "Backup Owners" "someone@example.com" "John Doe"
People or Group (Multiple value)	User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. The values can be of single or multiple. Multiple values should be separated with ','. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\User1; BUILTIN\Administrators; Guest Members;Temps"
Hyperlink or Picture	The http URL of any resource or picture can be given to this field.	"http://sharepoint/Shared Documents/My Sample File.doc"

		"http://sharepoint/Pictures/chart.bmp"
Target Audiences (Multiple value) (Applicable only for a MOSS / Microsoft SharePoint Server 2010 and above library)	Global Audience name, Security / Distribution Group name and SharePoint Group name can be given to this field. Global Audience and Security / Distribution Group should be crawled and stored in User Profile Store of SSP / Services. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the respective group list and assign the ID of the matching group name to the Target Audiences column of the imported file, only if the group name exists. Moreover, in order to assign the values that belong either to Global Audience or Security / Distribution Group require Dockit Server Agent component to be installed in the destination SharePoint server (MOSS / Microsoft SharePoint Server 2010 and above).	"All site users; Admins; Viewers; Administrators; SPUUsers; 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 " 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	"Continent North America Country United States States Alaska" "Alaska"

	the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	
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	"http://sharepoint/Documents/Sample 1.doc;" http://sharepoint/Documents/Sample 2.xlsx"

	be of single or multiple. Multiple values should be separated by ';'. "	"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 ';#'. * - 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 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 ';#'. * - The delimiter ';#' is a reserved character pattern in the Choice field column. The multi-value should not contain ';#' as part of its	";#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	";#Windows Live;;#Mail;#Windows Photo Gallery;#"	Windows Live;#Mail; Windows Photo Gallery

value to be assigned to the Choice field column in SharePoint.		
--	--	--

Sample format of a CSV / TEXT metadata file:

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

"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** page will appear as shown below:

The screenshot displays the 'Target SharePoint Credential' page in the Dockit Migrator (Evaluation Version) application. The interface includes a top navigation bar with 'My Jobs >> New Job' and a progress bar with four steps: 'Credentials' (active), 'Select Files', 'Migration Settings', and 'Finish'. The main content area is titled 'Target SharePoint Credential' and contains the following fields:

- Target SharePoint URL:** A text input field with a dropdown arrow.
- Authentication:** A dropdown menu currently set to 'Windows'.
- User name:** A text input field containing 'vsslab\farmadmin_sp16-1' and a blue button with three dots.
- Password:** A text input field with masked characters (dots).

A large blue arrow on the right side of the page indicates the 'Next' step.

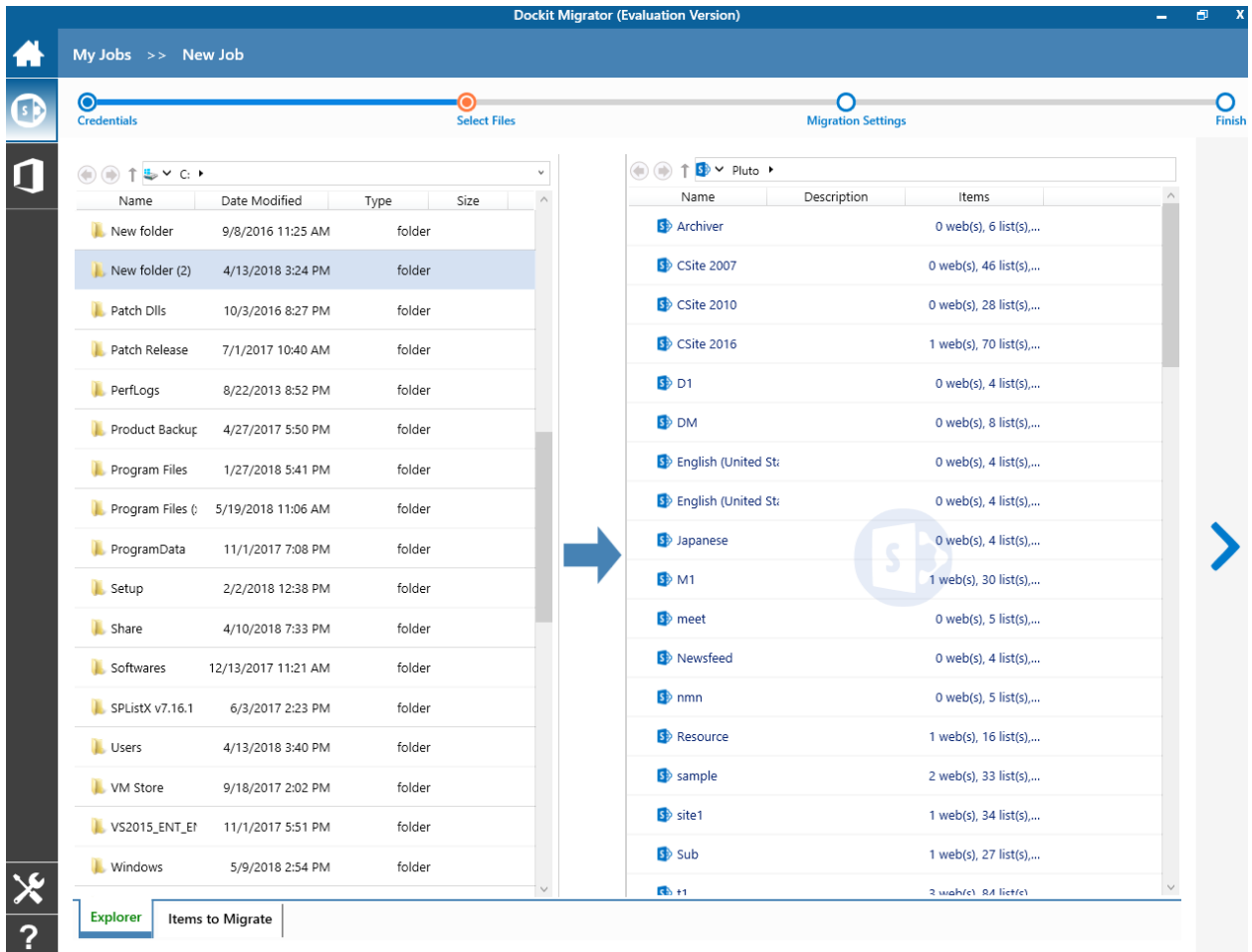
2. Specify a valid SharePoint URL in the URL textbox. You can specify a SharePoint site, library or folder location in the URL textbox. Dockit will load the tree view of the destination location from the level specified in this textbox.
3. Specify the Authentication mechanism and credentials to connect 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.
 - i. **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.
 - i. **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., john.doe@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:
 - i. **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.

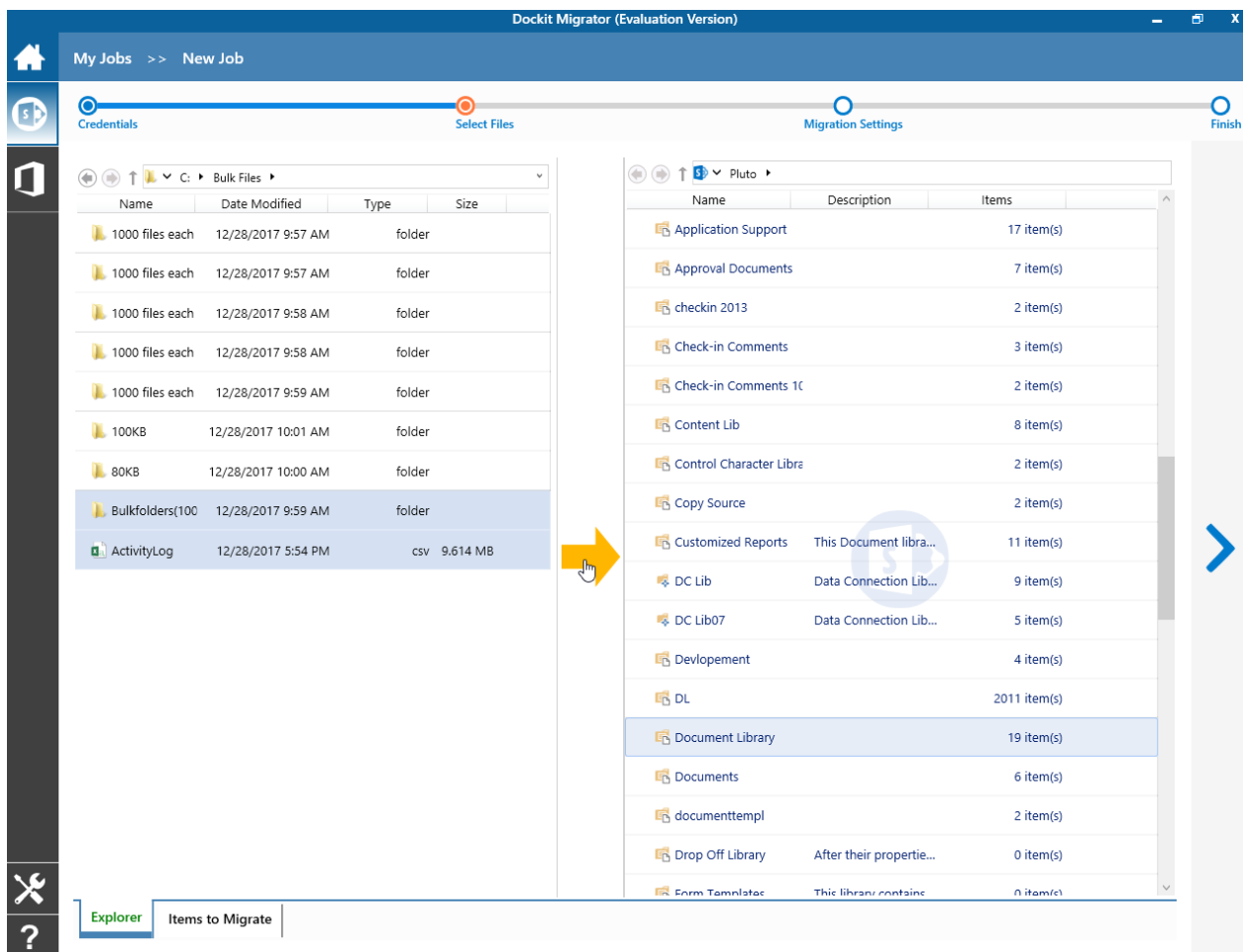
Items to Import

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

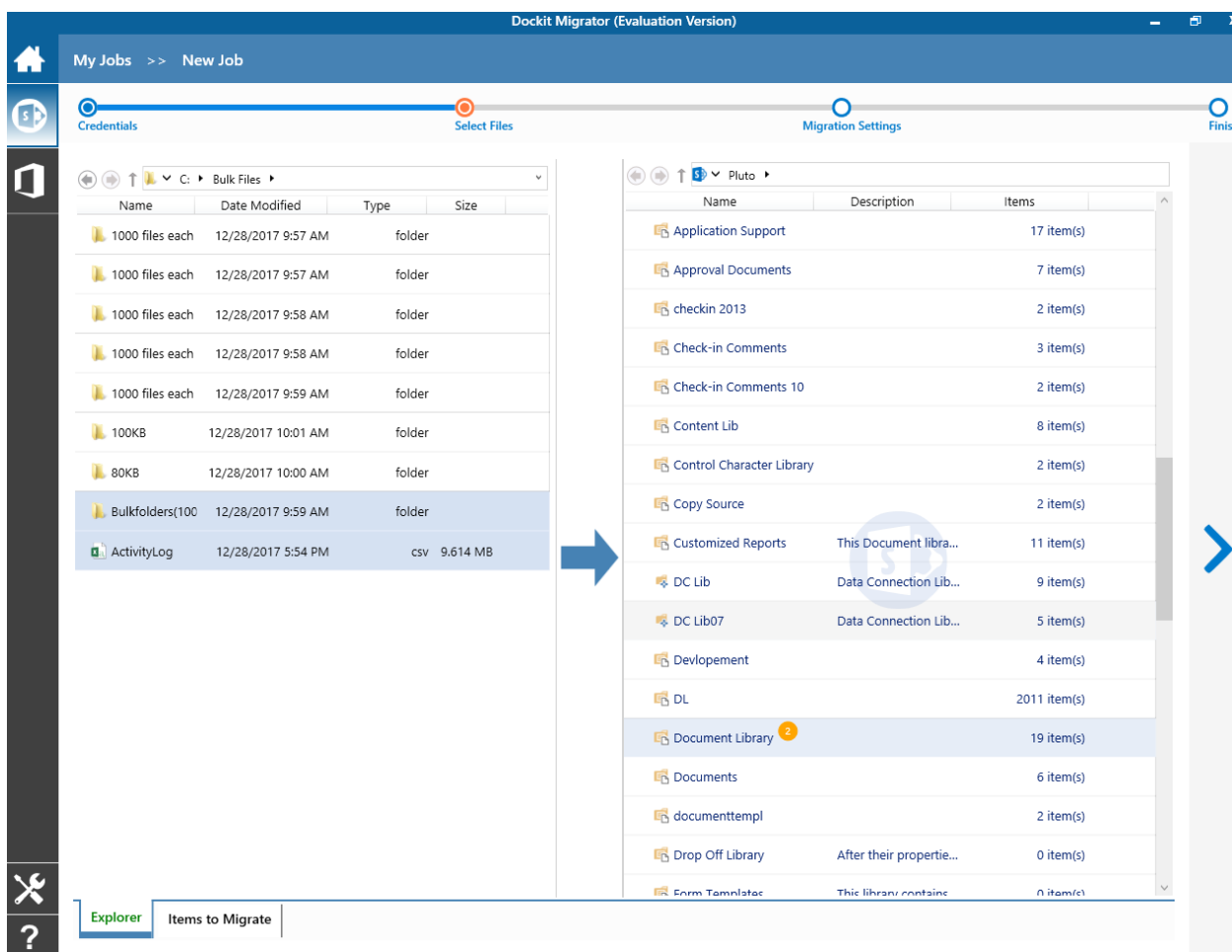
1. The **Select files** page appears as shown below:



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



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

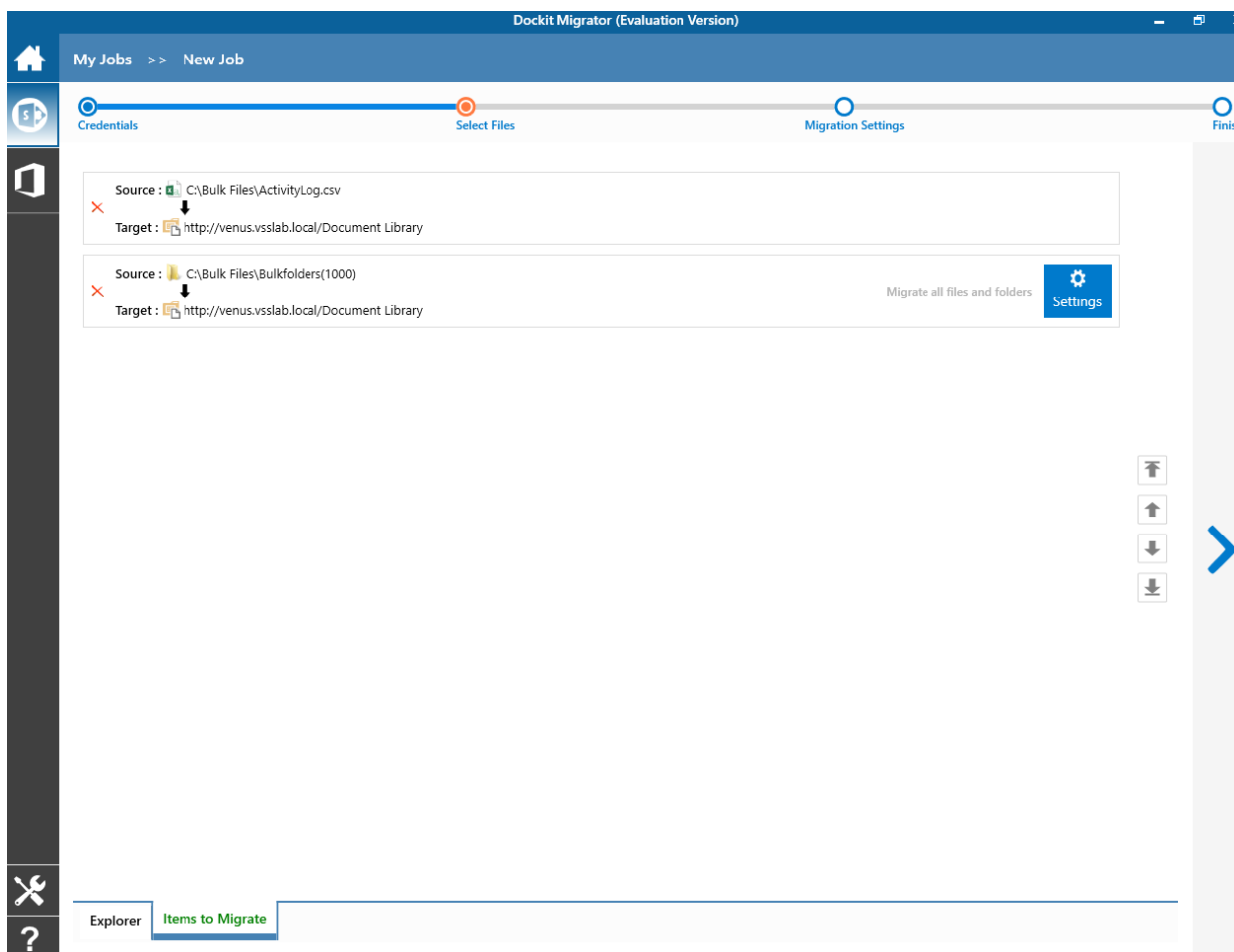


- The selected folders and files added for import will be displayed in the **Items to Migrate** tab. Dockit processes the top-level folders and files added for import in the order in which it appears in the **Items to Migrate** tab. The import process order can be changed by the **navigation** buttons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

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

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

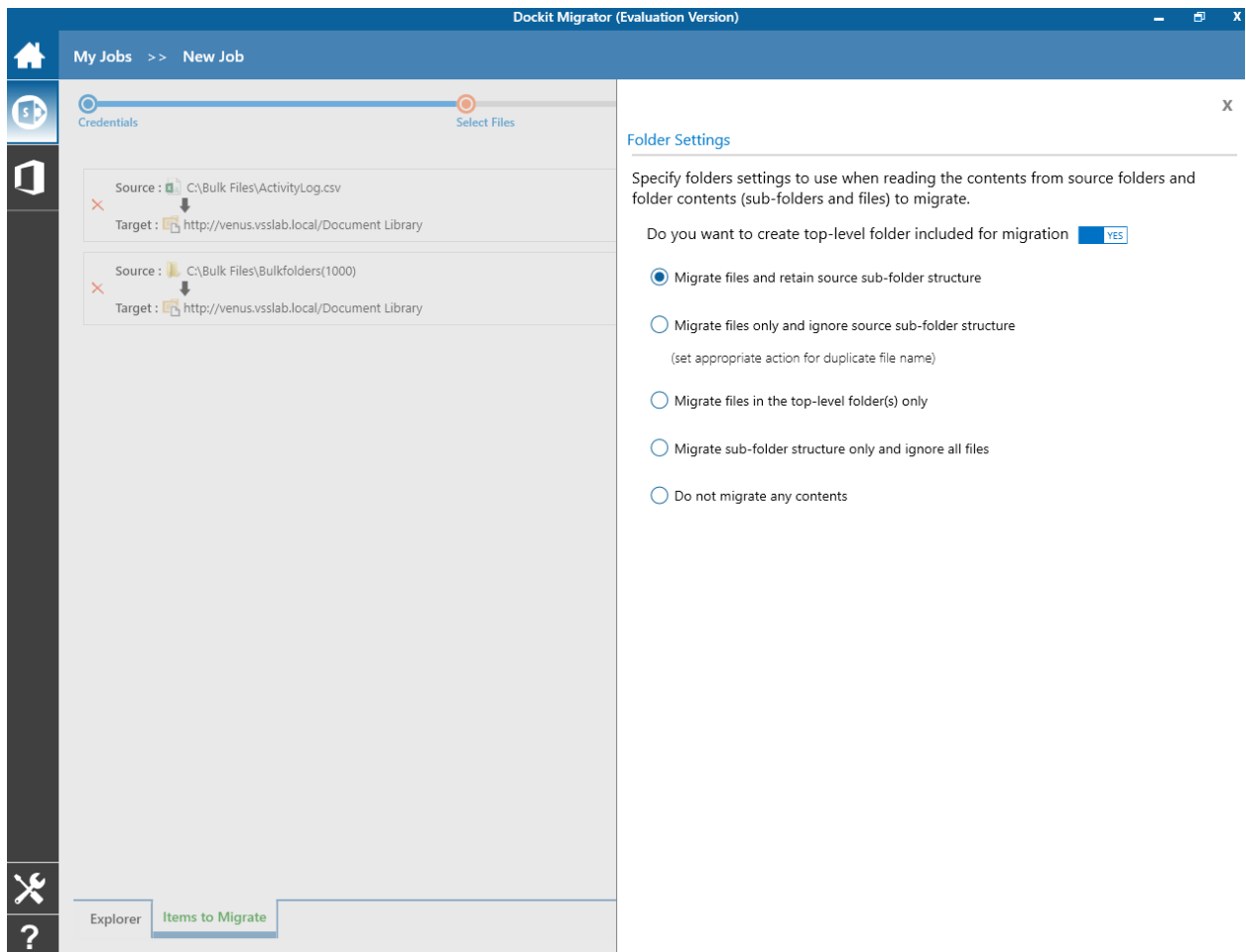
5. If you need to import different versions of files that are suffixed with its version number as - D:\Document Store\Sample_v1.txt, D:\Document Store\Sample_v2.txt, D:\Document Store\Sample_v3.txt etc, click [Import Document Versions...](#) for step by step guide to import them as a single file with versions.
6. Click **Next** button to proceed or click **Cancel** to discard the changes.
7. **Items to Migrate** step contains the folders and files added for import as shown below:



8. To make the import process easier for users, Docket 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 '**Settings**' button to edit the folder traversal option for folders that are added in Items added for import grid view.

A Folder Traversal page will appear 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:

- 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.
- 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).
- 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.

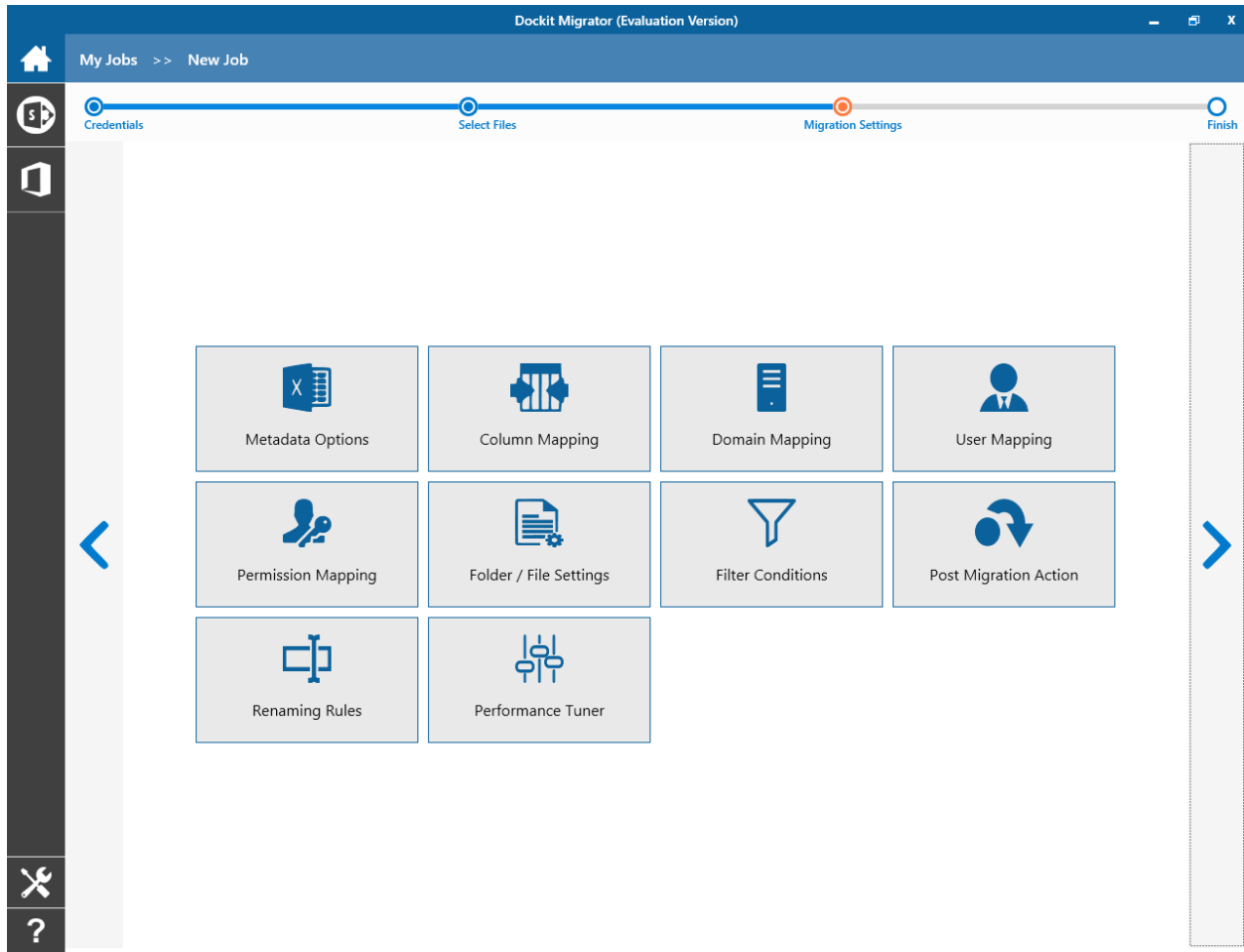
Note: Folder Traversal option is not applicable for file.

- 9. Click **Next** to proceed.

Migration Settings

To specify Migration Settings inputs to use for the task:

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



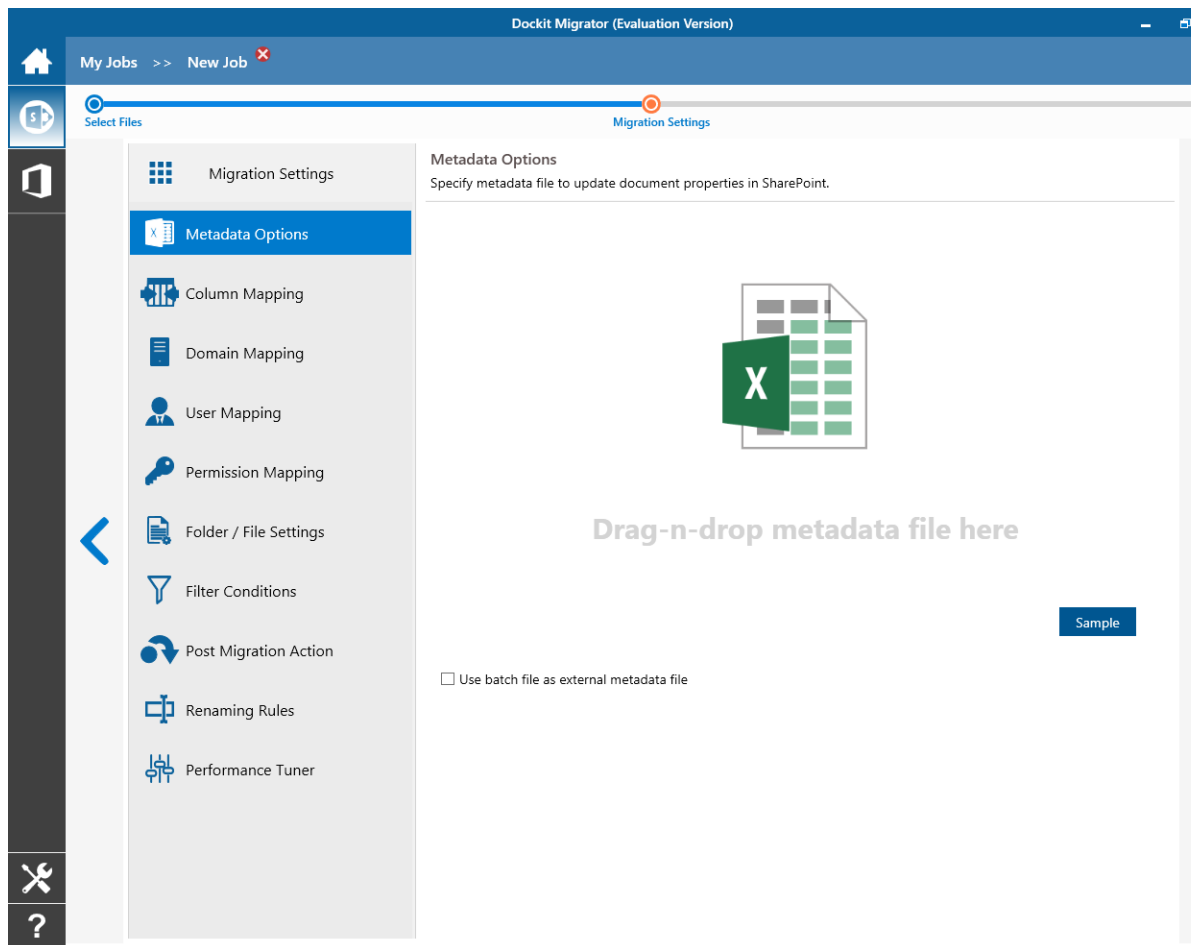
1. [Metadata Options](#)
2. [Column Mapping](#)
3. [Domain Mapping](#)
4. [User / Group Mapping](#)
5. [Permission Mapping](#)
6. [Folder / File Settings](#)
7. [Filter Conditions](#)
8. [Post Migration Action](#)
9. [Renaming Rules](#)

10. Click **Next** to proceed.

Metadata Options

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

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

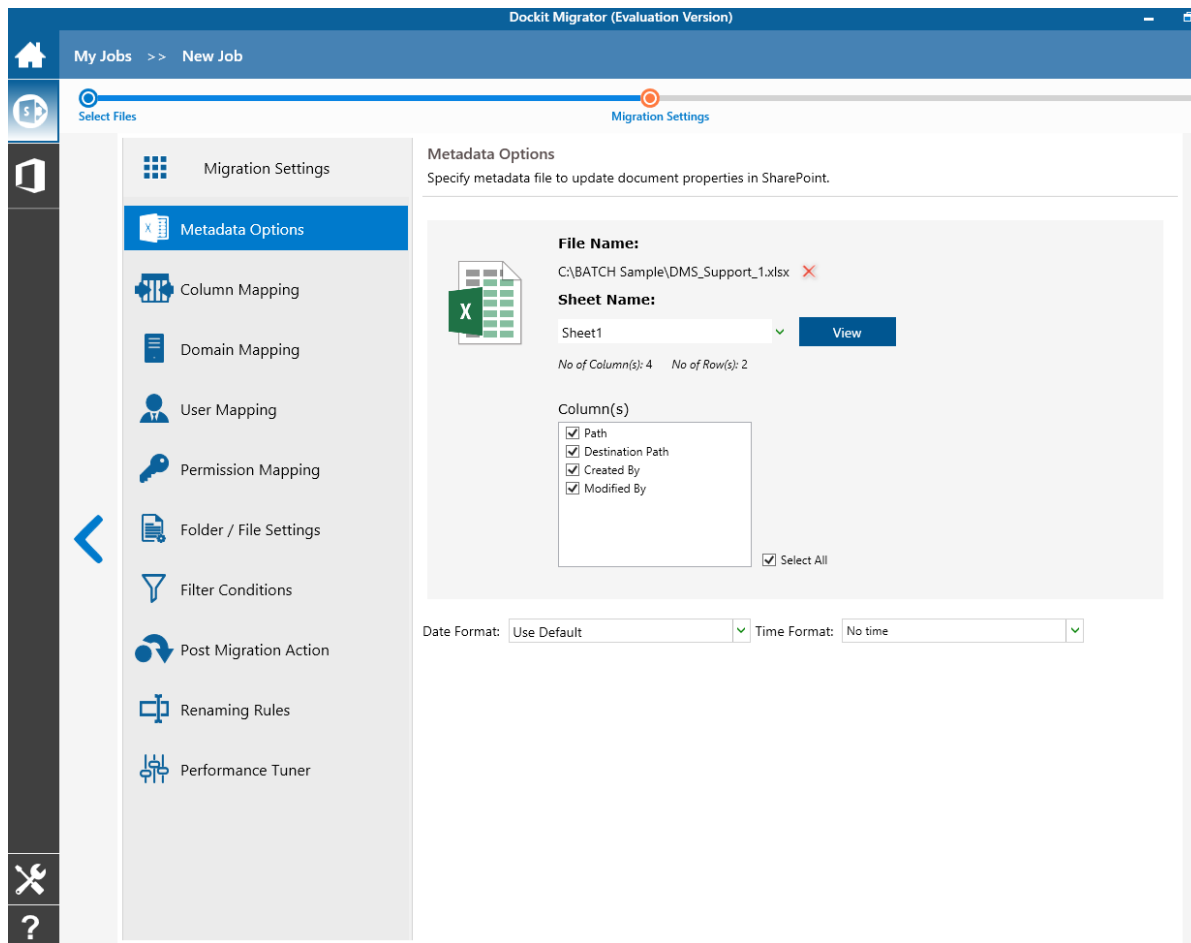


2. **Click**  drop down button if you want to see a sample external metadata file (such as, Comma delimited (CSV) file, Excel (XLSX) file) to know how the columns should be arranged in an external metadata file.

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

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

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

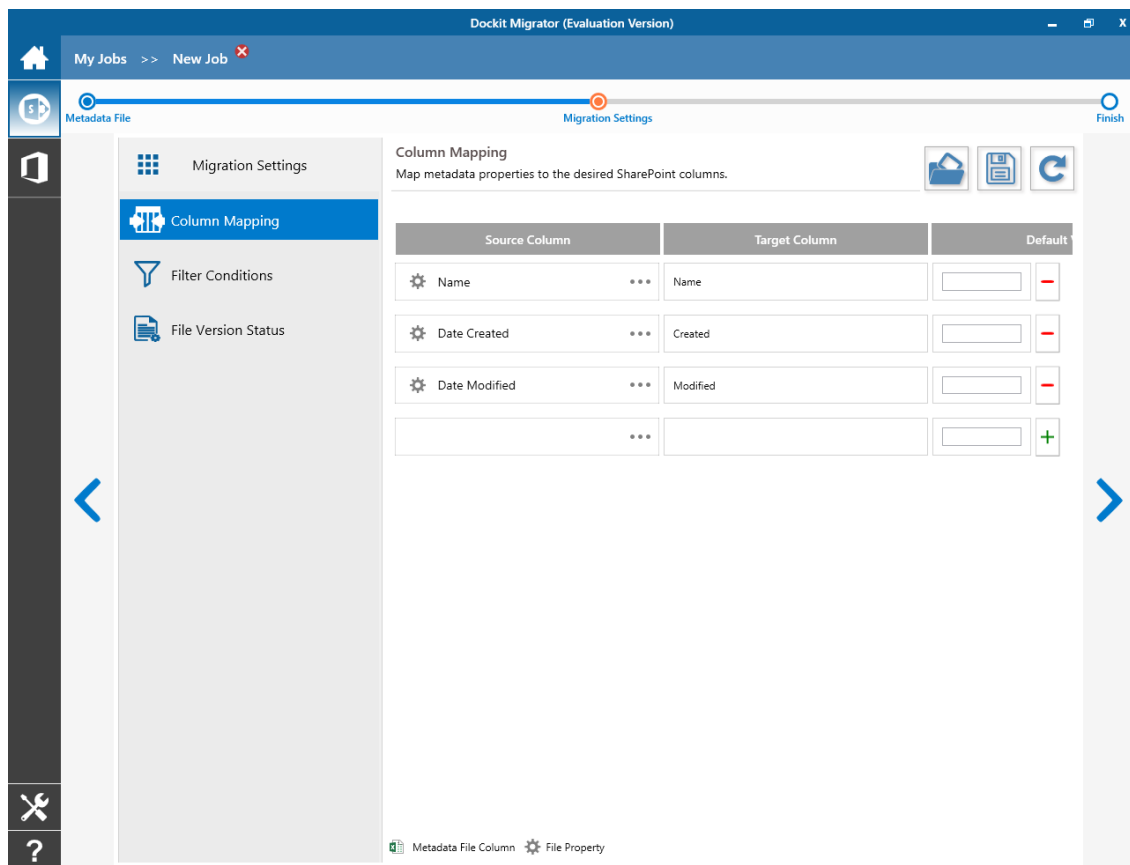


6. Click  button if you want to see the contents of selected metadata file in the associated native application.
7. If you want use the batch file as input for Metadata Options page, select '**Use batch file as external metadata file**' checkbox.
8. 'Use batch file as metadata external file' option will be available in 'Batch File Mode' only.
9. For more information about how to create external metadata file, [click here](#).
10. Select the desired columns for which you wish to assign metadata.
11. If you want to replace with a different metadata file, click  button and select the new metadata file as before.
12. If any of the selected columns contains date and time values, specify **Date and Time format** to parse the date values. The default value is the current system settings.

13. Click **Next** to proceed.

Column Mapping

1. Dockit allows you to assign values from file properties or metadata properties to SharePoint columns by using Column Mapping option.
2. You can also assign metadata values by using 'Column Mapping Template' for repeated use.
3. To create new column mapping, select **Column Mapping** option. A default page will appear as shown below.



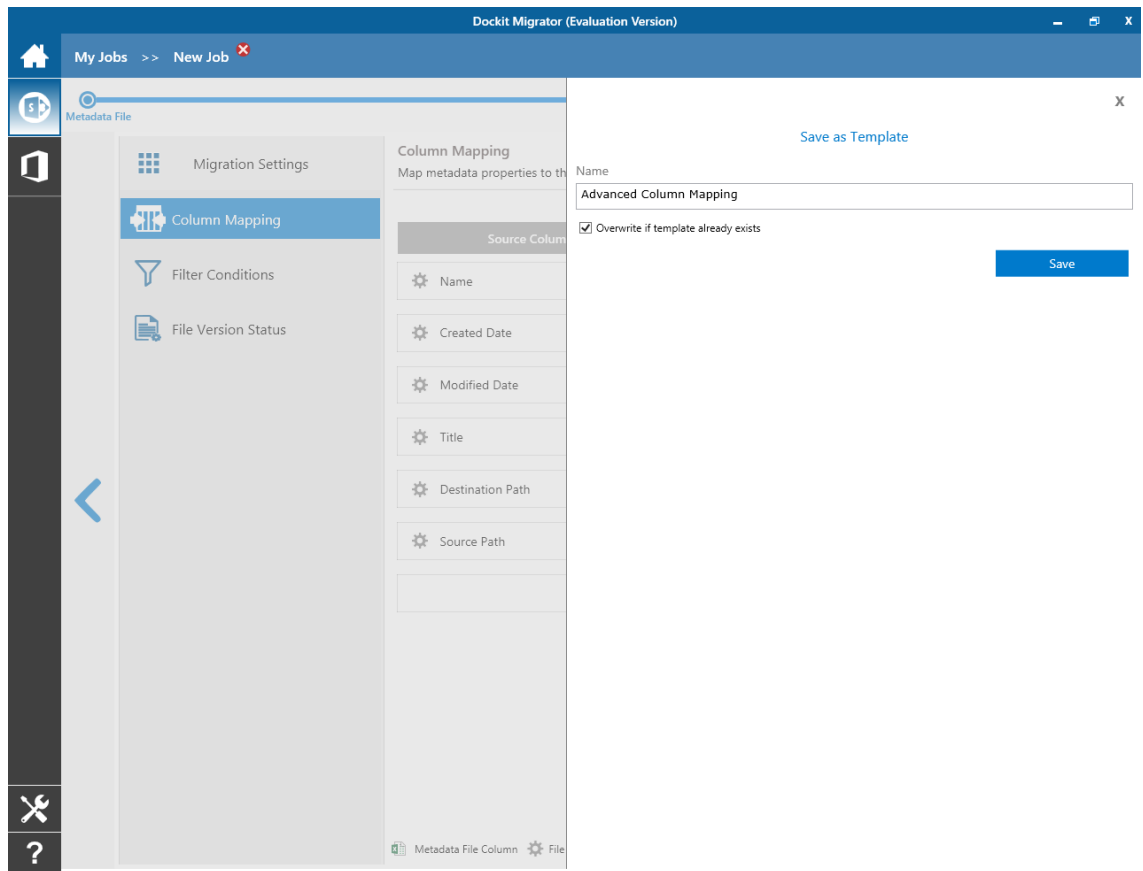
4. **Source Column:** You can specify source column values from '**File properties**', '**Metadata File**', '**Function Builder**' and also from '**Other File Properties**' by entering the property name.
5. **Target Column:** You can specify the target SharePoint Column which needs to map and assign values.
6. **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.

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

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



8. Once you finish mapping the columns, you can click  to save as new template. This option enables you to save the configured column mapping as templates for reuse in other migration tasks.



9. Once you save a template, you can load from the saved templates to use in this task.



10. **Click** to load available column mapping templates.

The screenshot shows the 'Docket Migrator (Evaluation Version)' application window. The main interface is divided into several sections:

- Top Bar:** 'My Jobs >> New Job' with a red 'X' icon.
- Left Sidebar:** Contains icons for 'Metadata File', 'Migration Settings', 'Column Mapping', 'Filter Conditions', and 'File Version Status'. The 'Column Mapping' section is currently selected.
- Main Panel:** Displays 'Column Mapping' settings, including 'Map metadata properties to the' and 'Source Column'.
- Right Panel:** Shows a list of 'Available Templates' with a search bar and a list of 7 templates. Each template entry includes a name, creation date, and a red 'X' icon.

The 'Available Templates' list contains the following entries:

Name	Created
Advanced Column Mapping	7/20/2018 5:58:46 PM
Column Migration	7/20/2018 5:59:54 PM
Custom Columns	7/20/2018 5:58:59 PM
Metadata Column Mapping	7/20/2018 5:56:57 PM
New Column Mapping	7/20/2018 5:55:45 PM
Security Columns	7/20/2018 5:59:21 PM
Share Column Mapping	7/20/2018 5:56:37 PM

An 'OK' button is located at the bottom right of the 'Available Templates' dialog box.



11. Click to load the application default settings.

Dockit Migrator (Evaluation Version)

My Jobs >> New Job ✖

Metadata File Migration Settings Finish

Migration Settings

Column Mapping

Map metadata properties to the desired SharePoint columns.

Source Column	Target Column	Default
Name	Name	-
Created Date	Created Date	-
Modified Date	Modified Date	-
Title	Title	-
Destination Path	Target Path	-
Source Path	Source	-
		+

Metadata File Column File Property

12. Click **Next** to proceed

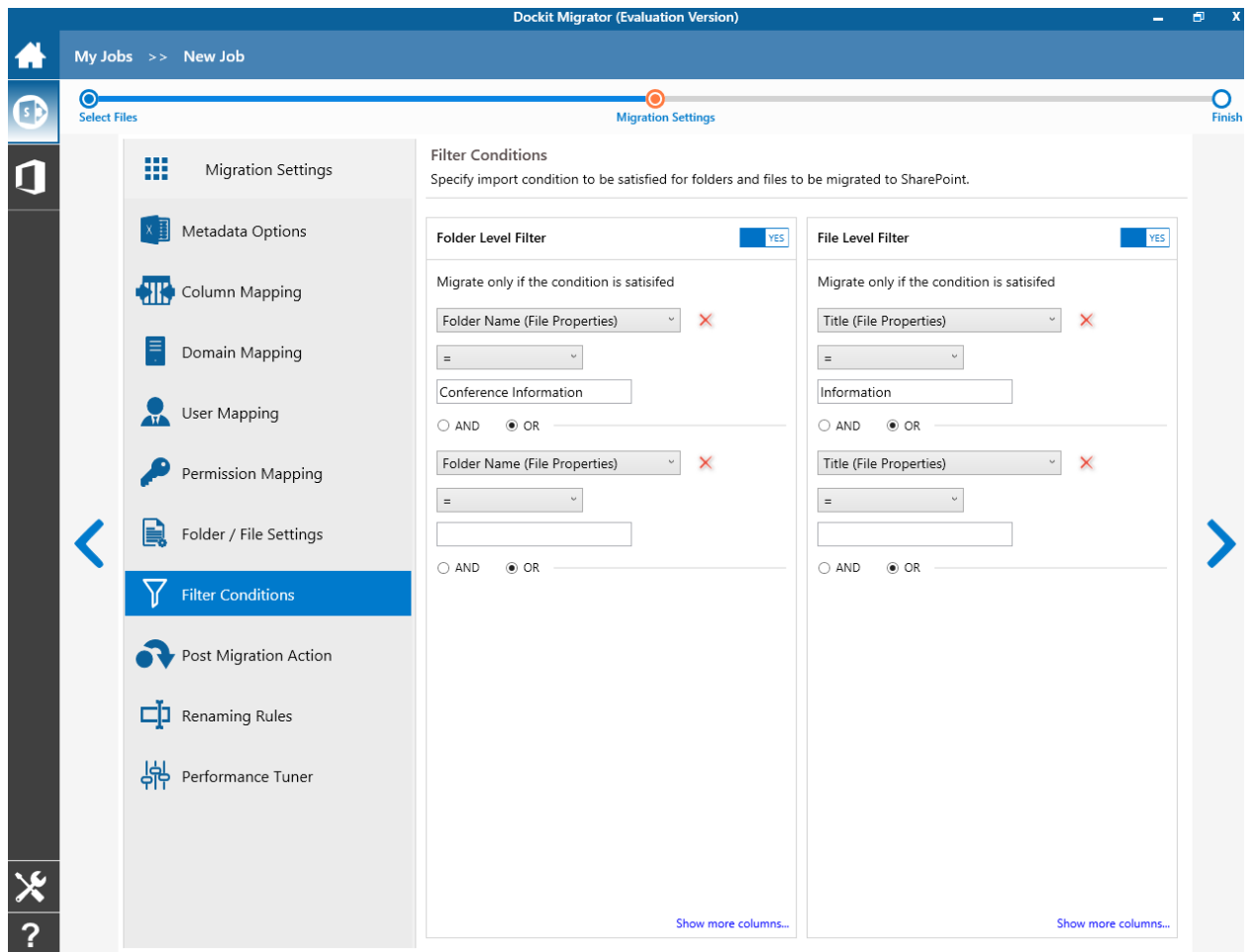
Filter Conditions

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 **Filter Conditions** page will appear as shown below:

The screenshot displays the 'Filter Conditions' page in the Dockit Migrator (Evaluation Version) application. The interface includes a sidebar with various migration settings, with 'Filter Conditions' currently selected. The main workspace is divided into two sections: 'Folder Level Filter' and 'File Level Filter'. Each section allows users to define conditions for migration based on file properties. In the 'Folder Level Filter' section, the condition is set to 'Folder Name (File Properties)' with an equals sign and a text input field. The 'File Level Filter' section is similarly configured with 'Title (File Properties)'. Both sections include radio buttons to choose between 'AND' and 'OR' logical operators. Navigation arrows are visible on the left and right sides of the main content area.

2. Select any one of the following options given below:
3. The available import conditions specified will be used to filter folders / files that are uploaded to SharePoint.
4. Specify condition to apply at the folder level. For example, you can Import folders when ['Folder Name']='Conference Information'].



5. Specify rule that must be satisfied before creating folders to SharePoint. For example, you can create folders only when ['Folder Name' Starts With 'Team']

6. You can specify the import conditions by selecting the Field Name and by specifying a corresponding value with the required operator.

The screenshot displays the 'Dockit Migrator (Evaluation Version)' application window. The top navigation bar includes 'My Jobs >> New Job'. Below this, a progress bar shows the current step as 'Migration Settings', with 'Select Files' and 'Finish' as previous and next steps respectively. A left-hand sidebar contains various configuration options: Migration Settings, Metadata Options, Column Mapping, Domain Mapping, User Mapping, Permission Mapping, Folder / File Settings, Filter Conditions (highlighted in blue), Post Migration Action, Renaming Rules, and Performance Tuner. The main workspace is titled 'Filter Conditions' and contains the instruction: 'Specify import condition to be satisfied for folders and files to be migrated to SharePoint.' It is divided into two panels: 'Folder Level Filter' and 'File Level Filter', both with 'YES' status indicators. Each panel has a 'Migrate only if the condition is satisfied' section. The 'Folder Level Filter' panel shows three conditions: 1) 'Folder Name (File Properties)' with an equals operator and 'Conference Information' as the value. 2) 'Last Accessed Date (File Properties)' with a greater-than operator and '6/27/2018' as the value. 3) 'Folder Name (File Properties)' with an equals operator and an empty text field. The 'File Level Filter' panel shows two conditions: 1) 'Title (File Properties)' with an equals operator and 'Information' as the value. 2) 'Title (File Properties)' with an equals operator and an empty text field. Both panels have radio buttons for 'AND' and 'OR' logic, with 'OR' selected. At the bottom of each panel is a 'Show more columns...' link. The interface also features blue navigation arrows on the left and right sides of the main workspace.

7. You can use mathematical operators such as $>$, $=$, $>=$ etc. to define your query.

The screenshot displays the 'Docket Migrator (Evaluation Version)' application window. The top navigation bar includes 'My Jobs' and 'New Job'. The left sidebar contains a 'Migration Settings' menu with options: Metadata Options, Column Mapping, Domain Mapping, User Mapping, Permission Mapping, Folder / File Settings, Filter Conditions (highlighted), Post Migration Action, Renaming Rules, and Performance Tuner. The main area is titled 'Filter Conditions' with the instruction 'Specify import condition to be satisfied for folders and files to be migrated to SharePoint.' It features two panels: 'Folder Level Filter' and 'File Level Filter', both with 'YES' status indicators. The 'Folder Level Filter' panel shows a list of conditions: 'Folder Name (File Properties)' with an equals operator, 'Conference Information' with an AND/OR selector, 'Last Accessed Date (File Properties)' with a less-than operator and a date picker set to 6/27/2018, and 'Date Modified (File Properties)' with a dropdown menu open showing operators like '<', '<=', '>=', '=', '<>', 'Is Null', and 'Is Not Null'. The 'File Level Filter' panel shows 'Title (File Properties)' with an equals operator, 'Keywords (File Properties)' with a Like operator and the value 'info', and 'Title (File Properties)' with an equals operator. Both panels have 'Show more columns...' links at the bottom.

8. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.
9. Click **Next** to proceed.

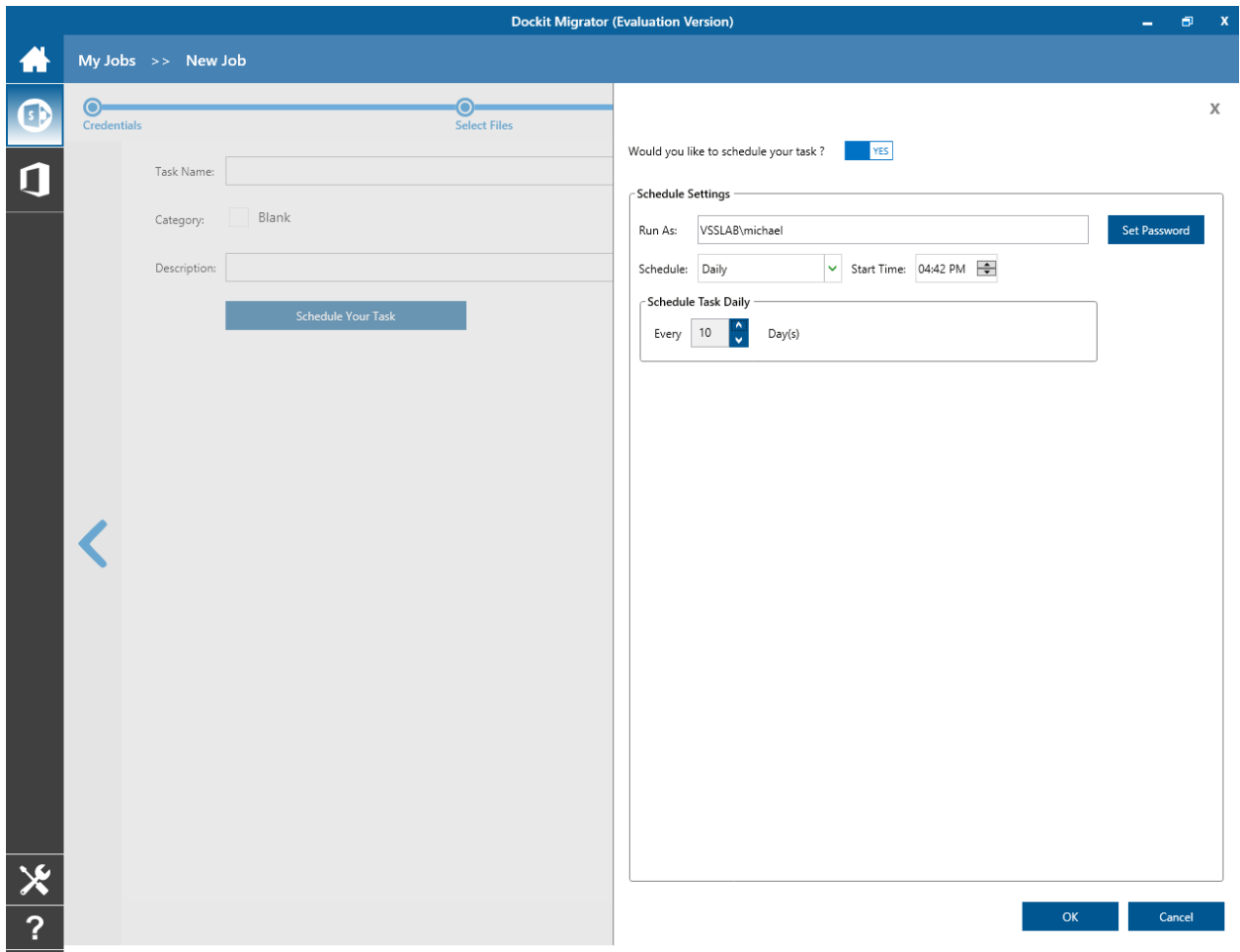
Task Schedule Settings

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

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

The screenshot shows the 'Task Schedule Settings (Finish)' page in the Dockit Migrator (Evaluation Version) application. The page has a blue header bar with the title 'Dockit Migrator (Evaluation Version)'. Below the header, there is a navigation bar with 'My Jobs' and '>> New Job'. A progress bar is visible with three steps: 'Select Files', 'Migration Settings', and 'Finish'. The 'Migration Settings' step is currently active. Below the progress bar, there are three input fields: 'Task Name', 'Category' (with a dropdown menu showing 'Blank'), and 'Description'. A 'Schedule Your Task' button is located below the 'Description' field. At the bottom right, there are two buttons: 'Save & Close' and 'Save & Start'.

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



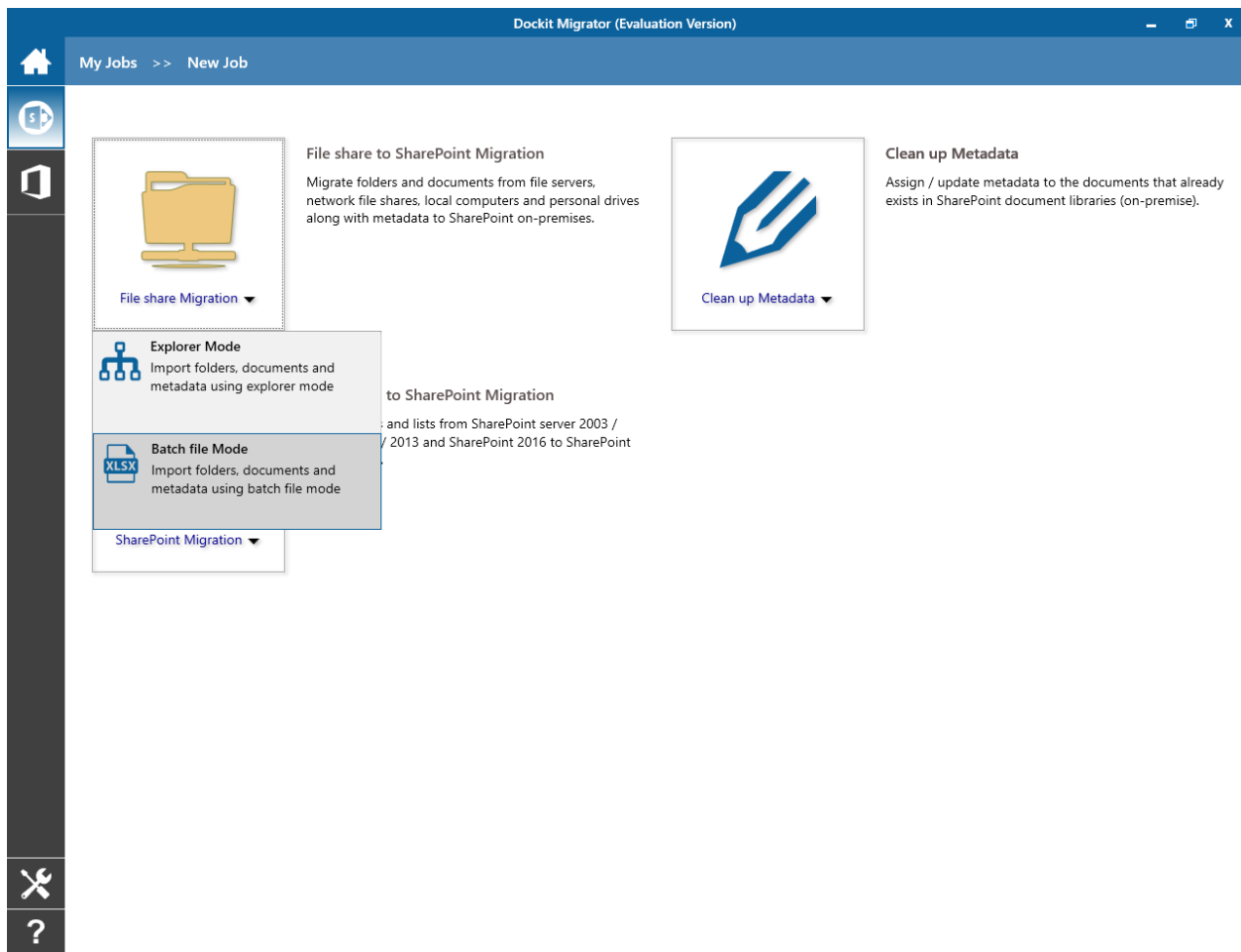
Docket will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords / Credential Manager applet for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created. Hence, you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

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

Batch file mode (Create Task)

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

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



1. Specify [Batch File Options](#).
2. Specify [Migration Settings](#).
3. Specify [Task Schedule Settings](#).
4. 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.

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 ';'. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists.	"Windows 7; 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. 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 ';'. Dokit 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 Dokit 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. Dokit 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. Dokit 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"

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)		"Company Name:Vyapin" "ID:1000" "Product Name:Dockit Migrator" If the filter name contains colon (:) in its name, use the following syntax: "FILTER:Product:Product ID,QUERY:Dockit" "FILTER:ID:Name,QUERY:1000AX"
Managed Metadata (Single Value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with ' '. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. 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"

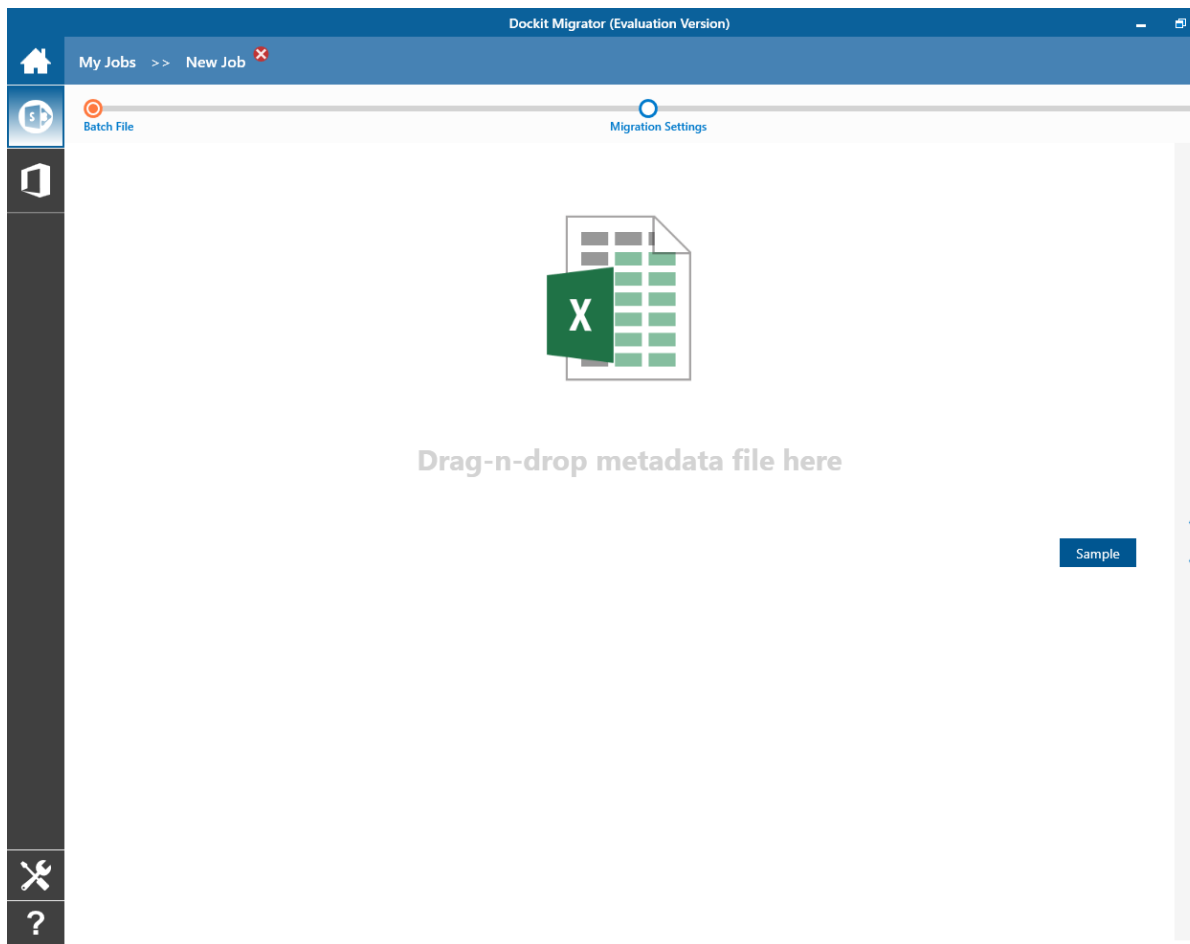
"C:\My Sales\Sample Sales Template.xlsx","11/24/2006","Jane Doe","VP Sales","Corporate Sales"

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

Batch File Options

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

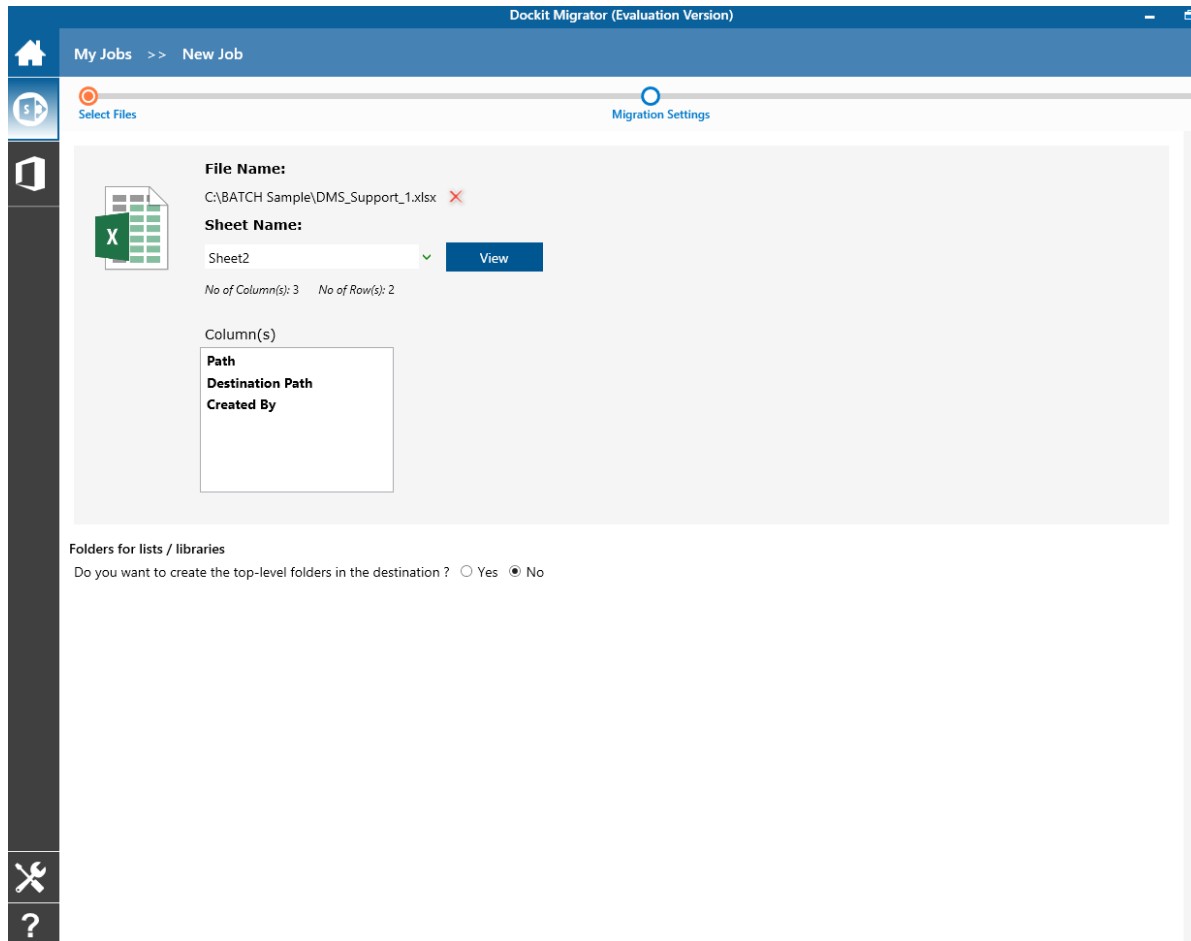
1. The **Batch File Options** page will appear as shown below:



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

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

5. File selection dialog opens. Drag and drop the batch file from the explorer to the window or double click on the batch file.
6. The selected batch file will automatically be extracted and its contents will be loaded in the window. If you select a Microsoft Excel metadata file, then select the sheet name to use from the dropdown.

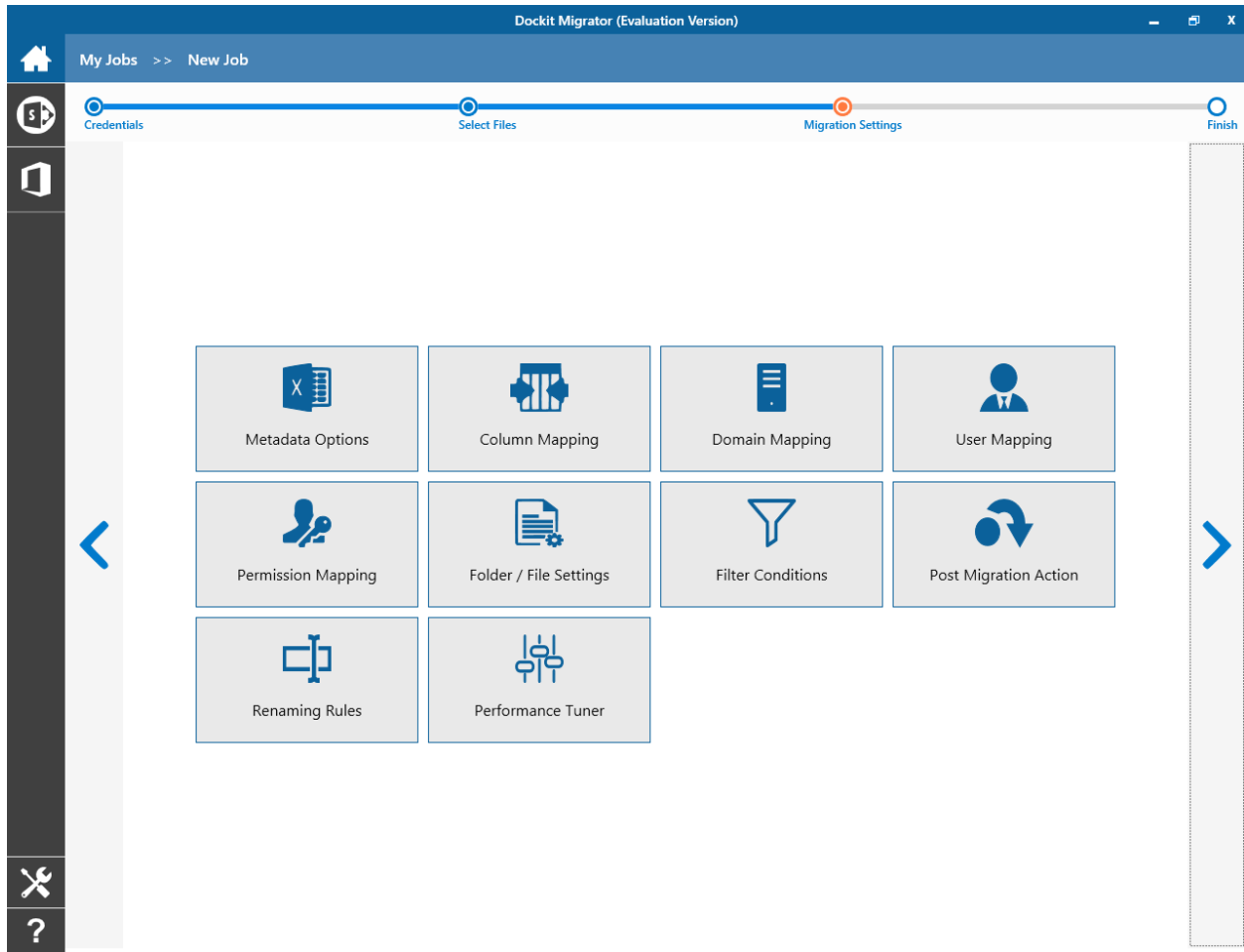


7. Click **View** button to see the contents of selected batch file in the associated native application.
8. If you want to replace with a different batch file, click  button and select the new batch file as before.
9. The top-level folder is the folder specified for migration by the user. Dockit will commence the migration process from this top-level folder. Select the appropriate option to create this top-level folder by selecting the option buttons (Yes/No).
10. Click **Next** to proceed.

Migration Settings

To specify Migration Settings inputs to use for the task:

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



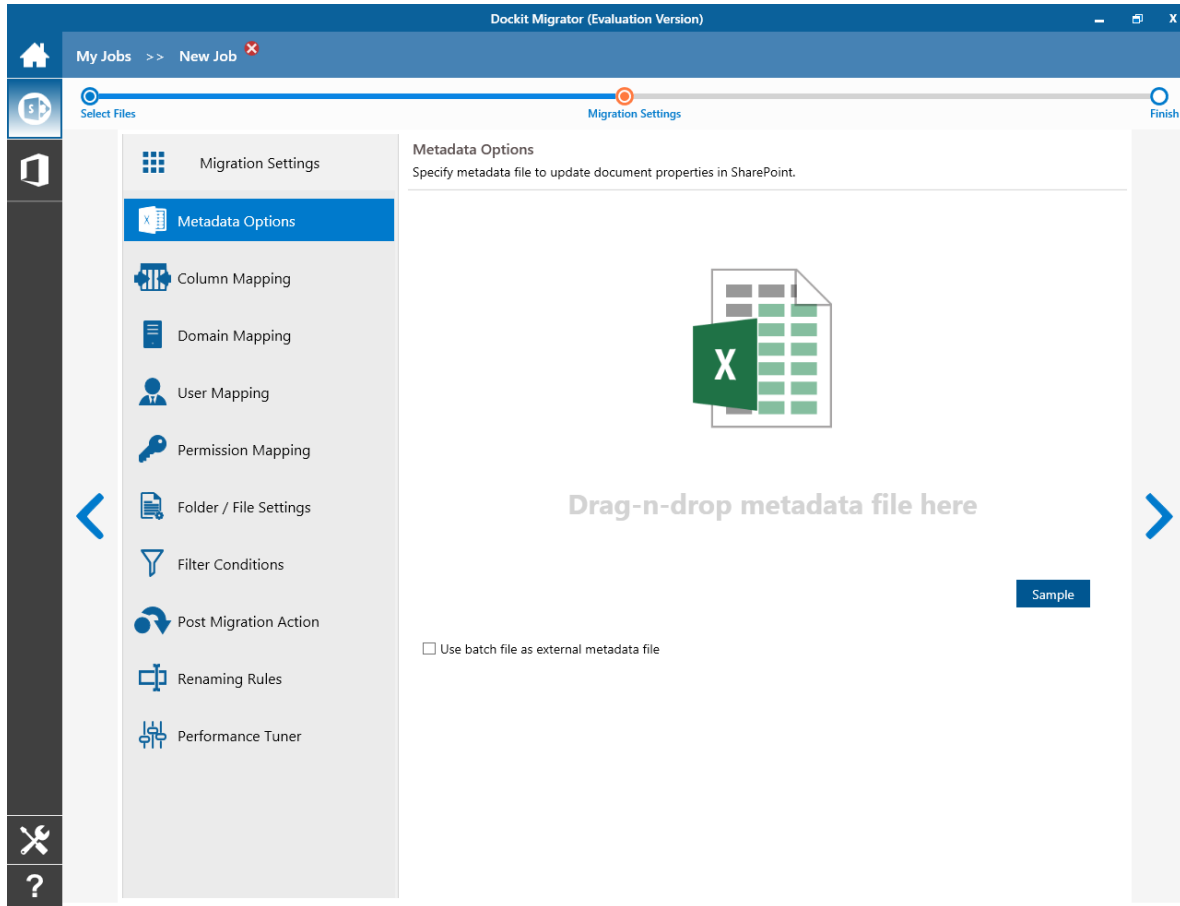
1. [Metadata Options](#)
2. [Column Mapping](#)
3. [Domain Mapping](#)
4. [User / Group Mapping](#)
5. [Permission Mapping](#)
6. [Folder / File Settings](#)
7. [Filter Conditions](#)
8. [Post Migration Action](#)
9. [Renaming Rules](#)

10. Click **Next** to proceed

Metadata Options

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

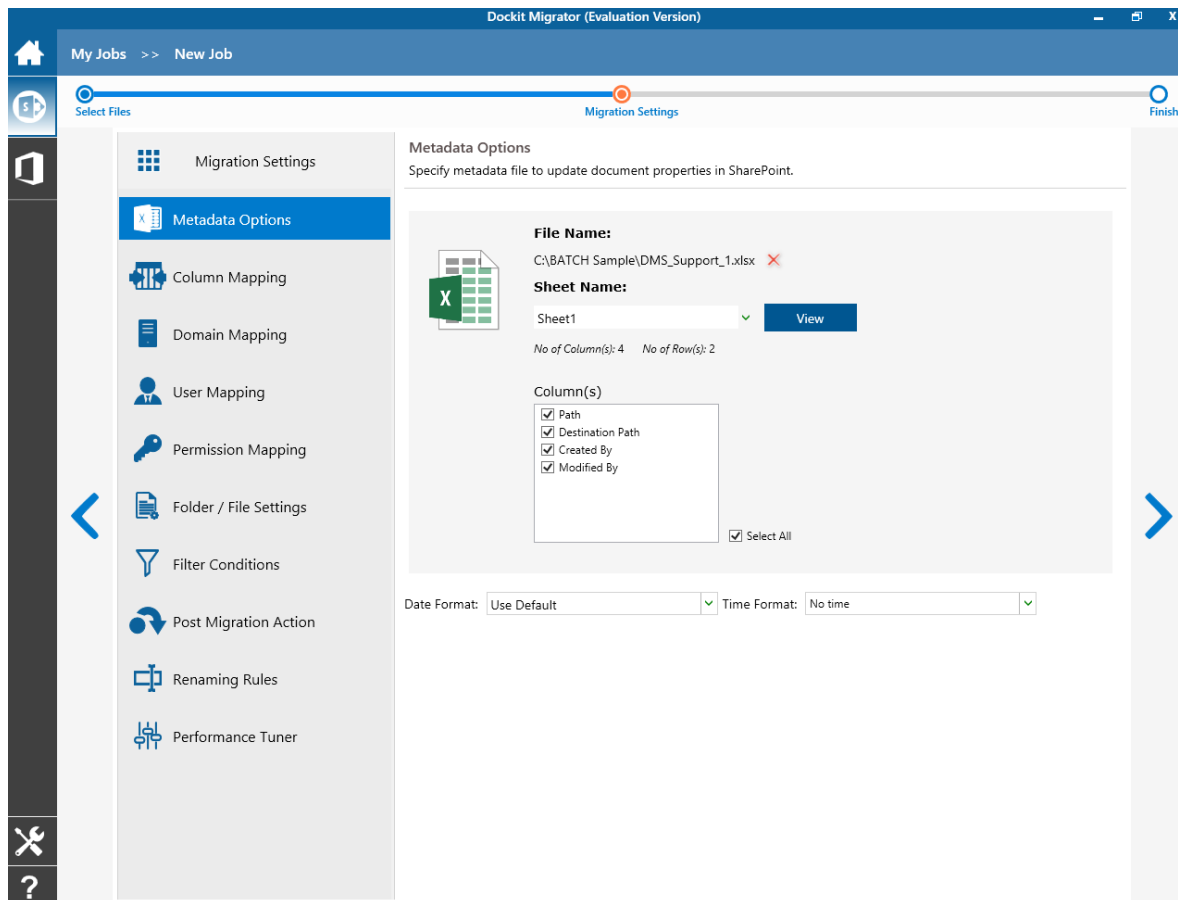
1. The **Metadata Options** page will appear as shown below:



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

3. **Click**  button to specify the external metadata file. The metadata file can be any one of the following file formats - Comma delimited (CSV), Microsoft Excel (XLSX) or Text file (TXT).
4. File selection dialog opens. Drag and drop the metadata file from the explorer to the window or double click on the metadata file.

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

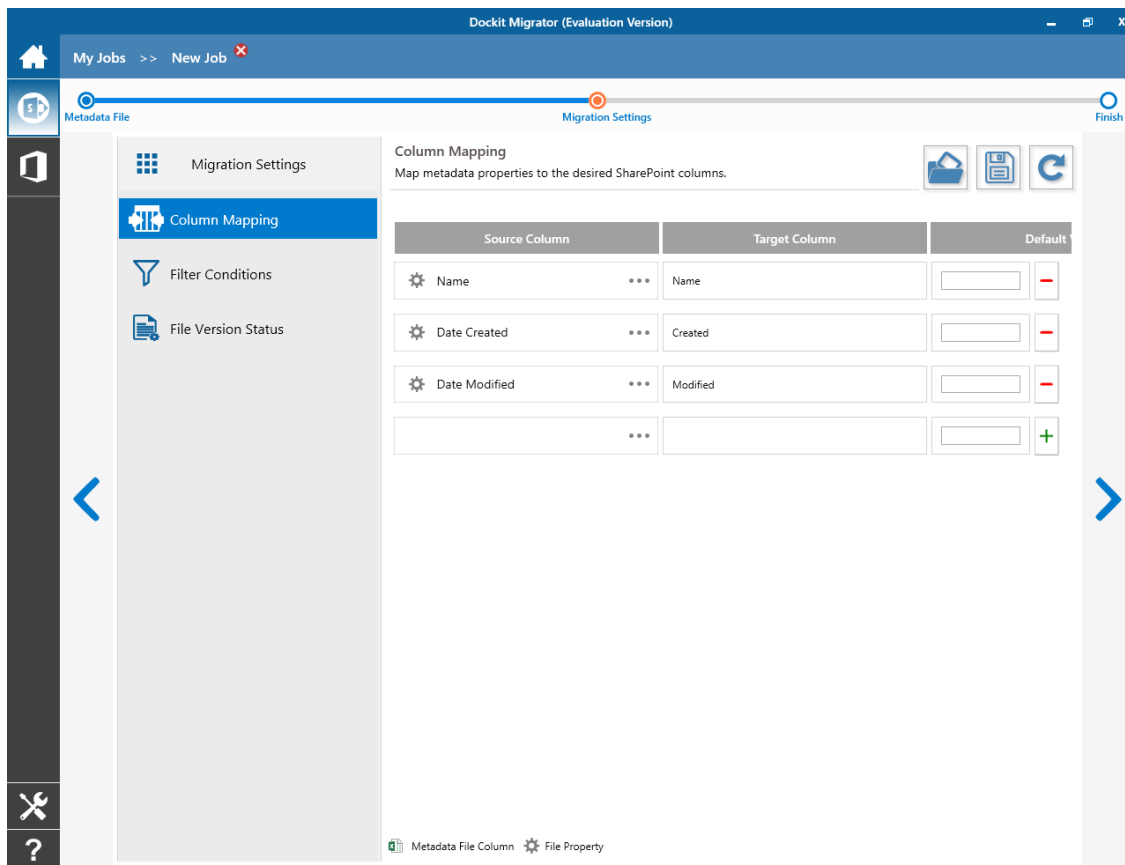


6. Click  button if you want to see the contents of selected metadata file in the associated native application.
7. If you want use the batch file as input for Metadata Options page, select '**Use batch file as external metadata file**' checkbox.
8. 'Use batch file as metadata external file' option will be available in 'Batch File Mode' only.
9. For more information about how to create external metadata file, [click here](#).
10. Select the desired columns for which you wish to assign metadata.
11. If you want to replace with a different metadata file, click  button and select the new metadata file as before.
12. If any of the selected columns contains date and time values, specify **Date and Time format** to parse the date values. The default value is the current system settings.

13. Click **Next** to proceed.

Column Mapping

1. Dockit allows you to assign values from file properties or metadata properties to SharePoint columns by using Column Mapping option.
2. You can also assign metadata values by using 'Column Mapping Template' for repeated use.
3. To create new column mapping, select **Column Mapping** option. A default page will appear as shown below.



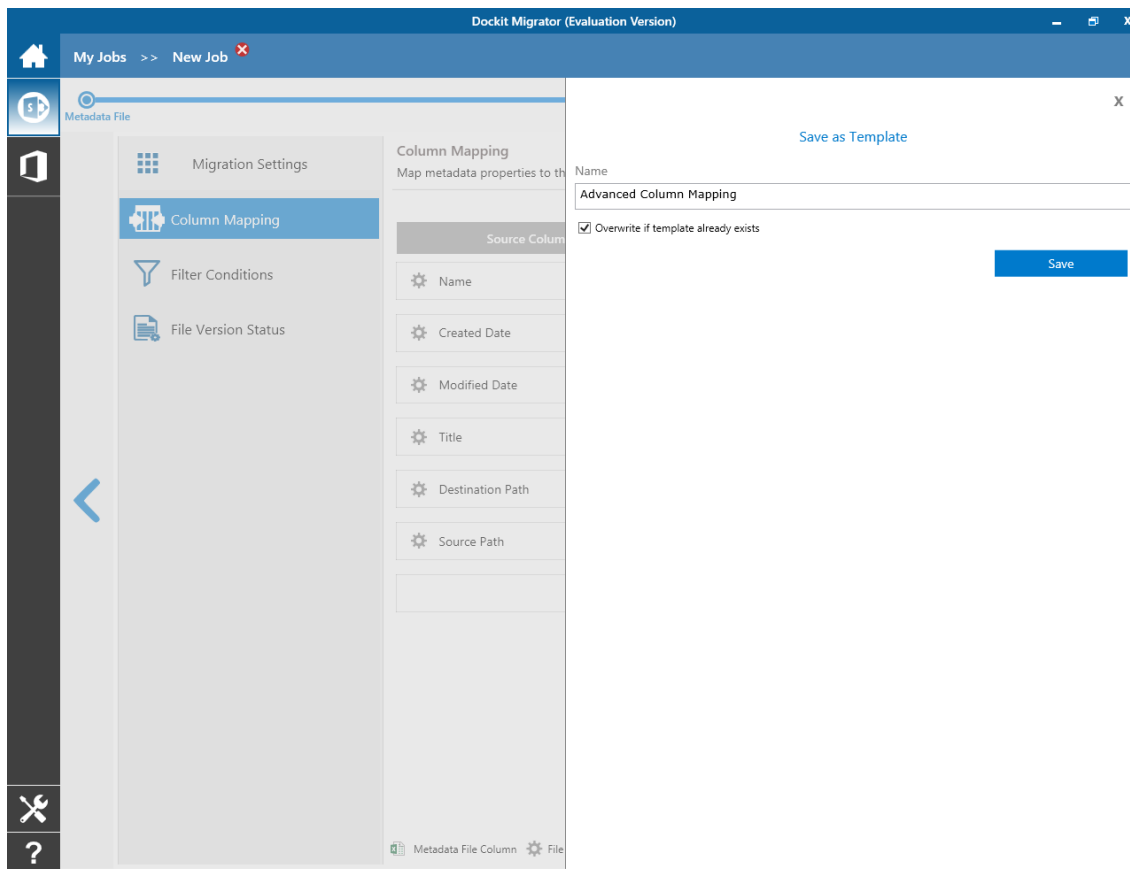
4. **Source Column:** You can specify source column values from '**File properties**', '**Metadata File**', '**Function Builder**' and also from '**Other File Properties**' by entering the property name.
5. **Target Column:** You can specify the target SharePoint Column which needs to map and assign values.
6. **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.

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

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



8. Once you finish mapping the columns, you can click  to save as new template. This option enables you to save the configured column mapping as templates for reuse in other migration tasks.



9. Once you save a template, you can load from the saved templates to use in this task.



10. Click to load available column mapping templates.

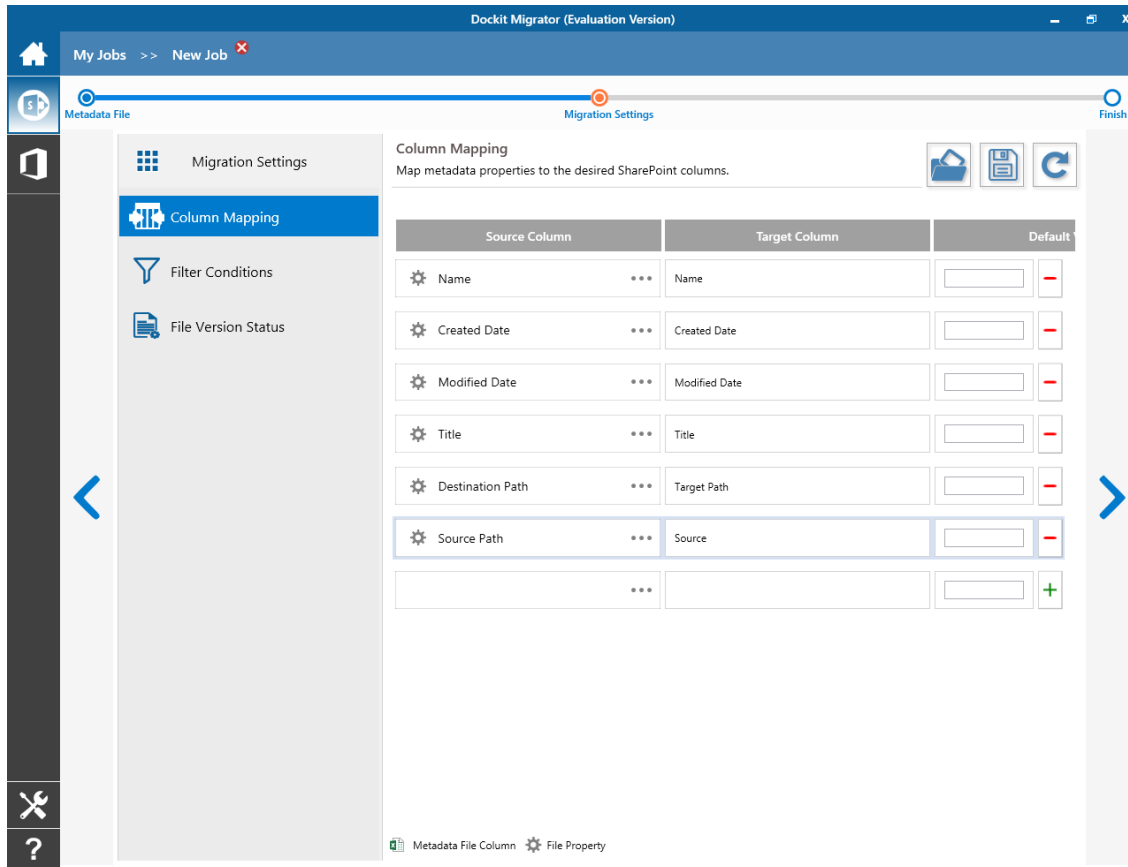
The screenshot shows the 'Dockit Migrator (Evaluation Version)' application window. The main interface is divided into several sections:

- Top Bar:** Contains 'My Jobs' and 'New Job' buttons.
- Left Sidebar:** Contains icons for 'Metadata File', 'Migration Settings', 'Column Mapping', 'Filter Conditions', and 'File Version Status'.
- Center Panel:** Displays 'Migration Settings' and 'Column Mapping' options. The 'Column Mapping' section is currently selected, showing a list of 'Source Column' properties: Name, Date Created, and Date Modified.
- Right Panel:** Displays the 'Available Templates' dialog box. It lists 7 templates available for selection, each with a name and a creation date. The templates are: Advanced Column Mapping, Column Migration, Custom Columns, Metadata Column Mapping, New Column Mapping, Security Columns, and Share Column Mapping.

The 'Available Templates' dialog box includes a search bar and an 'OK' button at the bottom right.

Name	Created
Advanced Column Mapping	7/20/2018 5:58:46 PM
Column Migration	7/20/2018 5:59:54 PM
Custom Columns	7/20/2018 5:58:59 PM
Metadata Column Mapping	7/20/2018 5:56:57 PM
New Column Mapping	7/20/2018 5:55:45 PM
Security Columns	7/20/2018 5:59:21 PM
Share Column Mapping	7/20/2018 5:56:37 PM

11. Click  to load the application default settings.



The screenshot shows the 'Dockit Migrator (Evaluation Version)' application window. The 'Migration Settings' tab is active, and the 'Column Mapping' sub-tab is selected in the left sidebar. The main area displays a table for mapping source columns to target columns. The table has three columns: 'Source Column', 'Target Column', and 'Default'. The 'Source Column' column contains a gear icon and a text input field. The 'Target Column' column contains a text input field. The 'Default' column contains a text input field and a red minus sign icon. The 'Source Path' row is highlighted. Below the table, there is a legend indicating that a green square represents a 'Metadata File Column' and a gear icon represents a 'File Property'.

Source Column	Target Column	Default
 Name ***	Name	-
 Created Date ***	Created Date	-
 Modified Date ***	Modified Date	-
 Title ***	Title	-
 Destination Path ***	Target Path	-
 Source Path ***	Source	-
***		+

Metadata File Column  File Property

12. Click **Next** to proceed.

Filter Conditions

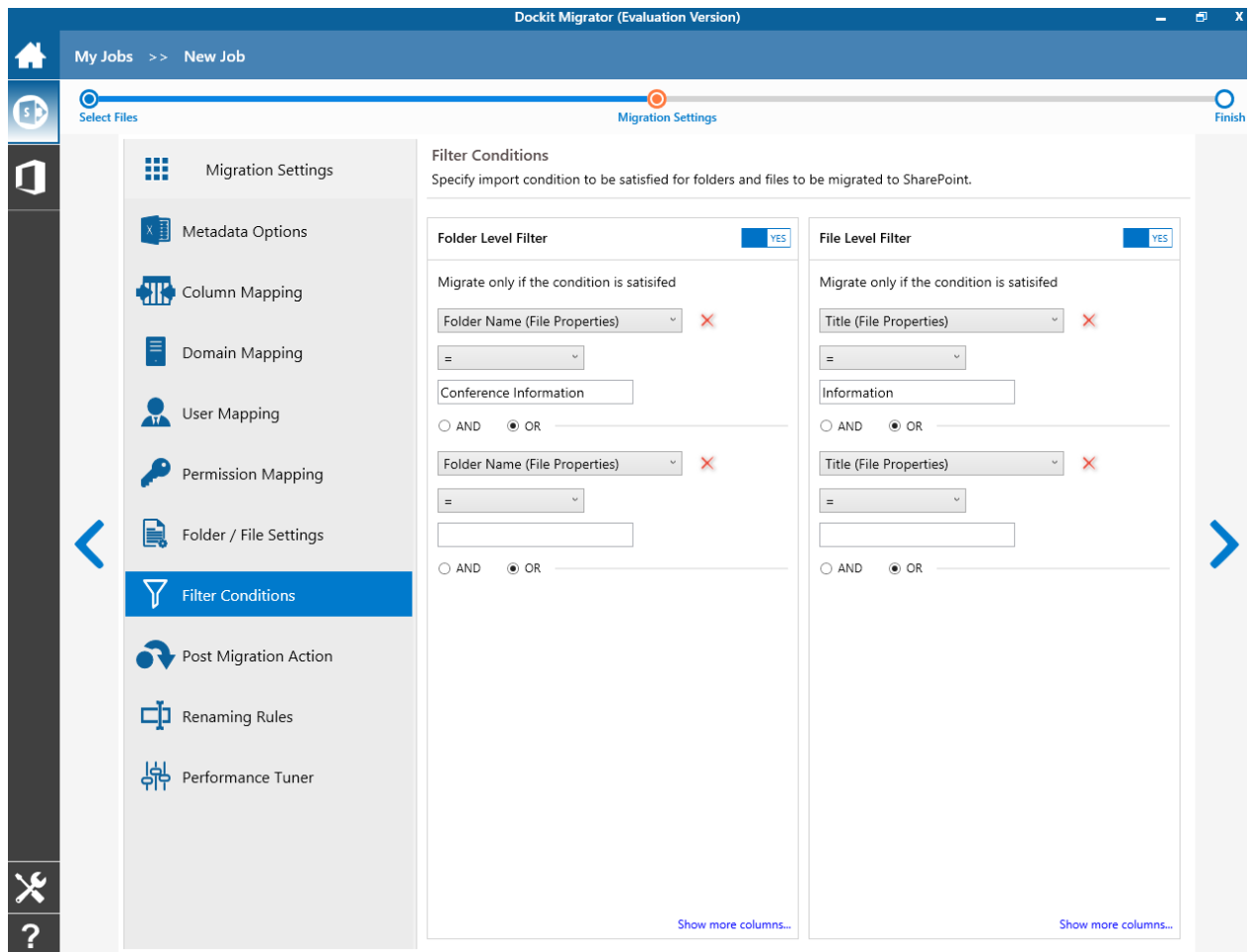
Dockit can migrate or upload folders and files to SharePoint after they meet certain criteria. Dockit will import folders and files based on these filter conditions. Filters can be created using metadata columns and values (from external metadata file), file properties (include Office document properties)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

The screenshot displays the 'Filter Conditions' page in the Dockit Migrator (Evaluation Version) application. The interface includes a sidebar with various migration settings, with 'Filter Conditions' currently selected. The main workspace is divided into two sections: 'Folder Level Filter' and 'File Level Filter'. Each section allows users to define conditions for migration based on file properties. In the 'Folder Level Filter' section, 'Folder Name (File Properties)' is selected as the condition, and the 'Migrate only if the condition is satisfied' checkbox is checked. Similarly, in the 'File Level Filter' section, 'Title (File Properties)' is selected, and the same checkbox is checked. Both sections provide options for logical operators (AND/OR) and a link to 'Show more columns...'.

2. Select any one of the following options given below:
3. The available import conditions specified will be used to filter folders / files that are uploaded to SharePoint.

- Specify condition to apply at the folder level. For example, you can Import folders when ['Folder Name'='Conference Information'].



- Specify rule that must be satisfied before creating folders to SharePoint. For example, you can create folders only when ['Folder Name' Starts With 'Team']

- You can specify the import conditions by selecting the Field Name and by specifying a corresponding value with the required operator.

The screenshot displays the 'Dockit Migrator (Evaluation Version)' application window. The top navigation bar includes 'My Jobs >> New Job' and a progress indicator with 'Select Files', 'Migration Settings' (active), and 'Finish' steps. A left sidebar lists various configuration options: Migration Settings, Metadata Options, Column Mapping, Domain Mapping, User Mapping, Permission Mapping, Folder / File Settings, Filter Conditions (highlighted), Post Migration Action, Renaming Rules, and Performance Tuner. The main content area is titled 'Filter Conditions' with the instruction 'Specify import condition to be satisfied for folders and files to be migrated to SharePoint.' It features two panels: 'Folder Level Filter' and 'File Level Filter', both with 'YES' status buttons. Each panel contains a 'Migrate only if the condition is satisfied' section with dropdown menus for field names (e.g., 'Folder Name (File Properties)', 'Last Accessed Date (File Properties)', 'Title (File Properties)'), operators (e.g., '=', '<>'), and values (e.g., 'Conference Information', '6/27/2018', 'Information'). Radio buttons for 'AND' and 'OR' logic are provided for each panel. A 'Show more columns...' link is at the bottom of each panel. Navigation arrows are visible on the left and right sides of the main content area.

7. You can use mathematical operators such as $>$, $=$, $>=$ etc. to define your query.

The screenshot displays the 'Docket Migrator (Evaluation Version)' application window. The top navigation bar includes 'My Jobs >> New Job'. Below this, a progress bar shows 'Select Files' (completed) and 'Migration Settings' (active). The left sidebar contains a list of configuration options: Migration Settings, Metadata Options, Column Mapping, Domain Mapping, User Mapping, Permission Mapping, Folder / File Settings, Filter Conditions (highlighted), Post Migration Action, Renaming Rules, and Performance Tuner. The main area is titled 'Filter Conditions' with the instruction 'Specify import condition to be satisfied for folders and files to be migrated to SharePoint.' It features two panels: 'Folder Level Filter' and 'File Level Filter', both with a 'YES' toggle. The 'Folder Level Filter' panel shows three conditions: 'Folder Name (File Properties)' with an equals operator, 'Last Accessed Date (File Properties)' with a less-than operator and a date of 6/27/2018, and 'Date Modified (File Properties)' with a less-than operator. A dropdown menu is open for the 'Date Modified' condition, showing various operators including '<', '<=', '>=', '=', '<>', 'Is Null', and 'Is Not Null'. The 'File Level Filter' panel shows two conditions: 'Title (File Properties)' with an equals operator and 'Keywords (File Properties)' with a 'Like' operator and the value 'info'. Both panels have 'AND' and 'OR' radio buttons for combining conditions. 'Show more columns...' links are present at the bottom of each panel.

8. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.
9. 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 (Finish)** page will appear as shown below:

The screenshot shows the 'Task Schedule Settings (Finish)' page in the Dockit Migrator (Evaluation Version) application. The page has a blue header bar with the title 'Dockit Migrator (Evaluation Version)'. Below the header, there is a navigation bar with 'My Jobs' and '>> New Job'. A progress bar is visible with three steps: 'Select Files', 'Migration Settings', and 'Finish'. The 'Migration Settings' step is currently active. Below the progress bar, there are three input fields: 'Task Name', 'Category' (set to 'Blank'), and 'Description'. A 'Schedule Your Task' button is located below the 'Description' field. At the bottom right, there are two buttons: 'Save & Close' and 'Save & Start'.

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

Docket Migrator (Evaluation Version)

My Jobs >> New Job

Select Files

Task Name:

Category: ☐ Blank

Description:

[Schedule Your Task](#)

Source:

Authentication:

User Name:

Password:

☐ Prompt me for user credentials when the task runs ☐ Run Now

Would you like to schedule your task? [YES](#)

Schedule Settings

Run As: [Set Password](#)

Schedule: Start Time:

Schedule Task Daily

Every Day(s)

[OK](#) [Cancel](#)

Docket 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.

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

SharePoint Migration

Explorer mode

- [SharePoint location](#)
- [Items to migrate](#)
- [Site / List elements to migrate](#)
- [Migration Settings](#)
- [Task Schedule Settings](#)

Batch file mode

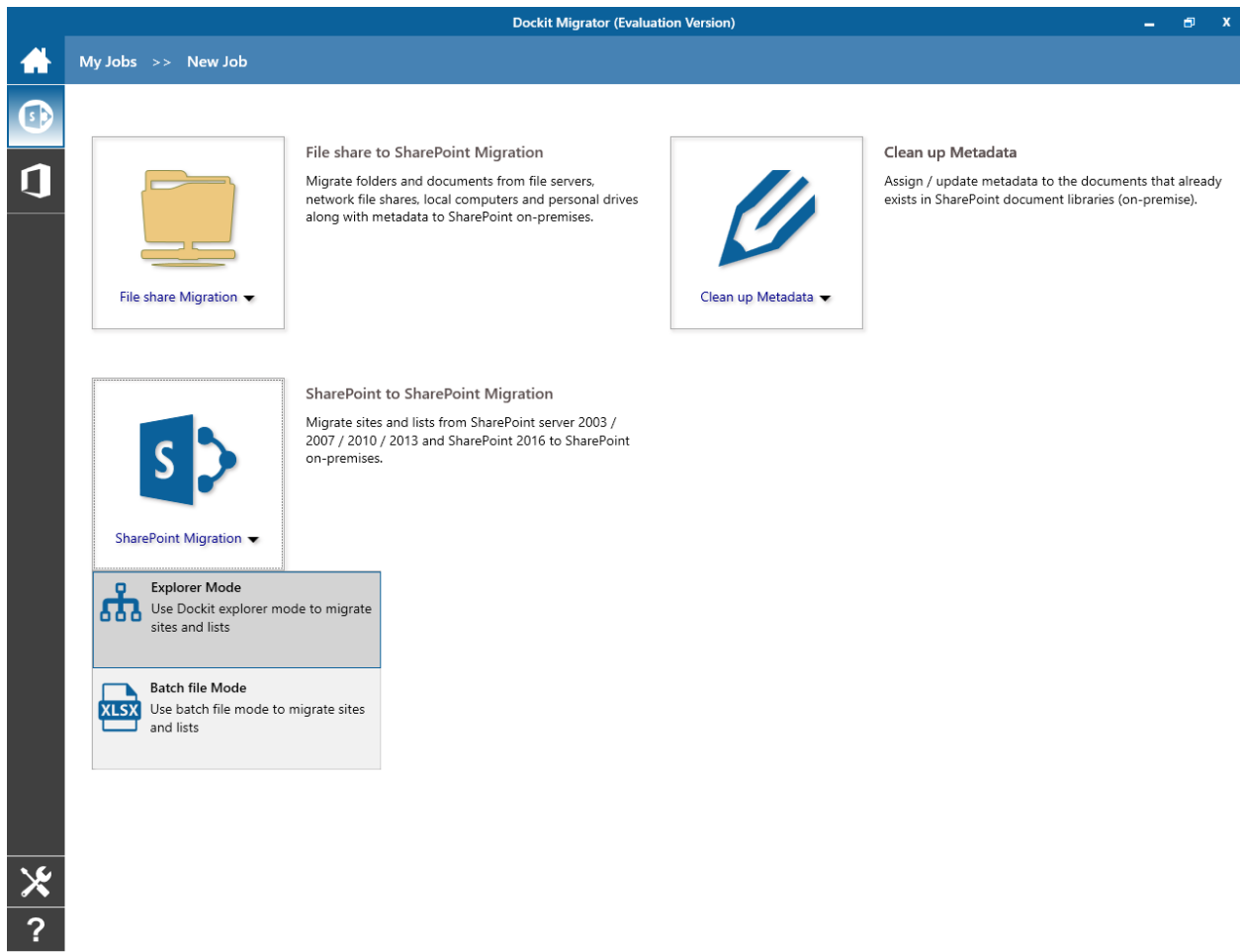
- [Batch File Options](#)
- [Site / List elements to migrate](#)
- [Migration Settings](#)
- [Task Schedule Settings](#)

Explorer Mode (Create Task)

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

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

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



2. Specify [SharePoint Location](#).
3. Add [Items to migrate](#).
4. Specify [Site / List elements to migrate](#).
5. Specify [Migration Settings](#).
6. Specify [Task Schedule 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** page will appear as shown below:

The screenshot shows the 'Source Location' page in the Dockit Migrator (Evaluation Version) application. The page is divided into two main sections: 'Source Location' and 'Destination Location'. Both sections have a 'Site URL' dropdown, an 'Authentication' dropdown (set to 'Windows'), a 'User Name' dropdown (set to 'vsslab\\farmadmin_sp10-1' for source and 'vsslab\\farmadmin_sp16-1' for destination), and a 'Password' field. A yellow arrow points from the 'User Name' field of the Source Location to the 'User Name' field of the Destination Location. The page has a top navigation bar with 'My Jobs >> New Job' and a progress bar with steps: 'Credentials', 'Items To Migrate', 'Site / List Elements', 'Mapping Template', and 'Finish'. A sidebar on the left contains icons for home, SharePoint, and help. A large blue arrow on the right indicates the next step.

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.

My Jobs >> New Job

Source Location:

Site URL:

Authentication:

User Name:

(johndoe@contoso.com, contoso\johndoe, johndoe)

Password:

Destination Location:

Site URL:

Authentication:

User Name:

(johndoe@contoso.com, contoso\johndoe, johndoe)

Password:

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.

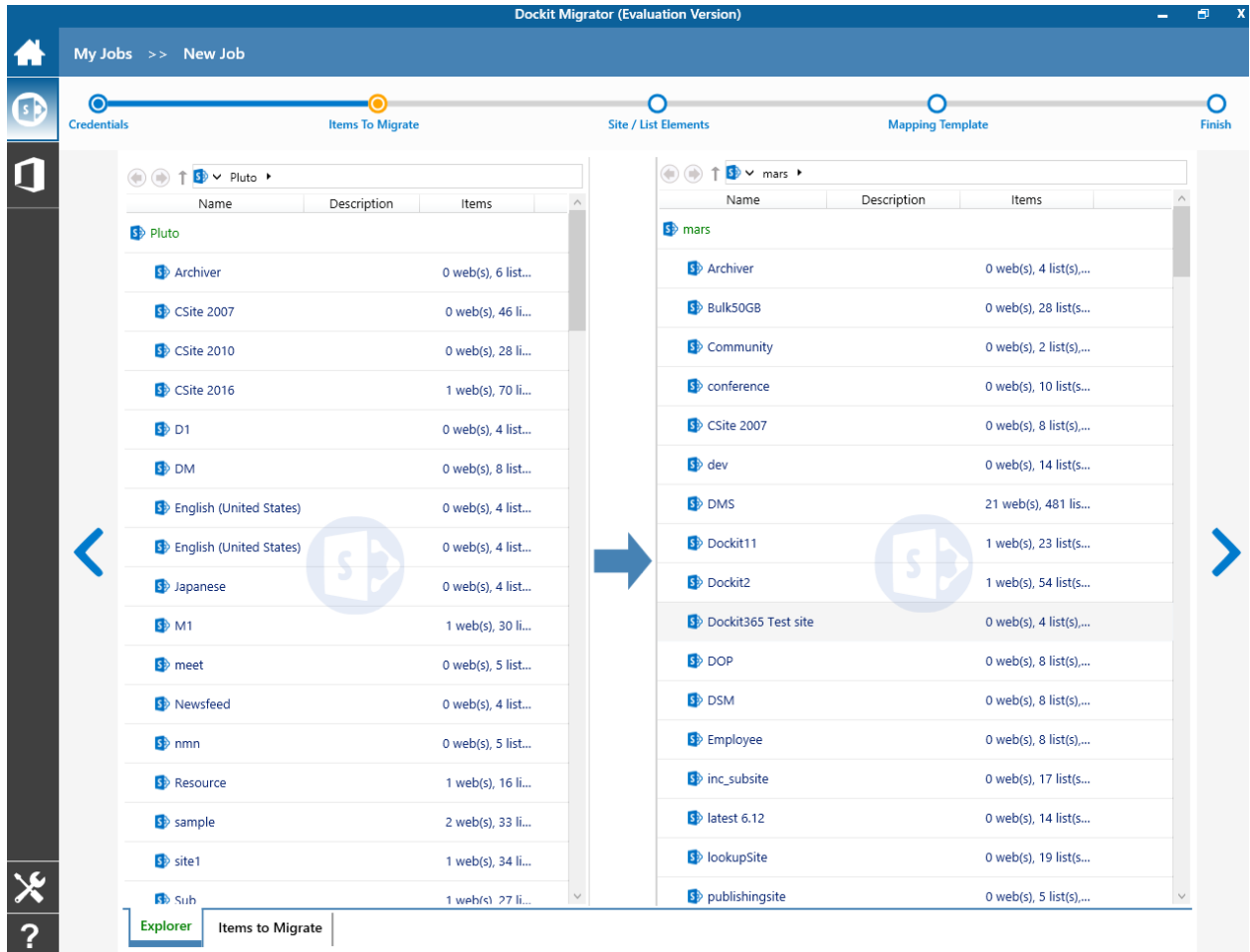
Click ... button to create new user profile. [Click here](#) to view the details about Profile Manager page.

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** page will appear as shown below:



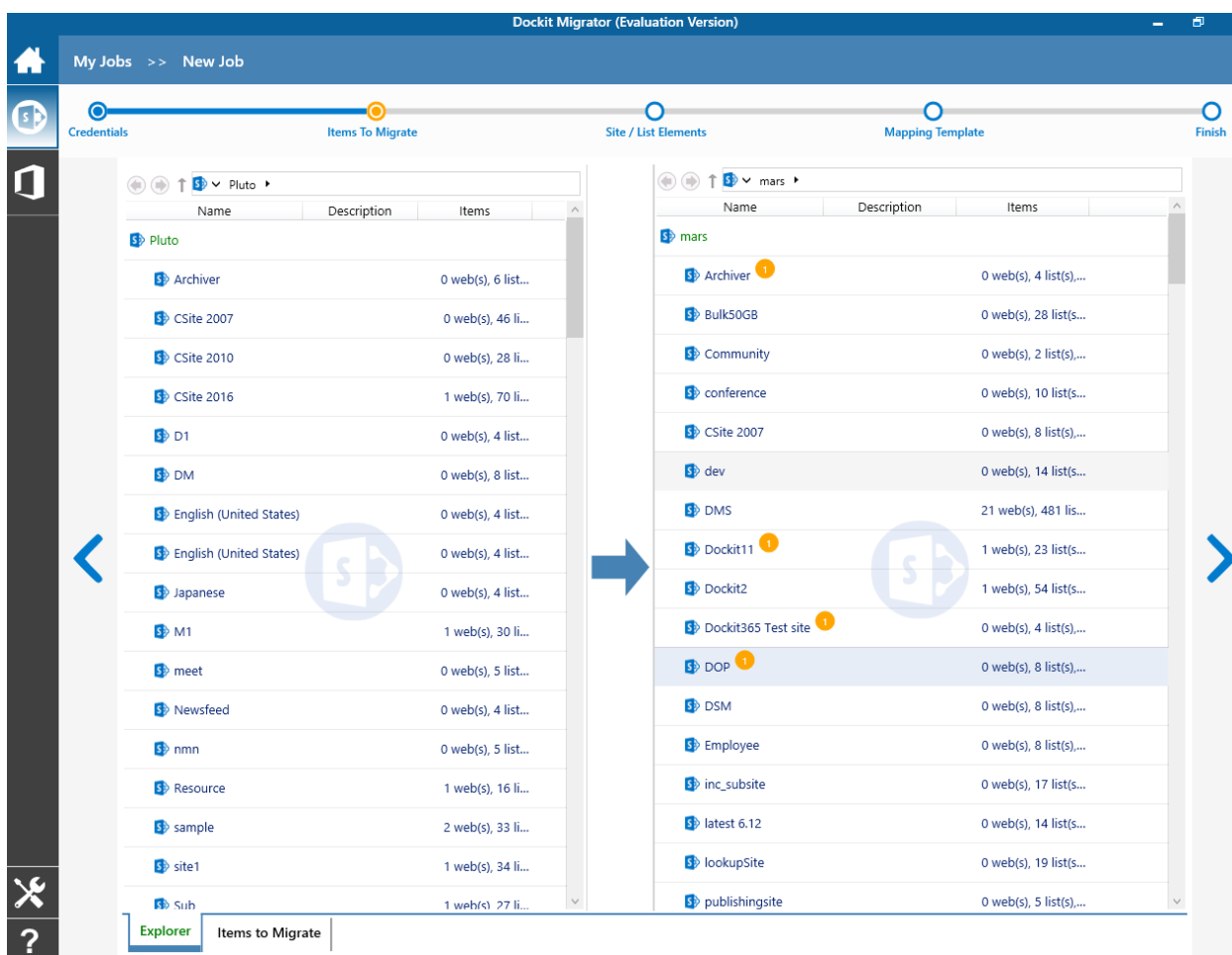
2. The **Items to Migrate** page has two tabs. They are **Explorer** tab, and **Items to Migrate** tab.

The screenshot displays the 'Dockit Migrator (Evaluation Version)' application window. The top navigation bar includes 'My Jobs >> New Job'. Below this, a progress bar shows four steps: 'Credentials', 'Items To Migrate' (active), 'Site / List Elements', 'Mapping Template', and 'Finish'. The main area is divided into two panels. The left panel, titled 'Pluto', shows a list of items with columns 'Name', 'Description', and 'Items'. The right panel, titled 'mars', shows a similar list. A large blue arrow points from the left panel to the right panel. At the bottom, there are two tabs: 'Explorer' and 'Items to Migrate'.

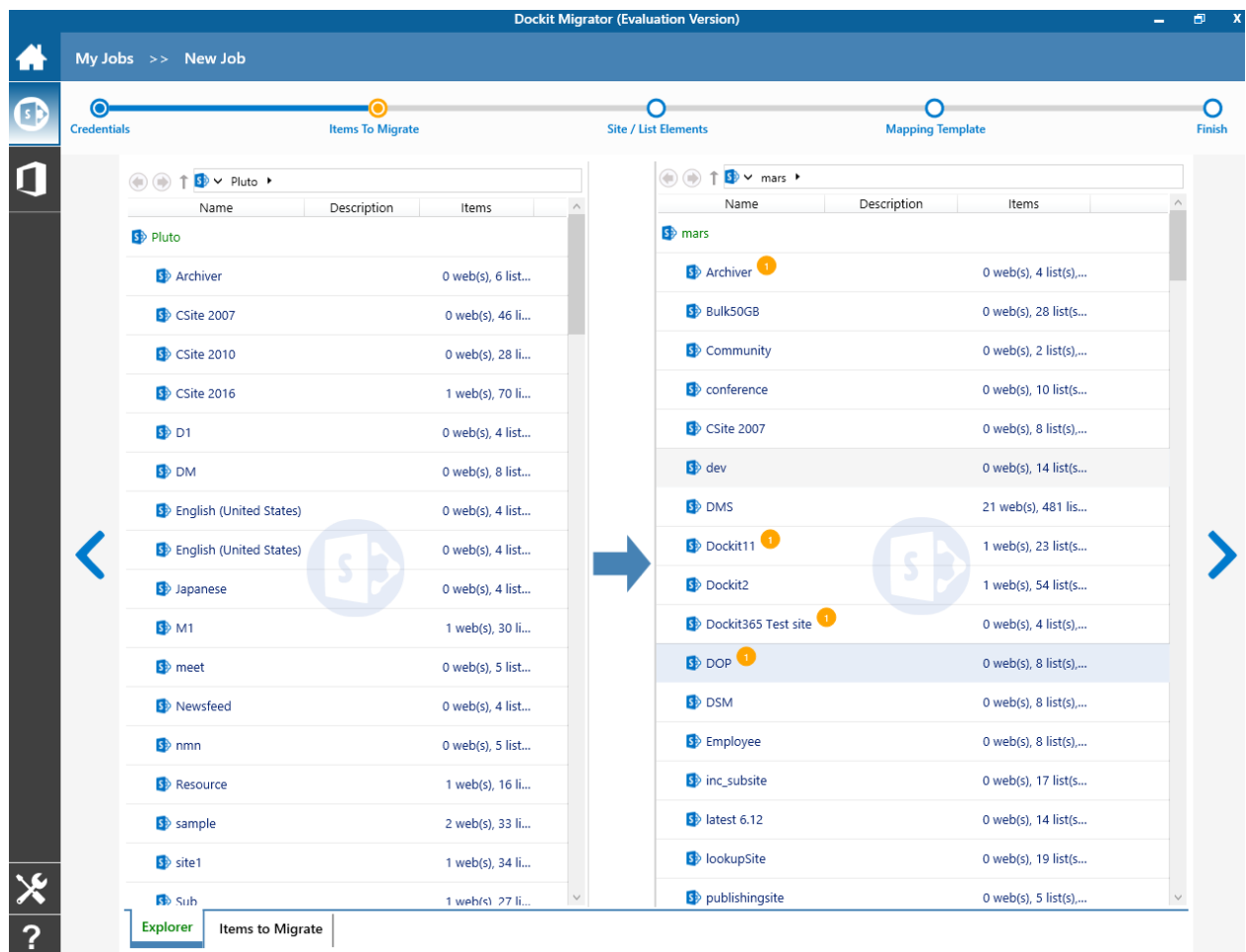
Name	Description	Items
Pluto		
Archiver		0 web(s), 6 list...
CSite 2007		0 web(s), 46 li...
CSite 2010		0 web(s), 28 li...
CSite 2016		1 web(s), 70 li...
D1		0 web(s), 4 list...
DM		0 web(s), 8 list...
English (United States)		0 web(s), 4 list...
English (United States)		0 web(s), 4 list...
Japanese		0 web(s), 4 list...
M1		1 web(s), 30 li...
meet		0 web(s), 5 list...
Newsfeed		0 web(s), 4 list...
nmn		0 web(s), 5 list...
Resource		1 web(s), 16 li...
sample		2 web(s), 33 li...
site1		1 web(s), 34 li...
Sub		1 web(s), 27 li...

Name	Description	Items
mars		
Archiver		0 web(s), 4 list(s),...
Bulk50GB		0 web(s), 28 list(s)...
Community		0 web(s), 2 list(s),...
conference		0 web(s), 10 list(s)...
CSite 2007		0 web(s), 8 list(s),...
dev		0 web(s), 14 list(s)...
DMS		21 web(s), 481 li...
Dockit11		1 web(s), 23 list(s)...
Dockit2		1 web(s), 54 list(s)...
Dockit365 Test site		0 web(s), 4 list(s),...
DOP		0 web(s), 8 list(s),...
DSM		0 web(s), 8 list(s),...
Employee		0 web(s), 8 list(s),...
inc_subsite		0 web(s), 17 list(s)...
latest 6.12		0 web(s), 14 list(s)...
lookupSite		0 web(s), 19 list(s)...
publishingsite		0 web(s), 5 list(s),...

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

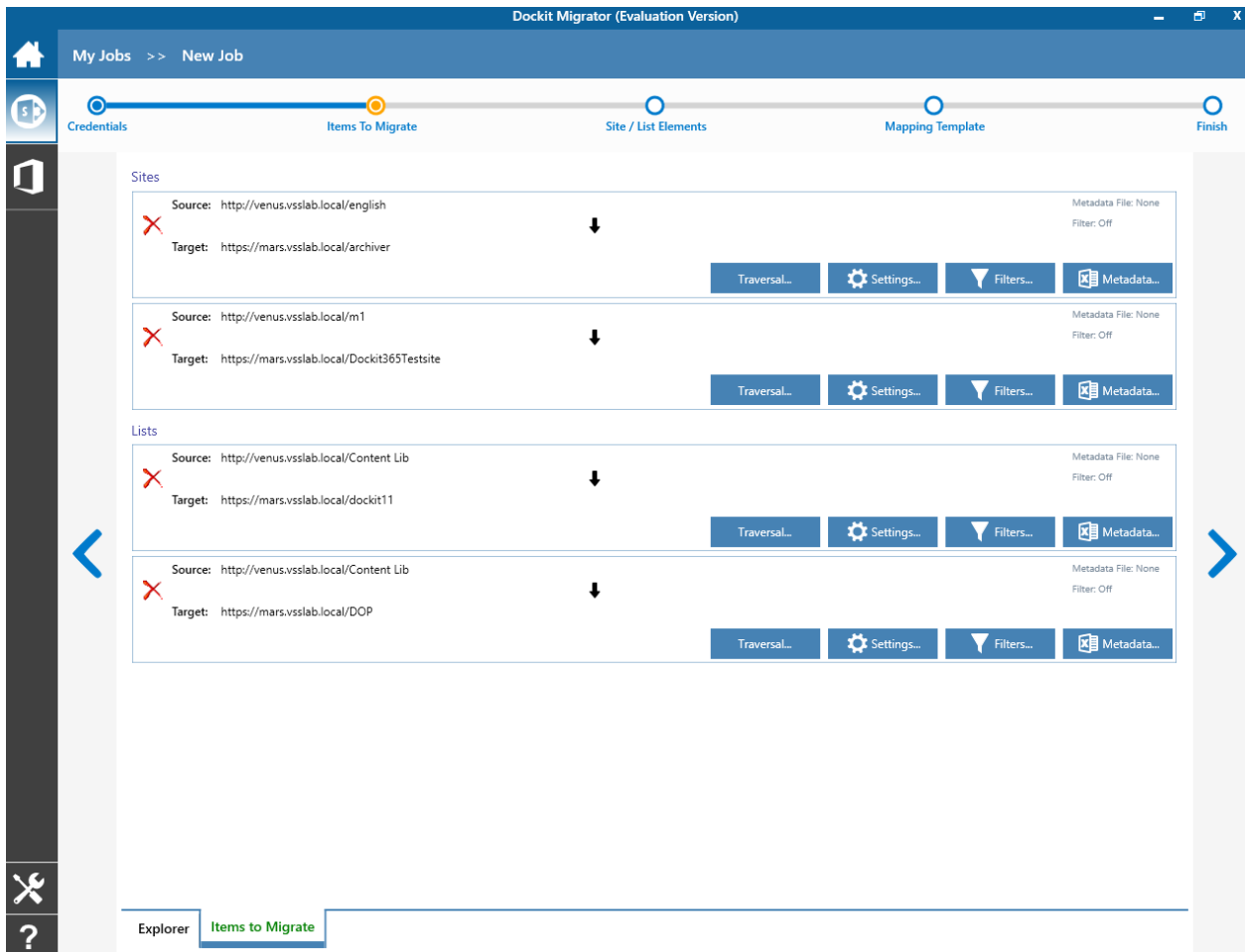


- Browse the source folders, files and list items of source SharePoint list and select the required folders, files and list items from source list-view. Select a destination location in the destination list-view and click **Arrow (->)** button to add selected items for migration.



- You are also having another options (i.e.,) drag-and-drop option. You can drag a source site / library / list item from source list-view and drop it in to the required target list-view.
- The selected folders, files and list items added for migration will be displayed in the **Items to Migrate** tab. Dockit processes the top-level folders, files and list items added for migration in the order in which it appears in the **Items to Migrate** tab. The migration process order can be changed by the **navigation** buttons available in the right side of the grid.

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



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

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

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

To specify traversal options for site, click [Site Traversal Options](#).

To specify traversal option for list, click [List Traversal Options](#).

To specify traversal option for list, click [Library Traversal Options](#).

To specify traversal options for folder, click [Folder Traversal Options](#).

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



Use **Settings...** 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.

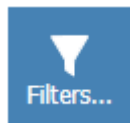
To specify migration options for site, click [Site Migration Options](#).

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

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

The screenshot shows the 'Docket Migrator (Evaluation Version)' interface. The top navigation bar includes 'My Jobs >> New Job'. Below it, a progress bar shows four steps: 'Batch Descriptor', 'Site / List Elements' (current step), 'Migration Settings', and 'Finish'. The main content area is split into two columns: 'Site Elements' and 'List Elements'. Each column contains a list of items with checkboxes for selection. In the 'Site Elements' column, 'Workflow history' is checked. In the 'List Elements' column, 'Root level web pages' has an information icon. At the bottom of each column is a 'Select All' checkbox. A 'Note' section at the bottom provides additional context for the migration process.

Site Elements

- ☐ Master Pages (SP 2007 and above)
- ☐ Home Page as in source site (SP 2010 and above)
- ☐ Themes (SP 2007 and above)
- ☐ Associate Web Parts
- ☐ User Alerts [1]
- ☐ Site Permissions [2]
- ☐ Site Features Inclusion / Exclusion List ...
- ☐ Content Types
- ☐ Root level web pages ⓘ
- ☐ Top Links in site pages (SP 2010 and above)
- ☐ Quick Launch Links (SP 2010 and above)
- ☐ Workflows
- ☒ Workflow history

☐ Select All

List Elements

- ☐ Associate Web Parts
- ☐ List Views Inclusion / Exclusion List ...
- ☐ List Permissions [2]
- ☐ Columns Inclusion / Exclusion List ...
- ☐ Content Types
- ☐ Maintain same List Item ID as in source [1]
- ☐ Root level web pages ⓘ
- ☐ Maintain same Document ID as in source
- ☐ Quick Launch Links as in source (SP 2010 and above)
- ☐ Workflows
- ☐ Workflow history

☐ Select All

Note: [1] Docket Server Agent must be available in target SharePoint server
[2] For SharePoint 2007 migration, Docket Server Agent must be available in source SharePoint server

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

Site Elements

- ☒ Master Pages (SP 2007 and above)
- ☒ Home Page as in source site (SP 2010 and above)
- ☒ Themes (SP 2007 and above)
- ☒ Associate Web Parts
- ☒ User Alerts [1]
- ☒ Site Permissions [2]
- ☒ Site Features Inclusion / Exclusion List . . .
- ☒ Content Types
- ☒ Root level web pages 
- ☒ Top Links in site pages (SP 2010 and above)
- ☒ Quick Launch Links (SP 2010 and above)
- ☒ Workflows
- ☒ Workflow history

☒ Select All

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 migrate the Web Parts (Landing pages, Form pages, List view and Web Part pages and Publishing Pages) during a Site / Web level migration. Note: • Ordering of Web Parts may not be preserved in Basic Pages (pages without Web Part Zones) • Dockit Server Agent is required in the <u>target</u> SharePoint server for link correction in web pages. • Custom Web Parts will not be migrated and must be available in the target SharePoint server prior to migration.
Workflows:	To migrate the site level workflows during a Site / Web level migration. Note: • Dockit Server Agent for SharePoint 2007 is required in the SharePoint server to retrieve the associated workflows from SharePoint 2007 or to associate workflows in SharePoint 2007. • Custom Workflows will be handled only during a Site / Web level migration. • It starts the workflows in the target which have running state in the source.

User Alerts:	To migrate user alerts to the target SharePoint lists, libraries and their content. Note: Dockit Server Agent is required in the <u>target SharePoint server</u> to migrate user alerts for on-premise.
Site Permissions:	To migrate site permissions. Note: Dockit Server Agent is required in the <u>source SharePoint server</u> to migrate when performing migration from SharePoint 2007.
Activate Features:	To activate Site collection feature and site feature. Note: Click 'Exclusion List button' and specify the feature id's that are excluded during feature activation.

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

List Elements

☒ Associate Web Parts

☒ List Views

Inclusion / Exclusion List ...

☒ List Permissions [2]

☒ Columns

Inclusion / Exclusion List ...

☒ Content Types

☒ Maintain same List Item ID as in source [1]

☒ Root level web pages



☒ Maintain same Document ID as in source

☒ Quick Launch Links as in source (SP 2010 and above)

☒ Workflows

☐ Workflow history

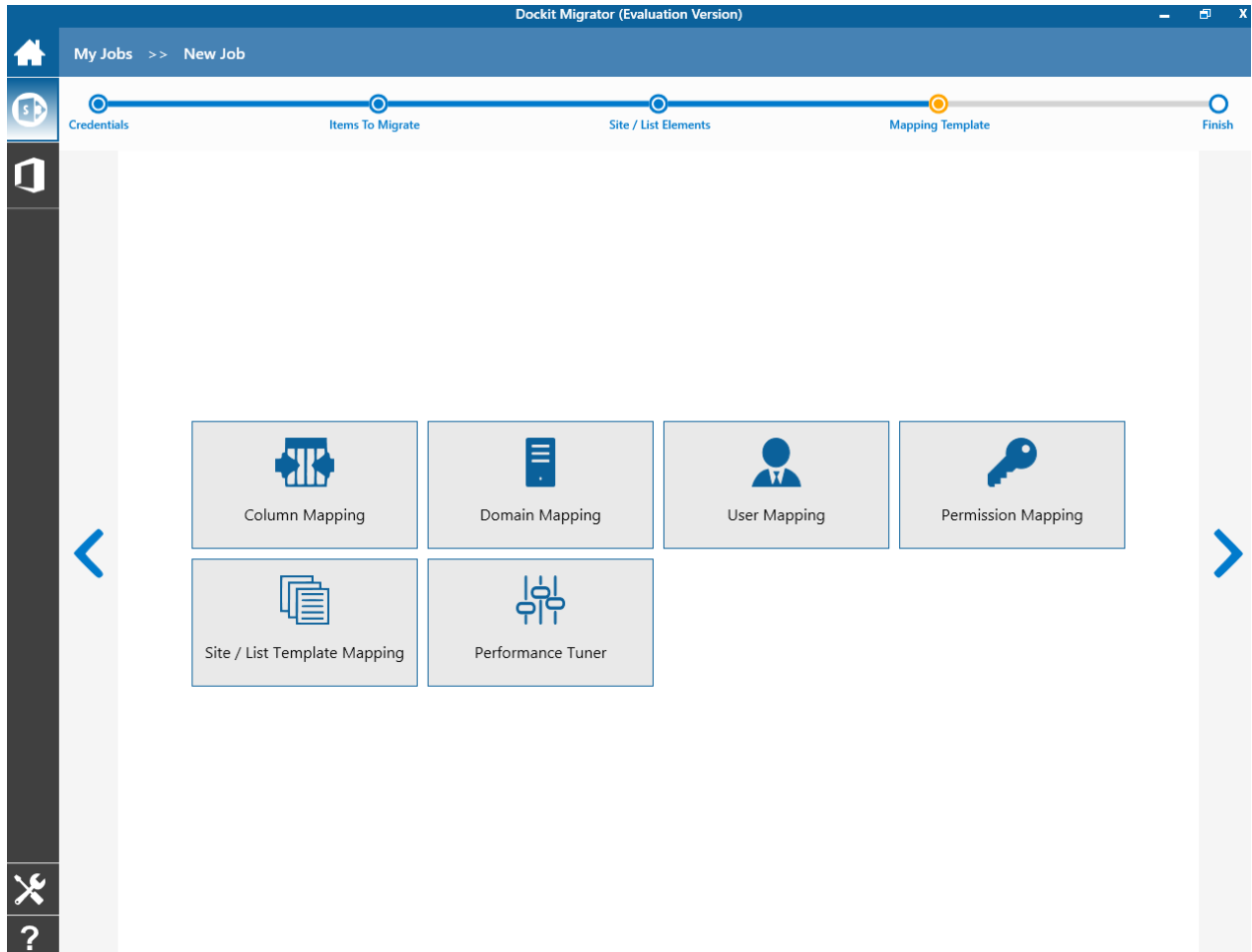
☒ Select All

List Views:	To migrate list views.
List Permissions:	To migrate list permissions. Note: Dockit Server Agent is required in the <u>source SharePoint server</u> to migrate when performing migration from SharePoint 2007.
Content Types:	To create content types which are not available in the target SharePoint.
Maintain same List Item ID as in source:	To retain the list item IDs as same as source list item. Note: Dockit Server Agent is required in the <u>target SharePoint server</u> to retain list item ID.
Maintain same Document ID as in source:	To retain the document ID for the migrated document as same as source document (when Document ID Services feature is activated in both source and target SharePoint servers).

Migration Settings

To specify Migration Settings inputs to use for the task:

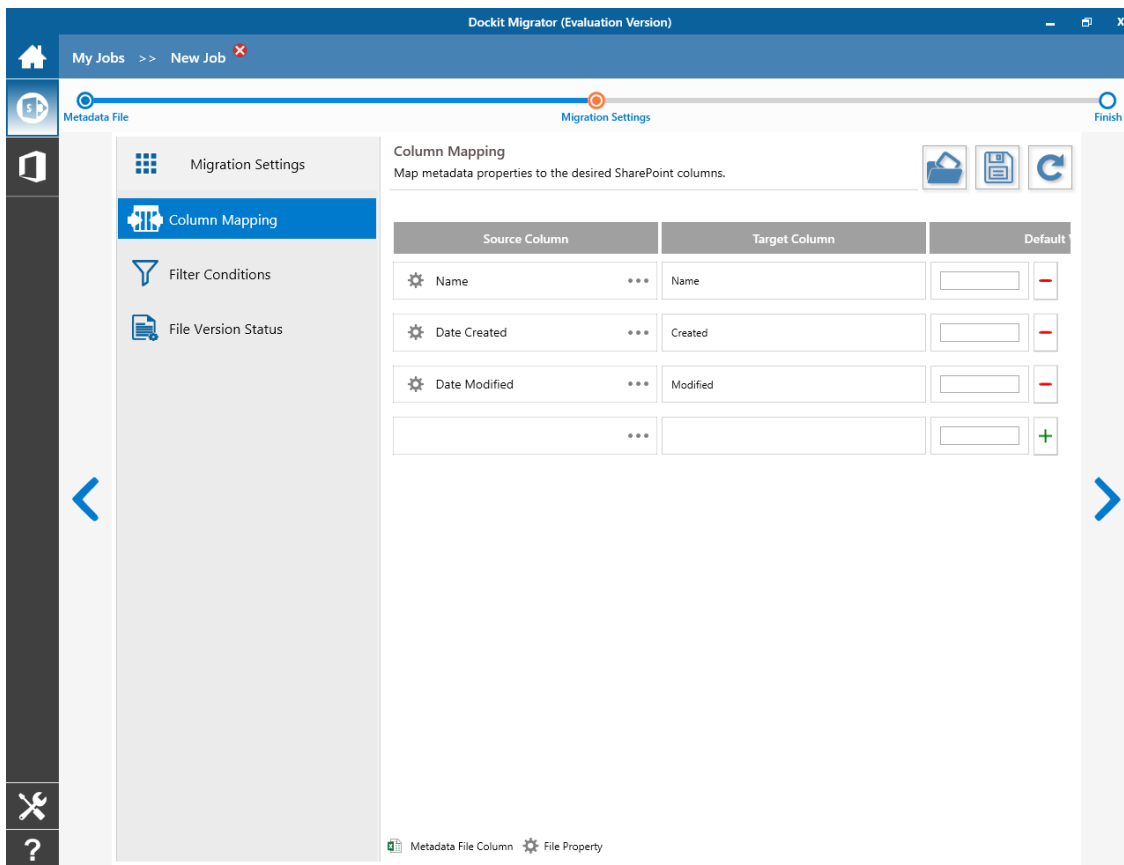
The Migration Settings page will appear as shown in the screen below:



1. [Column Mapping](#)
2. [Domain Mapping](#)
3. [User / Group Mapping](#)
4. [Permission Mapping](#)
5. [Site and List Template Mapping](#)
6. Click **Next** to proceed.

Column Mapping

1. Dockit allows you to assign values from file properties or metadata properties to SharePoint columns by using Column Mapping option.
2. You can also assign metadata values by using 'Column Mapping Template' for repeated use.
3. To create new column mapping, select **Column Mapping** option. A default page will appear as shown below.

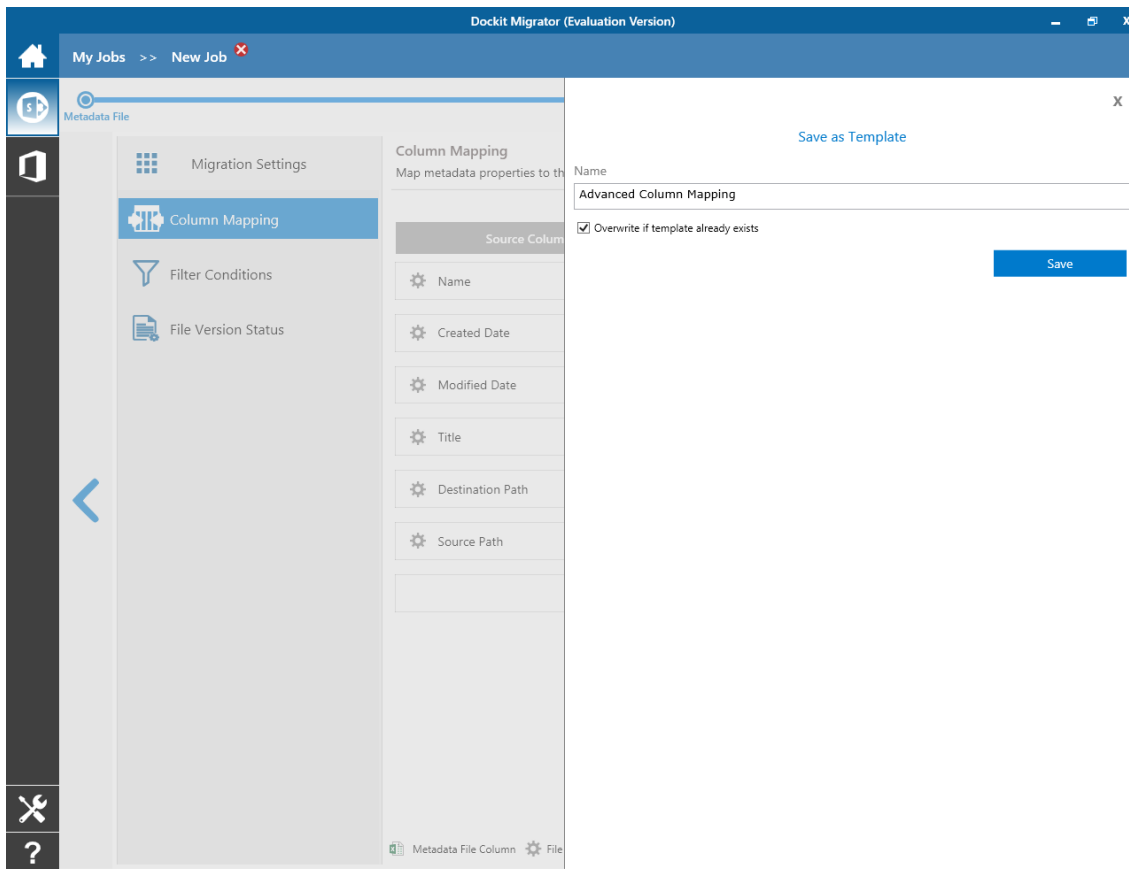


4. **Source Column:** You can specify source column values from '**File properties**', '**Metadata File**', '**Function Builder**' and also from '**Other File Properties**' by entering the property name.
5. **Target Column:** You can specify the target SharePoint Column which needs to map and assign values.
6. **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.
7. You can select a column to map by clicking on ... to get a list of file and metadata properties.

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



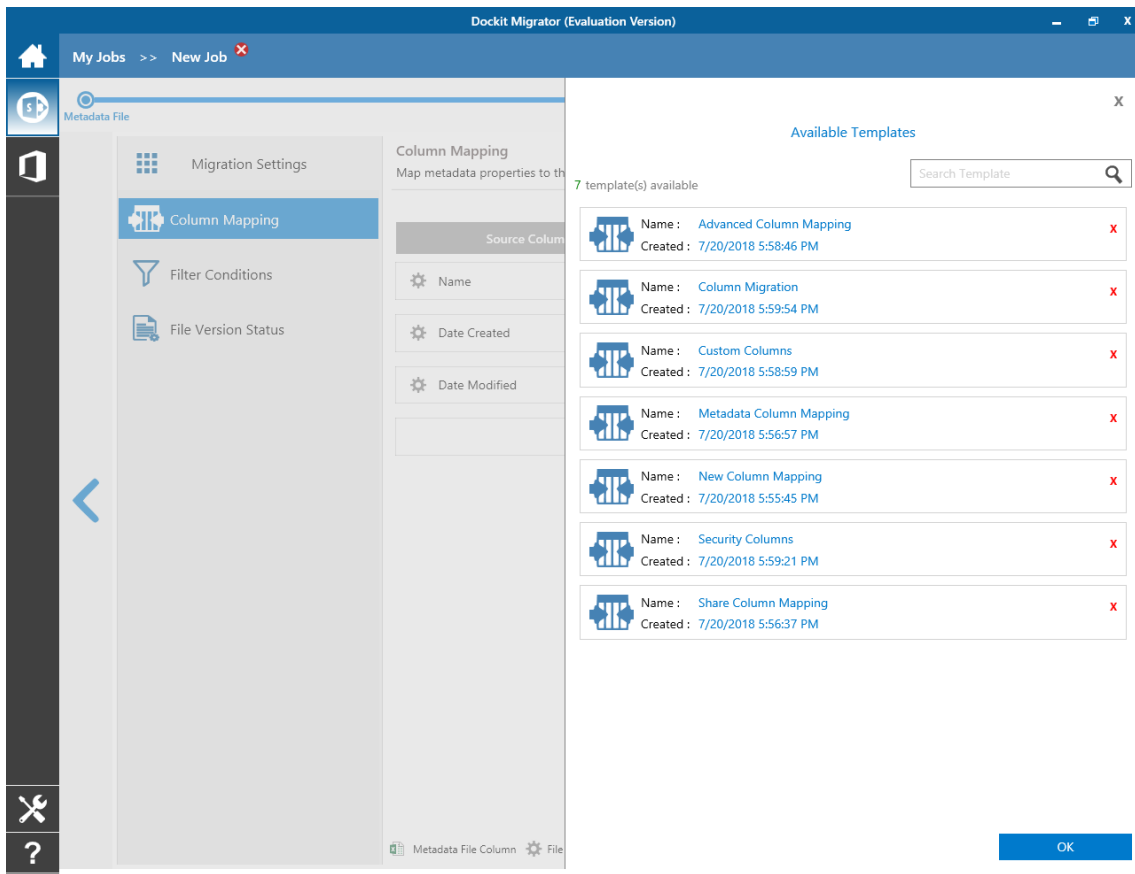
- Once you finish mapping the columns, you can click  to save as new template. This option enables you to save the configured column mapping as templates for reuse in other migration tasks.



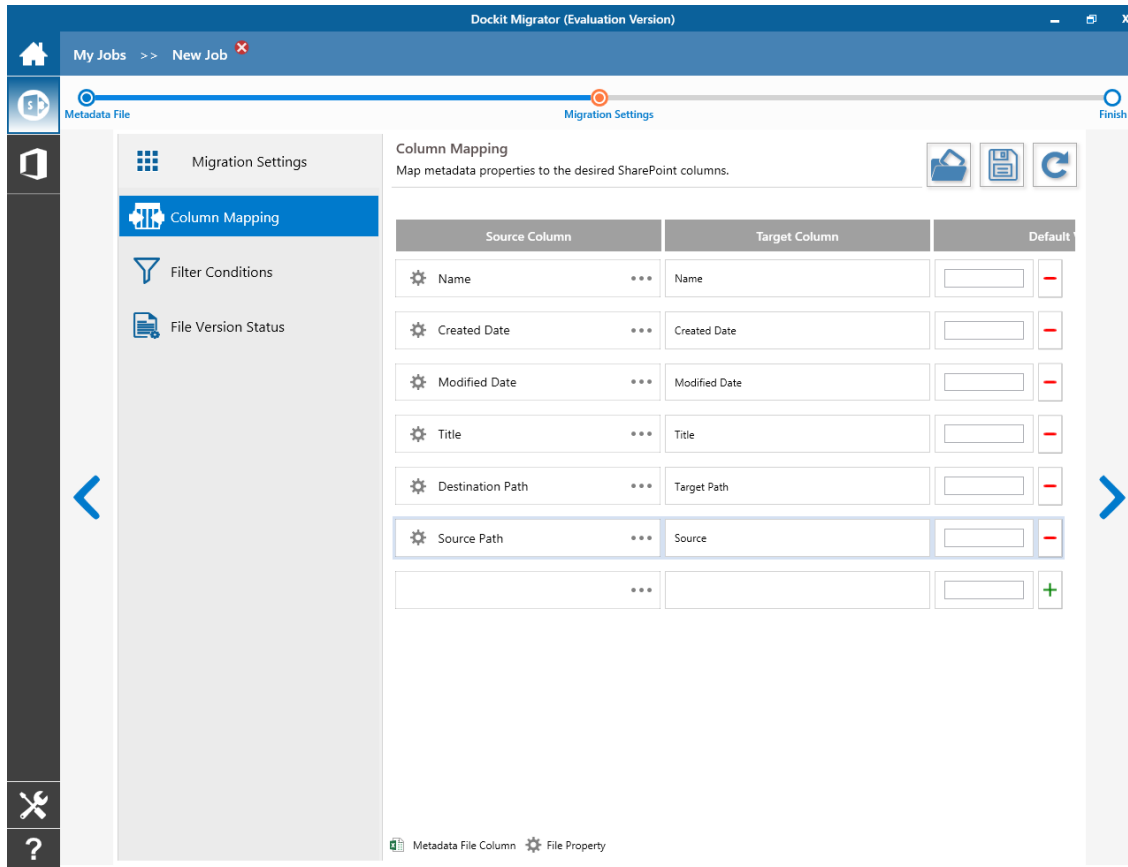
- Once you save a template, you can load from the saved templates to use in this task.



- Click  to load available column mapping templates.



11. Click  to load the application default settings.



The screenshot shows the Dockit Migrator (Evaluation Version) application interface. The top bar includes a home icon, 'My Jobs >> New Job' with a red error icon, and window controls. Below this is a progress bar with 'Metadata File' and 'Migration Settings' (active) steps, and a 'Finish' button. The left sidebar contains icons for 'Migration Settings', 'Column Mapping' (selected), 'Filter Conditions', and 'File Version Status'. The main area is titled 'Column Mapping' with the instruction 'Map metadata properties to the desired SharePoint columns.' and icons for folder, document, and refresh. A table lists mappings for Name, Created Date, Modified Date, Title, Destination Path, and Source Path. The 'Source Path' row is highlighted. A legend at the bottom identifies 'Metadata File Column' and 'File Property'.

Source Column	Target Column	Default
Name	Name	
Created Date	Created Date	
Modified Date	Modified Date	
Title	Title	
Destination Path	Target Path	
Source Path	Source	

12. Click **Next** to proceed.

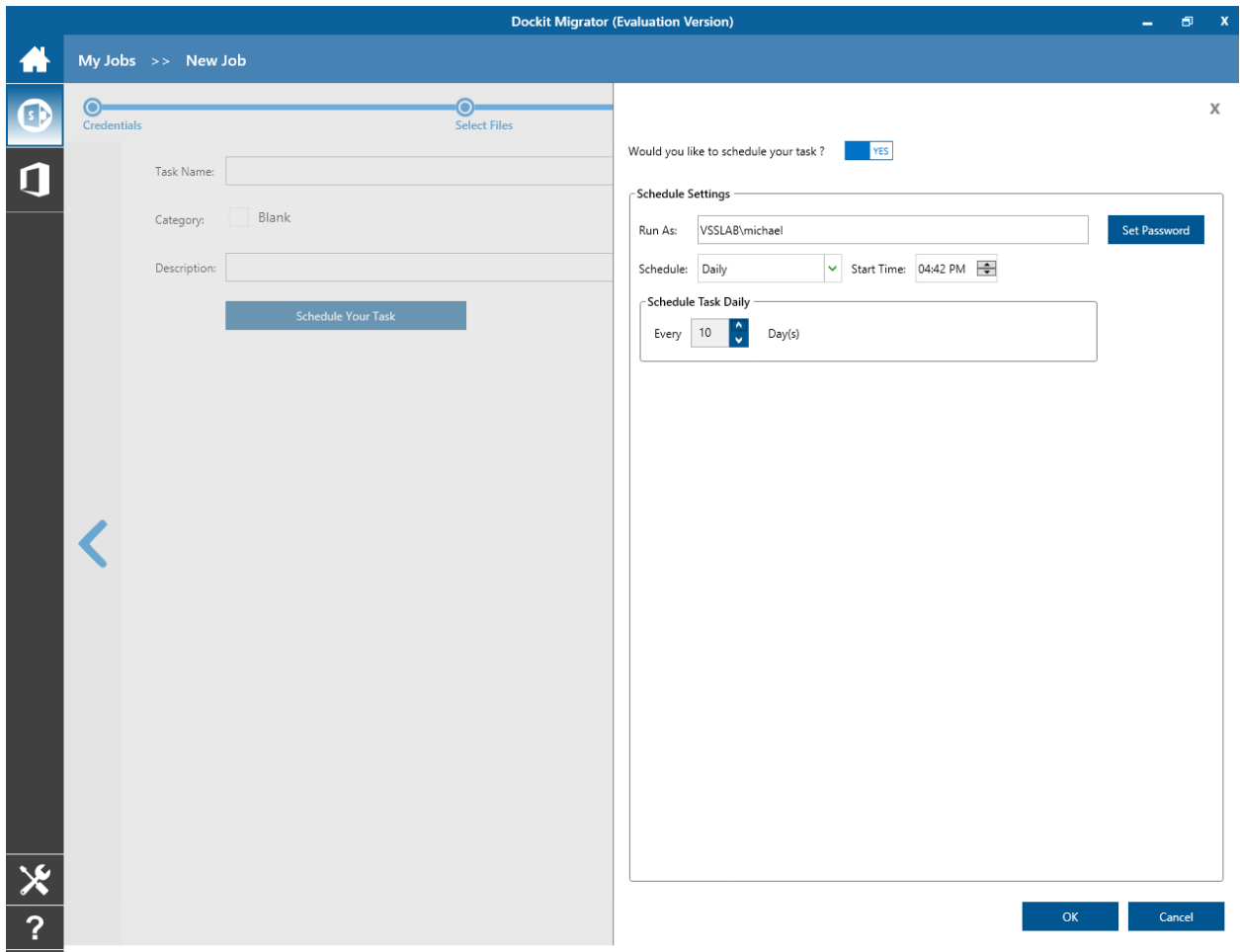
Task Schedule Settings

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

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

The screenshot displays the 'Task Schedule Settings (Finish)' page in the Dockit Migrator (Evaluation Version) application. The interface includes a top navigation bar with 'My Jobs' and 'New Job' links. A progress bar at the top indicates the current step is 'Migration Settings', with 'Select Files' completed and 'Finish' pending. The main form area contains a 'Task Name' text box, a 'Category' dropdown menu (set to 'Blank'), and a 'Description' text box. A 'Schedule Your Task' button is positioned below the description field. At the bottom right, there are 'Save & Close' and 'Save & Start' buttons. A large blue arrow points left on the left sidebar.

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



Docket 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.

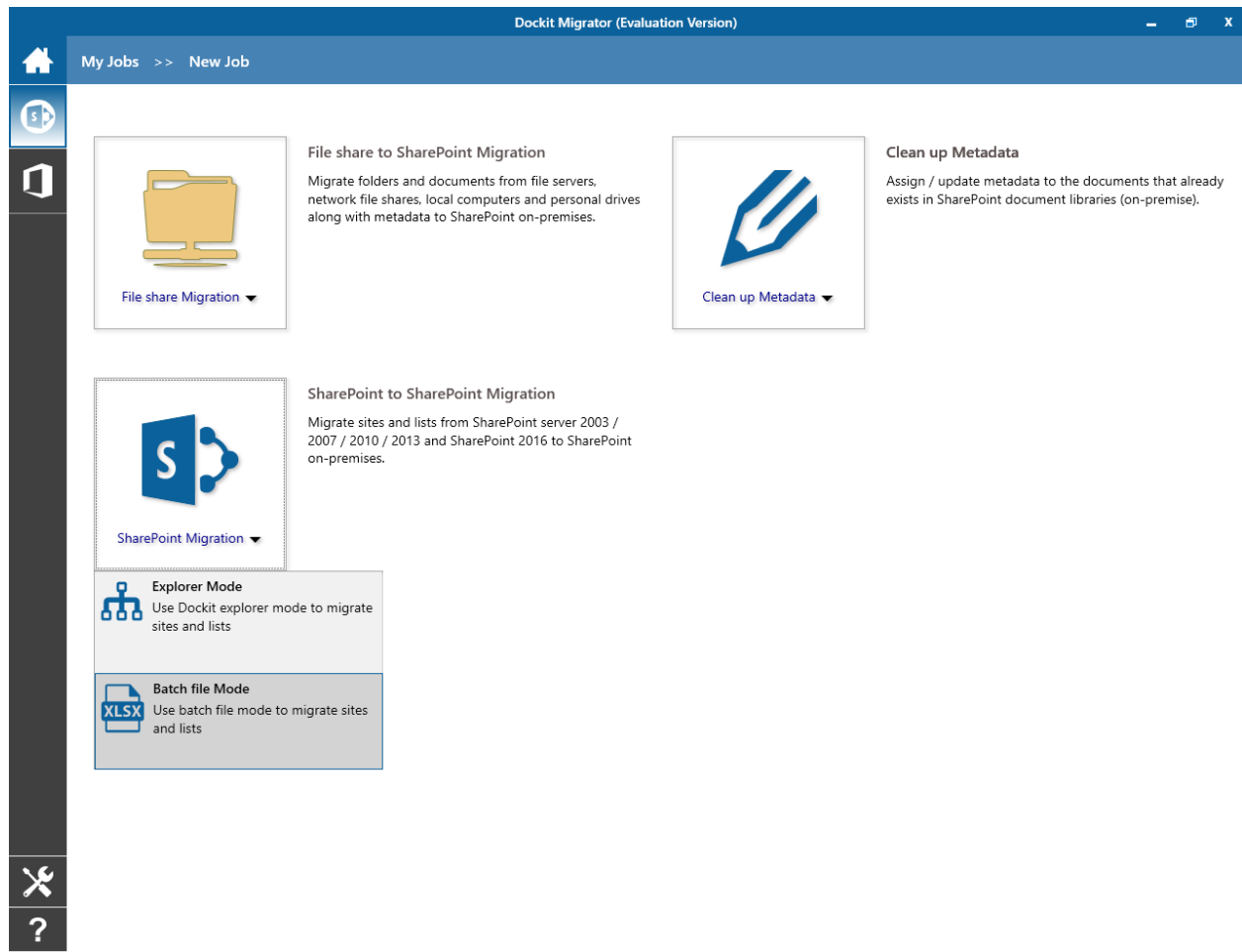
4. Click '**OK**' button to proceed or click '**Cancel**' to discard changes.
5. After creating schedule task. Click **Finish** button to run the task.

Batch File Mode (Create Task)

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

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

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

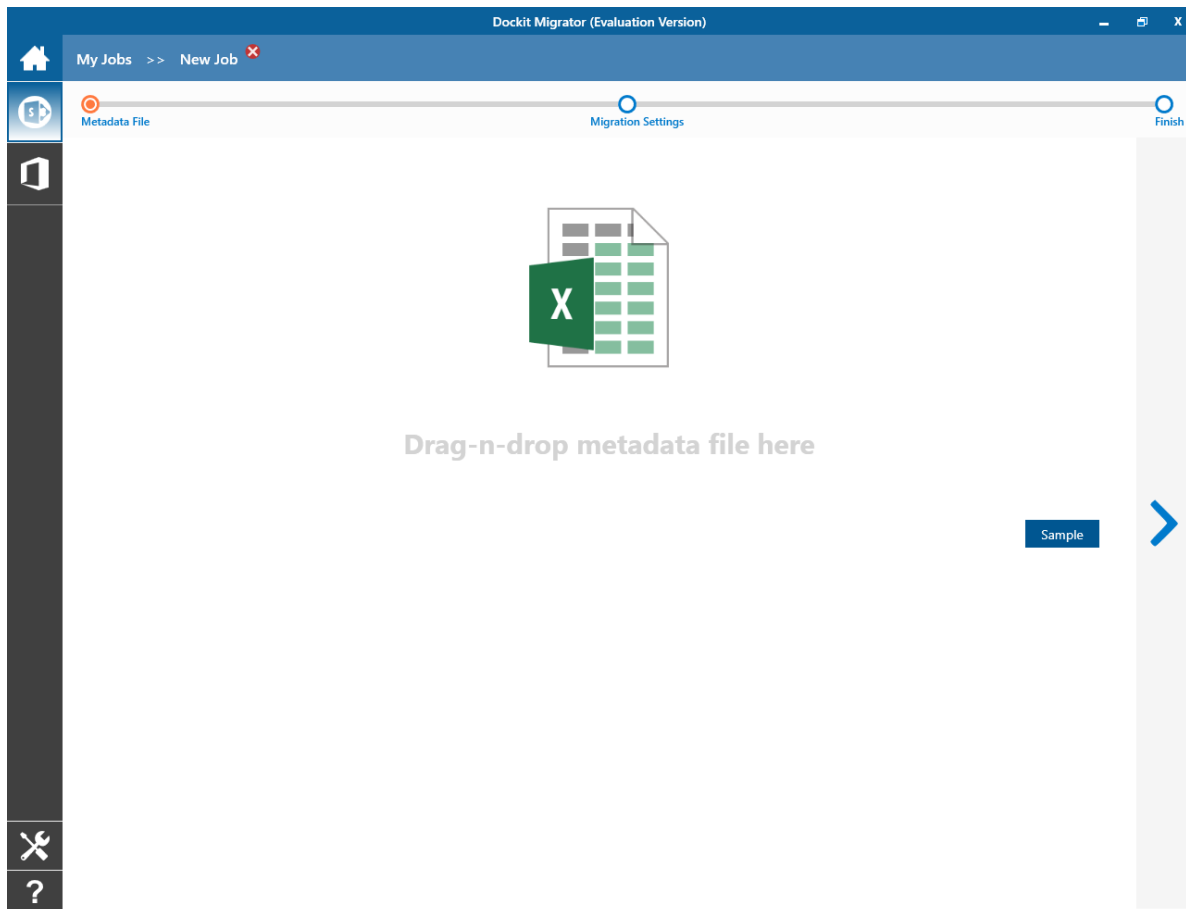


2. Specify [Batch Descriptor File](#).
3. Specify [Site / List Elements to migrate](#).
4. Specify [Migration Settings](#).
5. Specify [Task Schedule Settings](#).
6. Click **Finish** button to create a task, or click **Back** button to change any task settings.

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** page will appear as shown below:



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

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

For more information about how to create batch file, [click here](#).

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

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

6. Click  button to see the contents of selected batch file in the associated native application.
7. If you want to replace with a different batch file, click  button and select the new batch file as before.
8. 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.

Site Migration Option

☐ Create as sub-site / replace sub-site in target site

☒ Merge sites

If list / library exists in the target location:

☐ Overwrite list / library

☒ Retain list / library and merge content only

☐ Do not overwrite list / library (leave as-it-is)

☐ Replace site in target location

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

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

 **List Migration Option**

☐

 Replace list in target location

☒

 Merge lists

If list items / documents already exists in the target location:

☐

 Overwrite list item / document

☒

 Add source list item / document as new version(s) to existing item / document

☐

 Do not overwrite list item / document (leave as-it-is)

Site / List elements to migrate

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

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

The screenshot shows the 'Docket Migrator (Evaluation Version)' interface. The top navigation bar includes 'My Jobs >> New Job'. Below it, a progress bar shows four steps: 'Batch Descriptor', 'Site / List Elements' (current step), 'Migration Settings', and 'Finish'. The main content area is divided into two columns: 'Site Elements' and 'List Elements'. Each column contains a list of items with checkboxes for selection. In the 'Site Elements' column, 'Workflow history' is checked. In the 'List Elements' column, 'Root level web pages' has an information icon. At the bottom of each column is a 'Select All' checkbox. A 'Note' section at the bottom provides additional context for the migration process.

Site Elements

- ☐ Master Pages (SP 2007 and above)
- ☐ Home Page as in source site (SP 2010 and above)
- ☐ Themes (SP 2007 and above)
- ☐ Associate Web Parts
- ☐ User Alerts [1]
- ☐ Site Permissions [2]
- ☐ Site Features Inclusion / Exclusion List ...
- ☐ Content Types
- ☐ Root level web pages ⓘ
- ☐ Top Links in site pages (SP 2010 and above)
- ☐ Quick Launch Links (SP 2010 and above)
- ☐ Workflows
- ☒ Workflow history

☐ Select All

List Elements

- ☐ Associate Web Parts
- ☐ List Views Inclusion / Exclusion List ...
- ☐ List Permissions [2]
- ☐ Columns Inclusion / Exclusion List ...
- ☐ Content Types
- ☐ Maintain same List Item ID as in source [1]
- ☐ Root level web pages ⓘ
- ☐ Maintain same Document ID as in source
- ☐ Quick Launch Links as in source (SP 2010 and above)
- ☐ Workflows
- ☐ Workflow history

☐ Select All

Note: [1] Docket Server Agent must be available in target SharePoint server
[2] For SharePoint 2007 migration, Docket Server Agent must be available in source SharePoint server

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

Site Elements

- ☒ Master Pages (SP 2007 and above)
- ☒ Home Page as in source site (SP 2010 and above)
- ☒ Themes (SP 2007 and above)
- ☒ Associate Web Parts
- ☒ User Alerts [1]
- ☒ Site Permissions [2]
- ☒ Site Features Inclusion / Exclusion List . . .
- ☒ Content Types
- ☒ Root level web pages 
- ☒ Top Links in site pages (SP 2010 and above)
- ☒ Quick Launch Links (SP 2010 and above)
- ☒ Workflows
- ☒ Workflow history

☒ Select All

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 migrate the Web Parts (Landing pages, Form pages, List view and Web Part pages and Publishing Pages) during a Site / Web level migration. Note: • Ordering of Web Parts may not be preserved in Basic Pages (pages without Web Part Zones) • Dockit Server Agent is required in the <u>target</u> SharePoint server for link correction in web pages. • Custom Web Parts will not be migrated and must be available in the target SharePoint server prior to migration.
Workflows:	To migrate the site level workflows during a Site / Web level migration. Note: • Dockit Server Agent for SharePoint 2007 is required in the SharePoint server to retrieve the associated workflows from SharePoint 2007 or to associate workflows in SharePoint 2007. • Custom Workflows will be handled only during a Site / Web level migration. • It starts the workflows in the target which have running state in the source.

User Alerts:	To migrate user alerts to the target SharePoint lists, libraries and their content. Note: Dockit Server Agent is required in the <u>target SharePoint server</u> to migrate user alerts for on-premise.
Site Permissions:	To migrate site permissions. Note: Dockit Server Agent is required in the <u>source SharePoint server</u> to migrate when performing migration from SharePoint 2007.
Activate Features:	To activate Site collection feature and site feature. Note: Click 'Exclusion List button' and specify the feature id's that are excluded during feature activation.

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

List Elements

☒ Associate Web Parts

☒ List Views

Inclusion / Exclusion List ...

☒ List Permissions [2]

☒ Columns

Inclusion / Exclusion List ...

☒ Content Types

☒ Maintain same List Item ID as in source [1]

☒ Root level web pages



☒ Maintain same Document ID as in source

☒ Quick Launch Links as in source (SP 2010 and above)

☒ Workflows

☐ Workflow history

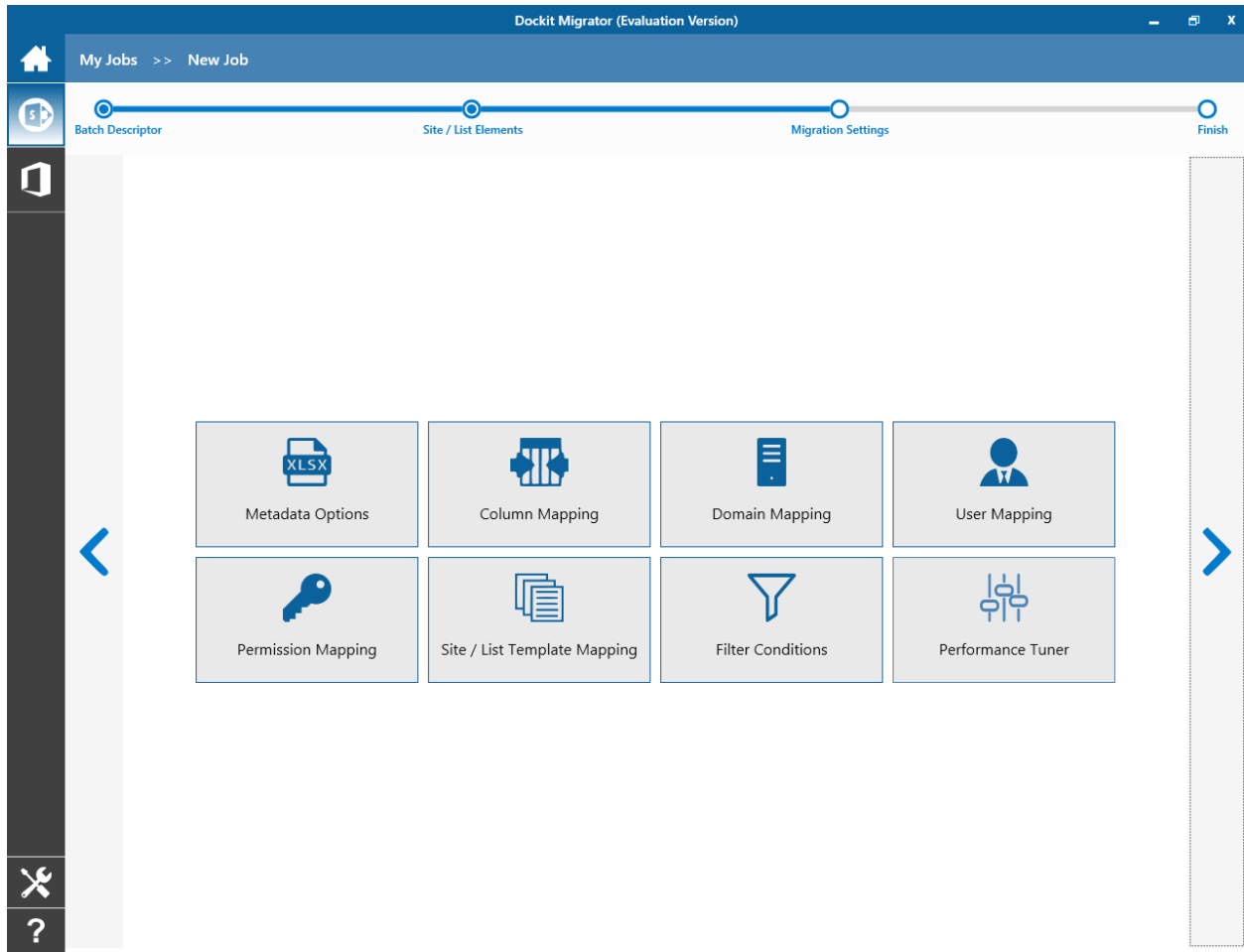
☒ Select All

List Views:	To migrate list views.
List Permissions:	To migrate list permissions. Note: Dockit Server Agent is required in the <u>source SharePoint server</u> to migrate when performing migration from SharePoint 2007.
Content Types:	To create content types which are not available in the target SharePoint.
Maintain same List Item ID as in source:	To retain the list item IDs as same as source list item. Note: Dockit Server Agent is required in the <u>target SharePoint server</u> to retain list item ID.
Maintain same Document ID as in source:	To retain the document ID for the migrated document as same as source document (when Document ID Services feature is activated in both source and target SharePoint servers).

Migration Settings

To specify Migration Settings inputs to use for the task:

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

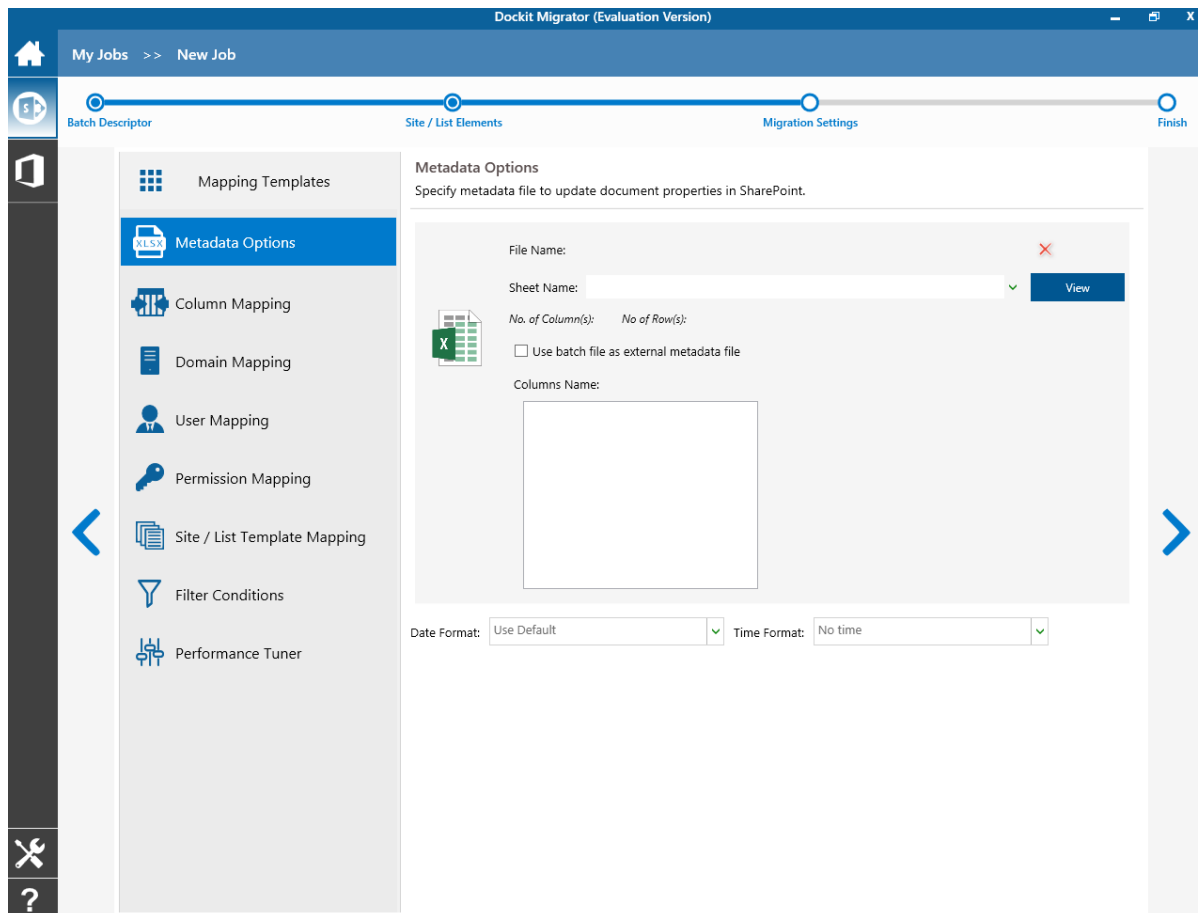


1. [Metadata Options](#)
2. [Column Mapping](#)
3. [Domain Mapping](#)
4. [User / Group Mapping](#)
5. [Permission Mapping](#)
6. [Filter Conditions](#)
7. [Site and List Template Mapping](#)
8. Click **Next** to proceed.

Metadata Options

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

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



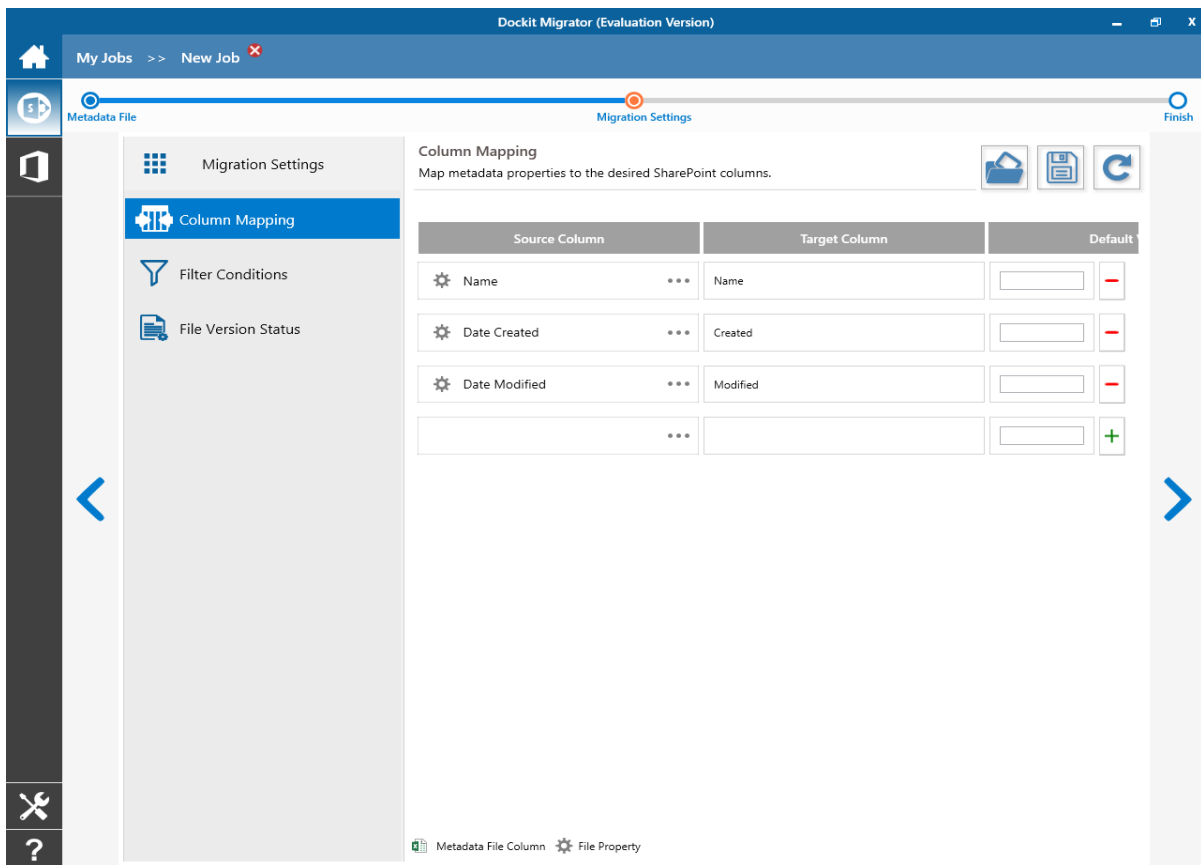
2.  **Click** button to specify the external metadata file. The reference file can be any one of the following file formats - Comma delimited (CSV), Microsoft Excel (XLSX) or Text file (TXT).
3. For more information about how to create external metadata file, click [here](#).
4. File selection dialog opens. Drag and drop the metadata file from the explorer to the window or double click on the metadata file.

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

- Click **View** button to see the contents of selected metadata file in the associated native application.
- Select the desired columns for which you wish to assign metadata.
- If you want use the batch file as input for Metadata Options page, select '**Use batch file as external metadata file**' checkbox. 'Use batch file as external metadata file' option will be available in 'Batch File Mode' only.
- If you want to replace another metadata file, click **X** button and select the new metadata file as before.
- If any of the selected columns contains date and time values, specify the **Date and Time format** to parse the date values. The default value is the current system settings.
- Click **Next** to proceed.

Column Mapping

1. Dockit allows you to assign values from file properties or metadata properties to SharePoint columns by using Column Mapping option.
2. You can also assign metadata values by using 'Column Mapping Template' for repeated use.
3. To create new column mapping, select **Column Mapping** option. A default page will appear as shown below.



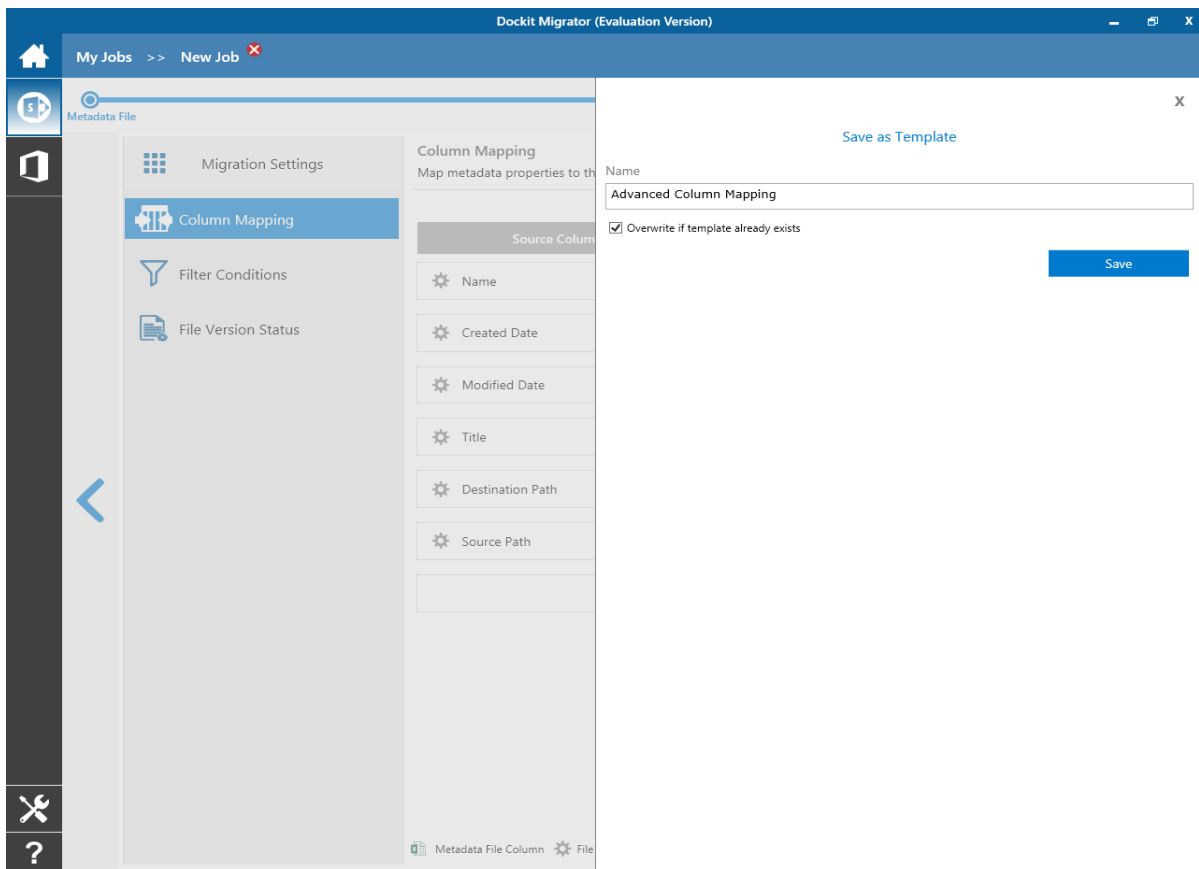
4. **Source Column:** You can specify source column values from '**File properties**', '**Metadata File**', '**Function Builder**' and also from '**Other File Properties**' by entering the property name.
5. **Target Column:** You can specify the target SharePoint Column which needs to map and assign values.
6. **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.

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

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



8. Once you finish mapping the columns, you can click  to save as new template. This option enables you to save the configured column mapping as templates for reuse in other migration tasks.



9. Once you save a template, you can load from the saved templates to use in this task.

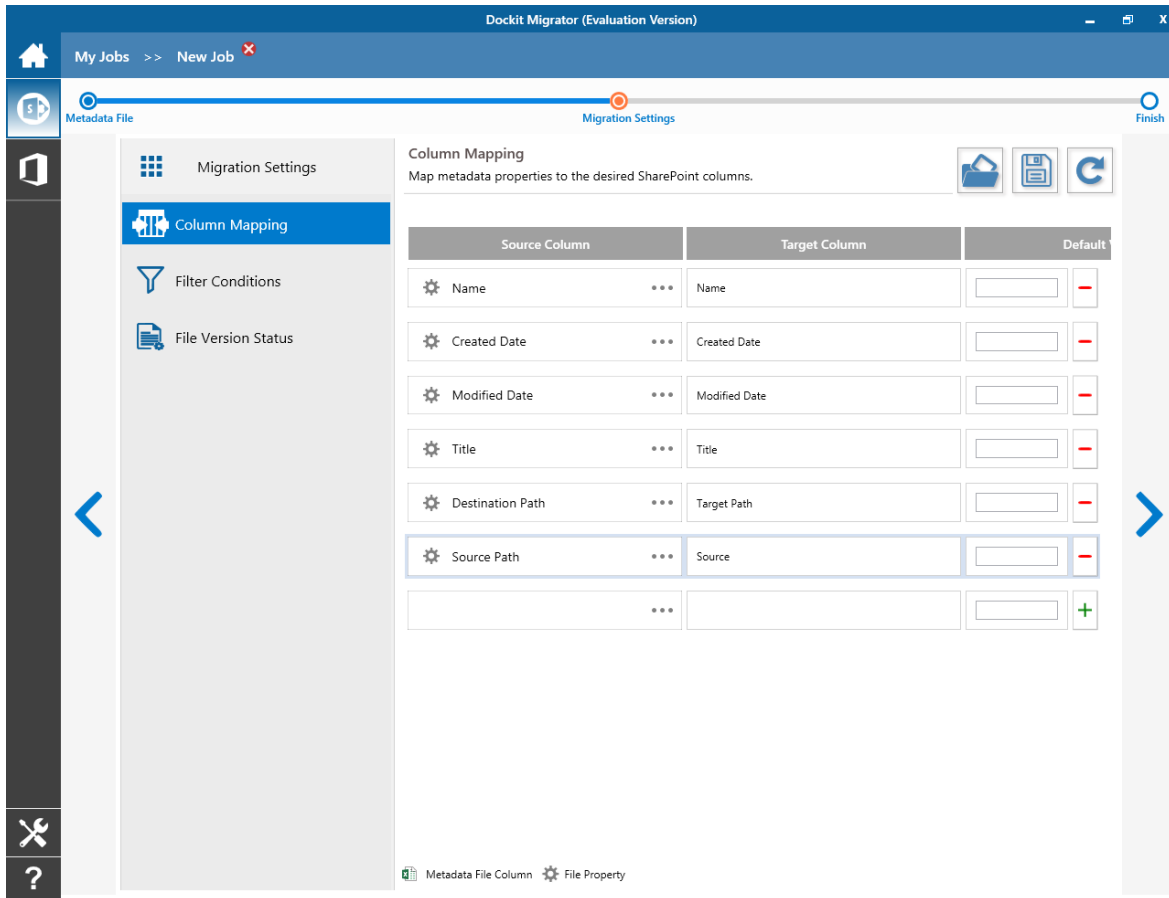


10. **Click** to load available column mapping templates.

The screenshot shows the 'Docket Migrator (Evaluation Version)' application window. The main interface has a sidebar with icons for 'My Jobs', 'New Job', 'Metadata File', 'Migration Settings', 'Column Mapping', 'Filter Conditions', and 'File Version Status'. The 'Column Mapping' section is active, showing a 'Source Column' table with columns for Name, Date Created, and Date Modified. A dialog box titled 'Available Templates' is open on the right, displaying a list of 7 templates. Each template entry includes a name and a creation timestamp, with a red 'X' icon to the right. The templates are: Advanced Column Mapping, Column Migration, Custom Columns, Metadata Column Mapping, New Column Mapping, Security Columns, and Share Column Mapping. A search bar is at the top of the dialog, and an 'OK' button is at the bottom right.

Name	Created
Advanced Column Mapping	7/20/2018 5:58:46 PM
Column Migration	7/20/2018 5:59:54 PM
Custom Columns	7/20/2018 5:58:59 PM
Metadata Column Mapping	7/20/2018 5:56:57 PM
New Column Mapping	7/20/2018 5:55:45 PM
Security Columns	7/20/2018 5:59:21 PM
Share Column Mapping	7/20/2018 5:56:37 PM

11. Click  to load the application default settings.



The screenshot shows the 'Dockit Migrator (Evaluation Version)' application window. The top navigation bar includes 'My Jobs' and 'New Job'. The left sidebar contains icons for 'Metadata File', 'Migration Settings', 'Column Mapping' (selected), 'Filter Conditions', and 'File Version Status'. The main area is titled 'Column Mapping' with the instruction 'Map metadata properties to the desired SharePoint columns.' It features a table with columns 'Source Column', 'Target Column', and 'Default'. The table contains several rows of mappings, with 'Source Path' highlighted. A legend at the bottom indicates that a folder icon represents 'Metadata File Column' and a gear icon represents 'File Property'.

Source Column	Target Column	Default
Name	Name	
Created Date	Created Date	
Modified Date	Modified Date	
Title	Title	
Destination Path	Target Path	
Source Path	Source	

12. Click **Next** to proceed.

Filter Conditions

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** page will appear as shown below:

The screenshot displays the 'Filter Conditions' page in the Dockit Migrator (Evaluation Version) application. The interface includes a top navigation bar with 'My Jobs >> New Job' and a progress bar with steps: Batch Descriptor, Site / List Elements, Migration Settings, and Finish. A left sidebar contains various configuration options, with 'Filter Conditions' currently selected. The main content area is titled 'Filter Conditions' and instructs the user to 'Specify import condition to be satisfied for folders and files to be migrated to SharePoint.' It features four filter configuration panels: 'Site Level Filter', 'List Level Filter', 'Folder Level Filter', and 'File Level Filter'. Each panel includes a 'Migrate only if the condition is satisfied' section with a dropdown menu, a comparison operator, and a text input field. The 'Site Level Filter' panel shows 'Web Name (SharePoint)' with an equals sign operator. The 'List Level Filter' panel shows 'List Type (SharePoint)' with an equals sign operator. The 'Folder Level Filter' panel shows 'Created Date (SharePoint)' with a less-than operator. The 'File Level Filter' panel shows 'Created Date (SharePoint)' with a less-than operator. Each panel also has radio buttons for 'AND' and 'OR' logic, and a 'Show more columns...' link.

2. Select any one of the following options given below:
 - 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.
3. Option that has discussed below is **Folder Level Filter**.

- Specify condition to apply at the folder level. For example, you can Import folders when ['Folder Name'='Conference Information'].

The screenshot displays the 'Dockit Migrator (Evaluation Version)' application window. The top navigation bar includes 'My Jobs >> New Job'. Below this is a progress bar with four stages: 'Batch Descriptor', 'Site / List Elements', 'Migration Settings', and 'Finish'. The 'Migration Settings' stage is currently active.

On the left side, there is a sidebar menu with the following options: 'Mapping Templates', 'Metadata Options', 'Column Mapping', 'Domain Mapping', 'User Mapping', 'Permission Mapping', 'Site / List Template Mapping', 'Filter Conditions' (which is highlighted in blue), and 'Performance Tuner'. At the bottom of the sidebar are icons for a wrench and a question mark.

The main content area is titled 'Filter Conditions' with the subtitle 'Specify import condition to be satisfied for folders and files to be migrated to SharePoint.' It contains four filter configuration panels:

- Site Level Filter:** Set to 'NO'. The condition is 'Web Name (SharePoint)' equals an empty text box. The 'OR' radio button is selected.
- List Level Filter:** Set to 'NO'. The condition is 'List Type (SharePoint)' equals an empty text box. The 'OR' radio button is selected.
- Folder Level Filter:** Set to 'YES'. The condition is 'Folder Name (SharePoint)' equals 'Conference Information'. The 'OR' radio button is selected.
- File Level Filter:** Set to 'NO'. The condition is 'Created Date (SharePoint)' is less than a date selected from a calendar (showing 1/15). The 'OR' radio button is selected.

Each panel includes a 'Show more columns...' link at the bottom right.

- Dockit Migrator (Evaluation Version)**

My Jobs >> New Job

Batch Descriptor Site / List Elements Migration Settings Finish

Filter Conditions

Specify import condition to be satisfied for folders and files to be migrated to SharePoint.

Mapping Templates

 - Metadata Options
 - Column Mapping
 - Domain Mapping
 - User Mapping
 - Permission Mapping
 - Site / List Template Mapping
 - Filter Conditions**
 - Performance Tuner

Site Level Filter NO

Migrate only if the condition is satisfied

Web Name (SharePoint) X

=

AND OR

Show more columns...

List Level Filter NO

Migrate only if the condition is satisfied

List Type (SharePoint) X

=

AND OR

Show more columns...

Folder Level Filter YES

Migrate only if the condition is satisfied

Folder Name (SharePoint) X

Starts With

Conference Information

AND OR

Show more columns...

File Level Filter NO

Migrate only if the condition is satisfied

Created Date (SharePoint) X

<

Select a date [15]

AND OR

Show more columns...

- You can specify the import conditions by selecting the Field Name and by specifying a corresponding value with the required operator.

The screenshot displays the 'Dockit Migrator (Evaluation Version)' application window. The top navigation bar includes 'My Jobs >> New Job'. Below this is a progress bar with four stages: 'Batch Descriptor', 'Site / List Elements', 'Migration Settings', and 'Finish'. The 'Migration Settings' stage is currently active.

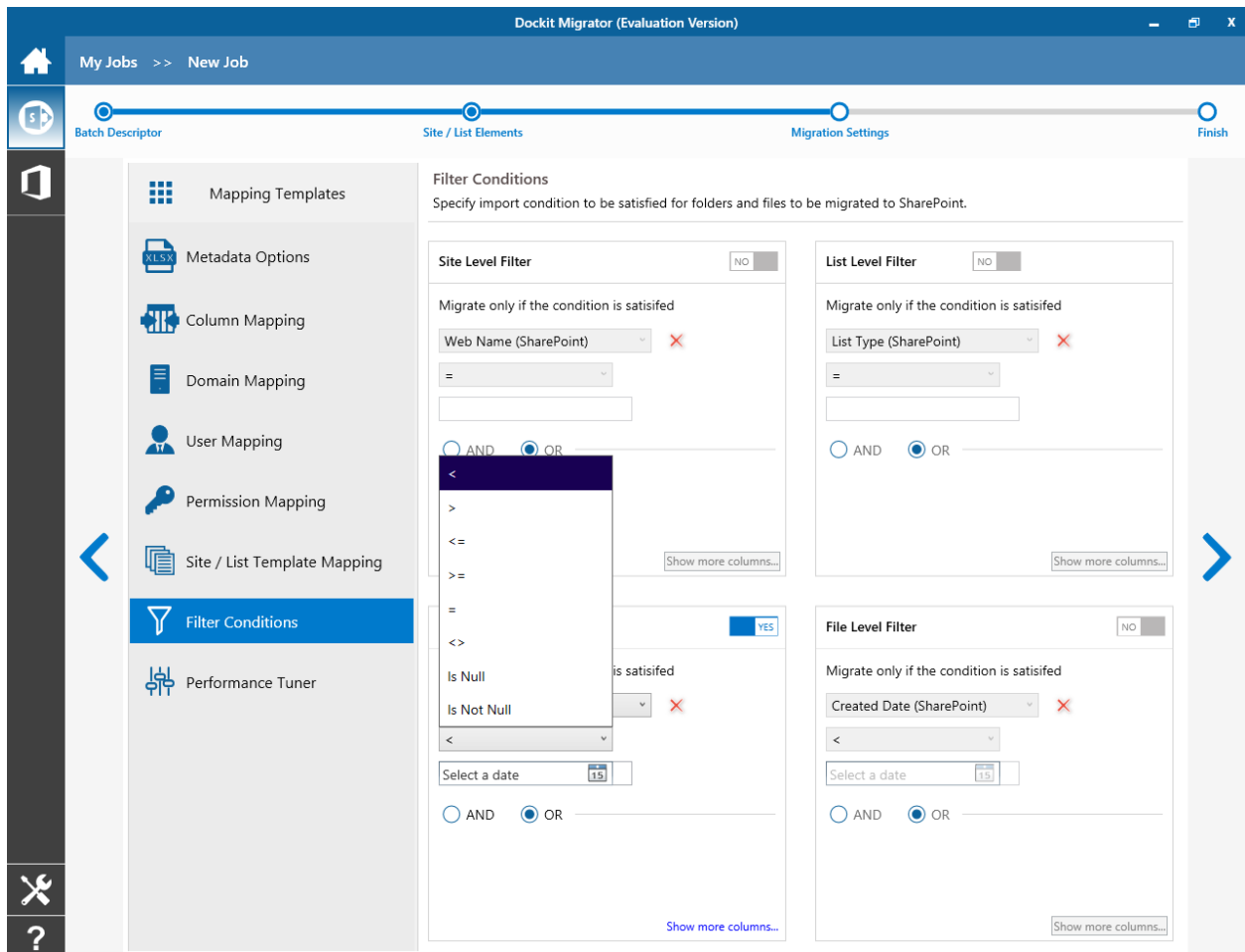
On the left, a sidebar contains several icons and labels: 'Mapping Templates', 'Metadata Options', 'Column Mapping', 'Domain Mapping', 'User Mapping', 'Permission Mapping', 'Site / List Template Mapping', 'Filter Conditions' (highlighted in blue), and 'Performance Tuner'. At the bottom of the sidebar are icons for a wrench and a question mark.

The main content area is titled 'Filter Conditions' with the subtitle 'Specify import condition to be satisfied for folders and files to be migrated to SharePoint.' It contains four filter configuration panels:

- Site Level Filter:** Includes a 'NO' toggle. The condition is 'Web Name (SharePoint)' with an equals operator (=) and an empty text input field. The logic is set to 'OR'.
- List Level Filter:** Includes a 'NO' toggle. The condition is 'List Type (SharePoint)' with an equals operator (=) and an empty text input field. The logic is set to 'OR'.
- Folder Level Filter:** Includes a 'YES' toggle. The condition is 'Created Date (SharePoint)' with a less-than operator (<) and a date input field containing '6/13/2018'. The logic is set to 'OR'.
- File Level Filter:** Includes a 'NO' toggle. The condition is 'Created Date (SharePoint)' with a less-than operator (<) and a date input field containing 'Select a date'. The logic is set to 'OR'.

Each panel has a 'Show more columns...' link at the bottom right.

- 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'.
- Once you specify the respective webs, lists, files and folders filter condition, 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 (Finish)** page will appear as shown below:

The screenshot shows the 'Task Schedule Settings (Finish)' page in the Dockit Migrator (Evaluation Version) application. The page has a blue header bar with the title 'Dockit Migrator (Evaluation Version)'. Below the header, there is a navigation bar with 'My Jobs' and '>> New Job'. A progress bar is visible with three steps: 'Select Files', 'Migration Settings', and 'Finish'. The 'Migration Settings' step is currently active. Below the progress bar, there are three input fields: 'Task Name', 'Category' (set to 'Blank'), and 'Description'. A 'Schedule Your Task' button is located below the 'Description' field. At the bottom right, there are two buttons: 'Save & Close' and 'Save & Start'. A sidebar on the left contains icons for home, back, and help.

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

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

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

Clean Up Metadata

[Document Libraries](#)

[Create Metadata File](#)

[Step 1: Metadata Options](#)

[Step 2: Migration Settings](#)

[Step 3: Task Schedule Settings](#)

[Other List Types \(Batch File Mode\)](#)

[Batch file structure](#)

[Step 1: Batch Import Settings](#)

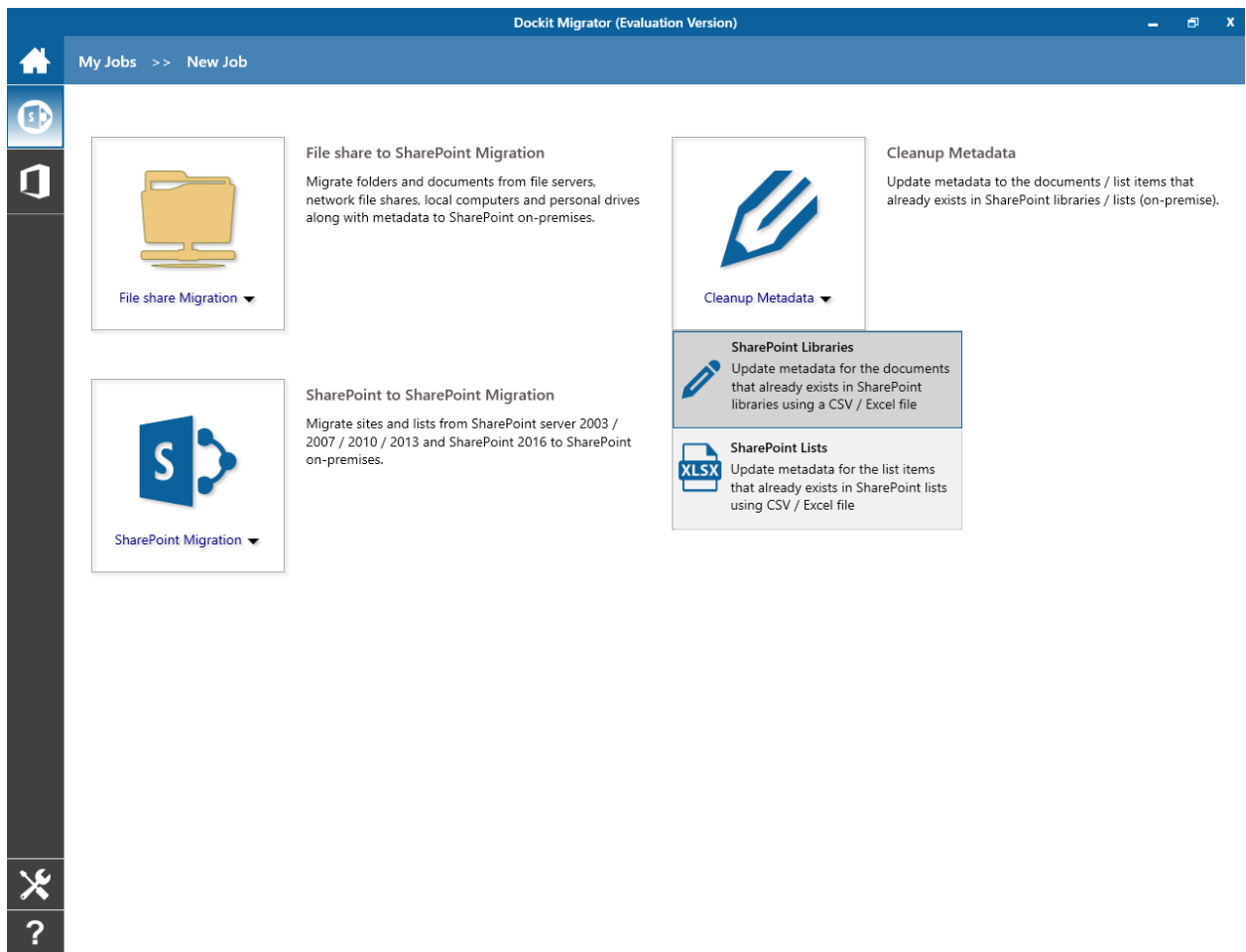
[Step 2: Migration Settings](#)

[Step 3: Task Schedule Settings](#)

Document Libraries (Create Task)

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

1. Select **Document Libraries** from **Clean up Metadata** option in **New Job** page as shown below:



2. Specify [Metadata Options](#).
3. Specify [Migration Settings](#).
4. Specify [Task Schedule Settings](#).
5. 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

- 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.

- 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

- 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.
- For Microsoft Excel file formats (XLSX), do not enclose the field names and their corresponding metadata values within double quotes.
- Ensure date values are in 'Date Only' or 'Date And Time' format.
- 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.
- People or Group data type value should be user name, Active Directory (AD) group name or SharePoint group name. User or group name referring to **non-existing user or group** will not be updated by Dockit. The user *Login Name (domain\username)*, *Display Name (John Doe)* or *E-mail address (someone@example.com)* can be used to denote a user account.
- The **New Name** field will not be carried forward as a metadata field into SharePoint.
- 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 ';'. 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; 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 Group (Single Value) or	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	"VOYAGER\Administrator" "BUILTIN\Administrators" "Backup Owners" "someone@example.com" "John Doe"

	People or Group column of the imported file, only if the user or group name exists.	
People or Group (Multiple value)	User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. The values can be of single or multiple. Multiple values should be separated with ','. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\User1; BUILTIN\Administrators; Guest Members;Temps"
Hyperlink or Picture	The http URL of any resource or picture can be given to this field.	"http://sharepoint/Shared Documents/My Sample File.doc" "http://sharepoint/Pictures/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 /	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 Portal Site)		
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" 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 corresponding managed metadata column.	"Continent North America Country United States States Alaska" "Alaska"
Managed Metadata (Multiple Values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with ' '. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in 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"

Choice field column in SharePoint.		
------------------------------------	--	--

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

Sample format of a CSV / TEXT metadata file:

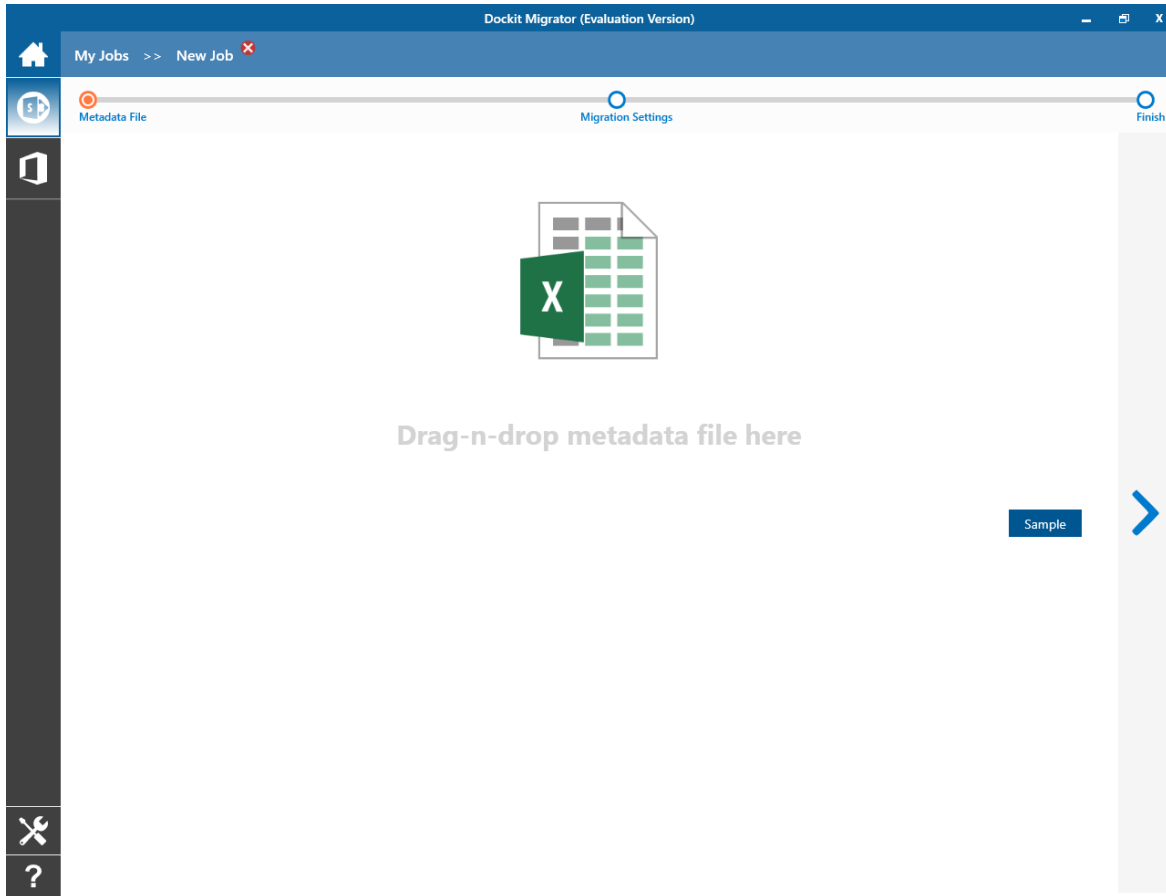
Note: Refer Point #2 for the separator to be used in the metadata file

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

Metadata Options

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

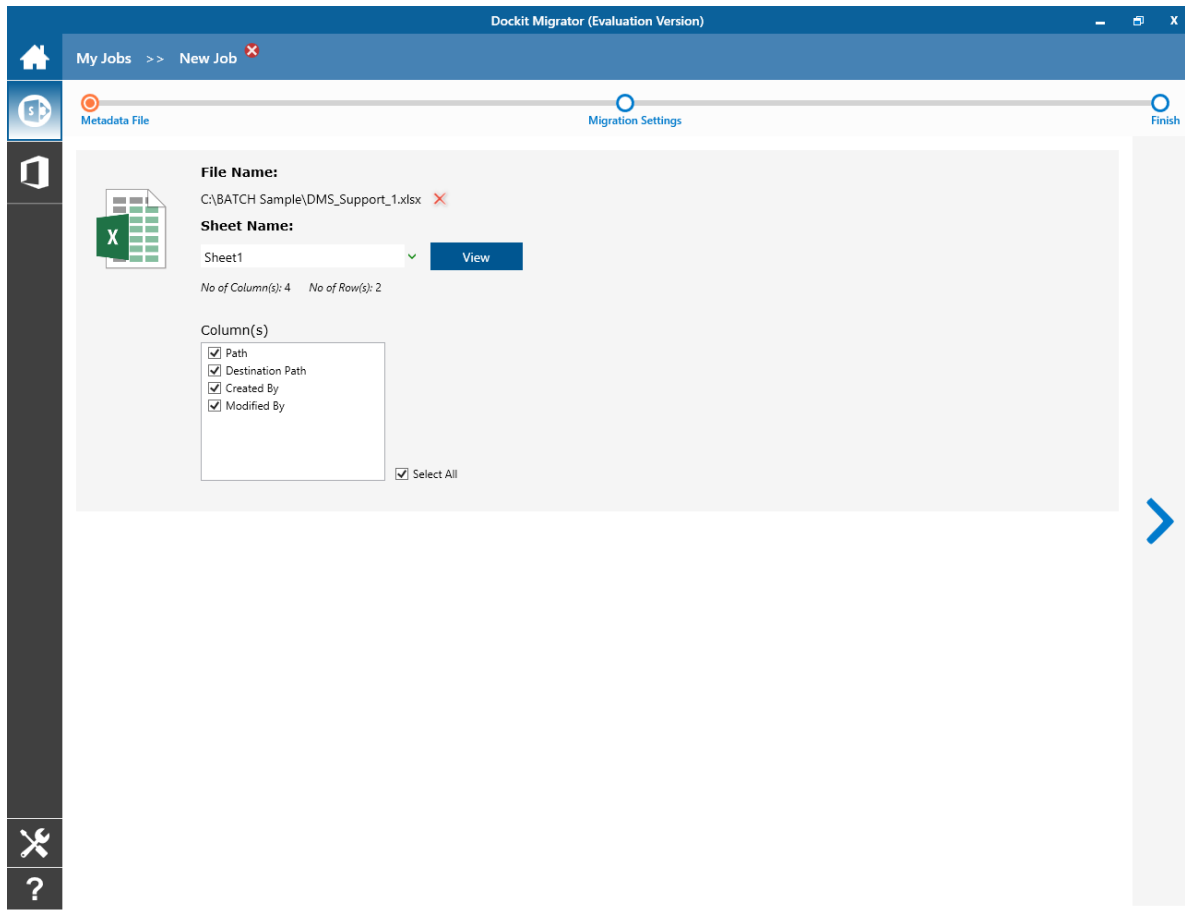
1. The **Metadata Options** page will appear as shown below:



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

3. **Click**  button to specify the external metadata file. The metadata file can be any one of the following file formats - Comma delimited (CSV), Microsoft Excel (XLSX) or Text file (TXT).
4. File selection dialog opens. Drag and drop the metadata file from the explorer to the window or double click on the metadata file.

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

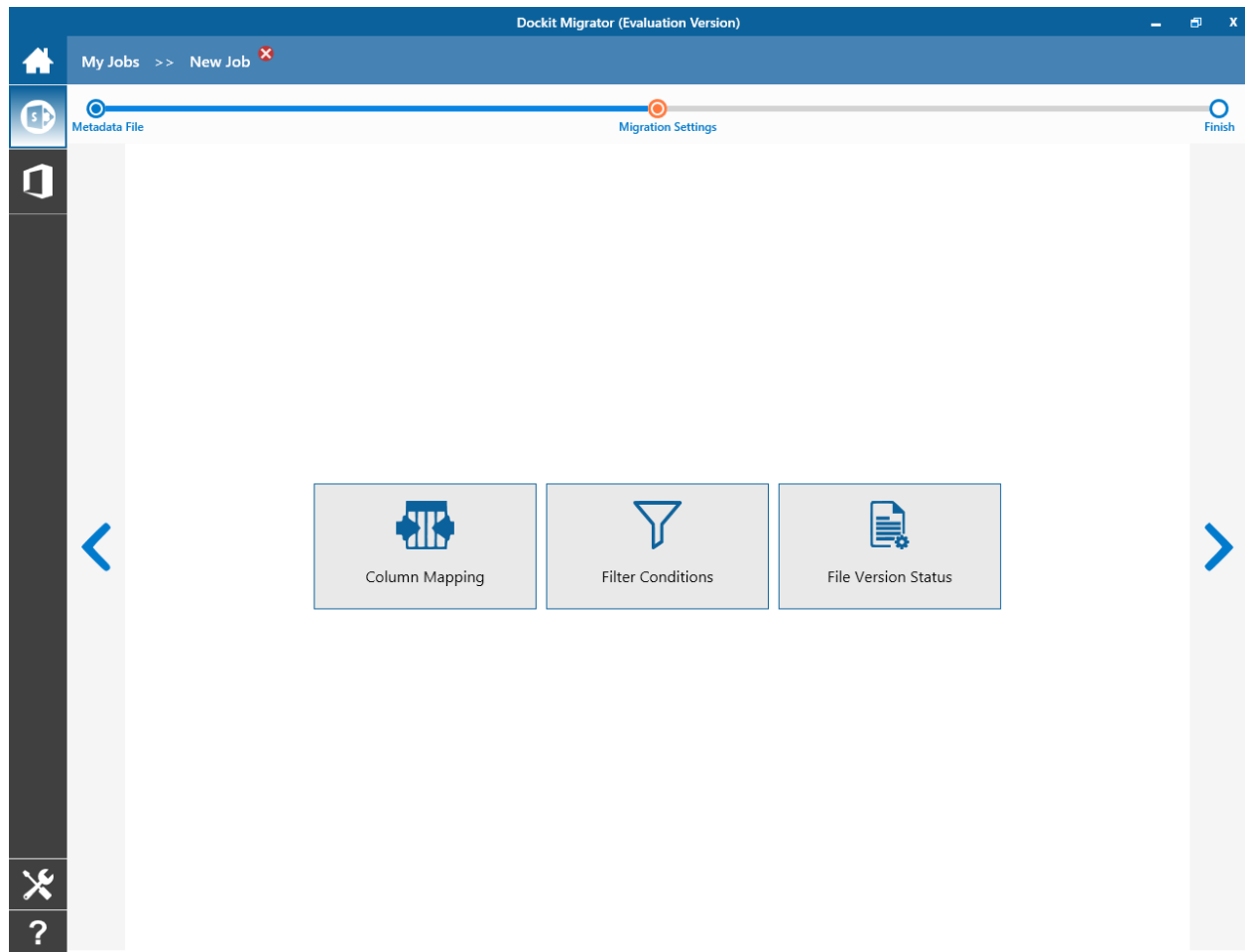


6. Click **View** button if you want to see the contents of selected metadata file in the associated native application.
7. For more information about how to create external metadata file, [click here](#).
8. Select the desired columns for which you wish to assign metadata.
9. If you want to replace with a different metadata file, click  button and select the new metadata file as before.
10. If any of the selected columns contains date and time values, specify **Date and Time format** to parse the date values. The default value is the current system settings.
11. Click **Next** to proceed.

Migration Settings

To specify Migration Settings inputs to use for the task:

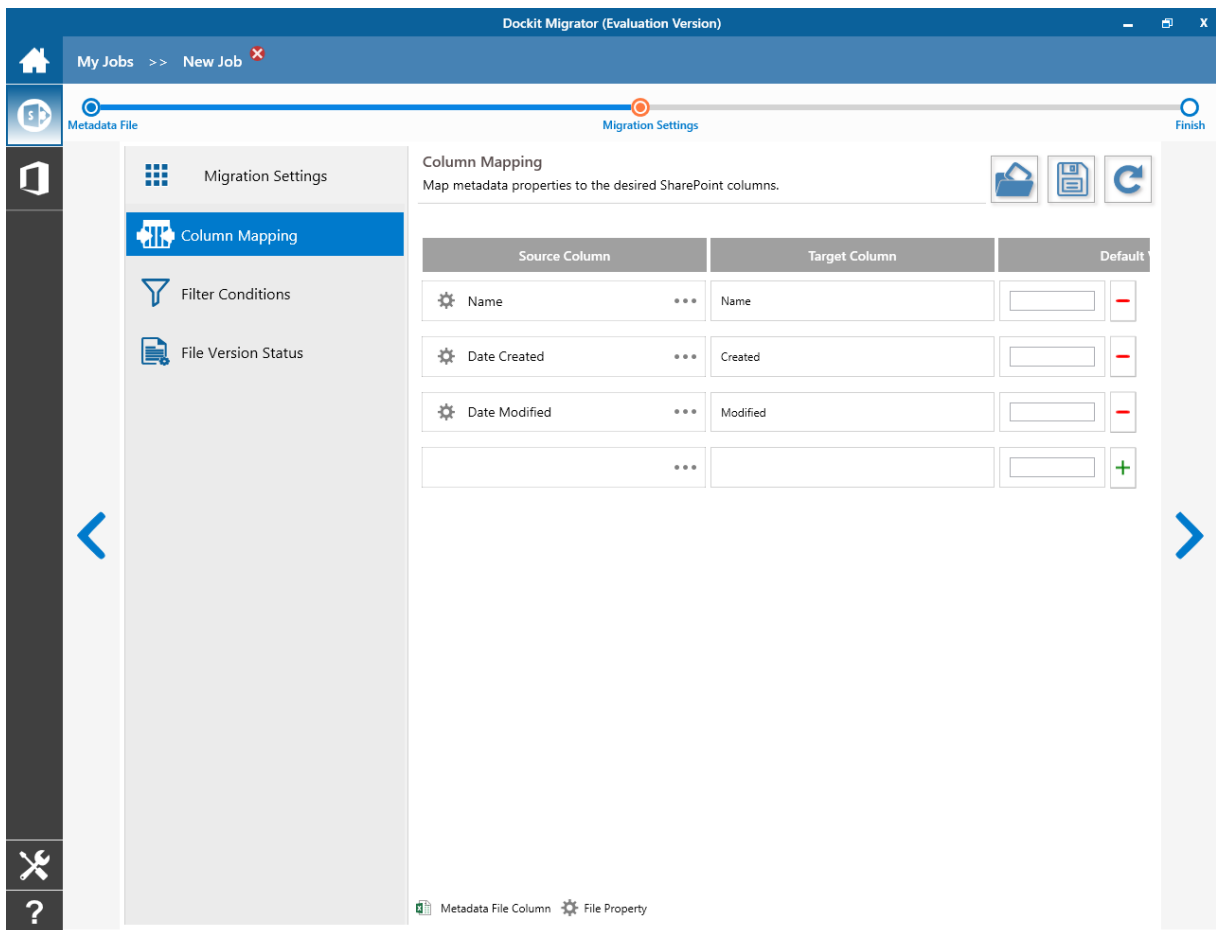
The Migration Settings page will appear as shown in the screen below:



1. [Column Mapping](#)
2. [Filter Conditions](#)
3. [File Version Status](#)
4. Click **Next** to proceed.

Column Mapping

1. Dockit allows you to assign values from file properties or metadata properties to SharePoint columns by using Column Mapping option.
2. You can also assign metadata values by using 'Column Mapping Template' for repeated use.
3. To create new column mapping, select **Column Mapping** option. A default page will appear as shown below.



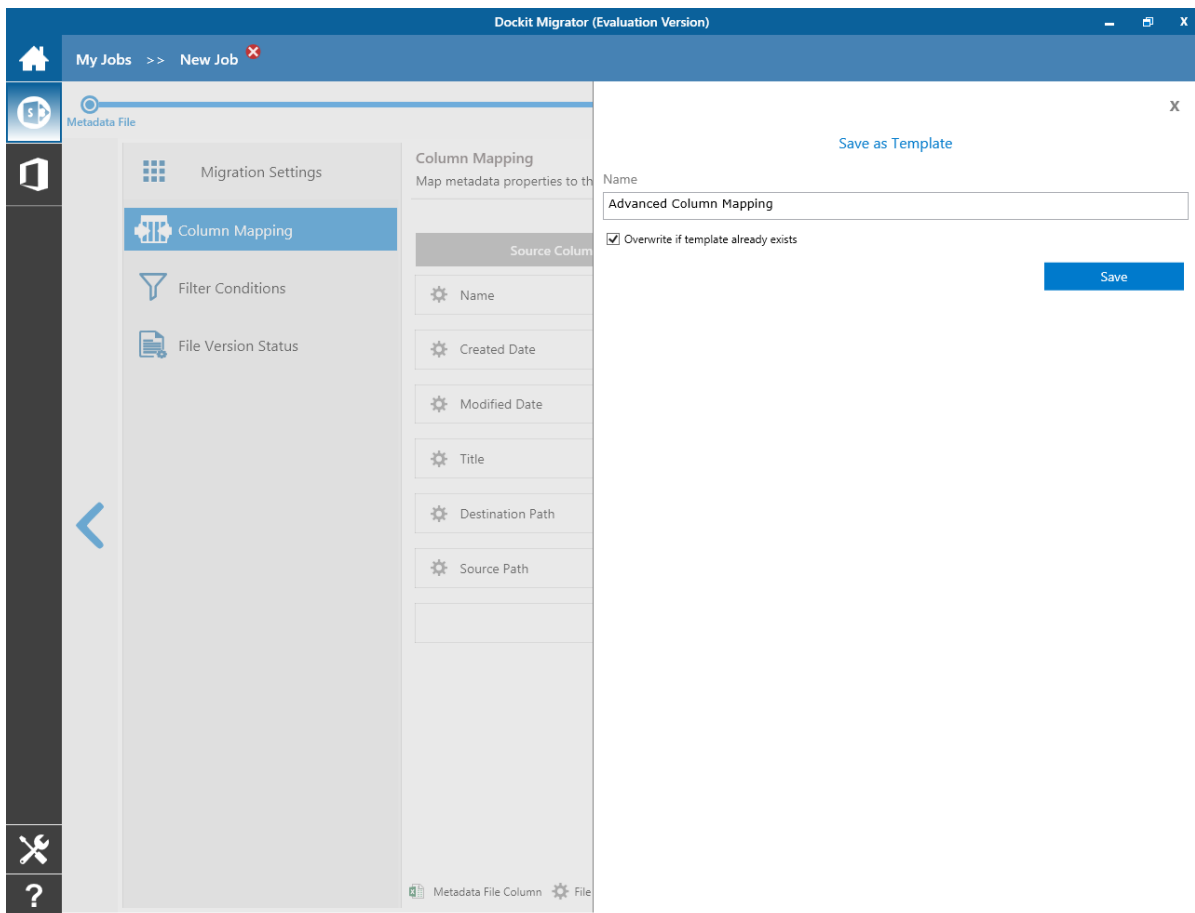
4. **Source Column:** You can specify source column values from '**File properties**', '**Metadata File**', '**Function Builder**' and also from '**Other File Properties**' by entering the property name.
5. **Target Column:** You can specify the target SharePoint Column which needs to map and assign values.
6. **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.

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

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



8. Once you finish mapping the columns, you can click  to save as new template. This option enables you to save the configured column mapping as templates for reuse in other migration tasks.



9. Once you save a template, you can load from the saved templates to use in this task.



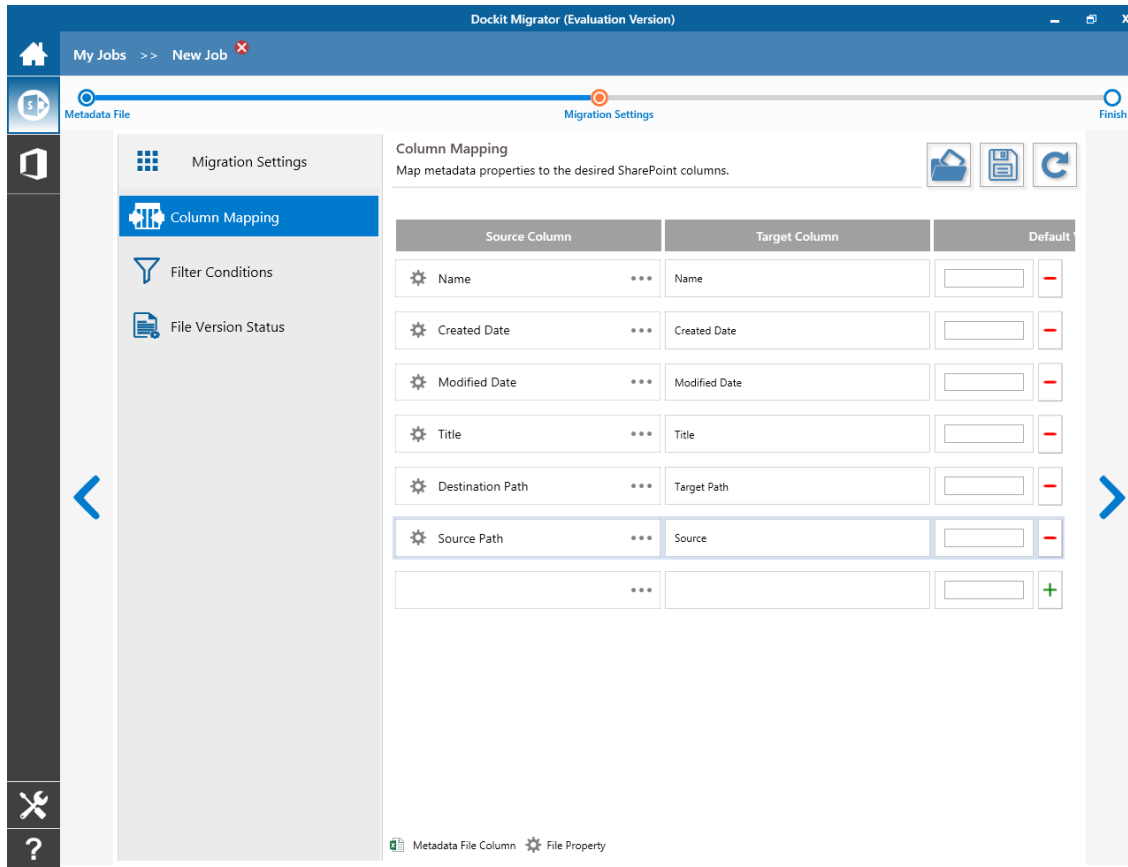
10. **Click** to load available column mapping templates.

The screenshot shows the 'Docket Migrator (Evaluation Version)' application window. The main interface has a sidebar with icons for 'My Jobs', 'New Job', 'Metadata File', 'Migration Settings', 'Column Mapping', 'Filter Conditions', and 'File Version Status'. The 'Column Mapping' section is active, showing a 'Map metadata properties to the' section with fields for 'Name', 'Date Created', and 'Date Modified'. A 'Source Column' field is also visible. The 'Available Templates' dialog box is open, displaying a list of 7 templates. Each template entry includes a 'Name' and a 'Created' timestamp, followed by a red 'X' icon. The templates are:

- Advanced Column Mapping (Created: 7/20/2018 5:58:46 PM)
- Column Migration (Created: 7/20/2018 5:59:54 PM)
- Custom Columns (Created: 7/20/2018 5:58:59 PM)
- Metadata Column Mapping (Created: 7/20/2018 5:56:57 PM)
- New Column Mapping (Created: 7/20/2018 5:55:45 PM)
- Security Columns (Created: 7/20/2018 5:59:21 PM)
- Share Column Mapping (Created: 7/20/2018 5:56:37 PM)

An 'OK' button is located at the bottom right of the dialog box.

11. Click  to load the application default settings.



The screenshot shows the 'Dockit Migrator (Evaluation Version)' application window. The 'My Jobs' tab is active, showing a 'New Job' button. The 'Migration Settings' section is selected, and the 'Column Mapping' sub-section is highlighted in the left sidebar. The main area displays a table for mapping source columns to target columns. The table has three columns: 'Source Column', 'Target Column', and 'Default'. The 'Source Column' column contains a gear icon and a text input field. The 'Target Column' column contains a text input field. The 'Default' column contains a text input field and a red minus sign. The 'Source Path' row is highlighted. Below the table, there is a legend: 'Metadata File Column' (represented by a green icon) and 'File Property' (represented by a gear icon).

Source Column	Target Column	Default
 Name ***	Name	-
 Created Date ***	Created Date	-
 Modified Date ***	Modified Date	-
 Title ***	Title	-
 Destination Path ***	Target Path	-
 Source Path ***	Source	-
***		+

Metadata File Column  File Property

12. Click **Next** to proceed.

Filter 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 **Filter Conditions** page will appear as shown below:

2. You can specify migration conditions at two levels:
 - **Folder Level** - Migrate the folders that satisfy the given migration filter.
 - **List Item Level** - Migrate the files / items that satisfy the given migration filter.
3. The available import conditions specified will be used to filter folders / files that are uploaded to SharePoint.

- Specify condition to apply at the folder level. For example, you can Import folders when ['Folder Name']='Conference Information'].

The screenshot displays the 'Dockit Migrator (Evaluation Version)' application window. The top navigation bar includes 'My Jobs' and a 'New Job' button. A progress bar at the top indicates the current step is 'Migration Settings', with 'Metadata File' and 'Finish' as previous and next steps respectively. On the left, a sidebar contains icons for 'Migration Settings', 'Column Mapping', 'Filter Conditions' (which is highlighted), and 'File Version Status'. The main content area is titled 'Filter Conditions' and includes the instruction: 'Specify import condition to be satisfied for folders and files to be updated in SharePoint.' Below this, there are two panels: 'Folder Level Filter' and 'File Level Filter', both with a 'YES' toggle. Each panel has a section 'Migrate only if the condition is satisfied'. The 'Folder Level Filter' panel shows two conditions: 'Folder Name (File Property)' equals 'Conference Information' and 'Folder Name (File Property)' equals an empty field. The 'File Level Filter' panel shows two conditions: 'Title (File Property)' equals 'Information' and 'Title (File Property)' equals an empty field. Both panels have radio buttons for 'AND' and 'OR' logic. At the bottom of each panel is a 'Show more columns...' link. The interface also features a left sidebar with a home icon, a 'My Jobs' section, and a bottom bar with a settings icon and a help icon.

- Specify rule that must be satisfied before creating folders to SharePoint. For example, you can create folders only when ['Folder Name' Starts With 'Team']
- You can specify the import conditions by selecting the Field Name and by specifying a corresponding value with the required operator.

My Jobs >> New Job

Metadata File

Migration Settings

Finish

Migration Settings

Column Mapping

Filter Conditions

File Version Status

Filter Conditions

Specify import condition to be satisfied for folders and files to be updated in SharePoint.

Folder Level Filter

YES

Migrate only if the condition is satisfied

Folder Name (File Property)

=

Conference Information

AND OR

Last Accessed Date (File Property)

<>

8/10/2018

AND OR

Folder Name (File Property)

=

AND OR

Show more columns...

File Level Filter

YES

Migrate only if the condition is satisfied

Title (File Property)

=

Information

AND OR

Title (File Property)

=

AND OR

Show more columns...

7. You can use mathematical operators such as $>$, $=$, $>=$ etc. to define your query.

The screenshot displays the 'Dockit Migrator (Evaluation Version)' application window. The top navigation bar includes 'My Jobs' and 'New Job' with a red 'X' icon. Below this, a progress bar shows 'Metadata File', 'Migration Settings' (the current step), and 'Finish'. The left sidebar contains icons for 'Migration Settings', 'Column Mapping', 'Filter Conditions' (highlighted), and 'File Version Status'. The main area is titled 'Filter Conditions' with the instruction 'Specify import condition to be satisfied for folders and files to be updated in SharePoint.' It is divided into two panels: 'Folder Level Filter' and 'File Level Filter', both with 'YES' status indicators. The 'Folder Level Filter' panel shows a list of conditions separated by 'OR' logic. The first condition is 'Folder Name (File Property)' with an equals sign operator. The second condition is 'Last Accessed Date (File Property)' with a less-than operator and a date value of '8/10/2018'. The third condition is 'Folder Name (File Property)' with an equals sign operator. A dropdown menu is open for the third condition, showing options: '=', '<>', 'Like', 'Starts With', 'Ends With', 'Is Null', and 'Is Not Null'. The 'File Level Filter' panel is currently empty. Both panels have a 'Show more columns...' link at the bottom.

8. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.
9. 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 (Finish)** page will appear as shown below:

The screenshot displays the 'Task Schedule Settings (Finish)' page in the Dockit Migrator (Evaluation Version) application. The interface includes a top navigation bar with 'My Jobs' and 'New Job' links. A progress bar at the top indicates the current step is 'Migration Settings', with 'Select Files' and 'Finish' as previous and next steps respectively. The main content area contains three input fields: 'Task Name', 'Category' (set to 'Blank'), and 'Description'. A 'Schedule Your Task' button is positioned below the 'Description' field. At the bottom right, there are two buttons: 'Save & Close' and 'Save & Start'. A large blue arrow on the left side of the page points back to the 'Select Files' step.

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

Docket Migrator (Evaluation Version)

My Jobs >> New Job

Select Files

Task Name:

Category: ☐ Blank

Description:

Schedule Your Task

Source:

Authentication:

User Name:

Password:

☐ Prompt me for user credentials when the task runs ☐ Run Now

Would you like to schedule your task ? **YES**

Schedule Settings

Run As: **Set Password**

Schedule: Start Time:

Schedule Task Daily

Every Day(s)

OK Cancel

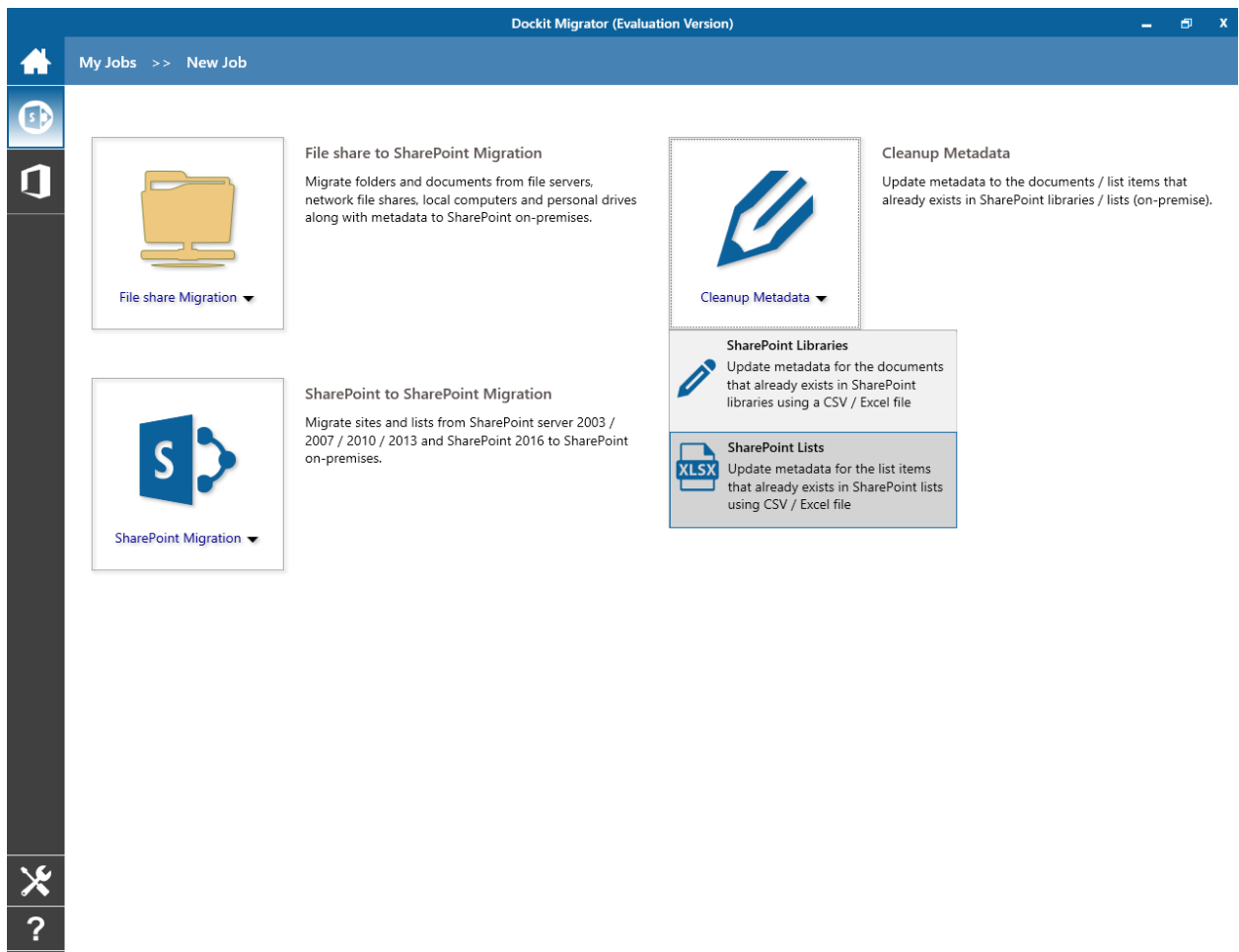
Docket will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords / Credential Manager applet for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created. Hence, you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

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

Other List Types (Batch File Mode)

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

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



2. Specify [Batch Import Settings](#).
3. Specify [Migration Settings](#).
4. Specify [Task Schedule Settings](#).
5. 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	"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/collaboration portal/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" 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

"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"

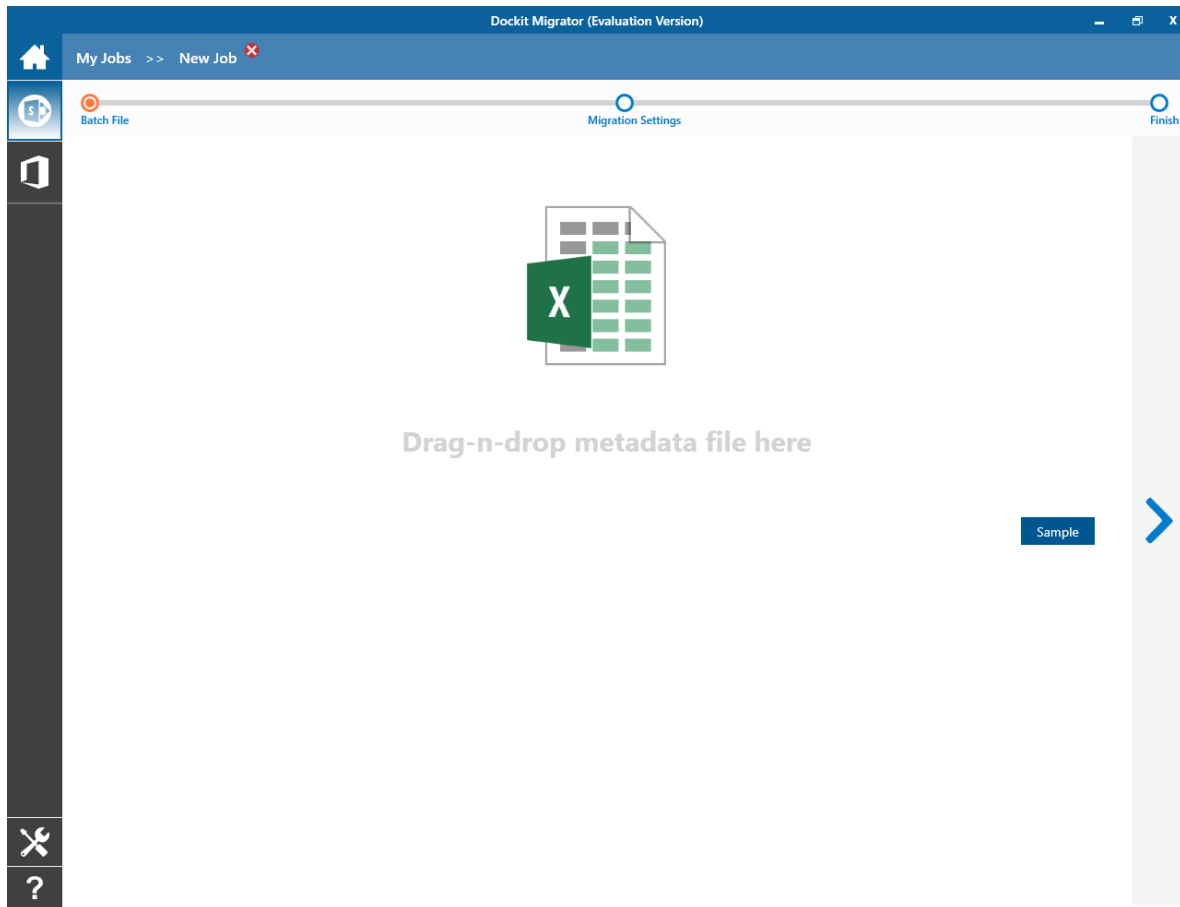
"http://sharepoint/list/Sales List","10_.000","Title10","12/05/2008","Sales
Manager","Sales","Delete"

"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

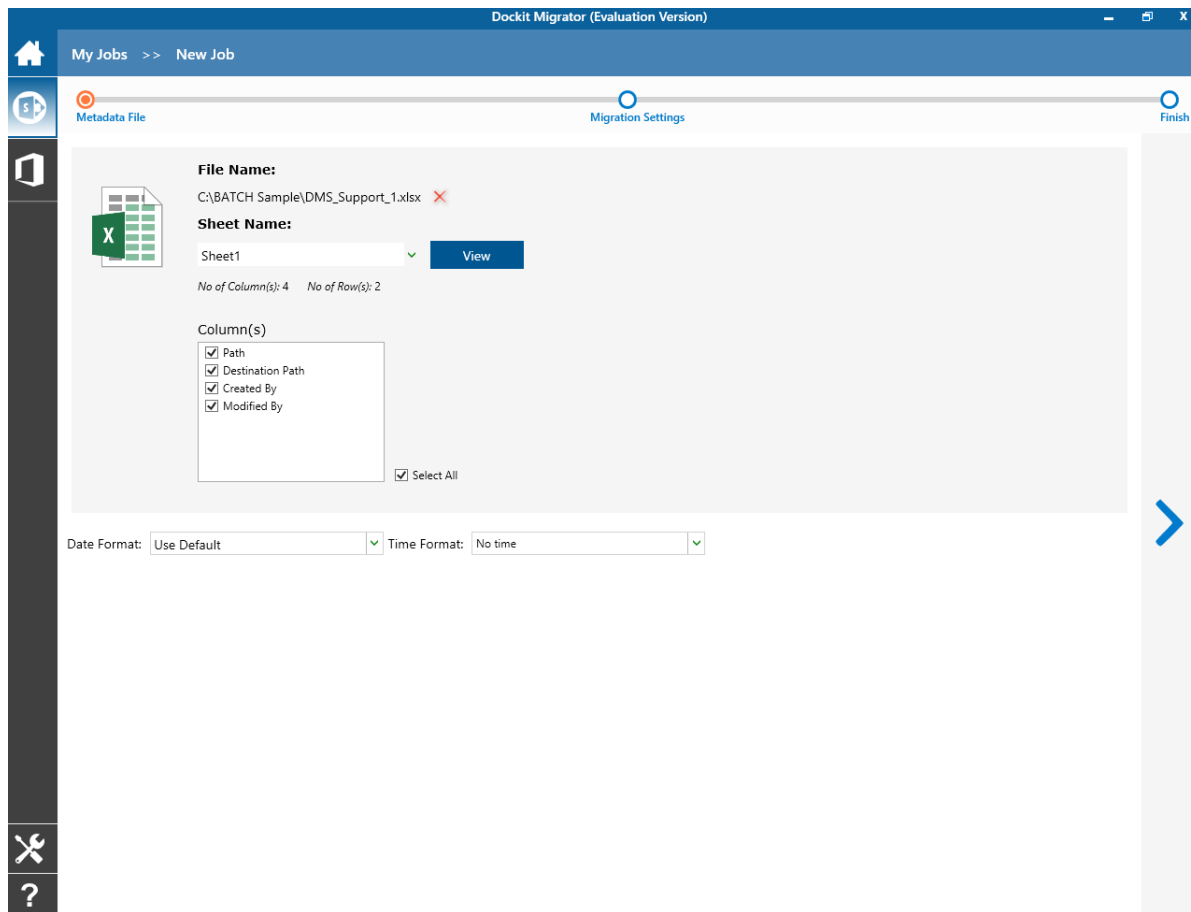
To specify the batch file to use to create or update list items in SharePoint:

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



2. **Click**  button to specify the external batch file. The metadata file can be any one of the following file formats - Comma delimited (CSV), Microsoft Excel (XLSX) or Text file (TXT). For more information about how to create a batch file, click [here](#).
3. **Click**  drop down button if you want to see a sample batch file (such as, Comma delimited (CSV) file, Excel (XLSX) file) to know how the columns should be arranged in a batch file.
4. File selection dialog opens. Drag and drop the metadata file from the explorer to the window or double click on the metadata file.

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

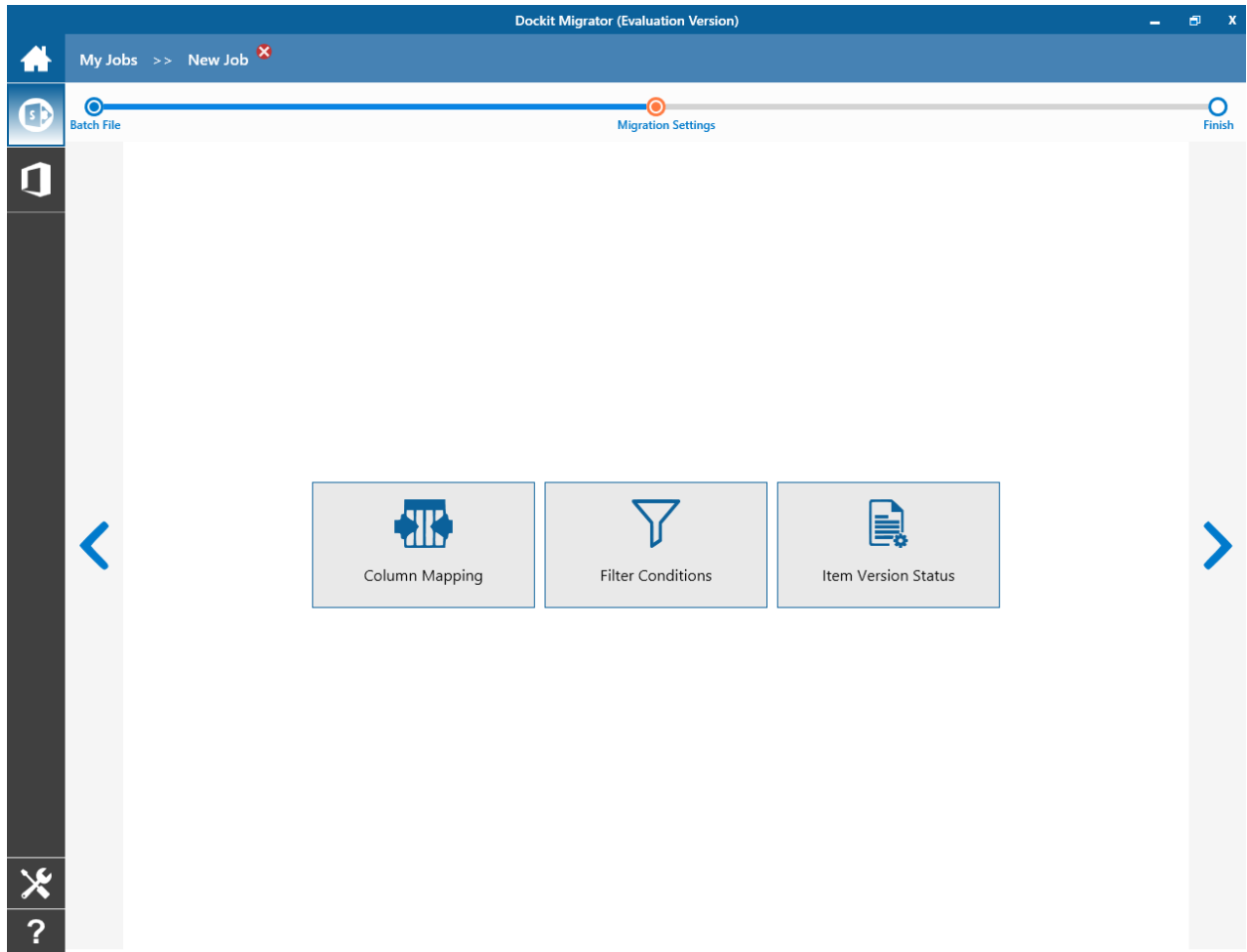


6. Click **View** button if you want to see the contents of selected batch file in the associated native application.
7. Select the desired columns for which you wish to assign metadata.
8. If you want to replace with a different batch file, click  button and select the new batch file as before.
9. Specify the **Date and Time format** for the date fields used in the batch file. If the columns selected to update contains date and time values, specify the date mask to parse the date values correctly. The default value is the current system settings.
10. Click **Next** to proceed.

Migration Settings

To specify Migration Settings inputs to use for the task:

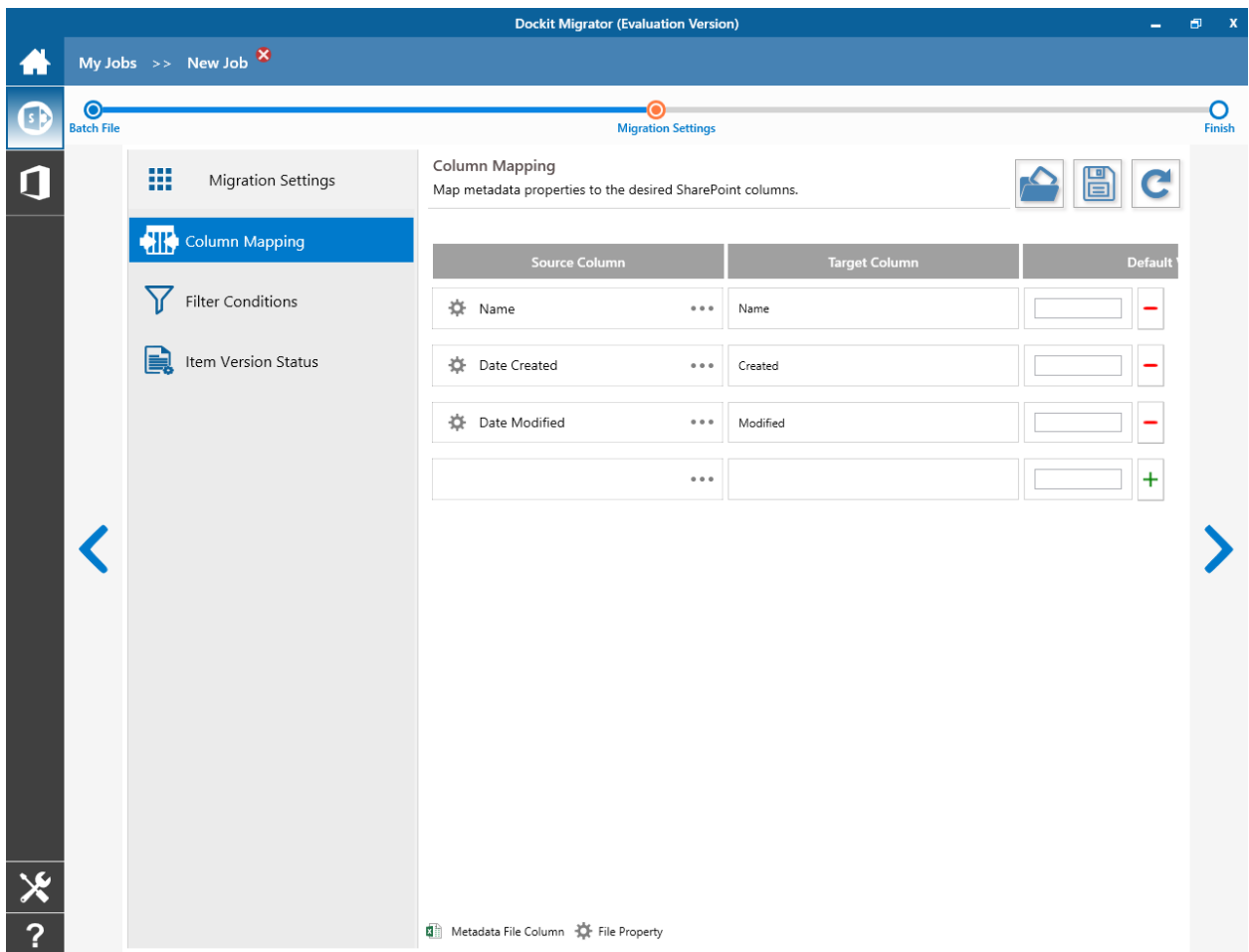
The Migration Settings page will appear as shown in the screen below:



1. [Column Mapping](#)
2. [Filter Conditions](#)
3. [Item Version Status](#)
4. Click **Next** to proceed.

Column Mapping

1. Dockit allows you to assign values from file properties or metadata properties to SharePoint columns by using Column Mapping option.
2. You can also assign metadata values by using 'Column Mapping Template' for repeated use.
3. To create new column mapping, select **Column Mapping** option. A default page will appear as shown below.



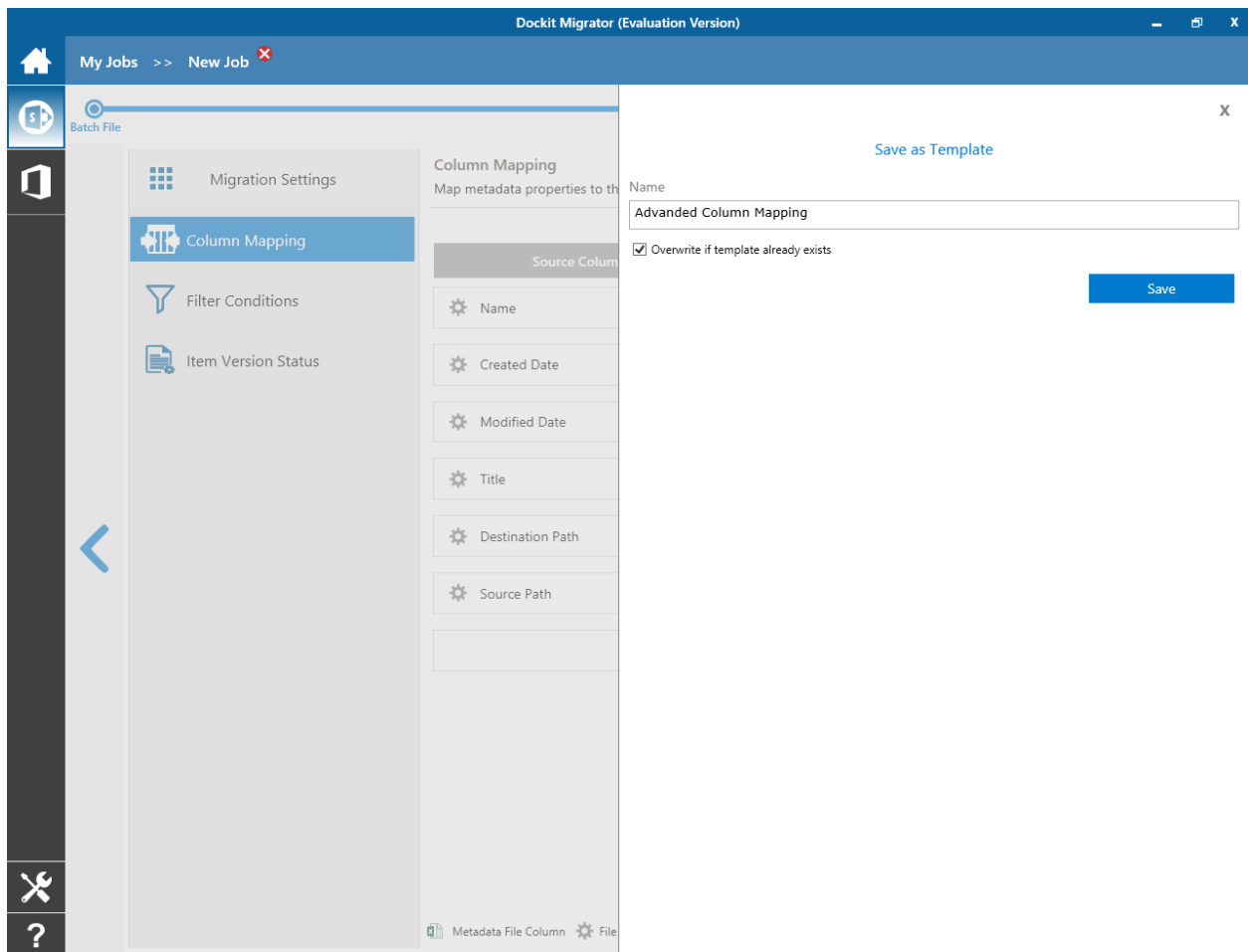
4. **Source Column:** You can specify source column values from '**File properties**', '**Metadata File**' and also from '**Other File Properties**' by entering the property name.
5. **Target Column:** You can specify the target SharePoint Column which needs to map and assign values.
6. **Default value:**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

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

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

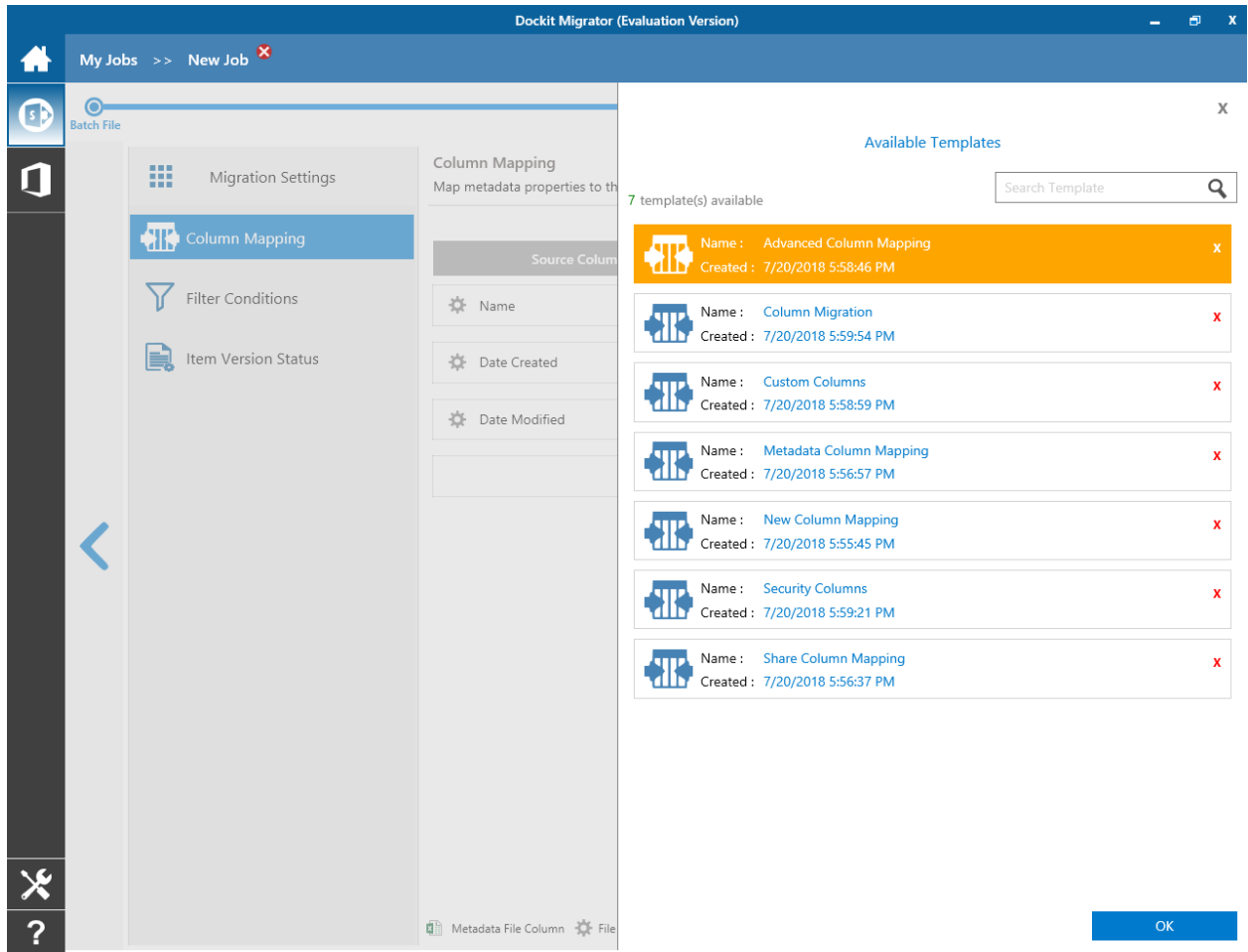


8. Once you finish mapping the columns, you can click  to save as new template. This option enables you to save the configured column mapping as templates for reuse in other migration tasks.



9. Once you save a template, you can load from the saved templates to use in this task.

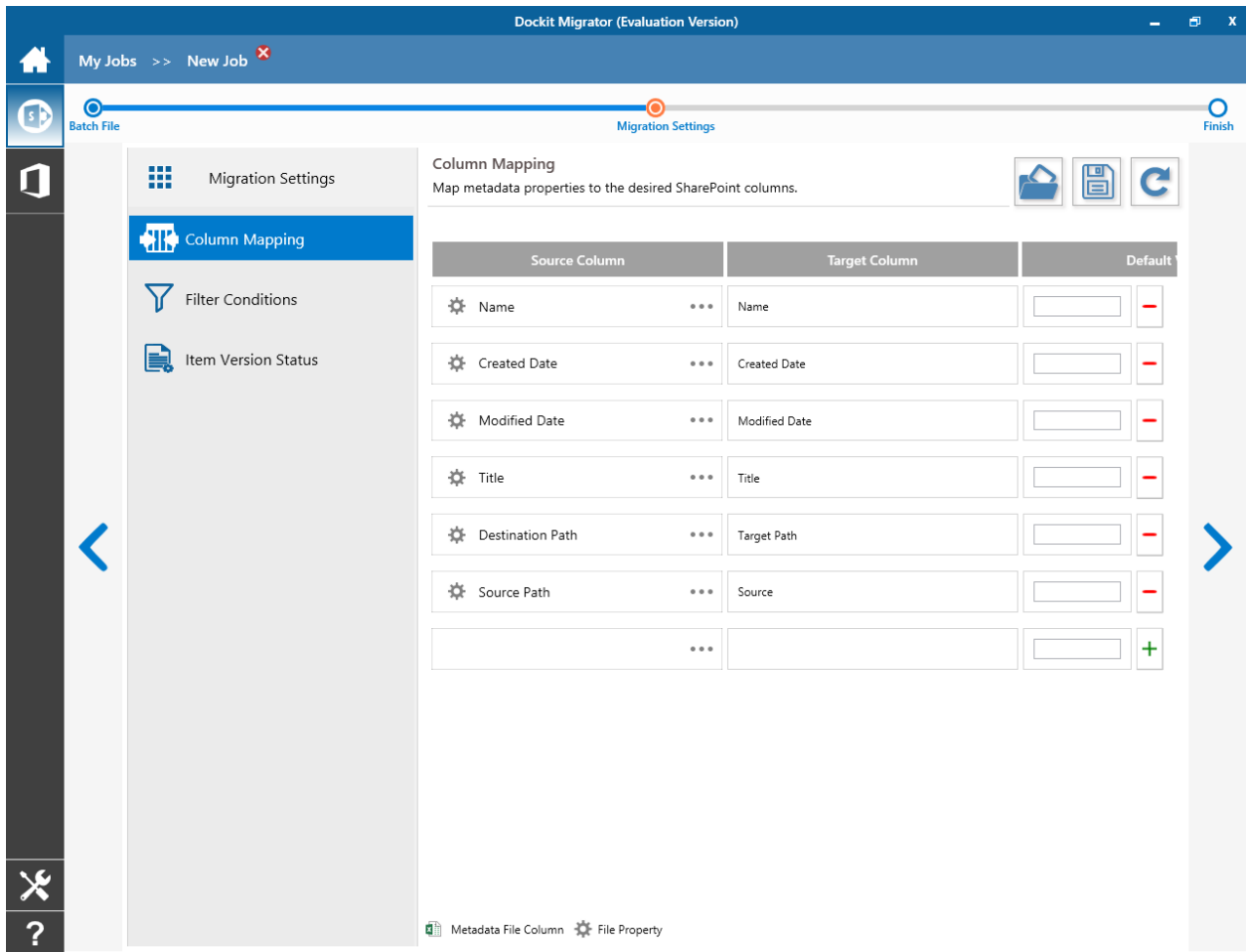
10.  Click to load available column mapping templates.



The screenshot shows the Docket Migrator (Evaluation Version) application. The main window has a dark blue header with the title 'Docket Migrator (Evaluation Version)'. Below the header, there's a navigation bar with 'My Jobs' and 'New Job' (with a red 'X' icon). The left sidebar contains icons for 'Batch File', 'Migration Settings', 'Column Mapping', 'Filter Conditions', and 'Item Version Status'. The 'Column Mapping' section is active, showing a 'Source Column' table with columns for Name, Date Created, and Date Modified. The 'Available Templates' dialog box is open on the right, displaying a list of 7 templates. The first template, 'Advanced Column Mapping', is highlighted in orange. The dialog box has a search bar and a close button (X). An 'OK' button is located at the bottom right of the dialog box.

Name	Created
Advanced Column Mapping	7/20/2018 5:58:46 PM
Column Migration	7/20/2018 5:59:54 PM
Custom Columns	7/20/2018 5:58:59 PM
Metadata Column Mapping	7/20/2018 5:56:57 PM
New Column Mapping	7/20/2018 5:55:45 PM
Security Columns	7/20/2018 5:59:21 PM
Share Column Mapping	7/20/2018 5:56:37 PM

11. Click  to load the application default settings.



The screenshot shows the 'Docket Migrator (Evaluation Version)' application window. The top navigation bar includes 'My Jobs' and 'New Job'. The main interface is divided into a left sidebar and a main content area. The sidebar contains a 'Batch File' button and a 'Migration Settings' section with three options: 'Column Mapping' (selected), 'Filter Conditions', and 'Item Version Status'. The main content area is titled 'Column Mapping' and includes the instruction 'Map metadata properties to the desired SharePoint columns.' Below this is a table with three columns: 'Source Column', 'Target Column', and 'Default'. The table contains six rows of mappings, each with a gear icon for configuration and a red minus button for removal. A green plus button is at the bottom right of the table. The bottom status bar shows 'Metadata File Column' and 'File Property'.

Source Column	Target Column	Default
⚙️ Name	Name	-
⚙️ Created Date	Created Date	-
⚙️ Modified Date	Modified Date	-
⚙️ Title	Title	-
⚙️ Destination Path	Target Path	-
⚙️ Source Path	Source	-
...		+

12. Click **Next** to proceed.

Filter 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 **Filter Conditions** page will appear as shown below:

2. You can specify migration conditions at two levels:
 - **Folder Level** - Migrate the folders that satisfy the given migration filter.
 - **List Item Level** - Migrate the files / items that satisfy the given migration filter.
3. The available import conditions specified will be used to filter folders / files that are uploaded to SharePoint.

- Specify condition to apply at the folder level. For example, you can Import folders when ['Folder Name']='Conference Information'].

The screenshot displays the 'Dockit Migrator (Evaluation Version)' application window. The top navigation bar includes 'My Jobs' and 'New Job' with a red error icon. Below this is a progress bar with 'Batch File', 'Migration Settings' (active), and 'Finish' stages. The left sidebar contains icons for 'Migration Settings', 'Column Mapping', 'Filter Conditions' (selected), and 'Item Version Status'. The main content area is titled 'Filter Conditions' with the instruction 'Specify import condition to be satisfied for folders and files to be updated in SharePoint.' It features two panels: 'Folder Level Filter' and 'File Level Filter', both with 'YES' toggle buttons. Each panel has a section 'Migrate only if the condition is satisfied' with a dropdown for 'Folder Name (File Property)' set to '=', a text input field containing 'Conference Information', and radio buttons for 'AND' and 'OR' (with 'OR' selected). A second, identical set of controls is visible below the first in each panel, with a red 'X' icon next to the dropdown. At the bottom of each panel is a 'Show more columns...' link. The interface is flanked by blue left and right navigation arrows.

- Specify rule that must be satisfied before creating folders to SharePoint. For example, you can create folders only when ['Folder Name' Starts With 'Team'].

6. You can specify the import conditions by selecting the Field Name and by specifying a corresponding value with the required operator.

The screenshot displays the 'Dockit Migrator (Evaluation Version)' application window. The top navigation bar includes 'My Jobs >> New Job' and a 'Migration Settings' tab. The left sidebar contains icons for 'Batch File', 'Migration Settings', 'Column Mapping', 'Filter Conditions' (selected), and 'Item Version Status'. The main content area is titled 'Filter Conditions' and includes the instruction: 'Specify import condition to be satisfied for folders and files to be updated in SharePoint.'

There are two filter configuration panels:

- Folder Level Filter:** Includes a 'YES' toggle. It contains two conditions separated by an 'OR' operator. The first condition is 'Folder Name (File Property)' with an equals operator and the value 'Conference Information'. The second condition is 'Last Accessed Date (File Property)' with a greater-than operator and the value '8/10/2018'. A red 'X' is next to the second condition.
- File Level Filter:** Includes a 'YES' toggle. It contains two conditions separated by an 'OR' operator. The first condition is 'Title (File Property)' with an equals operator and the value 'Information'. The second condition is 'Title (File Property)' with an equals operator and an empty value field. A red 'X' is next to the second condition.

Both panels have a 'Show more columns...' link at the bottom right.

7. You can use mathematical operators such as $>$, $=$, $>=$ etc. to define your query.

The screenshot displays the 'Docket Migrator (Evaluation Version)' application window. The top navigation bar includes 'My Jobs >> New Job' and a 'Migration Settings' section with 'Batch File', 'Migration Settings', and 'Finish' options. The left sidebar contains 'Migration Settings', 'Column Mapping', 'Filter Conditions' (selected), and 'Item Version Status'. The main area is titled 'Filter Conditions' with the instruction 'Specify import condition to be satisfied for folders and files to be updated in SharePoint.' It features two panels: 'Folder Level Filter' and 'File Level Filter', both with 'YES' status indicators. The 'Folder Level Filter' panel shows a condition for 'Folder Name (File Property)' with an equals sign operator, a text input field containing 'Conference Information', and a date condition for 'Last Accessed Date (File Property)' set to '8/10/2018'. A dropdown menu is open for the 'Date Modified (File Property)' condition, showing options like '<', '<=', '>=', '=', '>', 'Is Null', and 'Is Not Null'. The 'File Level Filter' panel shows a condition for 'Title (File Property)' with an equals sign operator and a text input field containing 'Information'. Both panels have 'AND' and 'OR' logical operator options. Navigation arrows are visible on the left and right sides of the main content area.

8. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.
9. 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 (Finish)** page will appear as shown below:

The screenshot displays the 'Task Schedule Settings (Finish)' page in the Dockit Migrator (Evaluation Version) application. The interface includes a top navigation bar with 'My Jobs' and 'New Job' links. A progress bar at the top indicates the current step is 'Migration Settings', with 'Select Files' and 'Finish' as previous and next steps respectively. The main content area contains three input fields: 'Task Name', 'Category' (set to 'Blank'), and 'Description'. A 'Schedule Your Task' button is positioned below the 'Description' field. At the bottom right, there are two buttons: 'Save & Close' and 'Save & Start'. A large blue arrow on the left side of the page points back to the 'Select Files' step.

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

Docket Migrator (Evaluation Version)

My Jobs >> New Job

Select Files

Task Name:

Category: ☐ Blank

Description:

Schedule Your Task

Source:

Authentication: ✓

User Name: ...

Password:

☐ Prompt me for user credentials when the task runs ☒ Run Now

Would you like to schedule your task ?

Schedule Settings

Run As: **Set Password**

Schedule: ✓ Start Time:

Schedule Task Daily

Every Day(s)

OK Cancel

Docket 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.

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

Online

- [SharePoint Online \(Office 365\) Migration](#)
- [SharePoint to Office 365 Migration](#)
- [OneDrive Migration](#)

SharePoint Online (Office 365) Migration

[File Share to Office 365](#)

- [Batch File structure](#)
- [Items to Migrate](#)
- [Migration Settings](#)
 - [File Settings](#)
 - [Renaming Rules](#)
 - [Metadata File Structure](#)
 - [Column Mapping](#)
 - [Domain Mappings](#)
 - [User Mapping](#)
 - [Permission Mappings](#)
 - [Filter Conditions](#)
 - [Performance Tuner](#)
 - [Job Scheduler](#)
- [Pre-Migration Validation](#)

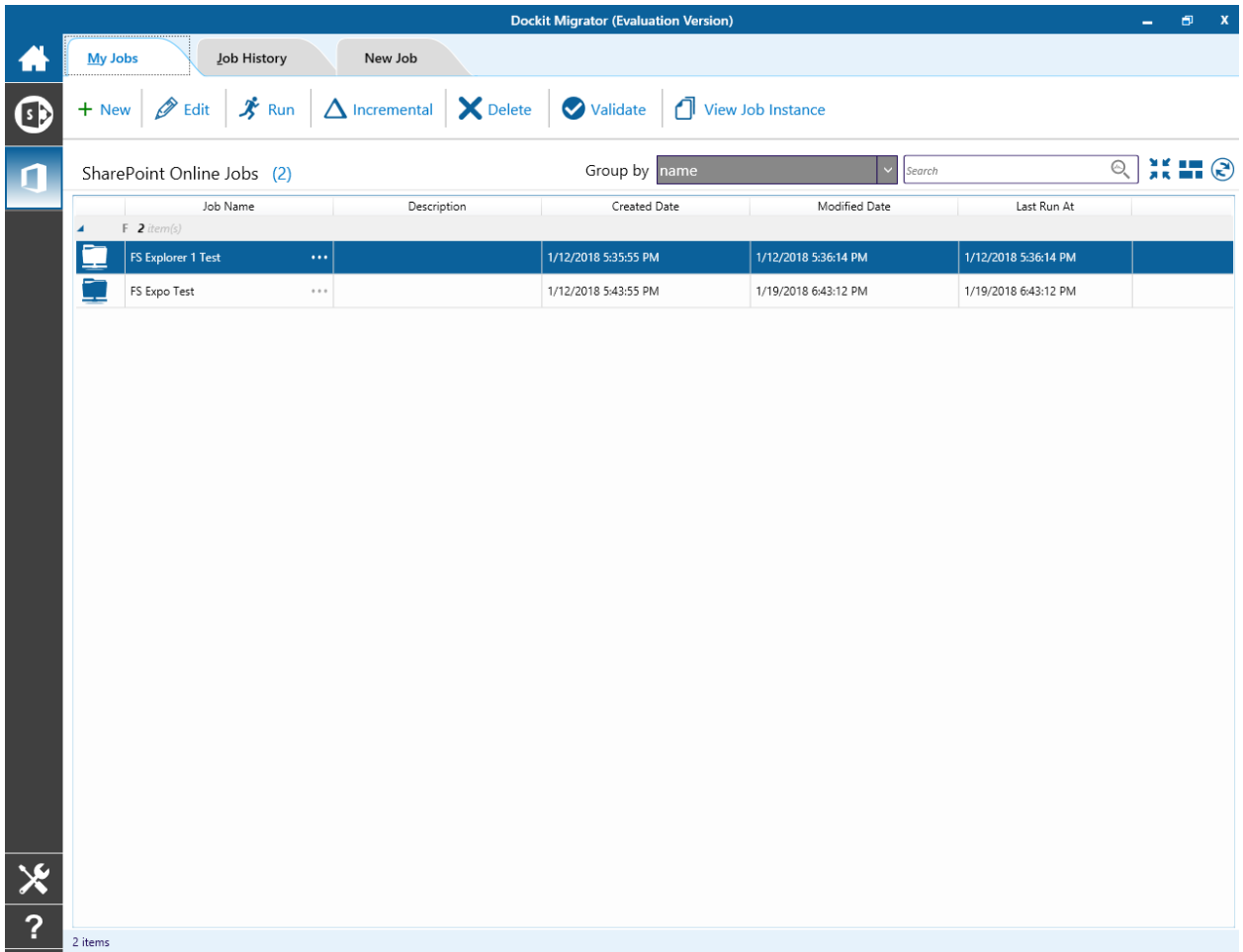
[File Share to One Drive](#)

- [OneDrive Users](#)
- [Batch File structure](#)
- [Items to Migrate](#)
- [Migration Settings](#)
 - [File Settings](#)
 - [Renaming Rules](#)
 - [Domain Mappings](#)
 - [User Mapping](#)
 - [Permission Mappings](#)
 - [Filter Conditions](#)
 - [Performance Tuner](#)
 - [Job Scheduler](#)
- [Pre-Migration Validation](#)

File Share to Office 365

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

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



The screenshot displays the 'Docket Migrator (Evaluation Version)' application window. The 'My Jobs' tab is active, showing a list of migration jobs. The table has columns for Job Name, Description, Created Date, Modified Date, and Last Run At. Two jobs are listed: 'FS Explorer 1 Test' and 'FS Expo Test'. The interface includes a sidebar with navigation icons and a top toolbar with actions like New, Edit, Run, Incremental, Delete, Validate, and View Job Instance.

Job Name	Description	Created Date	Modified Date	Last Run At
FS Explorer 1 Test		1/12/2018 5:35:55 PM	1/12/2018 5:36:14 PM	1/12/2018 5:36:14 PM
FS Expo Test		1/12/2018 5:43:55 PM	1/19/2018 6:43:12 PM	1/19/2018 6:43:12 PM

2. The New Job page appears as shown below

Docket Migrator (Evaluation Version)

My Jobs Job History list Migration

New Job > File share to Office 365 > list Migration

list Migration

Job Description

Office 365

Target URL

Authentication

Cloud Identity

User name

Password

Connect

3. Enter **Job Name, Description (Optional)**.
4. Specify Office 365 site URL in the textbox and click Connect button. You need to provide a valid site administrator credentials to proceed further.
5. If the target site is set with different regional and language settings, it will prompt you to select the equivalent time zone for your computer so as to ensure data integrity in migration.

Time Zone - Attempt Five

Unable to match the target web's time zone with this computer. Please select the correct Time zone as to avoid data integrity errors when migrating date values.

Web Time Zone:

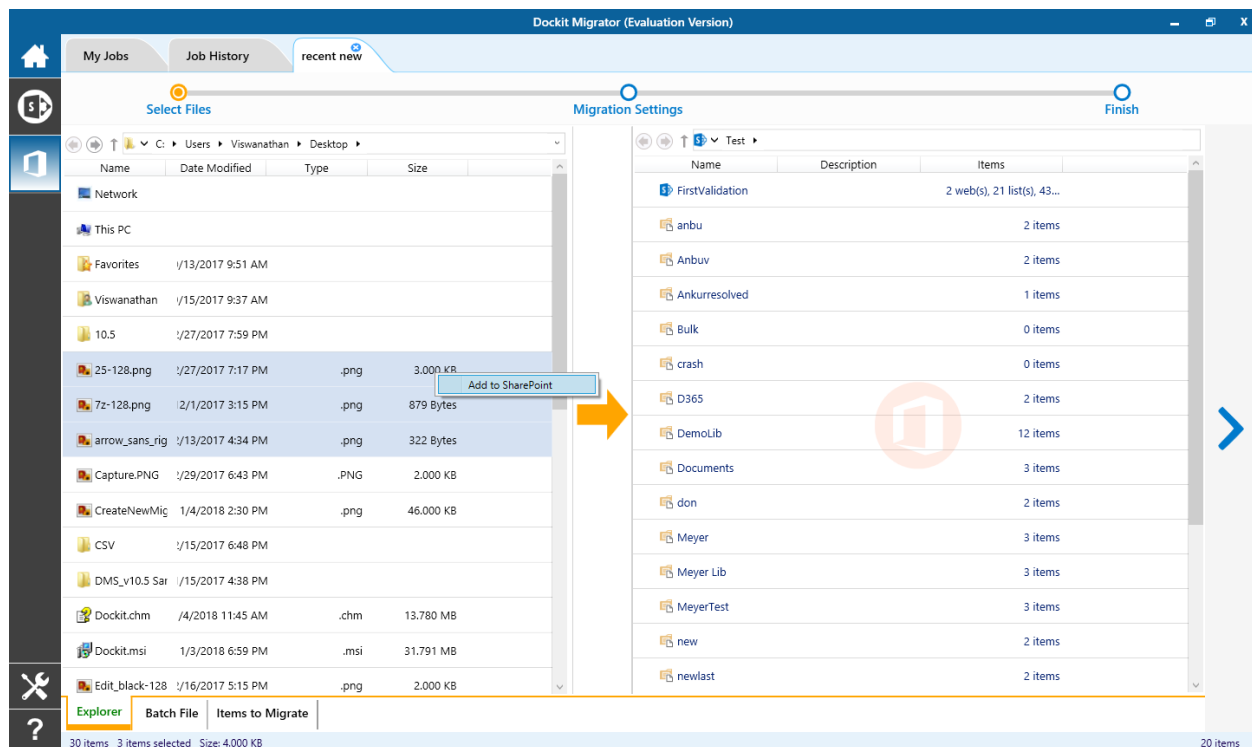
(UTC-08:00) Pacifique (É.-U. et Canada)

Select Time Zone:

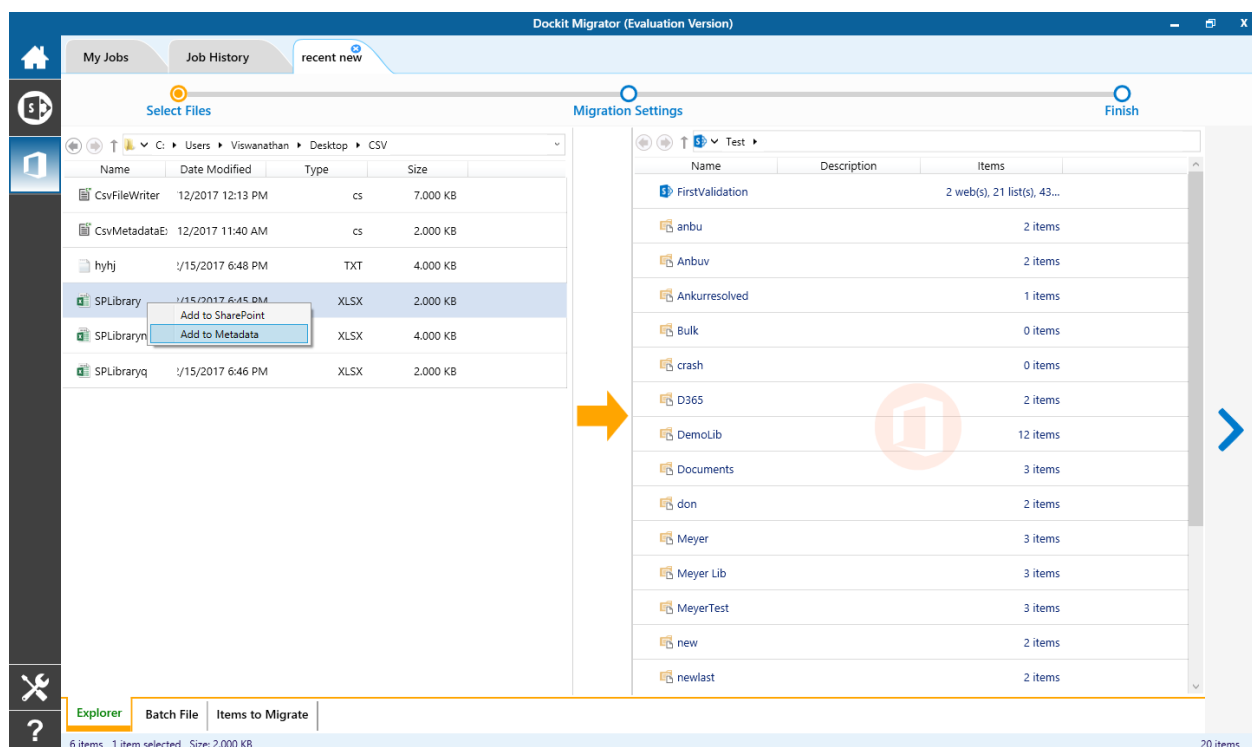
(UTC-08:00) Pacific Time (US & Canada)

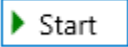
Save

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



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



8. Click **Items to Migrate** on Right pane to check the list of files selected for migration, also you can remove files by clicking the Red X.
9. Specify [Migration Settings](#)
10. Click **Save** button to create the job, or click < button to navigate to previous page to change any job settings.
11. After saving the job, it will be listed on the Job Manager page. You can click on  to initiate the migration process.

Batch File Structure

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

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

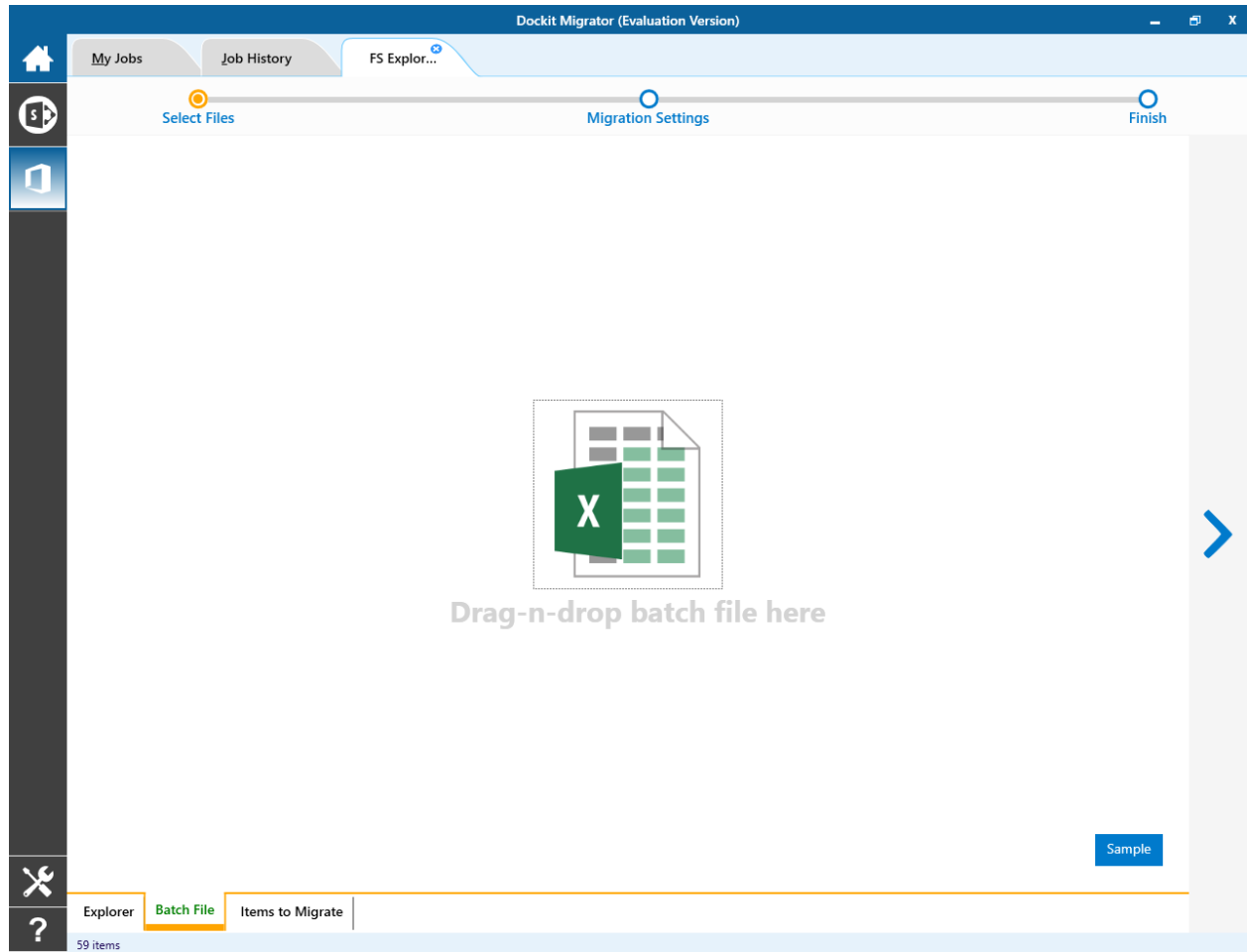
1. Path: The 'Path' column should contain the path of the source document / folder.
2. Destination Path: The 'Destination Path' column should contain the target location where the source gets moved.
3. New Folder: The column 'New Folder' is an optional column in the batch descriptor file. Using this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

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

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

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

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



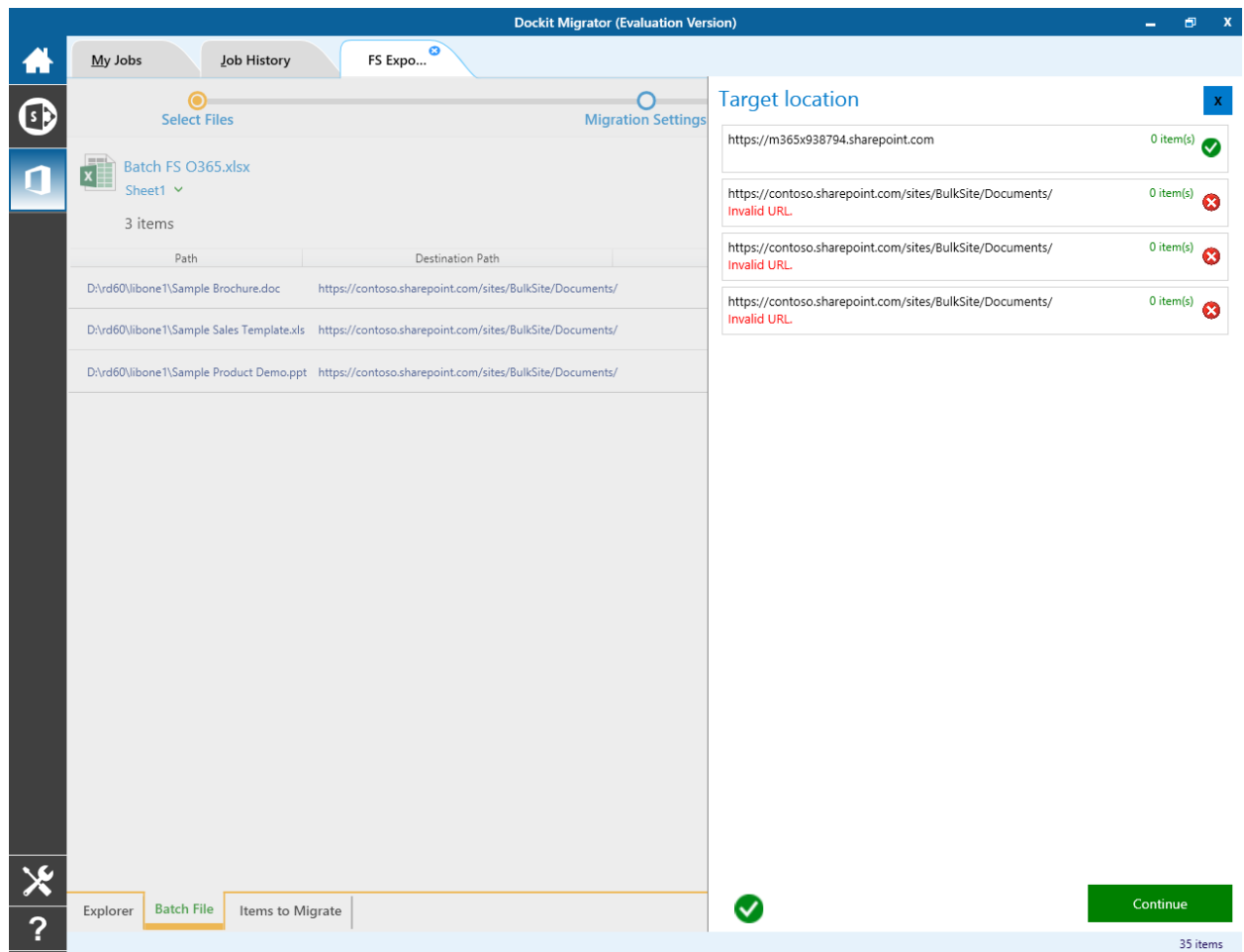
Batch file content will be shown as below.

The screenshot displays the Dockit Migrator (Evaluation Version) application window. The interface includes a top navigation bar with tabs for 'My Jobs', 'Job History', and 'FS Explor...'. Below this is a progress bar with three stages: 'Select Files', 'Migration Settings', and 'Finish'. The 'Select Files' stage is currently active, showing a file named 'Batch FS O365.xlsx' with 'Sheet1' selected. Below the file name, it indicates '3 items' and displays a table with two columns: 'Path' and 'Destination Path'.

Path	Destination Path
D:\vd60\iibone1\Sample Brochure.doc	https://contoso.sharepoint.com/sites/BulkSite/Documents/
D:\vd60\iibone1\Sample Sales Template.xls	https://contoso.sharepoint.com/sites/BulkSite/Documents/
D:\vd60\iibone1\Sample Product Demo.ppt	https://contoso.sharepoint.com/sites/BulkSite/Documents/

At the bottom right of the main area, there is a green 'Validate' button. The bottom status bar shows '59 items' and includes tabs for 'Explorer', 'Batch File', and 'Items to Migrate', with 'Batch File' currently selected.

2. Click Validate button to verify the batch content.

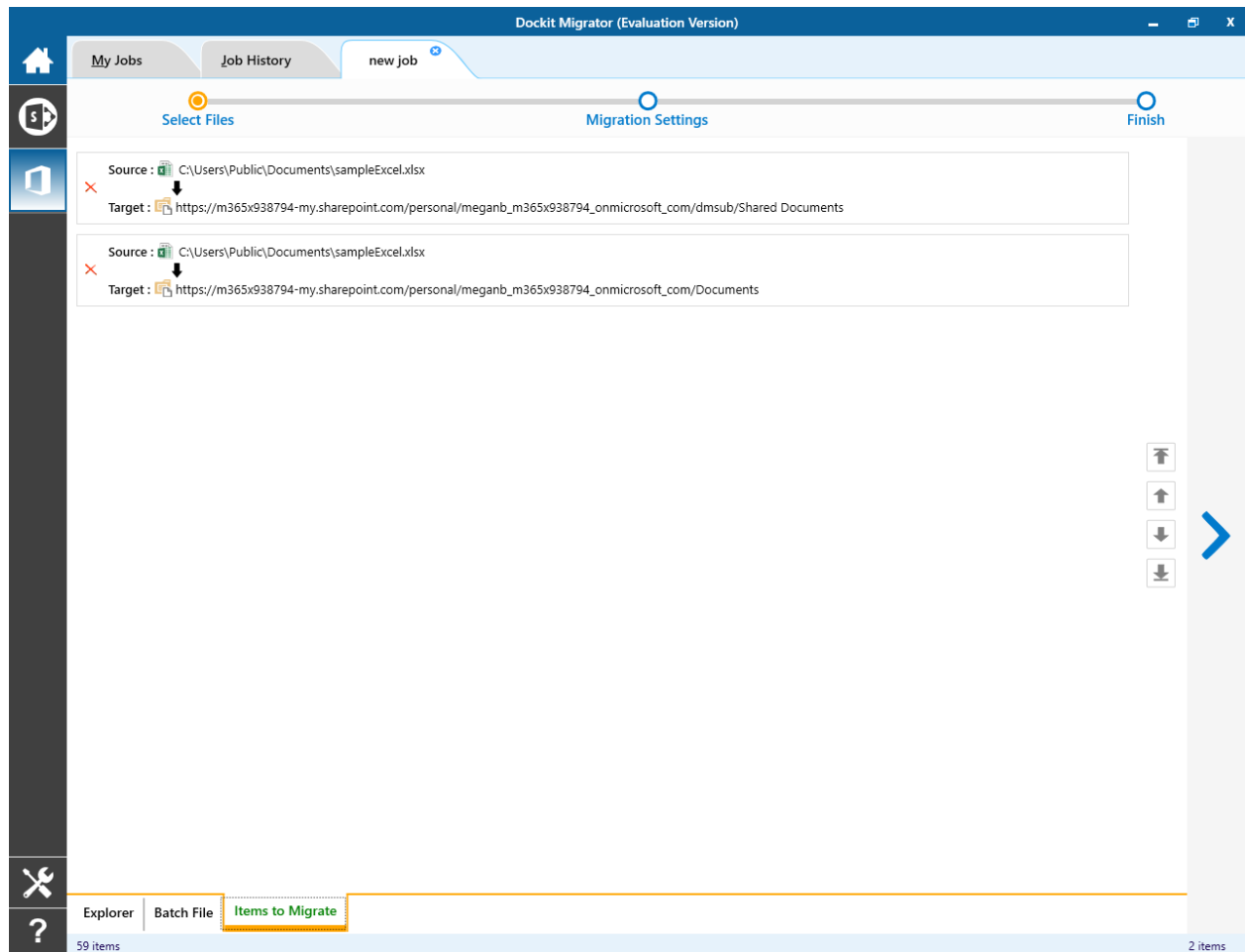


Once the validation is complete, click Continue button to proceed for next step. And the batch file content will be added to Items to Migrate tab.

Items to Migrate

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

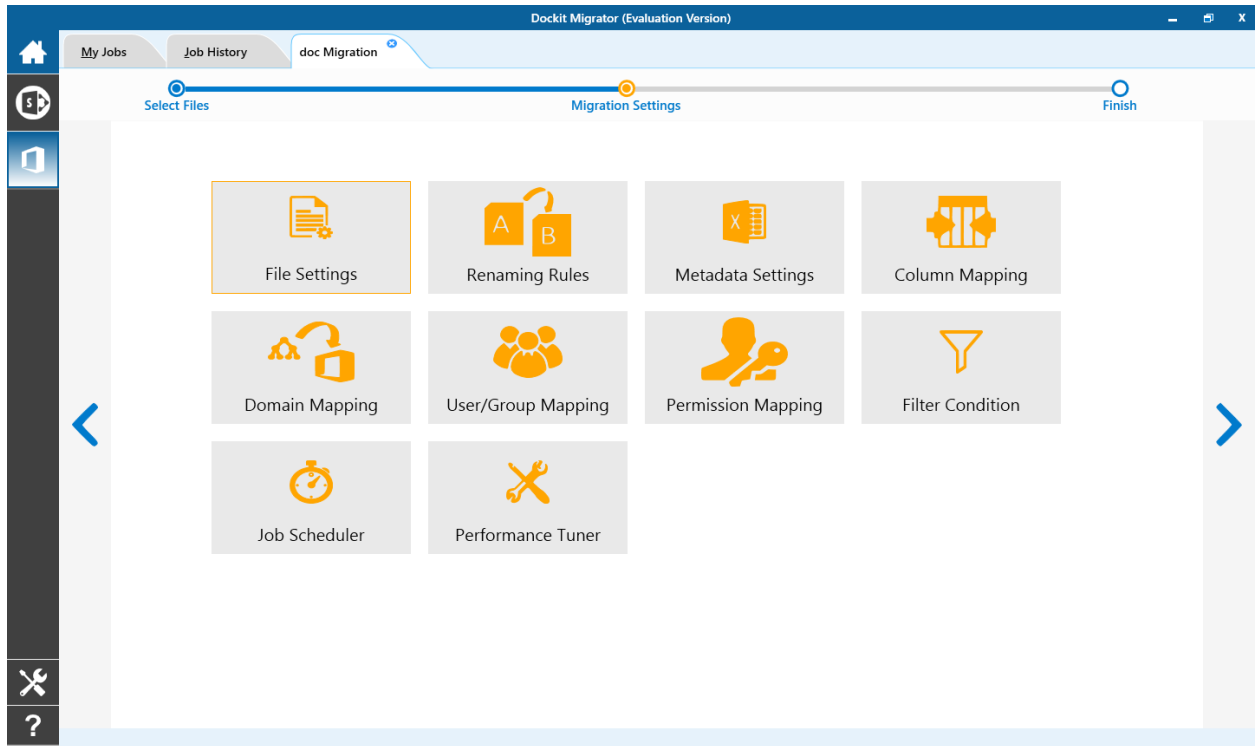
The **Items to migrate** appears as shown below:



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

Migration Settings

1. Migration Settings will appear as shown below.



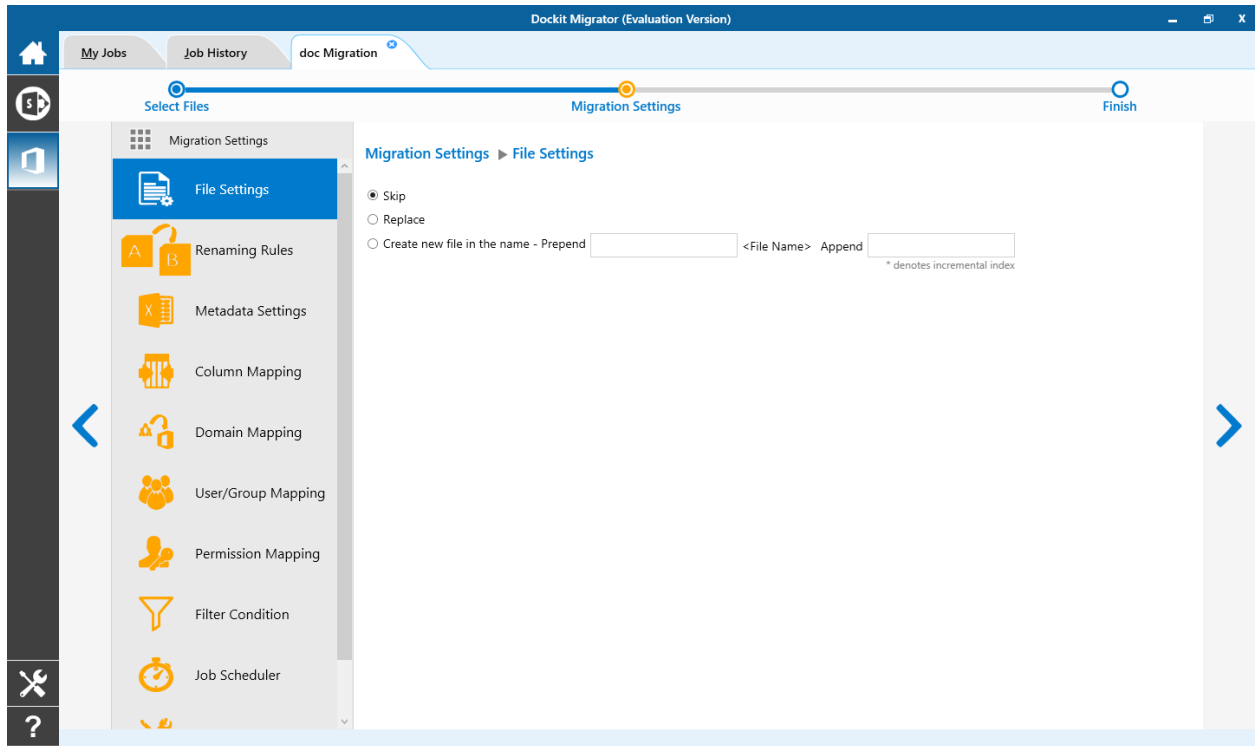
2. From this page, you can :

- [File Settings](#)
- [Renaming Rules](#)
- [Metadata Settings](#)
- [Column Mapping](#)
- [Permission Mapping](#)
- [User/Group Mapping](#)
- [Domain Mapping](#)
- [Filter Conditions](#)
- [Job Scheduler](#)
- [Performance Tuner](#)

File Settings

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

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



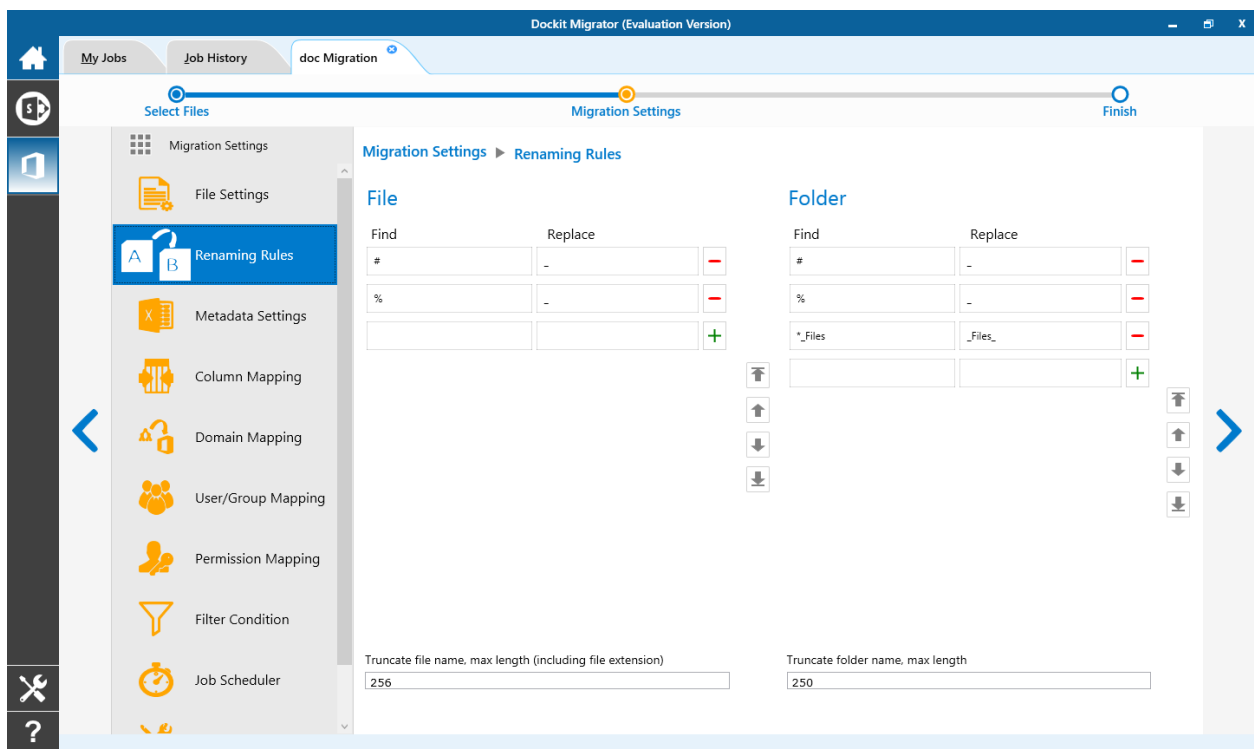
2. Select any one of the following options given below:
 - a. **Skip** - Skips the file without overwriting.
 - b. **Replace** - Deletes the file from the destination location (along with its version history) and imports the source file.
 - c. **Create new file** - Creates a new file by appending and prepending the user defined characters with the source file name and imports the newly created file. **Note:** * is the reserved character and denotes incremental index. For example, if a document named 'Sample.docx' already exists in the target location, Dockit Migrator will create a new file with the name as 'Sample1.docx'.
3. Click on **Renaming Rules** or > to proceed.

Renaming Rules

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

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

The renaming rules page will appear as shown below:



1. Folder Renaming Rule:

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

Truncate folder names:

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

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

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

2. File Renaming Rule:

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

Truncate file names:

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

Select appropriate checkbox for file and enter a valid character length for file name.

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

Sample renaming rules:

File Name	Find	Replace	Result	Remarks
SampleV1	*V1	{empty}	Sample	Truncate V1, if the file ends with V1
SampleV1	*V1	A	SampleA	Replace V1 with A, if the file name ends with V1
Hello_World	Hello_*	{empty}	World	Truncate Hello_, if the file name starts with Hello_
Hello_World	*_World	{empty}	Hello	Truncate _World, if file name ends with _World
SampleV1	v?	{empty}	Sample	Truncate V and the file name character following it (immediately succeeding character), if the file names contains V and followed by any one character.

Sample	?p	{empty}	Sale	Truncate one character preceding the letter p in the file name.
SampleV12	V??	{empty}	Sample	Truncate two characters following the character / letter V in the file name.
SampleFileVersion	*File*	{empty}	SampleVersion	Truncate the word 'File' in any position in the file name.
Sample.Matrix	\.	Dot	SampleDotMatrix	Example of escape sequence for .
Sample?File	\?	Text	SampleTextFile	Example of escape sequence for ?
Hello*World	*	{empty}	HelloWorld	Example of escape sequence for *
Sample\$	\\$	Dollar	SampleDollar	Example of escape sequence for \$
Sample^File	\^	{empty}	SampleFile	Example of escape sequence for ^
Sample+Document	\+	Plus	SamplePlusDocument	Example of escape sequence for +
Hello<World	\<	{empty}	HelloWorld	Example of escape sequence for <
Hello>World	\>	{empty}	HelloWorld	Example of escape sequence for >
[Document	\[	Word	WordDocument	Example of escape sequence for [
Word]	\]	Document	WordDocument	Example of escape sequence for]
(File	\(	Sample	SampleFile	Example of escape sequence for (
Sample)	\)	Document	SampleDocument	Example of escape sequence for)

Meta Data file structure

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

1. The first row of the metadata file should contain the Field Names as headers. In an import task, data type of the columns must be the same across all libraries. SharePoint Columns that are read-only will not be updated by Dockit Migrator.
2. The Path field will not be carried forward as a metadata field into SharePoint.
3. The first column of all the rows should contain the path of the file e.g., "C:\My Documents\Sample Brochure.doc" (or) "\\ProdServer\My Documents\Sample Sales Template.xlsx".
4. Be consistent with the drive letters and UNC path when adding folders and file into SharePoint library using Dockit Migrator user interface and the path field values in the metadata file. If you use local / mapped drives to import files, ensure the 'Path' field has the corresponding local / mapped drive path (e.g., M:\MyDocs\File1.xlsx). If you use shares to import file, ensure the 'Path' field has the corresponding UNC path (e.g., \\Machine_Name\Share_Name\Sample File1.xlsx).
5. For Microsoft Excel file formats (XLSX), do not enclose the field names and their corresponding metadata values within double quotes.
6. Ensure date values are in 'Date Only' or 'Date and Time' format.
7. Lookup data type value will be assigned based on column value only. Lookup columns referring to **non-existing list and column** will not be updated by Dockit Migrator.
8. People or Group data type value should be user name, Active Directory (AD) group name or SharePoint group name. User or group name referring to **non-existing user or group** will not be updated by Dockit Migrator. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account.
9. The Managed Metadata column values can be term labels or synonyms of term labels or full path of the term value (full term path). Dockit Migrator will search the specified term value under the specified parent term of the corresponding term set and assign the ID of the matching term value for the managed metadata column. You must provide the path of the term label in the format: ParentTerm|TermLabel1|TermLabel2|TermLabel3.

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

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

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

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

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

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

SharePoint Data Type	Remarks	Example
Yes/No	If any other value appears in the metadata file, other than Yes/No, default value will be assigned.	"Yes" "No"
Text	The text length should not exceed 255 characters.	"This is sample text"
Multi-line Text	The text length should not exceed 255 characters (preferred).	"This is sample text\nThis is sample for multi-line text"
Date and Time	Date or Date & Time can be given in this field. Dockit Migrator provides an user option to specify the date mask to use for the date fields in metadata file.	"12/30/2009 10:50 AM" "1/25/2010"
Number	The fixed or floating number can be given to this field. The value should not exceed the numeric boundary.	"10" "3.41"
Currency	The fixed or floating number can be given to this field. Do not use any currency symbol (\$) with this field value. The value should not exceed the currency boundary.	"100" "10000" "1500.67"
Choice (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values.	"Male" "15"
Choice (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple	"Windows 7;Windows Vista;Windows 2003;Windows XP"

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

		SharePoint can accept multiple values. Dockit Migrator will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	
People Group (Multiple value)	or	User name, AD Group name or SharePoint Group name can be given to this field. The user <i>Login Name (domain\username)</i>, <i>Display Name (John Doe)</i> or <i>E-mail address (someone@example.com)</i> can be used to denote a user account. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit Migrator will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\User1; BUILTIN\Administrators;Guest Members;Temps"
Hyperlink Picture	or	The http URL of any resource or picture can be given to this field.	"http://sharepoint/Shared Documents/My Sample File.doc " "http://sharepoint/Pictures/chart.bmp"
Business Data (BDC) / External Data (BCS)		The value of the primary key column in the LOB record can be given to this field. Dockit Migrator will query for the LOB record using the specified value and assign the corresponding ID (when the BDC / BCS column value match is found) of the LOB record to the BDC / BCS column in SharePoint. The BDC / BCS column value along with the filter name can be specified in this field. Dockit Migrator will search for the specified column value in the LOB	"SBI00008251" "600083" "Company Name:Vyapin" "ID:1000" "Product Name:Dockit Migrator"

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

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

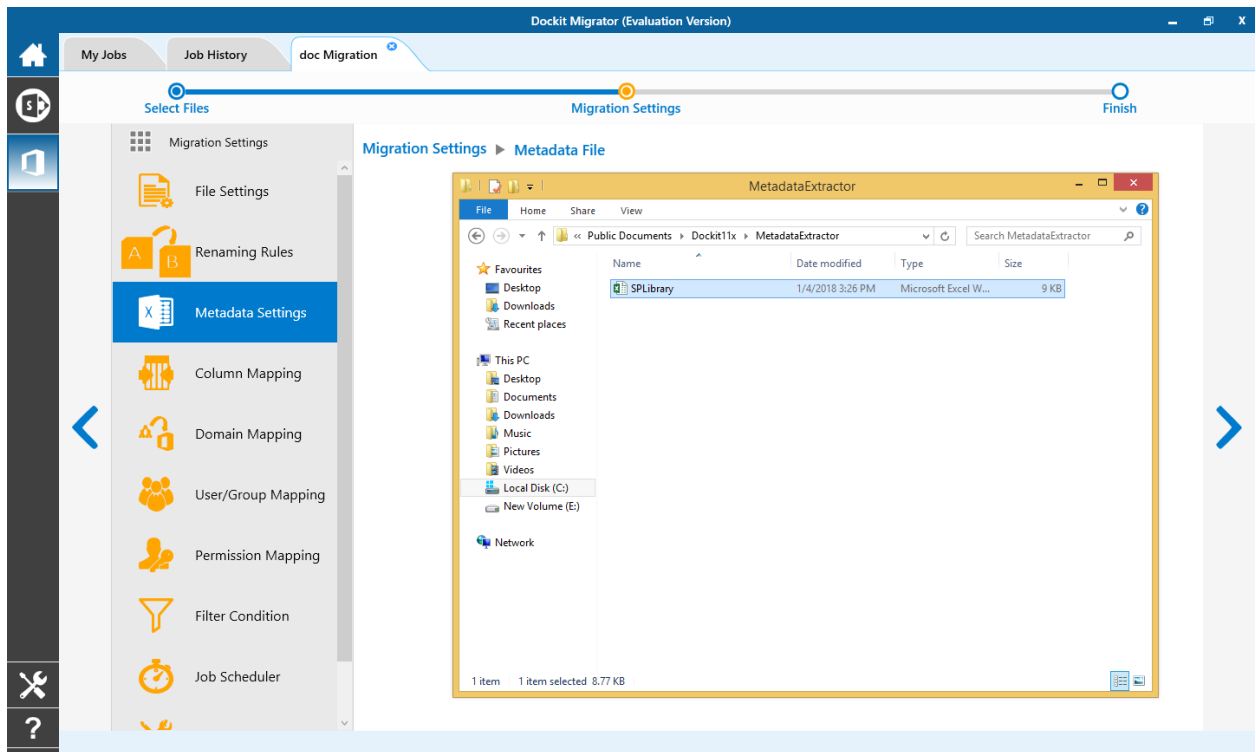
The following tables below describe the syntax to be used in the external metadata file for single values / multi values for the following data types in SharePoint:

- Choice*
- Lookup
- Person or Group

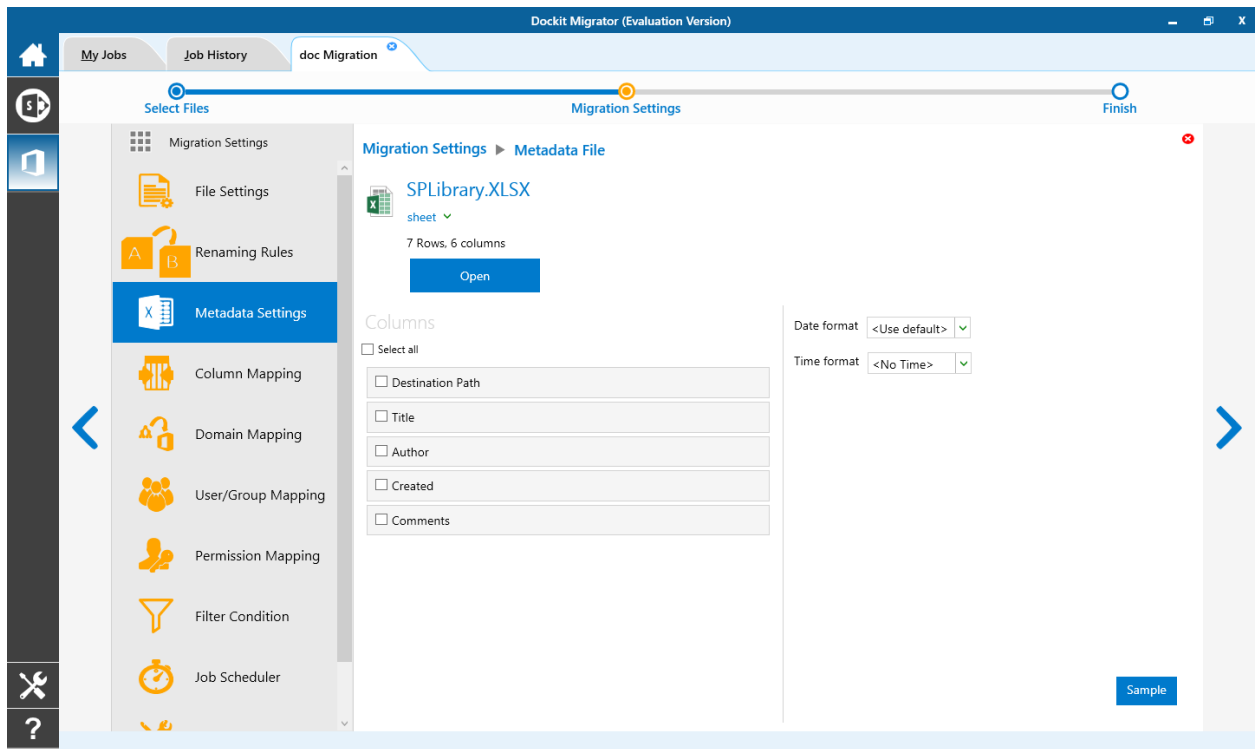
Single Value	Example	Final Result
In case single value contains ';' as part of its value, you can separate the values using ';#'.	";#Windows Live Spaces; Mesh;#"	<u>Windows Live Spaces; Mesh</u>
In case single value contains ';#' as part of its value, escape these characters by preceding them with a 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;#"	<u>Windows Live;#Mail</u>
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;#"	<u>Windows Live Spaces; Mesh;Windows Azure;Windows HPC</u>
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;#"	<u>Windows Live;#Mail;Windows Photo Gallery</u>

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

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

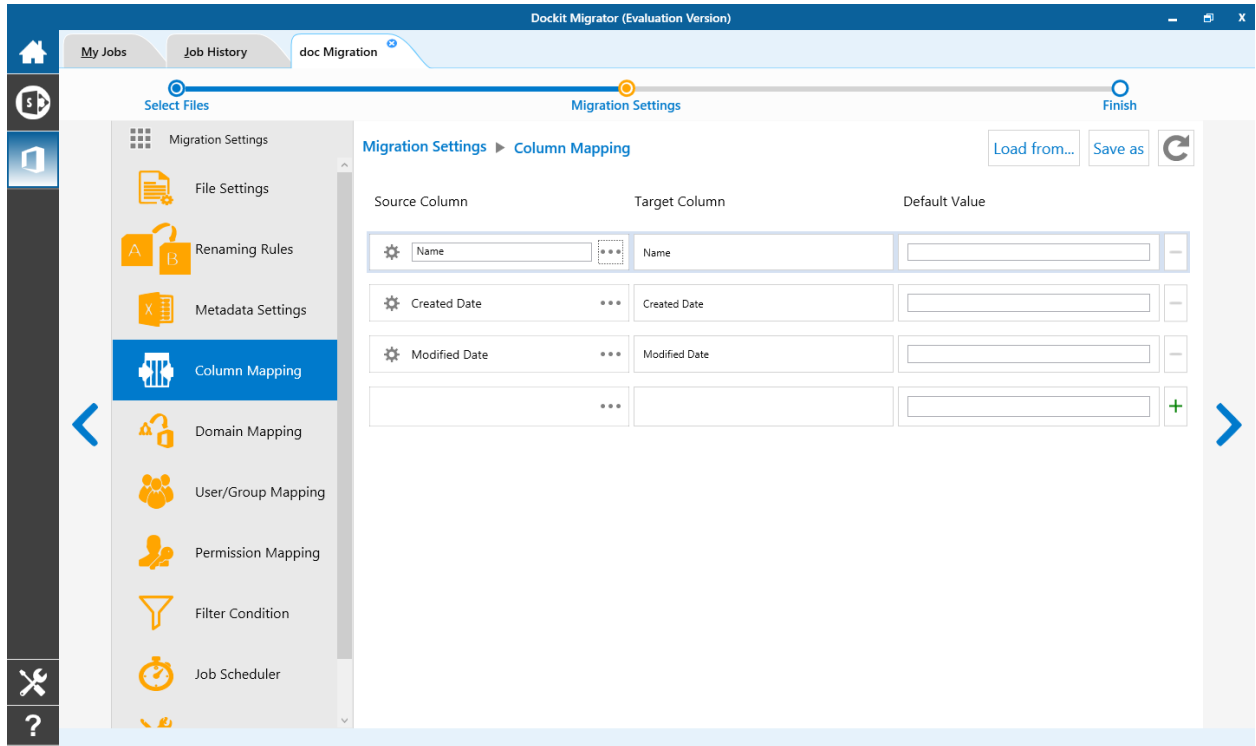


2. Once the metadata file is loaded as shown below, select the desired columns for migration.



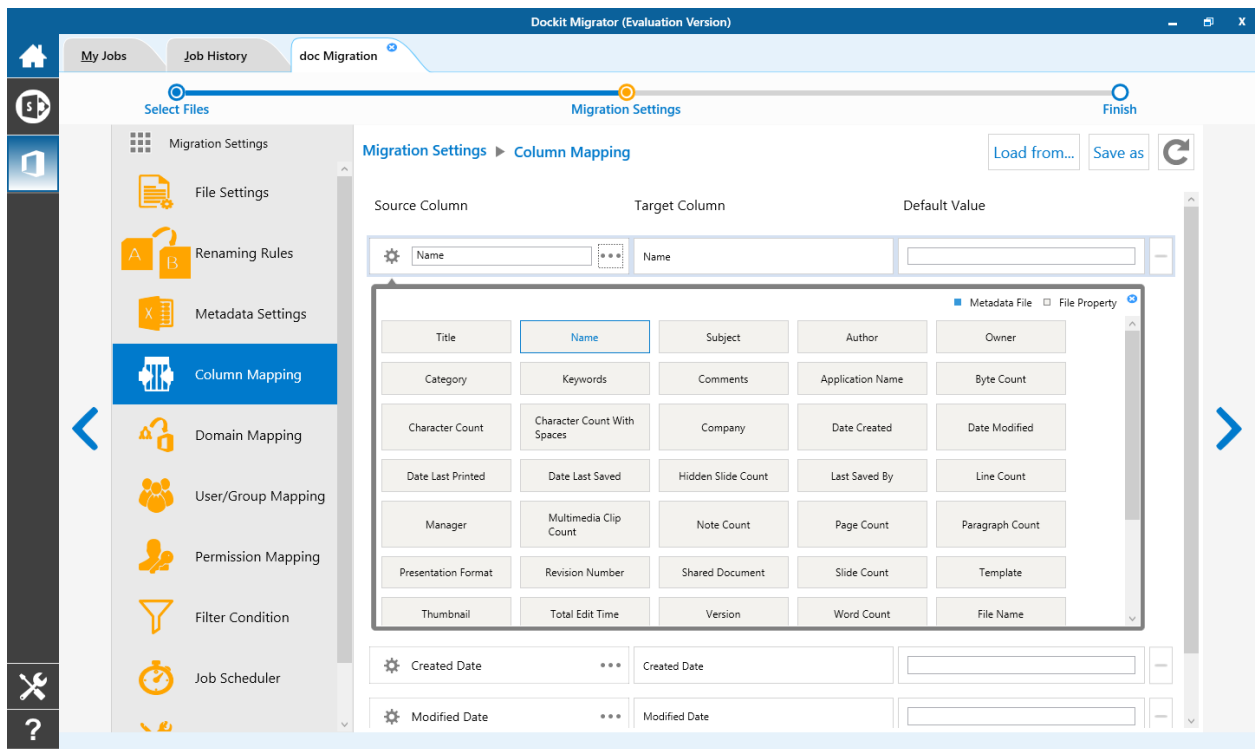
Column Mapping

Column mapping screen will appear as shown below.



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

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



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

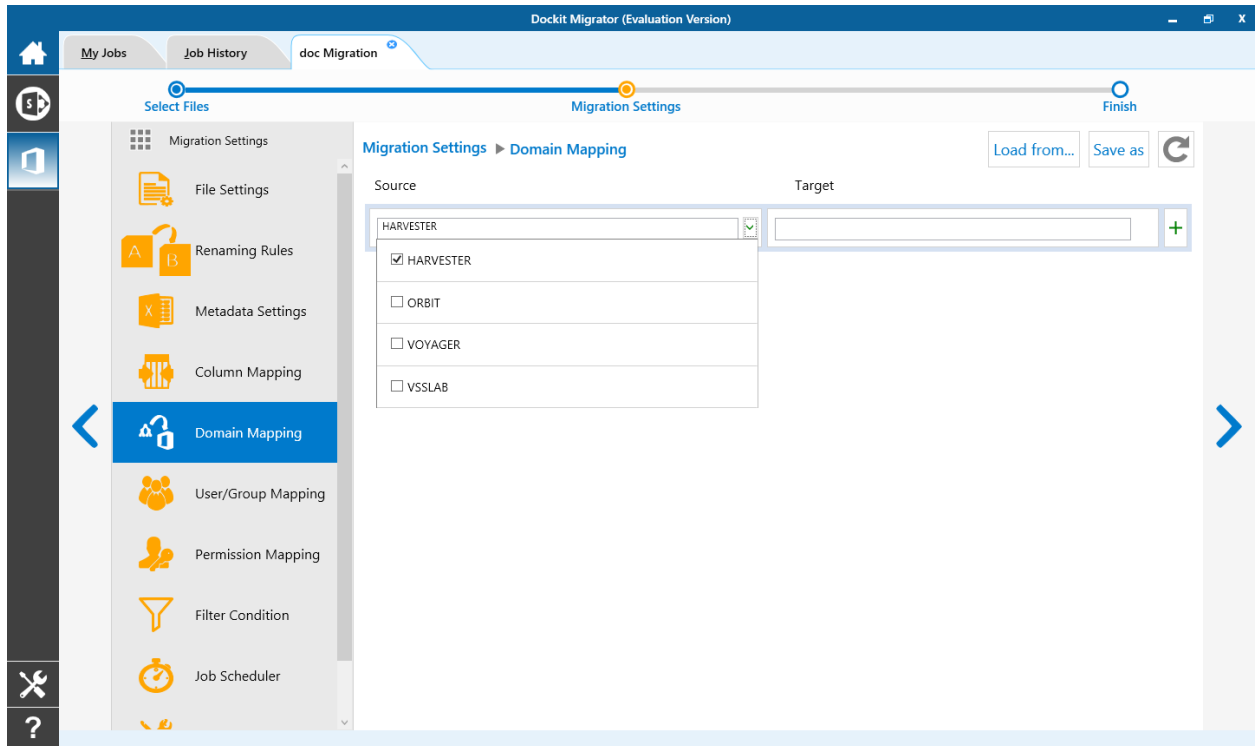
Metadata Properties- gives a list of columns available in metadata file.

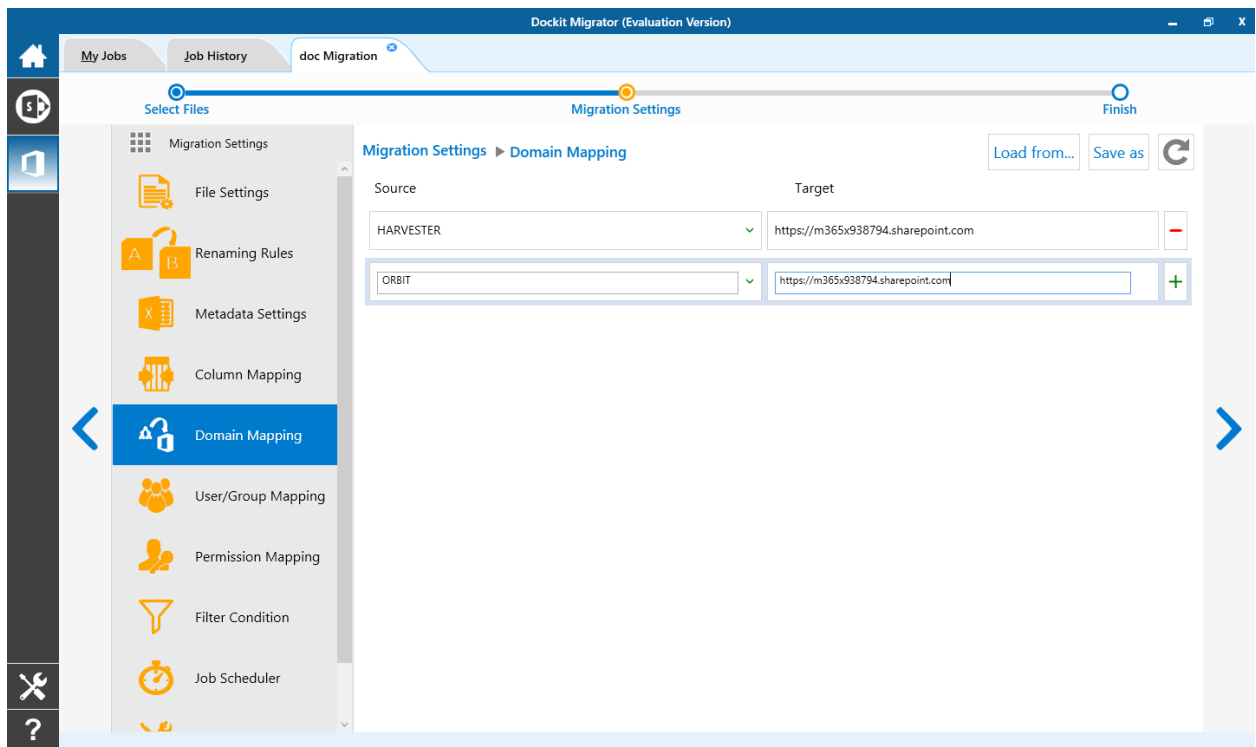
3. Click > to proceed.

Domain Mapping

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

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





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

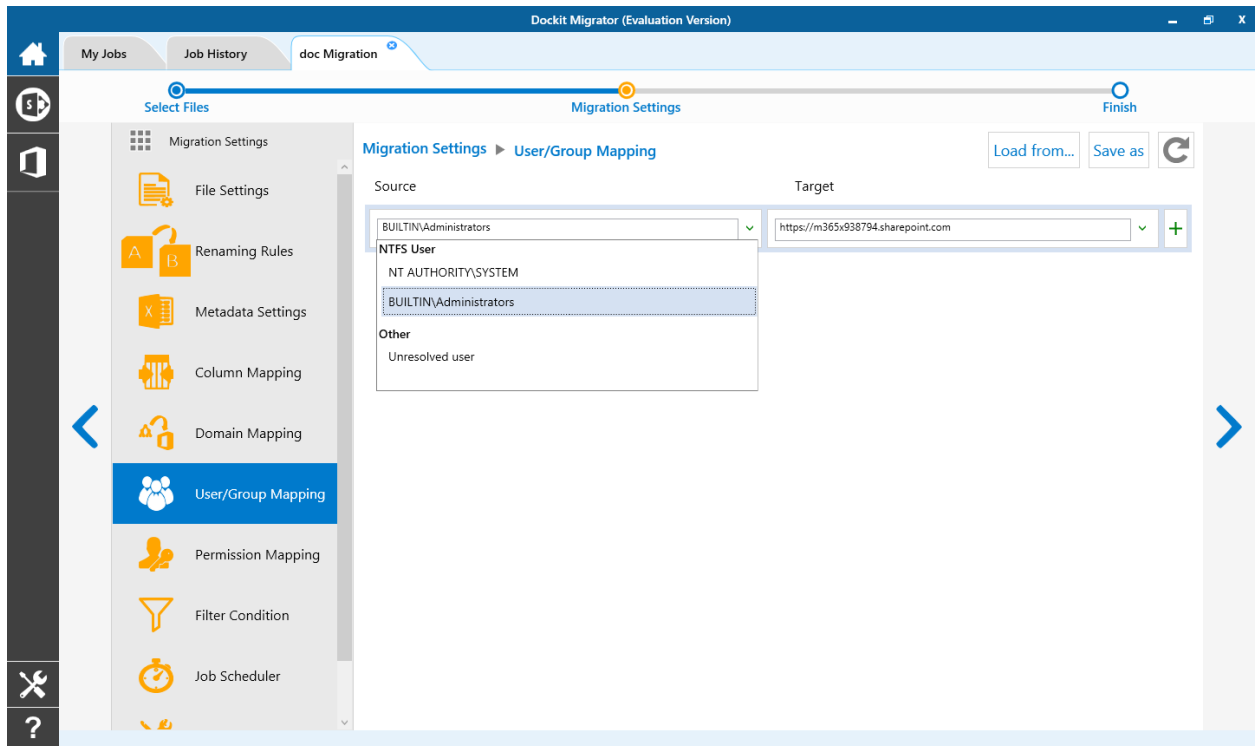
Note: As for entering free texts, multiple source domains can be entered, separated by comma.

User Mapping

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

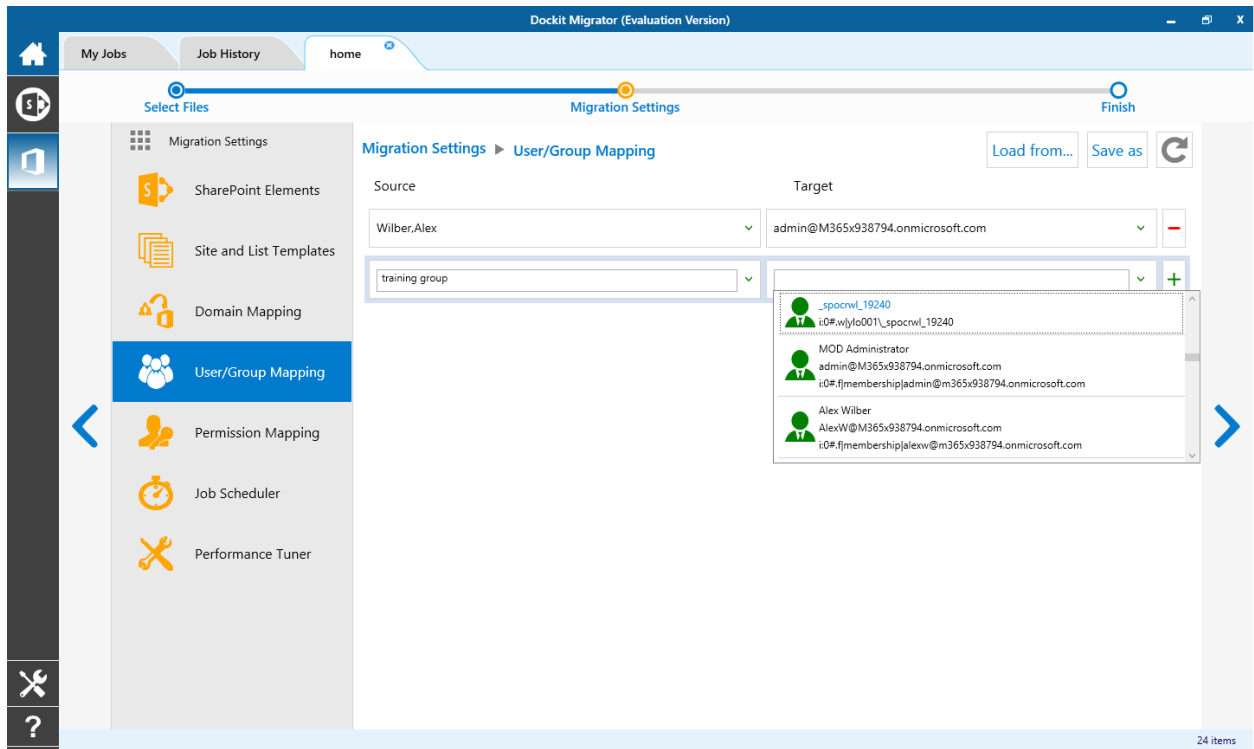
1. Source User

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



2. Target User

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



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

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

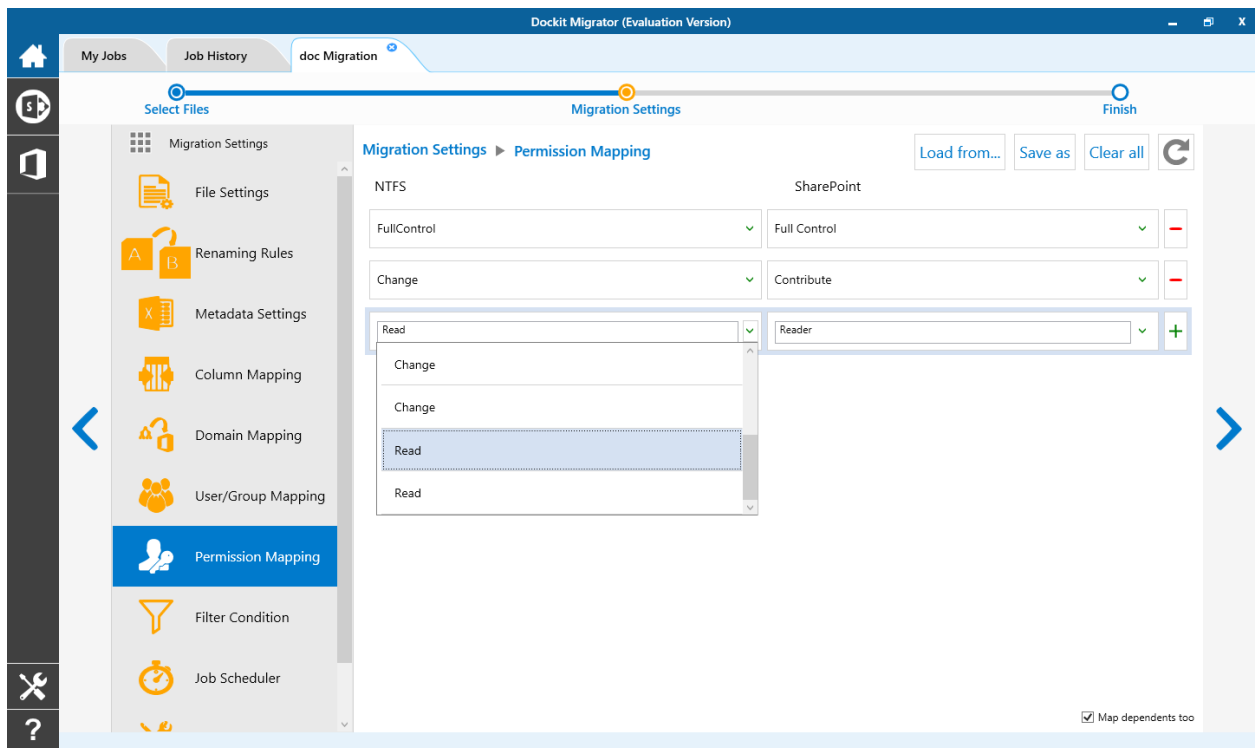
Permission Mapping

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

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

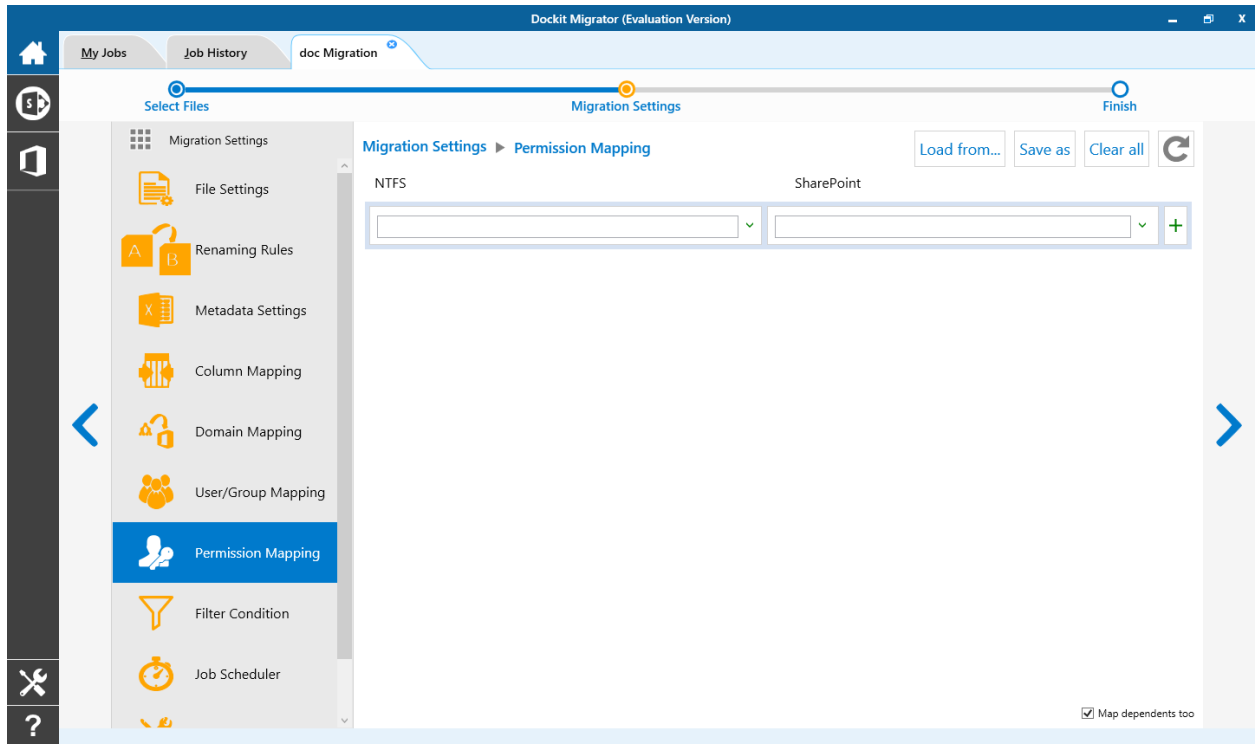
1. Source Permission

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



2. Target Permission

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



See the following sections for more information

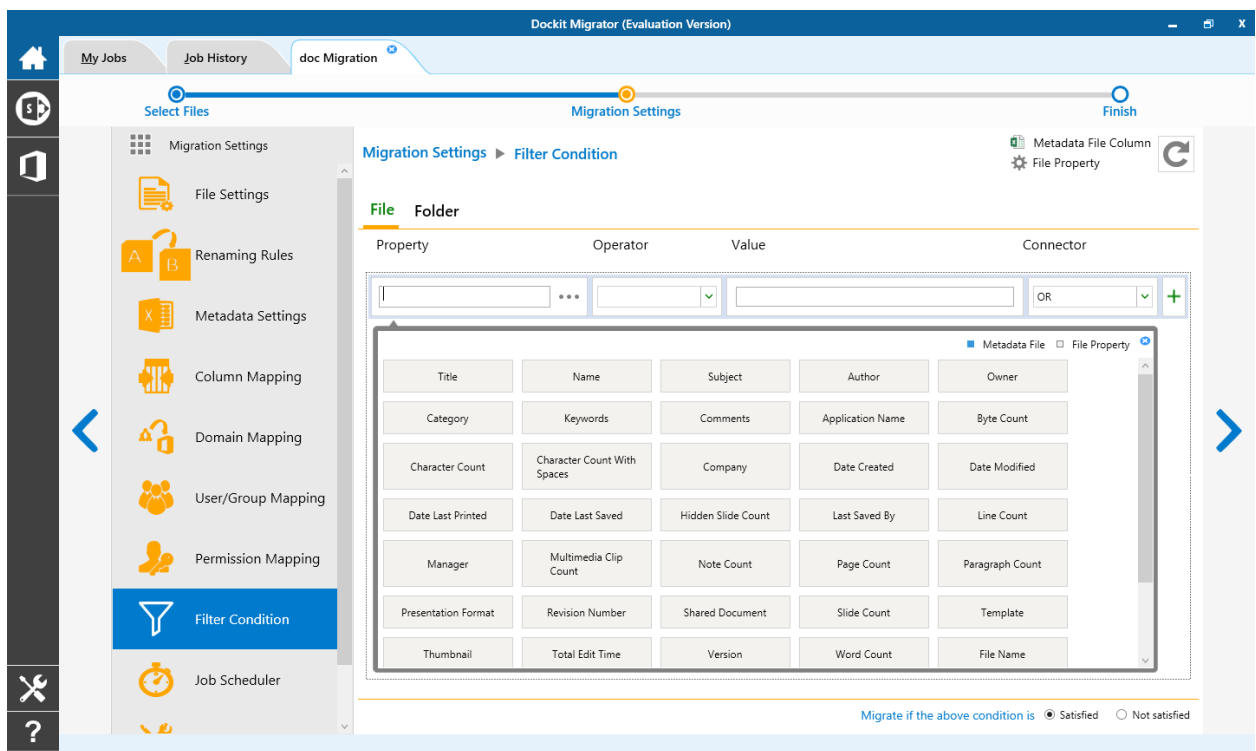
- [User Mapping](#)
- [Domain Mapping](#)

Filter Conditions

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

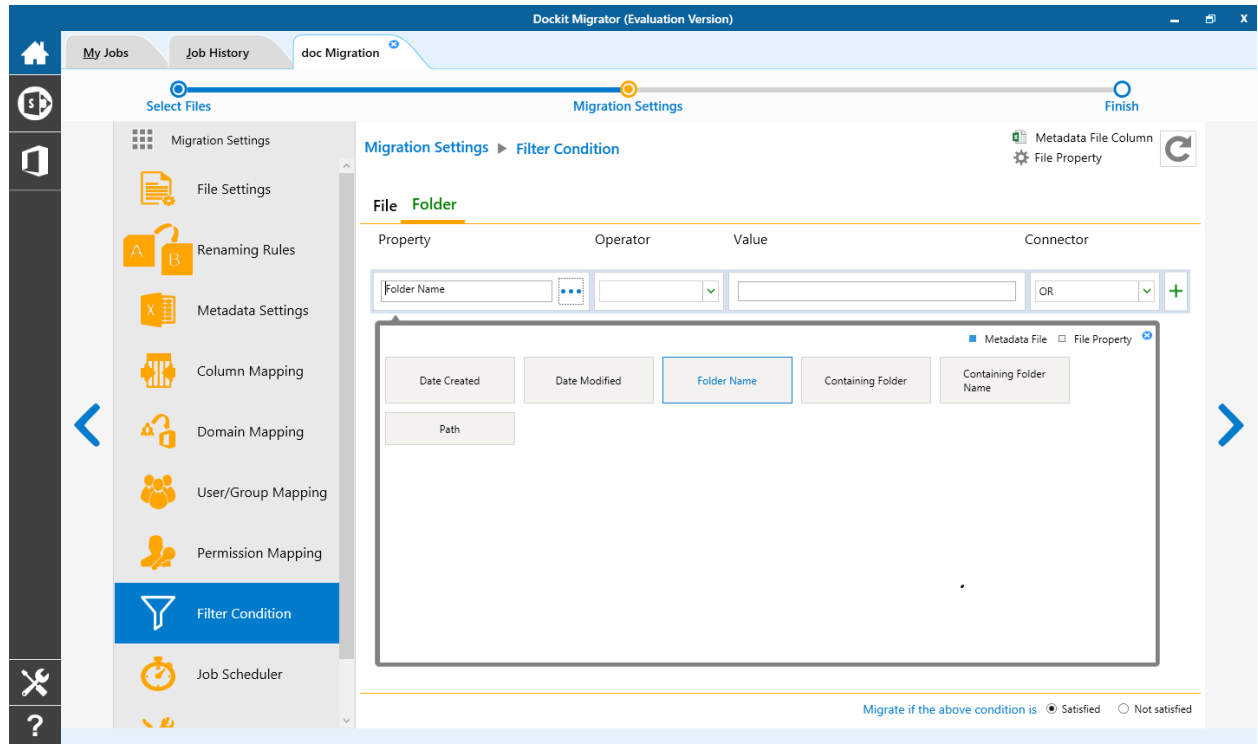
1. Select the filter conditions settings from migration settings. And add filter conditions for File/Folder filter as shown as below.

File Filter



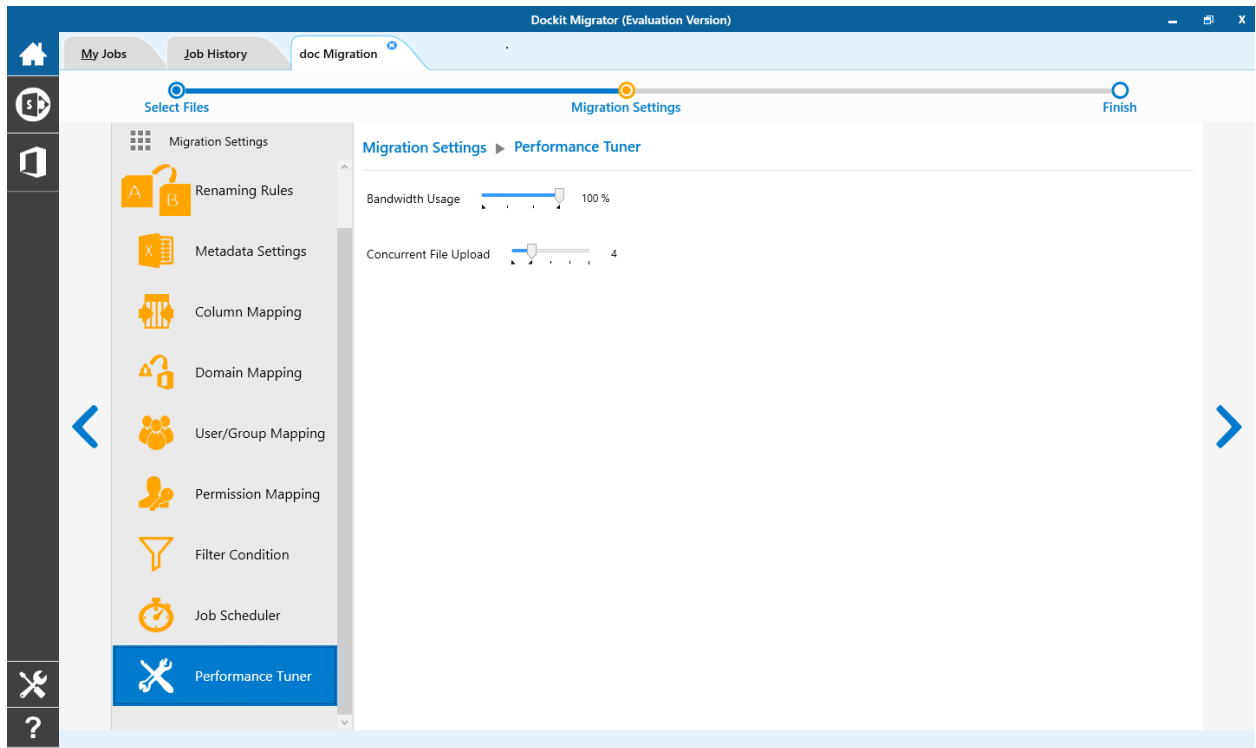
2. Add folder conditions in folder filter tab as shown as below.

Folder Filter



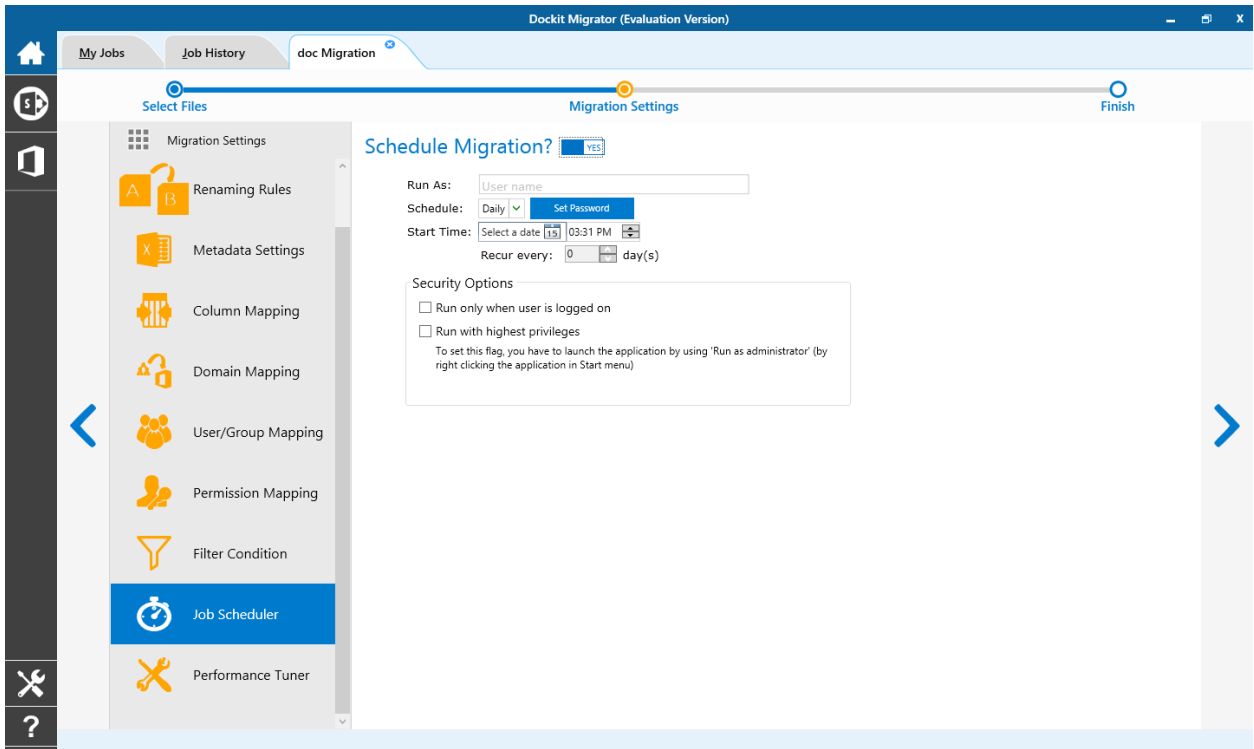
Performance Tuner

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



Job Scheduler

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



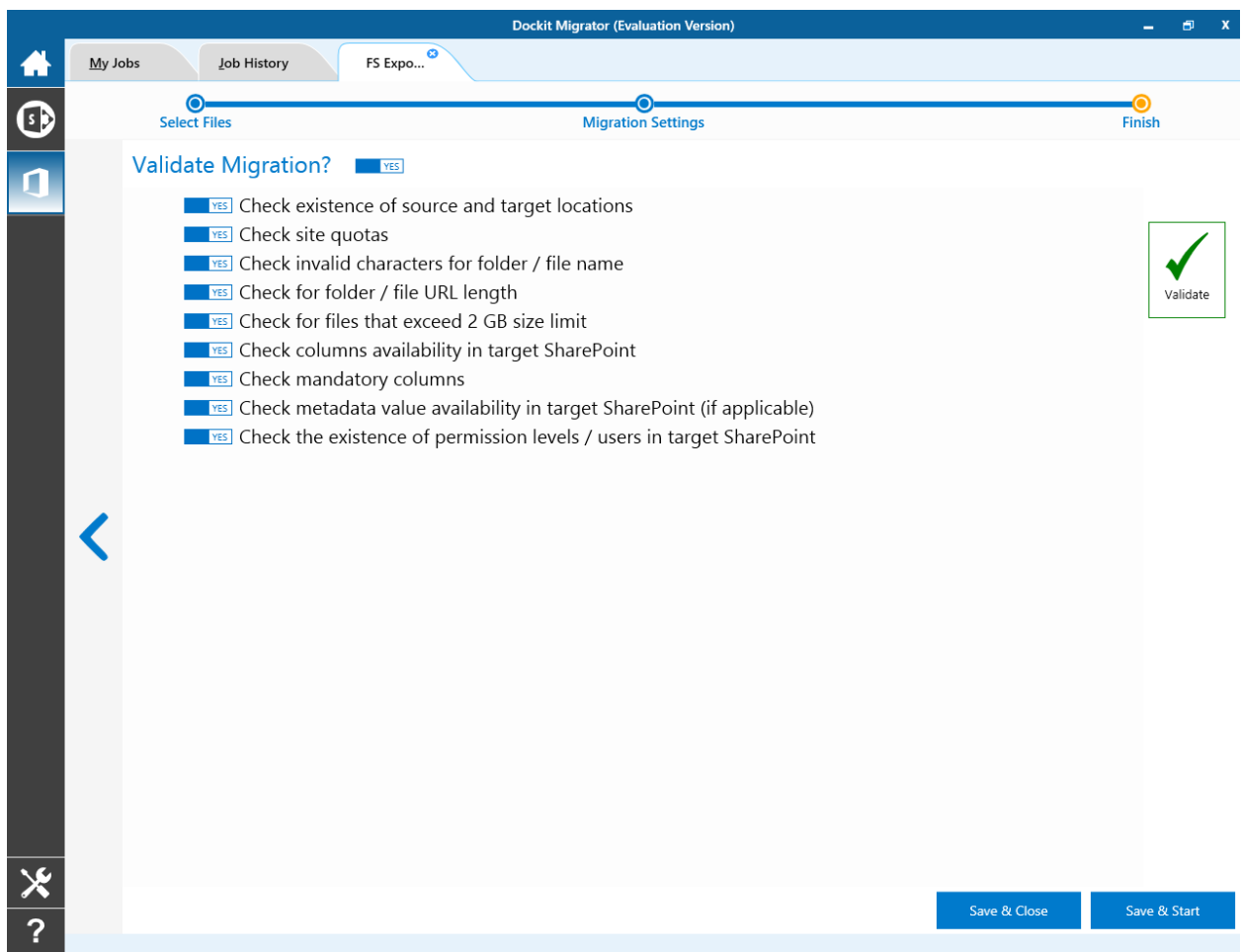
2. Dockit Migrator will create a schedule task in the Windows Scheduled Tasks with the given settings.

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

Pre-Migration Validation

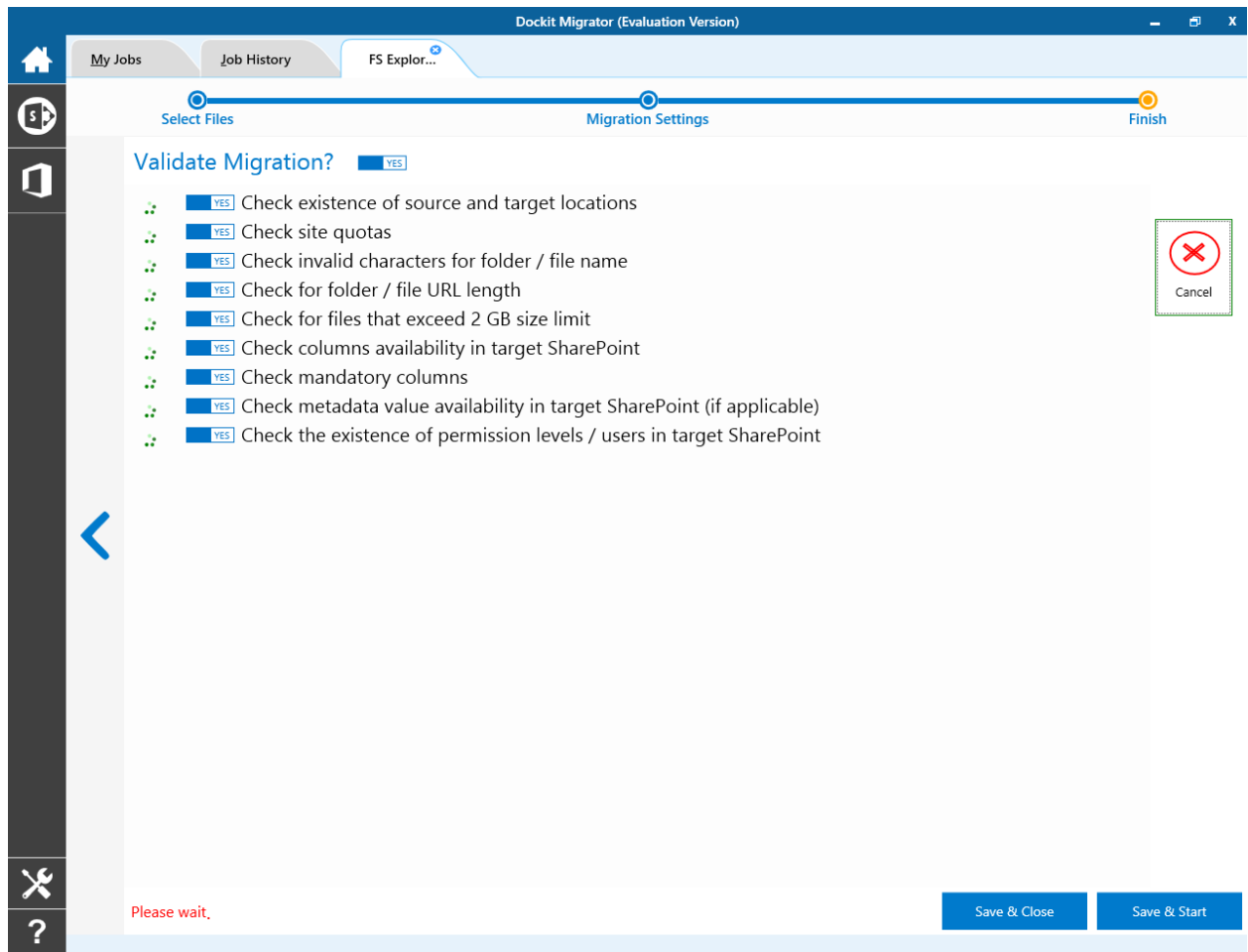
Pre-migration Validation tool helps you validate the exact steps performed by Dockit Migrator during the migration process. This tool does not migrate any files to the destination location. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there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

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



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

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



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

File Share to OneDrive

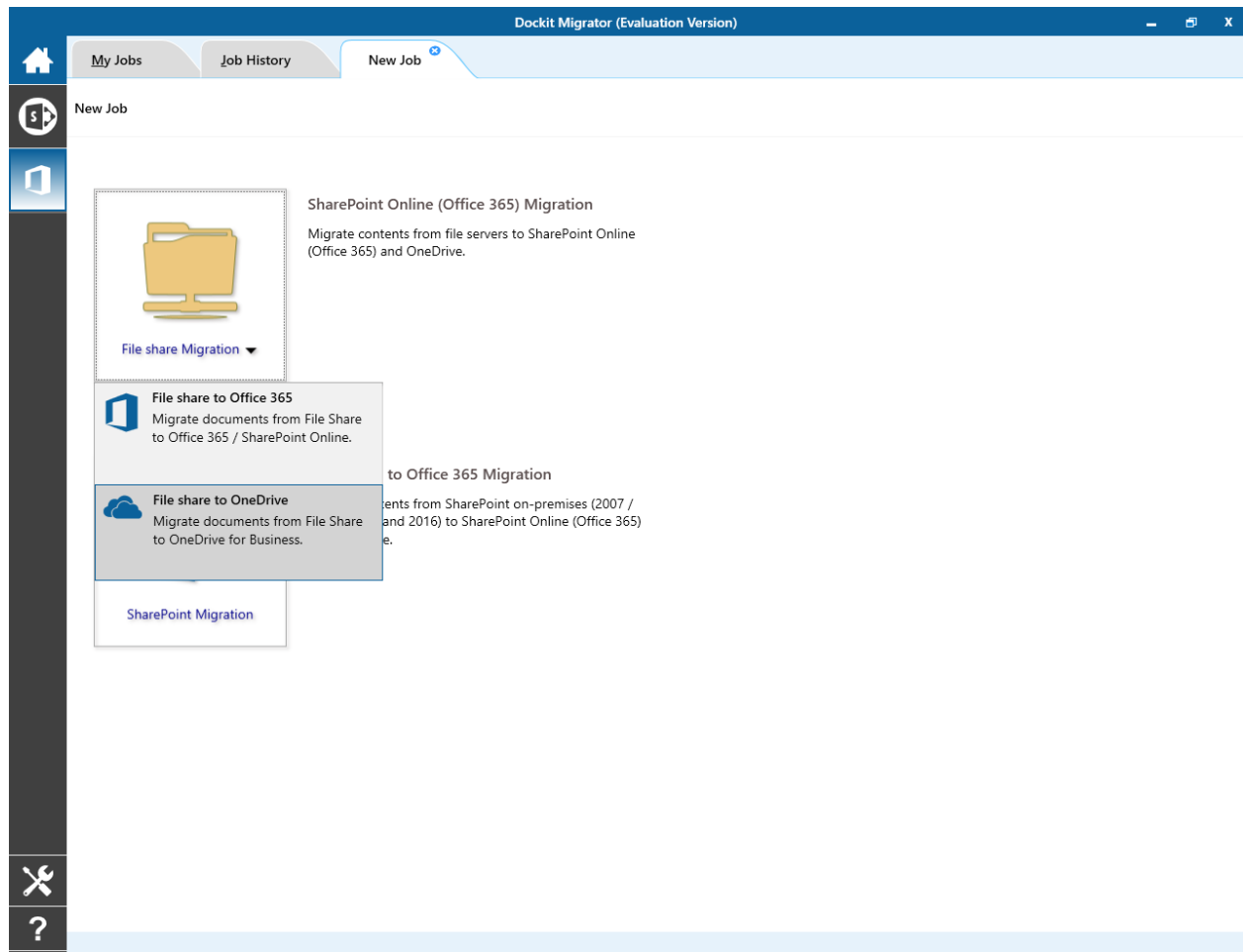
To create a new migration job to import folders and files from File System to OneDrive for Business:

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

The screenshot shows the Dockit Migrator (Evaluation Version) application window. The 'My Jobs' tab is selected, displaying a table of SharePoint Online Jobs. The table has columns for Job Name, Description, Created Date, Modified Date, and Last Run At. Two jobs are listed: 'FS Explorer 1 Test' and 'FS Expo Test'. The interface includes a sidebar with navigation icons and a top bar with tabs for 'My Jobs', 'Job History', and 'New Job'.

Job Name	Description	Created Date	Modified Date	Last Run At
FS Explorer 1 Test	...	1/12/2018 5:35:55 PM	1/12/2018 5:36:14 PM	1/12/2018 5:36:14 PM
FS Expo Test	...	1/12/2018 5:43:55 PM	1/19/2018 6:43:12 PM	1/19/2018 6:43:12 PM

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



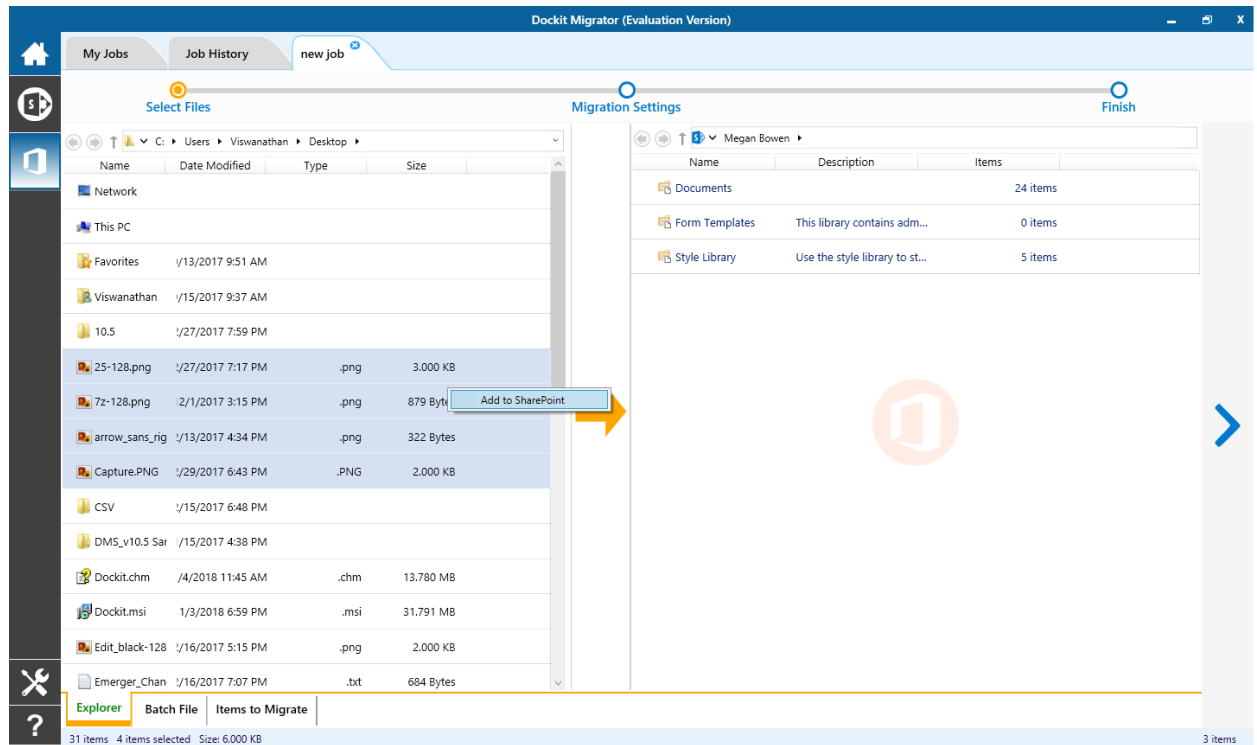
3. The **New Job** page appears as shown below. Enter **Job Name**, **Description (Optional)** and specify OneDrive Url based on the selected scope under **Enumerate personal site of:** and click **Connect** button.

The screenshot shows the 'New Job' page in the Dockit Migrator application. The page is titled 'Dockit Migrator (Evaluation Version)'. The navigation bar includes 'My Jobs', 'Job History', and 'new job'. The breadcrumb trail is 'New Job > File share to OneDrive > new job'. The main content area is divided into two sections. The left section contains a 'new job' text input and a 'Job Description' text area. The right section is titled 'OneDrive' and contains the 'Enumerate personal site of:' section. This section has two radio buttons: 'Current User' (selected) and 'Multiple Users' (with an example URL: https://contoso-my.sharepoint.com/personal/johndoe_contoso_onmicrosoft_com). Below these are fields for 'OneDrive URL', 'Authentication' (set to 'Cloud Identity'), 'User name', and 'Password'. A blue 'Connect' button is located at the bottom right of the right section.

Enumerate personal site of:

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

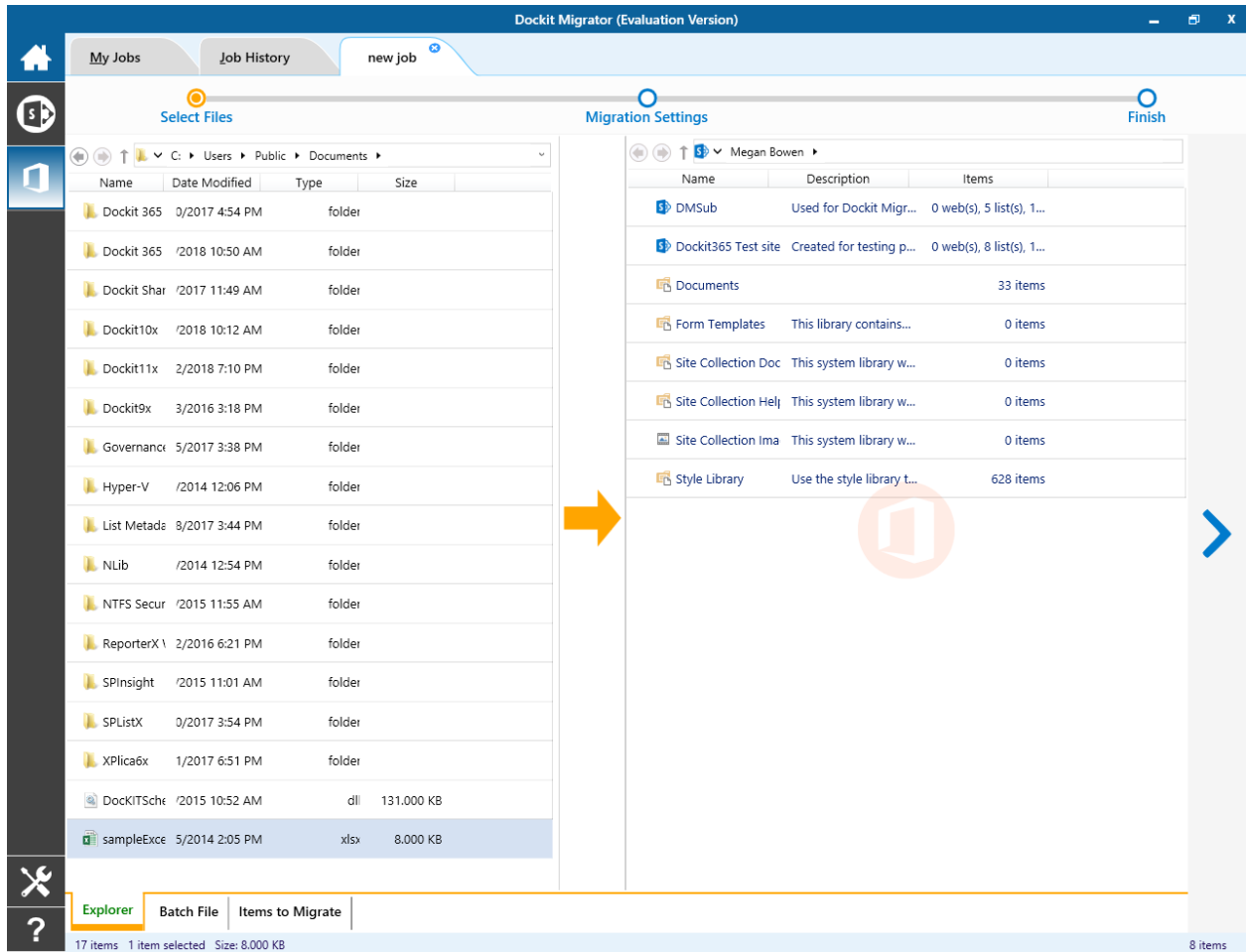
4. Drag and Drop files from File share (Left Pane) to OneDrive users (Right Pane) or Select files and Right click file share, select Add to SharePoint.



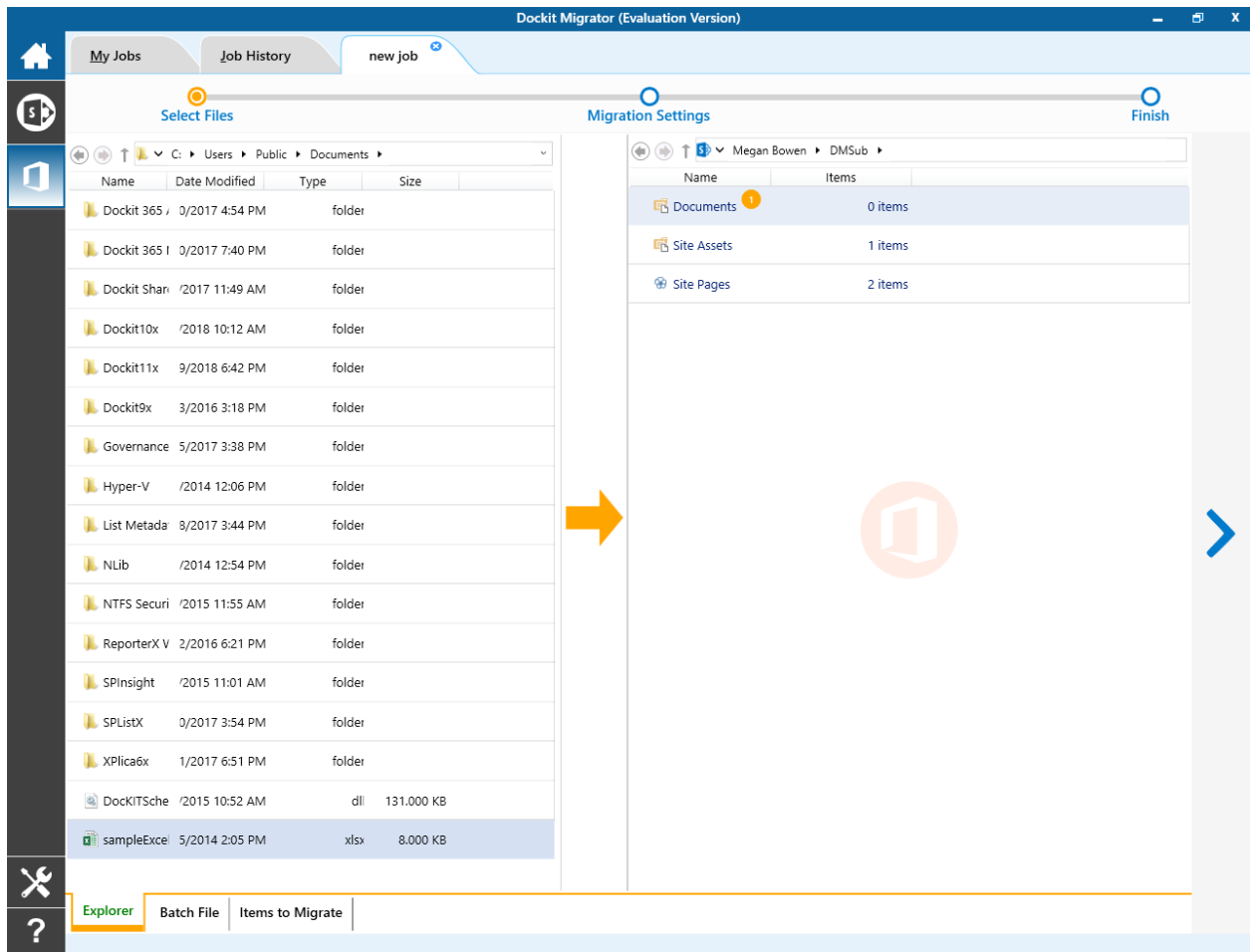
5. Click **Items to Migrate** on Right pane to check the list of files selected for migration, also you can remove files by clicking the Red **X**.
6. Specify [Migration Settings](#)
7. Click **Save & Close** button to create and close the job, or click < button to navigate to previous page to change any job settings.
8. After saving the job, it will be listed on the Job Manager page. You can click on  to initiate the migration process.

OneDrive Users

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



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



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

Batch File Structure

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

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

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

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

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

Path	Destination Path	New Folder
M:\My Document\Sample File.xlsx	https://contoso-my.sharepoint.com/personal/johndoe_contoso_onmicrosoft_com/documents/folder1	folder2/folder3

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

Another batch file structure for OneDrive Multiple users as follows:

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

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

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

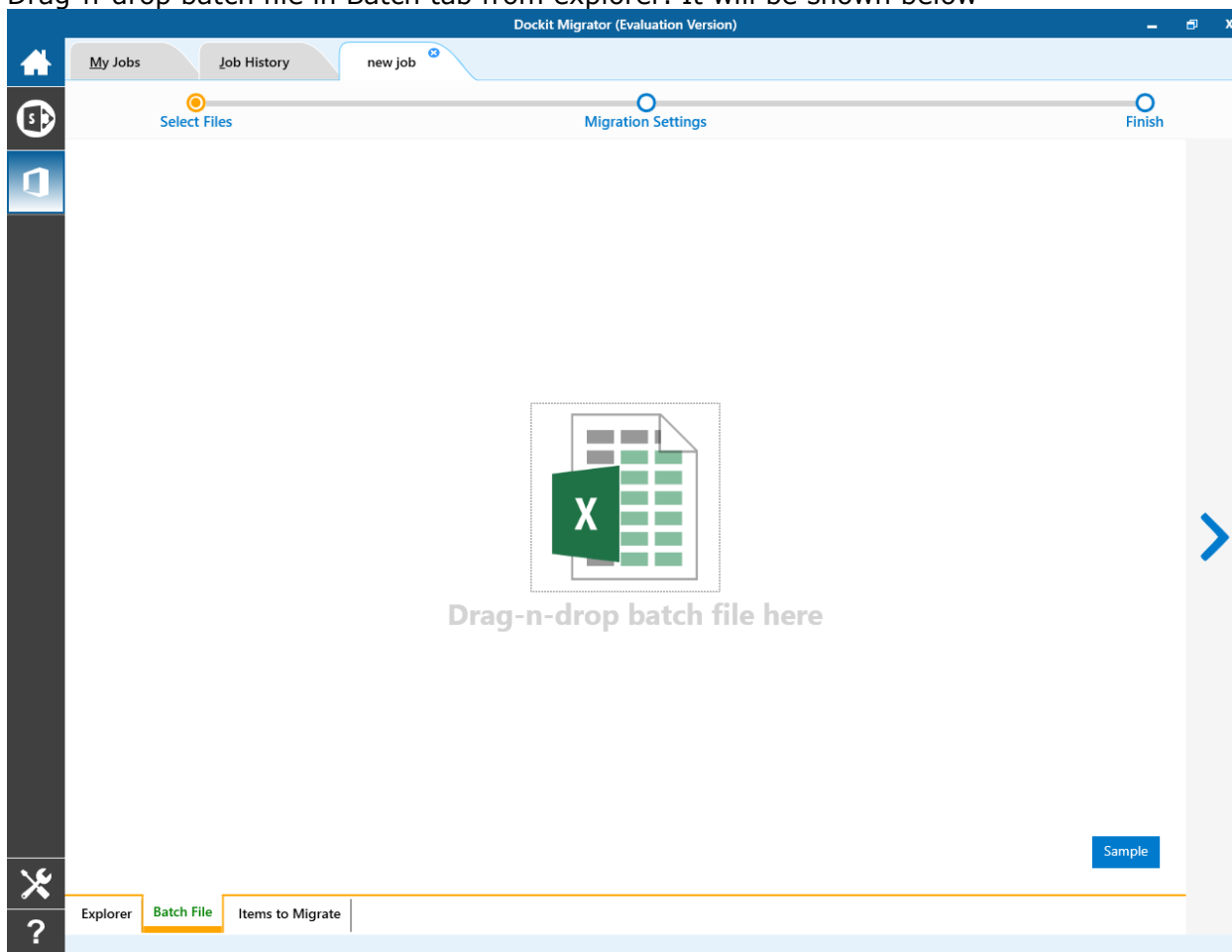
For instance, please see the batch descriptor file snippet given below:

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

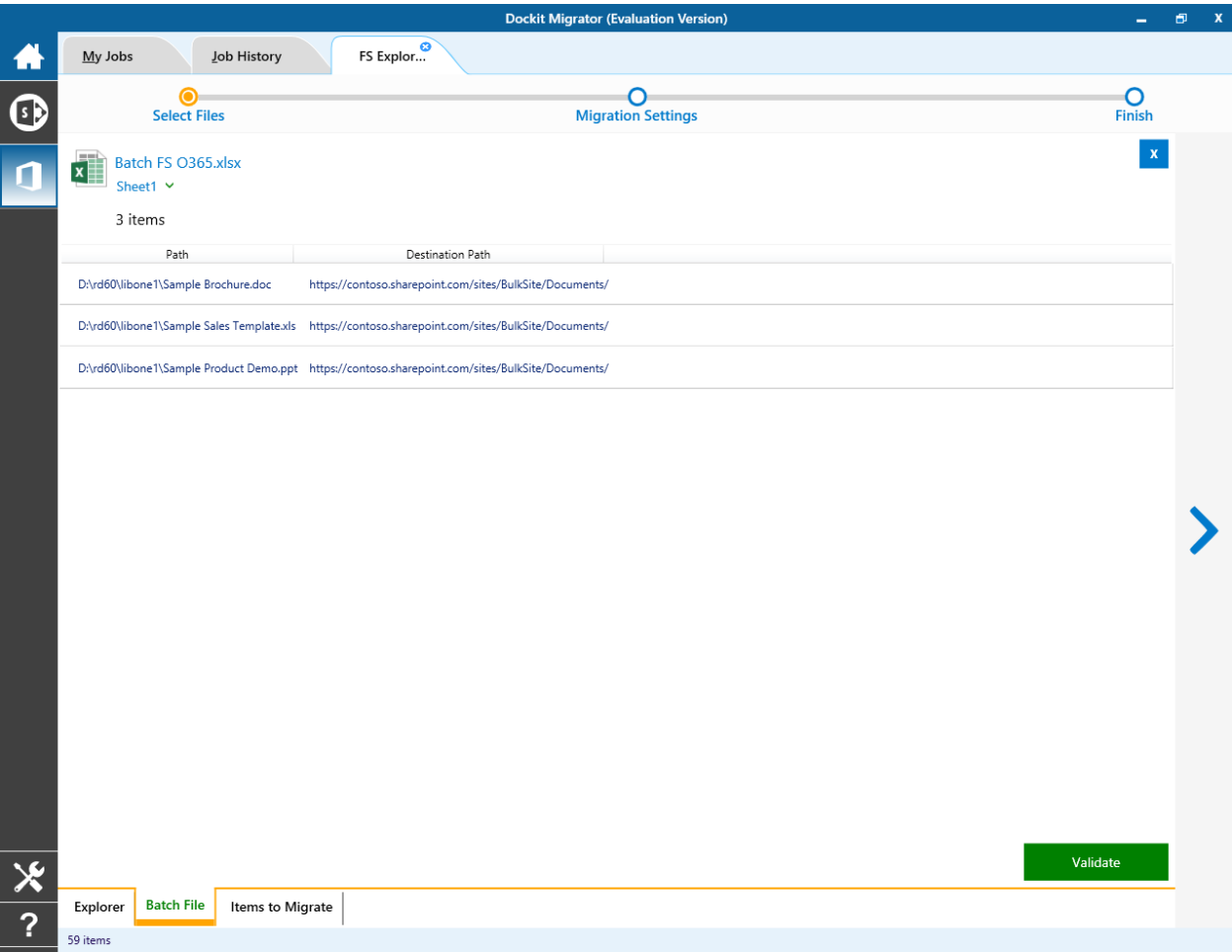
Dockit Migrator automatically provision the OneDrive, if OneDrive is not available for specified user and it creates the folders (folder2/folder3) specified in the column 'New Folder' underneath the specified OneDrive user's personal site. The 'Sample File.xlsx' will be imported into the new destination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

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

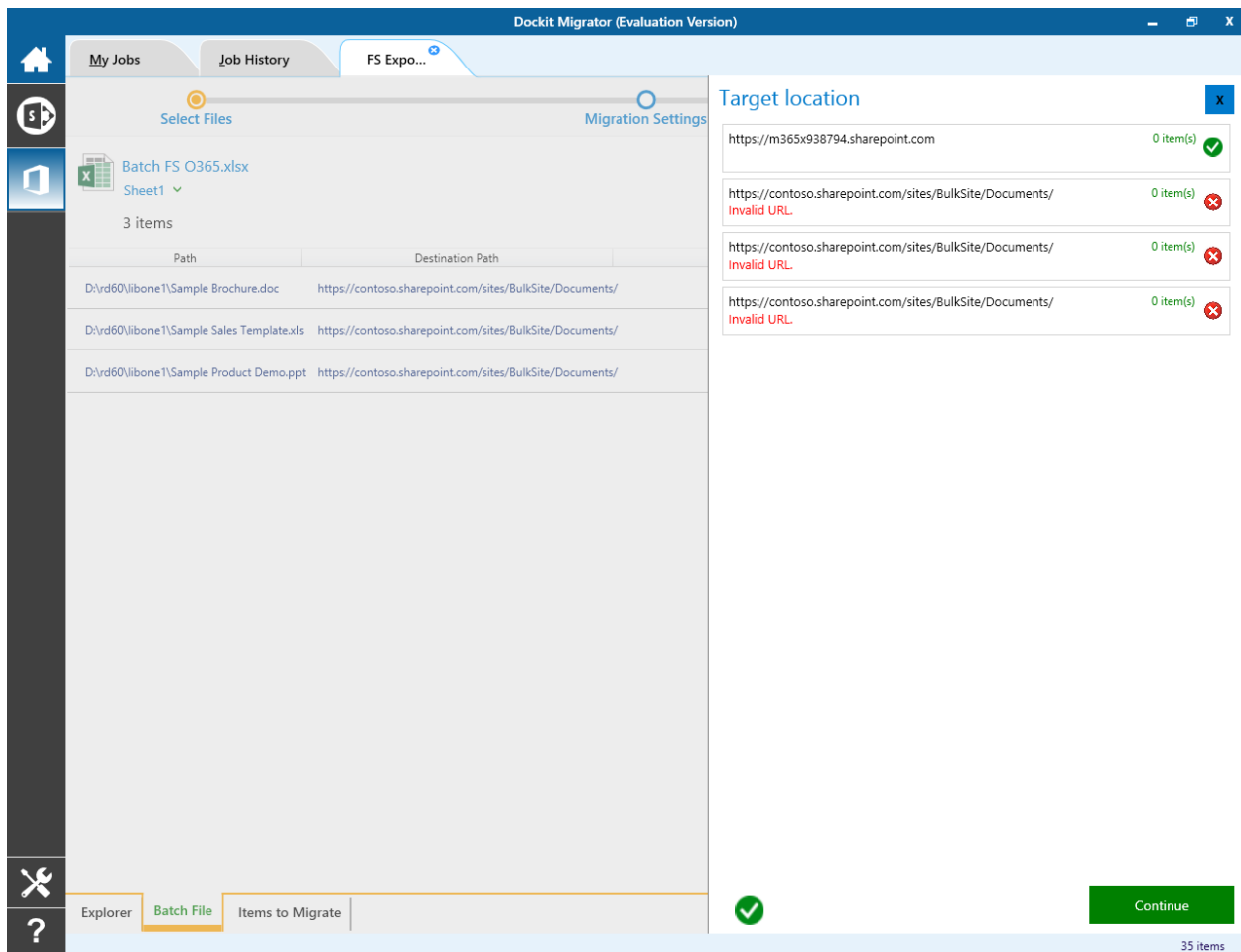
1. Drag-n-drop batch file in Batch tab from explorer. It will be shown below



Batch file content will be shown as below.



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

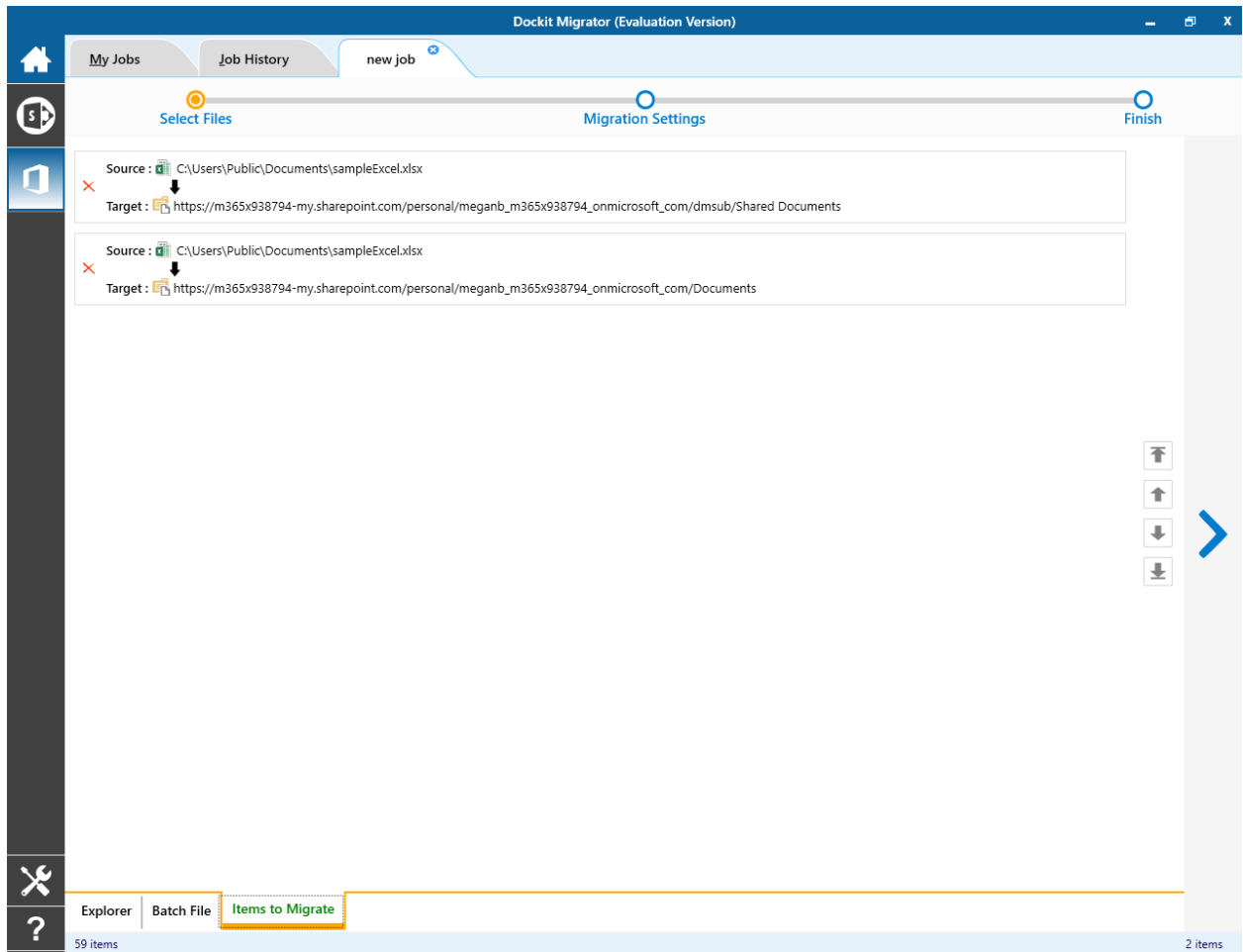


Once the validation is completed click the Continue button to proceed for next step. And the batch file content will be added to Items to Migrate tab.

Items to Migrate

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

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

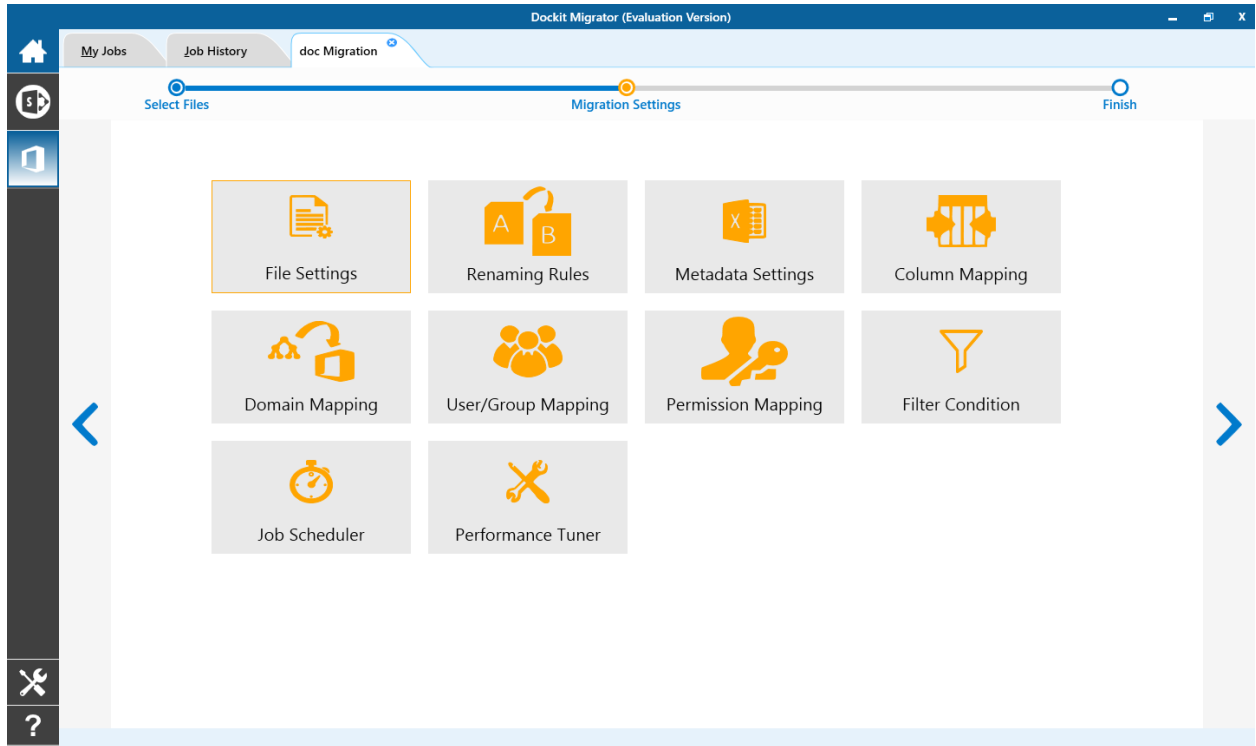


2. The selected folders and files added for import will be displayed in the **Items to Migrate** page. Dockit Migrator processes the top-level folders and files added for import in the order in which it appears in the **Items to Migrate** page. The import process order can be changed by the navigation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

3. Click > button to proceed.

Migration Settings

1. Migration Settings will appear as shown below.



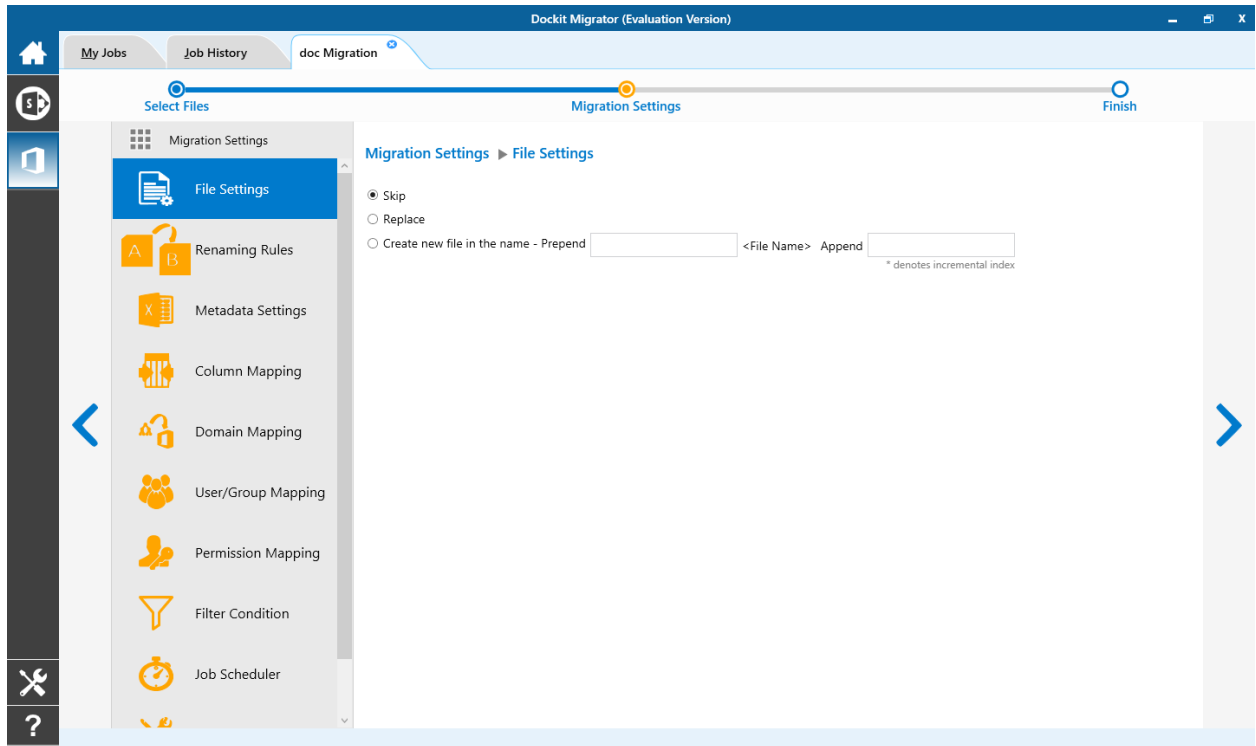
2. From this page, you can :

- [File Settings](#)
- [Renaming Rules](#)
- [Permission Mapping](#)
- [User/Group Mapping](#)
- [Domain Mapping](#)
- [Filter Conditions](#)
- [Job Scheduler](#)
- [Performance Tuner](#)

File Settings

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

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



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

Skip - Skips the file without overwriting.

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

Create new file - Creates a new file by appending and prepending the user defined characters with the source file name and imports the newly created file. **Note:** * is the reserved character and denotes incremental index. For example, if a document named 'Sample.docx' already exists in the target location, Dockit Migrator will create a new file with the name as 'Sample1.docx'.

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

Renaming Rules

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

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

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

The renaming rules page will appear as shown below :

The screenshot displays the Dockit Migrator (Evaluation Version) application window. The top navigation bar includes 'My Jobs', 'Job History', and 'doc Migration'. Below this, a progress bar shows 'Select Files', 'Migration Settings', and 'Finish'. The 'Migration Settings' section is expanded, showing 'Renaming Rules' as the active tab. The left sidebar contains icons for various settings: Migration Settings, File Settings, Renaming Rules, Metadata Settings, Column Mapping, Domain Mapping, User/Group Mapping, Permission Mapping, Filter Condition, and Job Scheduler. The main content area is divided into 'File' and 'Folder' sections. Each section has a table with 'Find' and 'Replace' columns. The 'File' section shows rules for '#' and '%', and the 'Folder' section shows rules for '*' and '_Files'. There are also truncation settings for file and folder names at the bottom.

Section	Find	Replace
File	#	-
	%	-
Folder	#	-
	%	-
	*_Files	_Files_

Truncate file name, max length (including file extension): 256

Truncate folder name, max length: 250

1. Folder Renaming Rule:

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

Truncate folder names:

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

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

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

2. File Renaming Rule:

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

Truncate file names:

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

Select appropriate checkbox for file and enter a valid character length for file name.

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

Sample renaming rules:

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

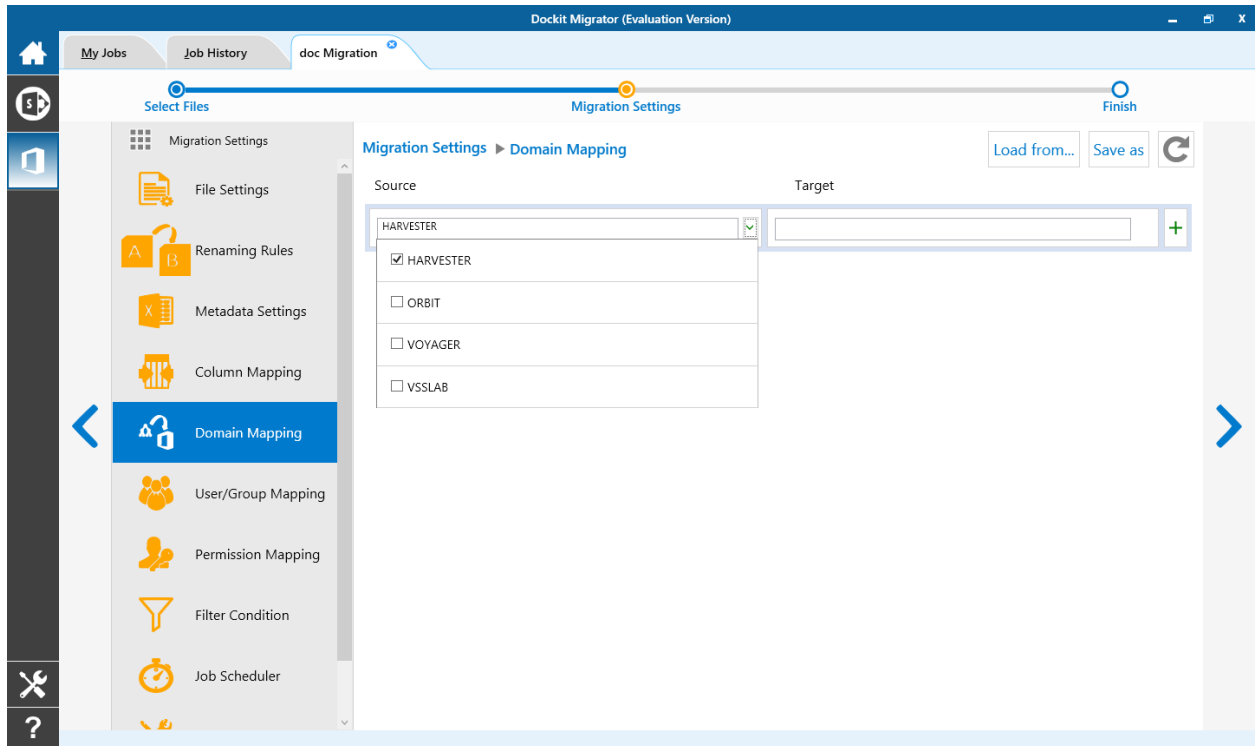
				if the file names contains V and followed by any one character.
Sample	?p	{empty}	Sale	Truncate one character preceding the letter p in the file name.
SampleV12	V??	{empty}	Sample	Truncate two characters following the character / letter V in the file name.
SampleFileVersion	*File*	{empty}	SampleVersion	Truncate the word 'File' in any position in the file name.
Sample.Matrix	\.	Dot	SampleDotMatrix	Example of escape sequence for .
Sample?File	\?	Text	SampleTextFile	Example of escape sequence for ?
Hello*World	*	{empty}	HelloWorld	Example of escape sequence for *
Sample\$	\\$	Dollar	SampleDollar	Example of escape sequence for \$
Sample^File	\^	{empty}	SampleFile	Example of escape sequence for ^
Sample+Document	\+	Plus	SamplePlusDocument	Example of escape sequence for +
Hello<World	\<	{empty}	HelloWorld	Example of escape sequence for <
Hello>World	\>	{empty}	HelloWorld	Example of escape sequence for >
[Document	\[	Word	WordDocument	Example of escape sequence for [
Word]	\]	Document	WordDocument	Example of escape sequence for]
(File	\(	Sample	SampleFile	Example of escape sequence for (

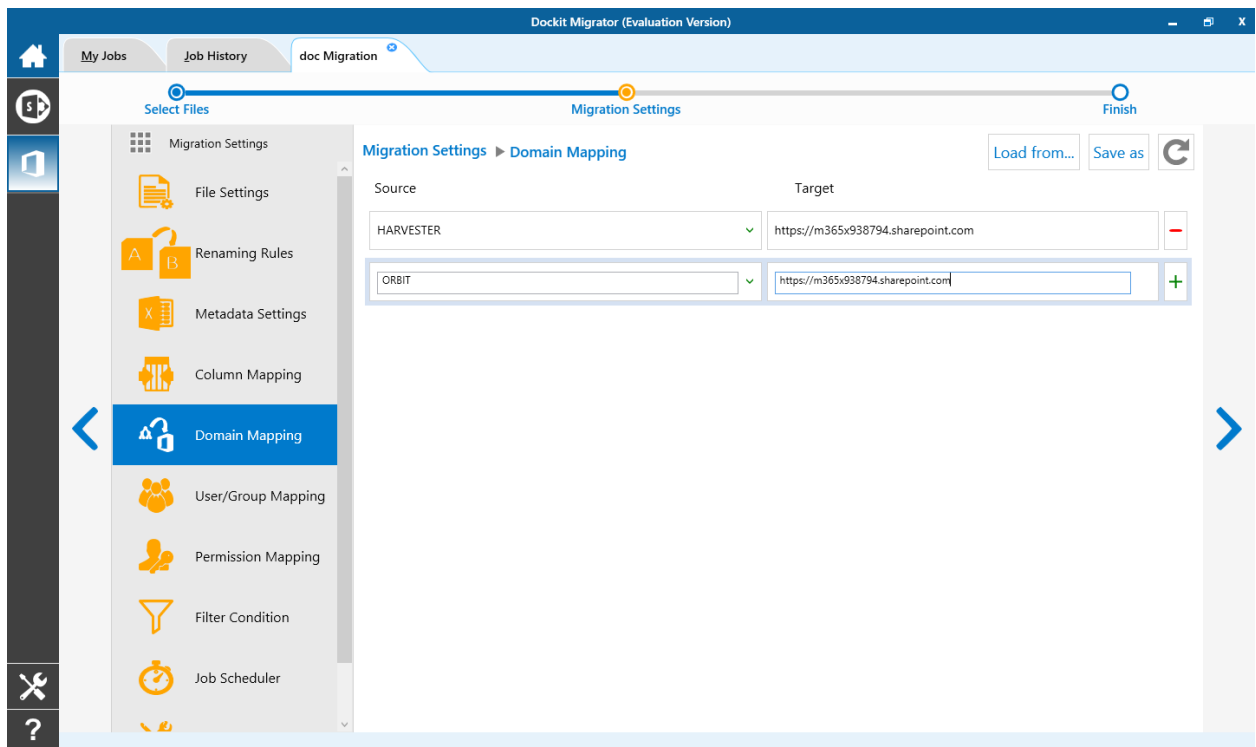
Sample)	\)	Document	SampleDocument	Example of escape sequence for)
---------	----	----------	----------------	----------------------------------

Domain Mapping

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

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





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

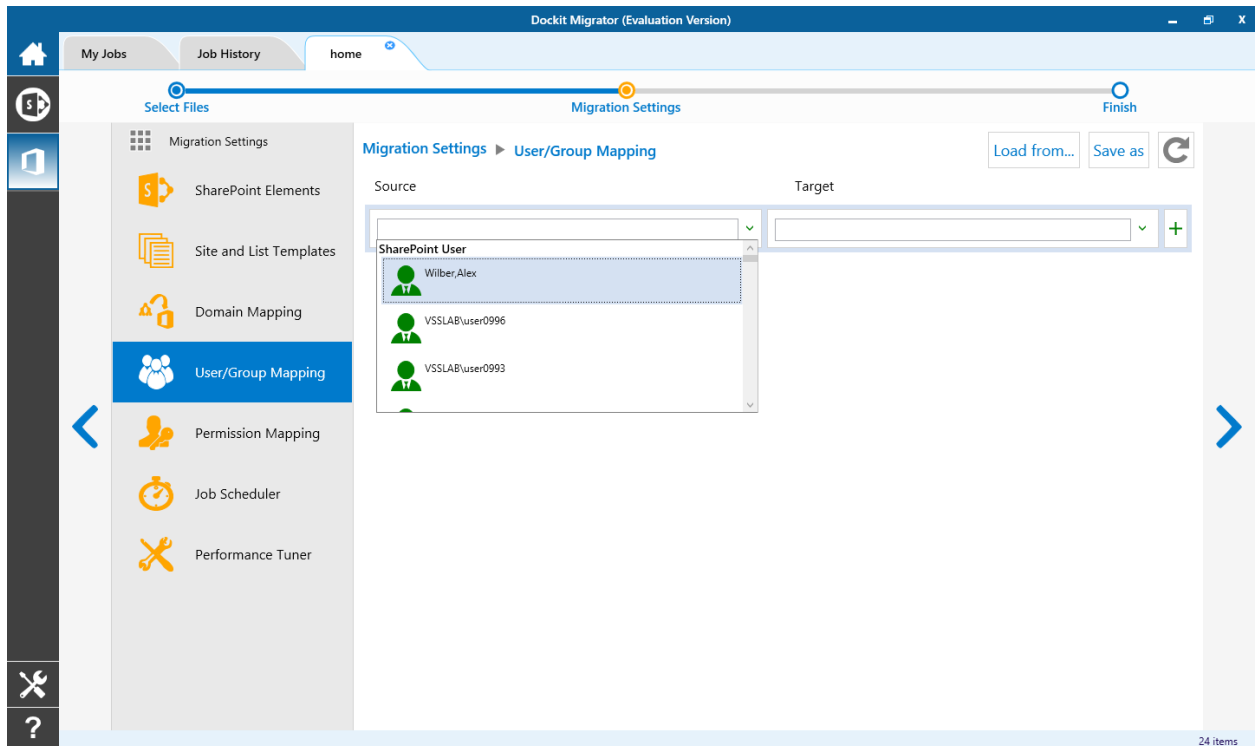
Note: As for entering free texts, multiple source domains can be entered, separated by comma.

User Mapping

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

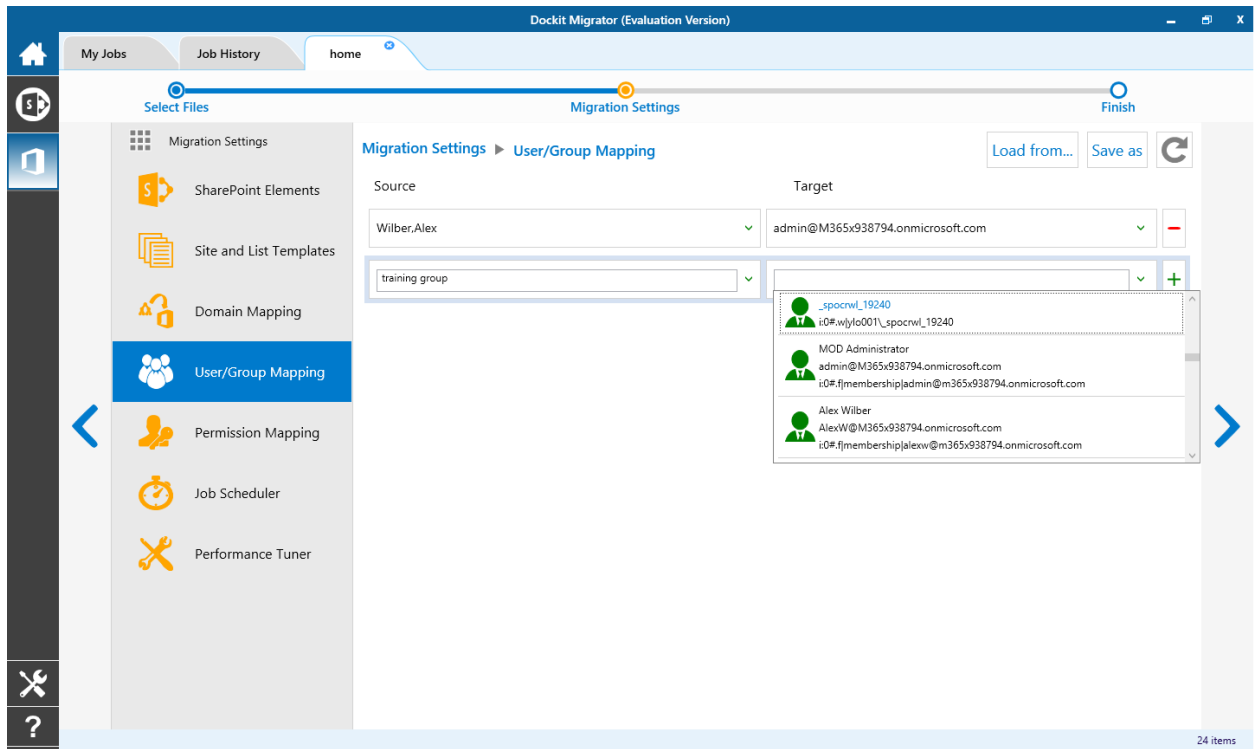
1. Source User

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



2. Target User

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



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

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

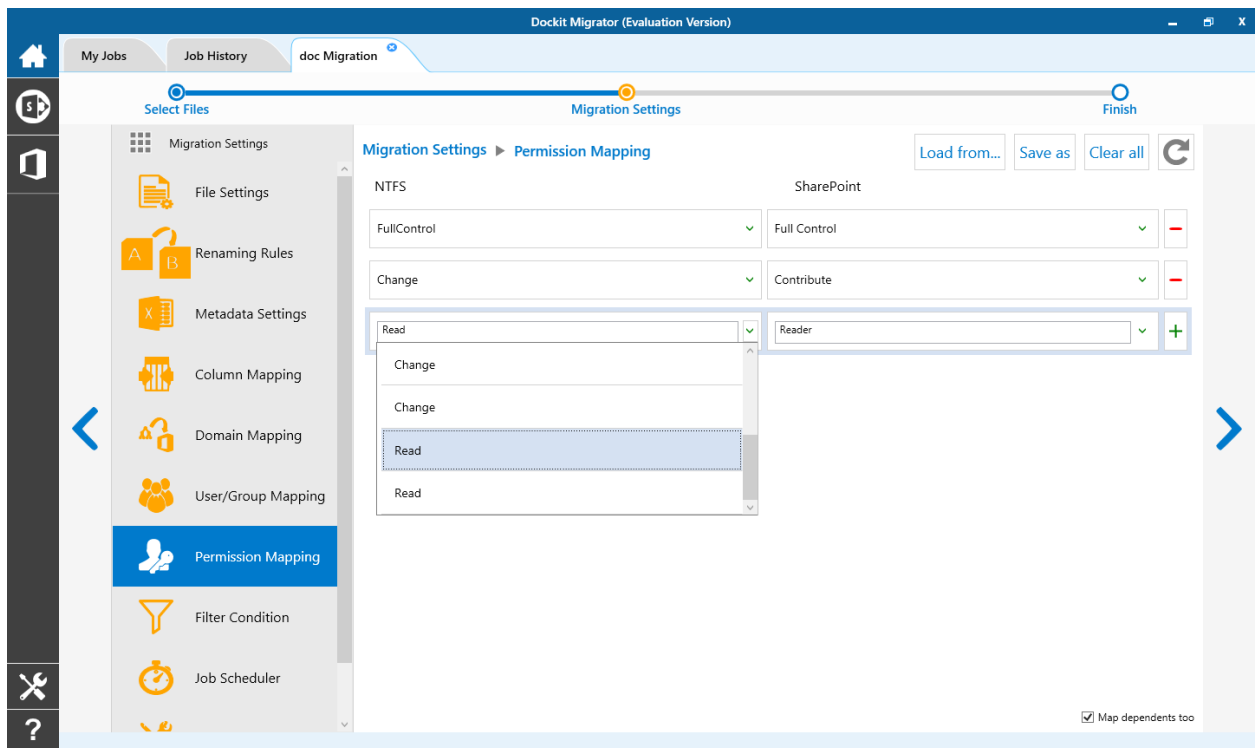
Permission Mapping

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

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

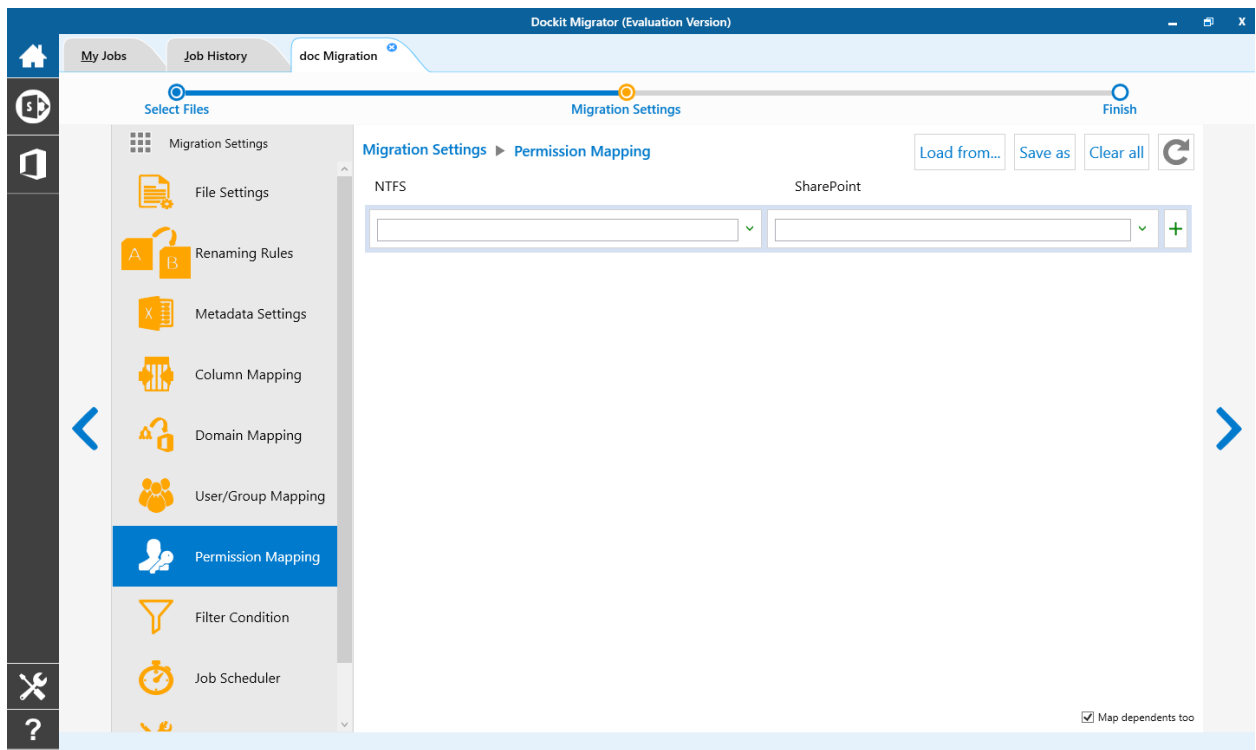
1. Source Permission

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



2. Target Permission

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



See the following sections for more information

- [User Mapping](#)
- [Domain Mapping](#)

Filter Conditions

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

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

File Filter

The screenshot displays the Dockit Migrator (Evaluation Version) interface. The top navigation bar includes 'My Jobs', 'Job History', and 'doc Migration'. The main workspace is divided into three sections: 'Select Files', 'Migration Settings', and 'Finish'. The 'Migration Settings' section is active, showing 'Filter Condition' settings. A sidebar on the left lists various settings: Migration Settings, File Settings, Renaming Rules, Metadata Settings, Column Mapping, Domain Mapping, User/Group Mapping, Permission Mapping, Filter Condition (highlighted), and Job Scheduler. The 'Filter Condition' panel shows a table with columns: Property, Operator, Value, and Connector. Below this, a dropdown menu is open, displaying a grid of metadata and file property options. The grid is organized into two columns: 'Metadata File' and 'File Property'. The 'Metadata File' column includes options like Title, Category, Character Count, Date Last Printed, Manager, Presentation Format, and Thumbnail. The 'File Property' column includes options like Name, Keywords, Character Count With Spaces, Date Last Saved, Multimedia Clip Count, Revision Number, Total Edit Time, Subject, Comments, Company, Hidden Slide Count, Note Count, Shared Document, Version, Author, Application Name, Date Created, Last Saved By, Page Count, Slide Count, Word Count, Byte Count, Date Modified, Line Count, Paragraph Count, Template, and File Name. At the bottom of the panel, there is a checkbox for 'Metadata File' (checked) and 'File Property' (unchecked), and a section for 'Migrate if the above condition is' with radio buttons for 'Satisfied' (selected) and 'Not satisfied'.

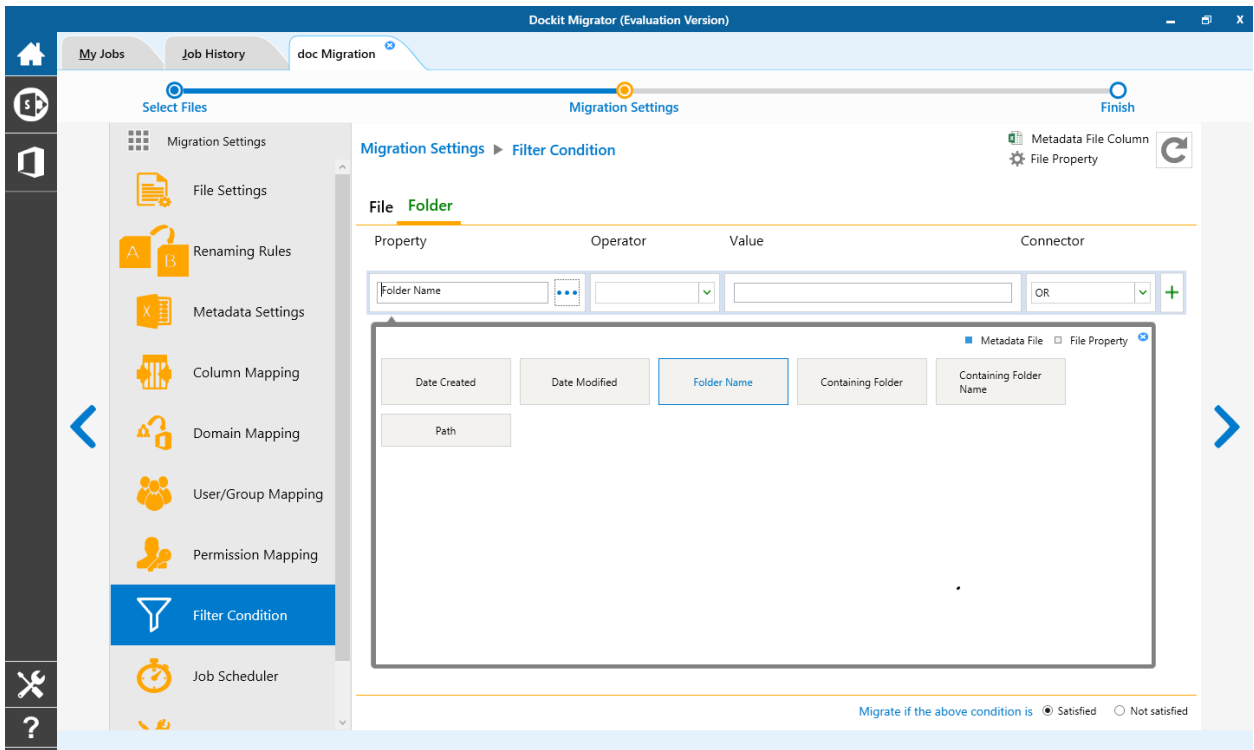
Property	Operator	Value	Connector
	...		OR

Metadata File		File Property	
Title	Name	Subject	Author
Category	Keywords	Comments	Application Name
Character Count	Character Count With Spaces	Company	Date Created
Date Last Printed	Date Last Saved	Hidden Slide Count	Last Saved By
Manager	Multimedia Clip Count	Note Count	Page Count
Presentation Format	Revision Number	Shared Document	Slide Count
Thumbnail	Total Edit Time	Version	Word Count

Migrate if the above condition is ☒ Satisfied ☐ Not satisfied

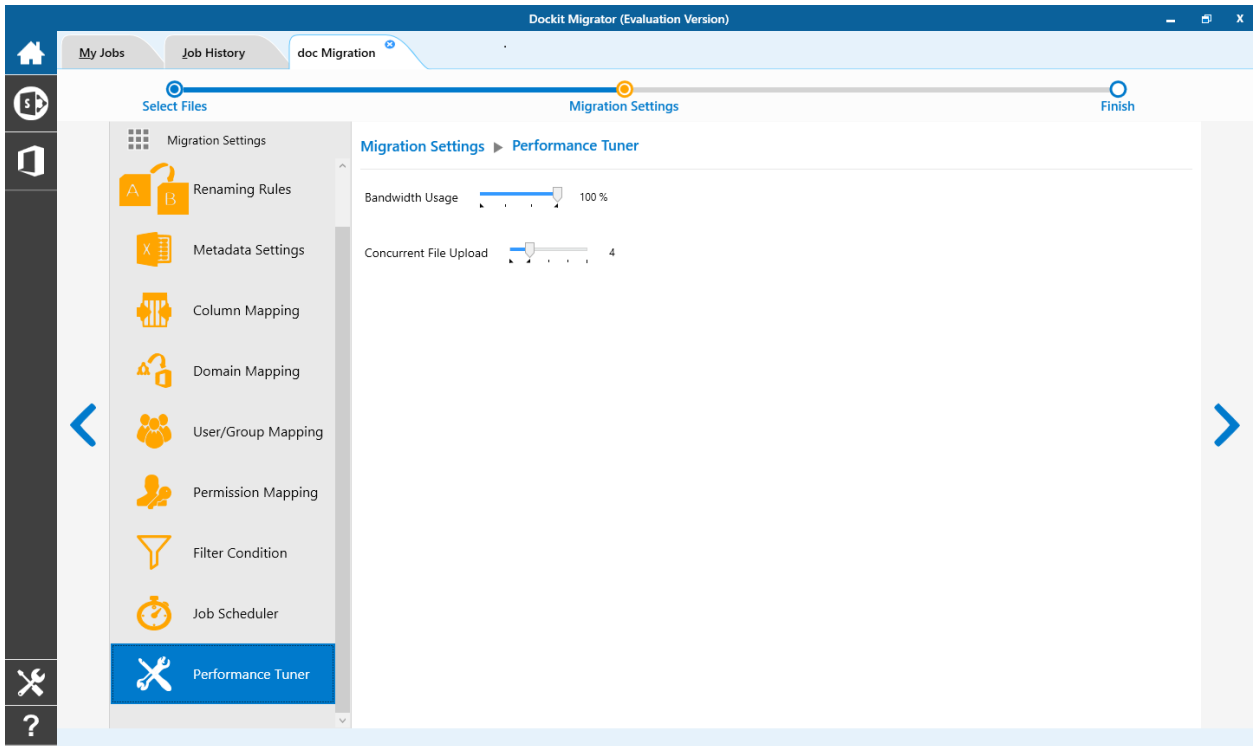
2. Add folder conditions in folder filter tab as shown as below.

Folder Filter



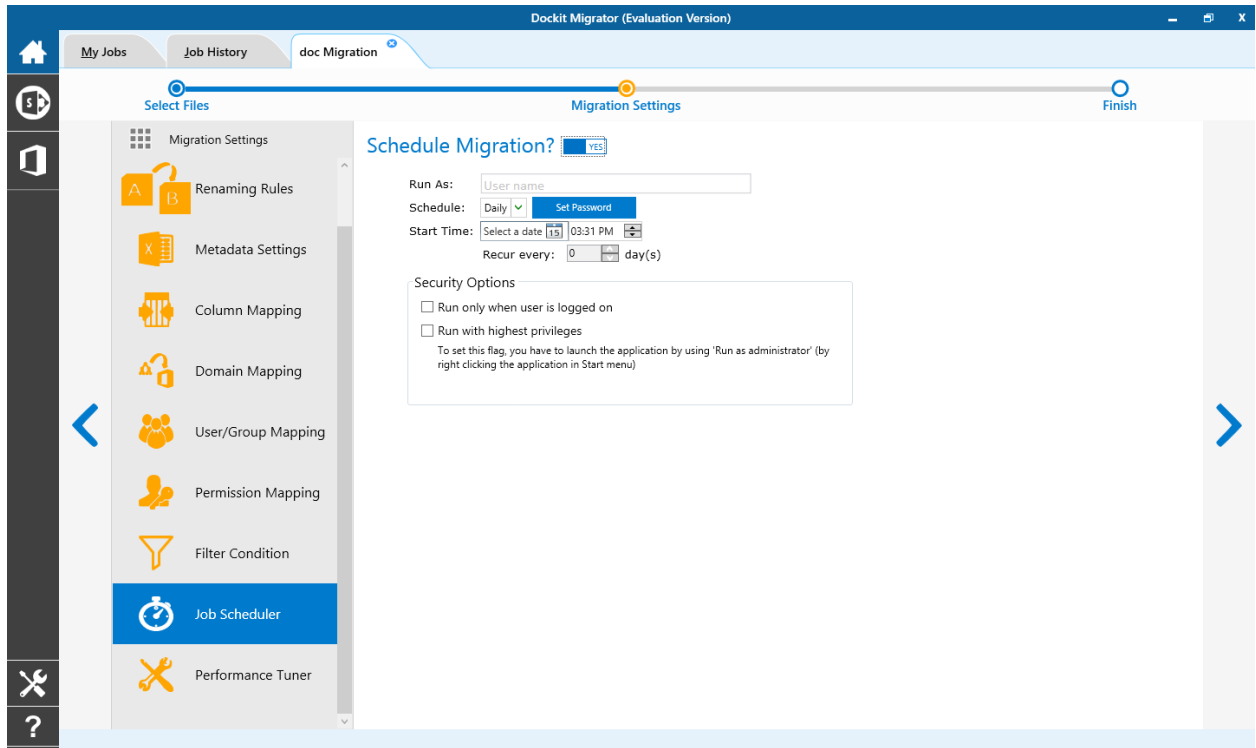
Performance Tuner

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



Job Scheduler

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



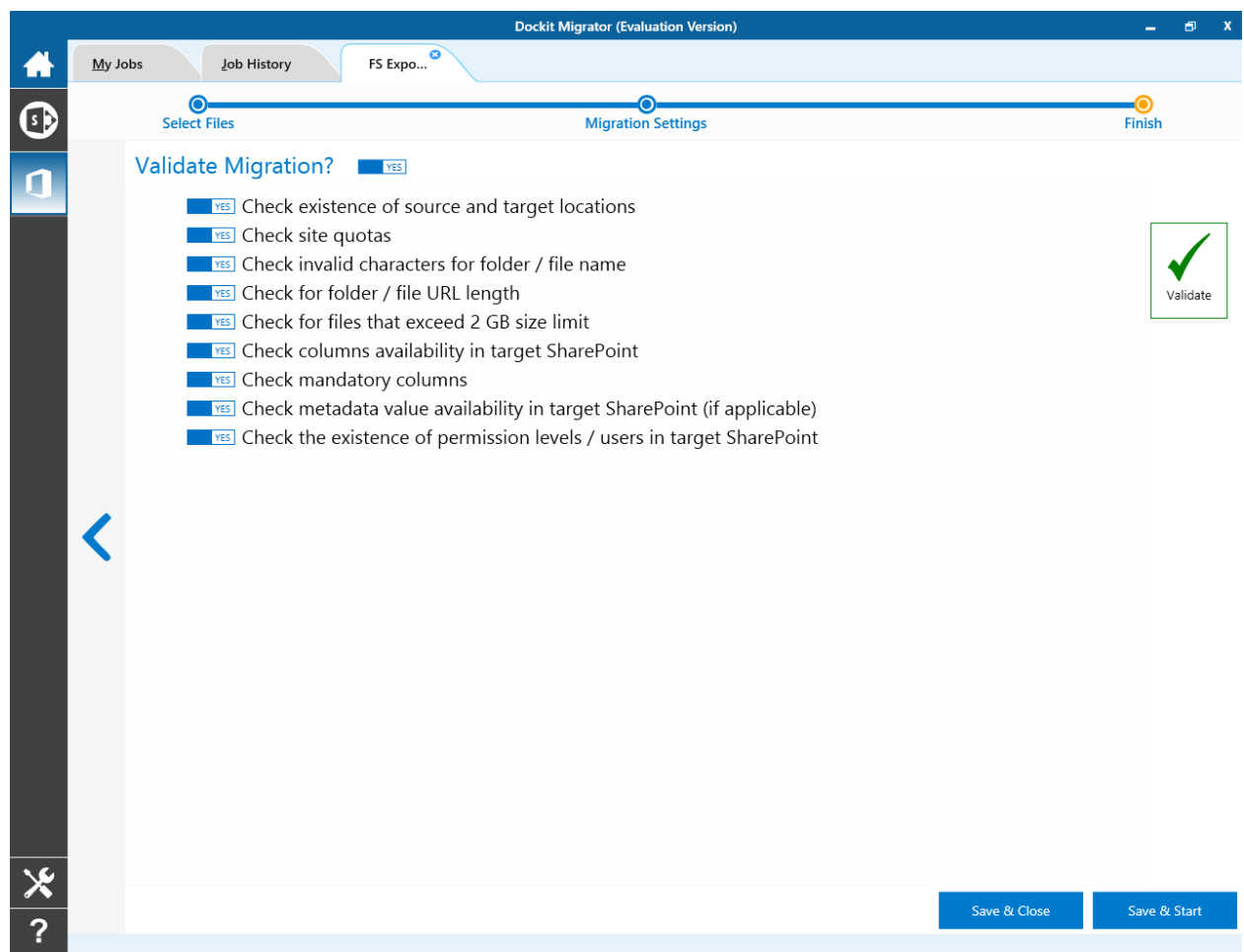
2. Docket Migrator will create a schedule task in the Windows Scheduled Tasks with the given settings.

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

Pre-Migration Validation

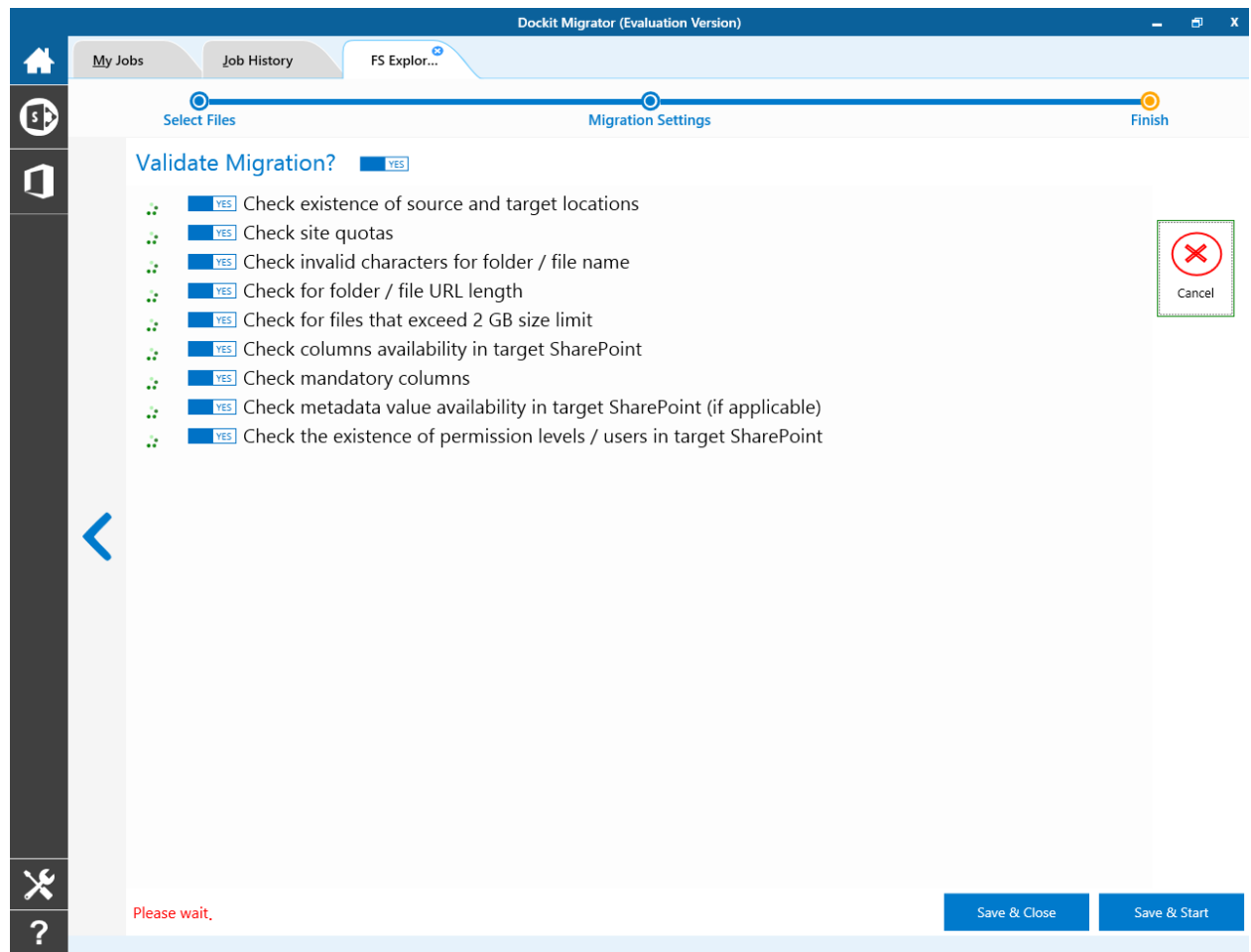
Pre-migration Validation tool helps you validate the exact steps performed by Dockit Migrator during the migration process. This tool does not migrate any files to the destination location. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there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

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



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

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



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

SharePoint to Office 365 Migration

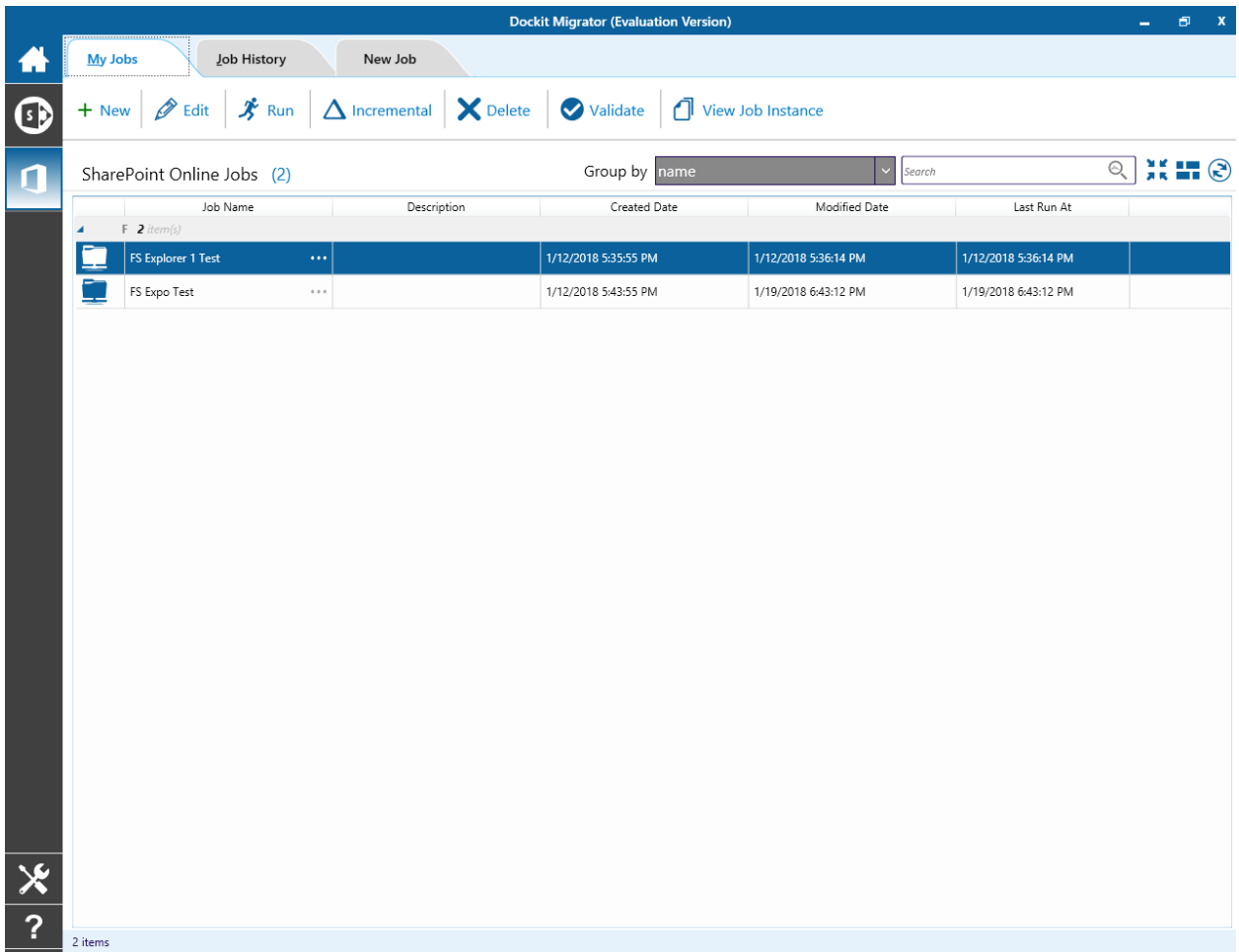
[SharePoint On-premises to Office 365 Migration](#)

[SharePoint On-premises to OneDrive](#)

SharePoint On-premises to Office 365 Migration

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

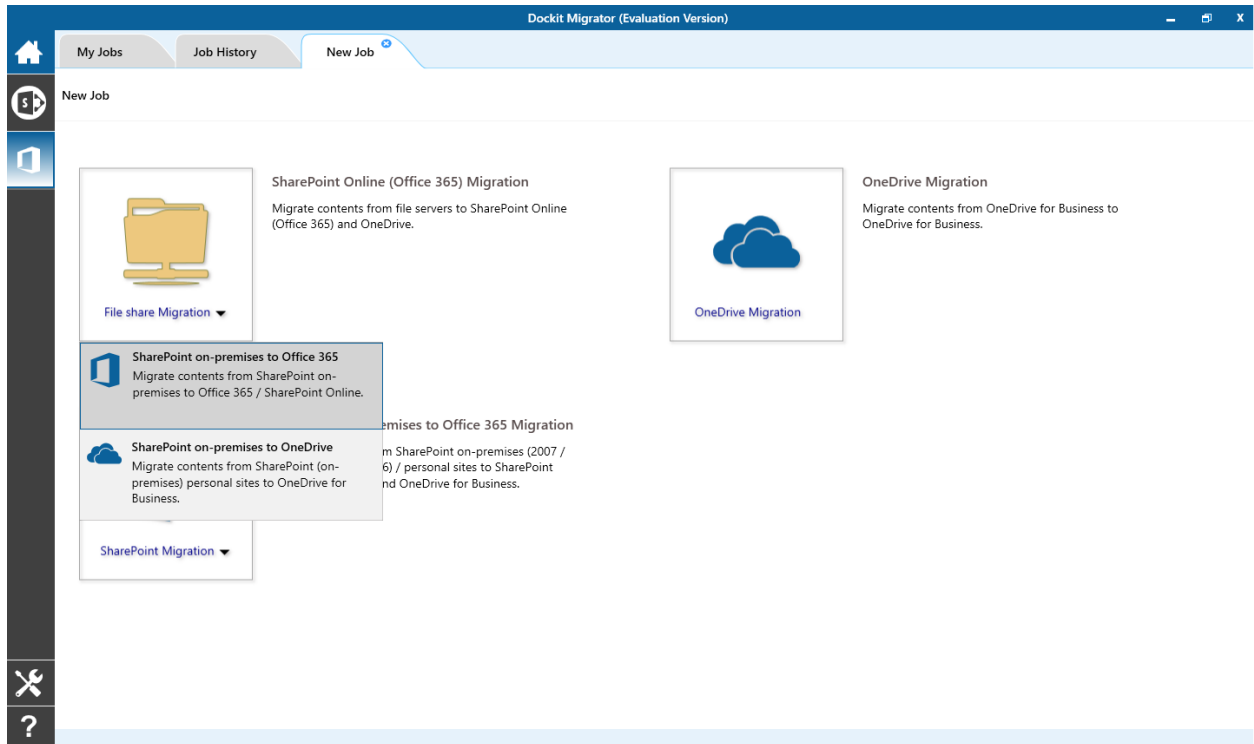
Click New option on My Jobs tab on SharePoint Online (Office 365) migration page.



The screenshot displays the 'Docket Migrator (Evaluation Version)' application window. The 'My Jobs' tab is active, showing a list of migration jobs. The interface includes a top navigation bar with 'My Jobs', 'Job History', and 'New Job' tabs. Below this is a toolbar with icons for '+ New', 'Edit', 'Run', 'Incremental', 'Delete', 'Validate', and 'View Job Instance'. The main area shows a table titled 'SharePoint Online Jobs (2)' with columns for Job Name, Description, Created Date, Modified Date, and Last Run At. Two jobs are listed: 'FS Explorer 1 Test' and 'FS Expo Test'. The bottom status bar indicates '2 items'.

Job Name	Description	Created Date	Modified Date	Last Run At
FS Explorer 1 Test		1/12/2018 5:35:55 PM	1/12/2018 5:36:14 PM	1/12/2018 5:36:14 PM
FS Expo Test		1/12/2018 5:43:55 PM	1/19/2018 6:43:12 PM	1/19/2018 6:43:12 PM

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



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

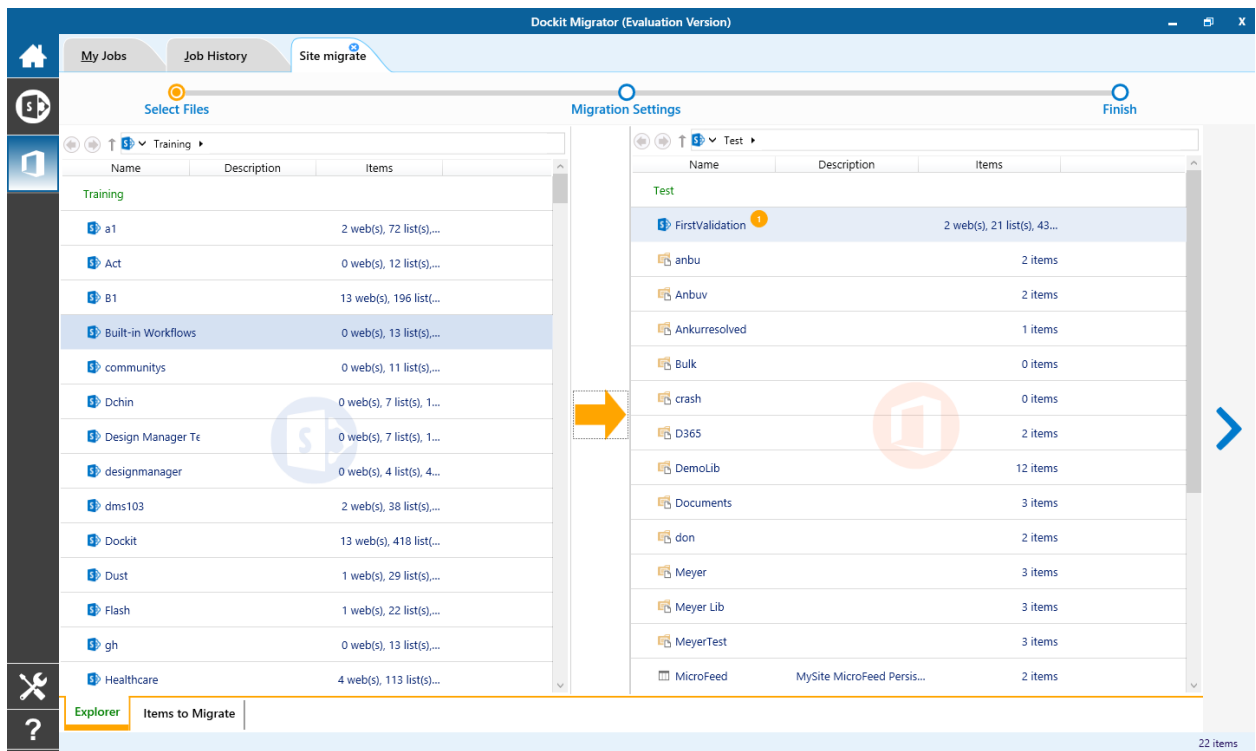
The screenshot shows the 'Site migrate' page in the Dockit Migrator application. The page is divided into a sidebar and a main content area. The sidebar contains icons for home, jobs, history, and migration. The main content area has a header with 'My Jobs', 'Job History', and 'Site migrate' tabs. Below the tabs is a breadcrumb trail: 'New Job > SharePoint to Online > Site migrate'. The main content area contains a 'Site migrate' section with a 'Job Description' text box. Below this are two sections: 'Source SharePoint Credential' and 'Target SharePoint Credential'. Each section has fields for 'Source URL', 'Authentication' (with a dropdown menu), 'User name', and 'Password'. An orange arrow points from the Source section to the Target section. A 'Connect' button is at the bottom right.

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

1. Specify a valid SharePoint site URL in source and specify valid Office 365 URL in target URL textbox.
2. Specify the Authentication type and user credentials to connect to the SharePoint URL using the options given below.
3. Specify the Authentication Type.
 - A. Windows
 - B. Forms
 - C. Cloud Identity
 - D. Federated Identity
4. Specify the **user credentials**
5. Specify the user context stored in the user profile (OR) Enter the user name in any ONE of the following formats: **DOMAIN NAME\USER NAME, UserName@DomainName, User Name** and its corresponding password. Dockit Migrator will initiate Windows authentication or Forms authentication depending on configuration in the SharePoint site.

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

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

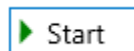


8. Click **Items to Migrate** on Right pane to check the list of items selected for migration, also you can remove files by clicking the Red X.

9. Specify [Migration Settings](#)

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

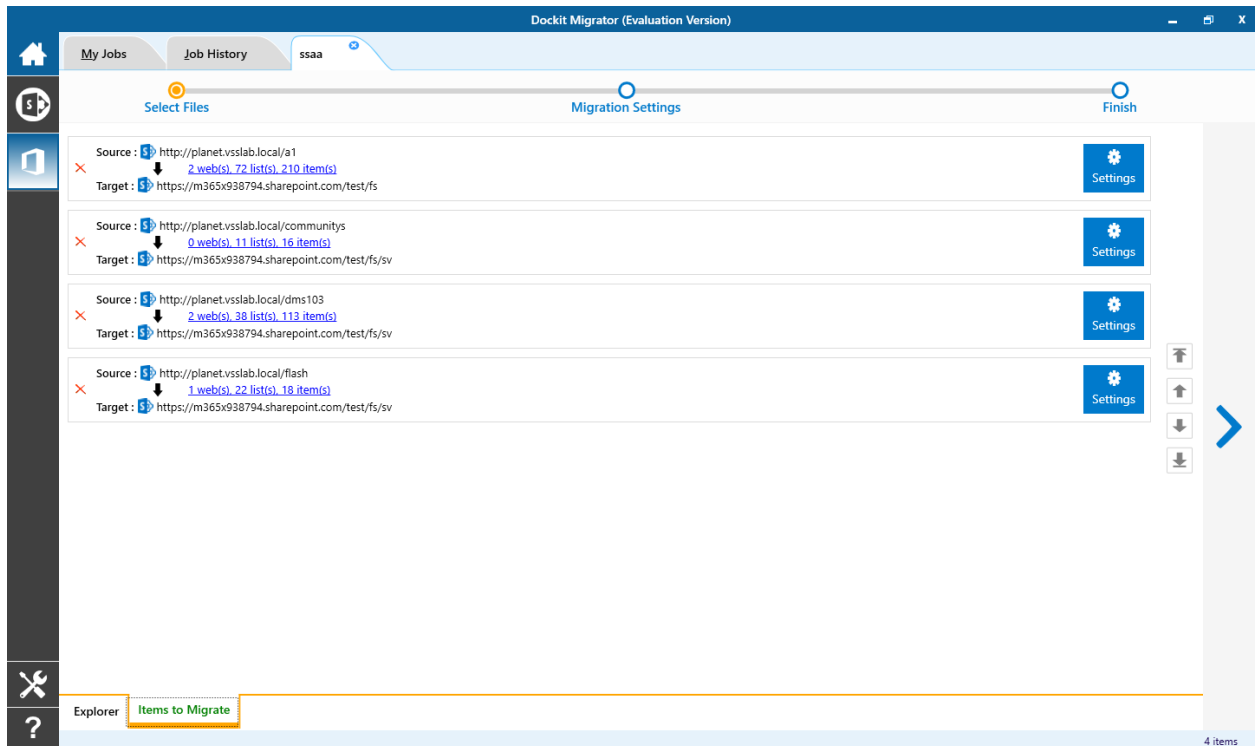
1. After saving the job, it will be listed on the Job Manager page. You can click on to initiate the migration process.



Items to migrate

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

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



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

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

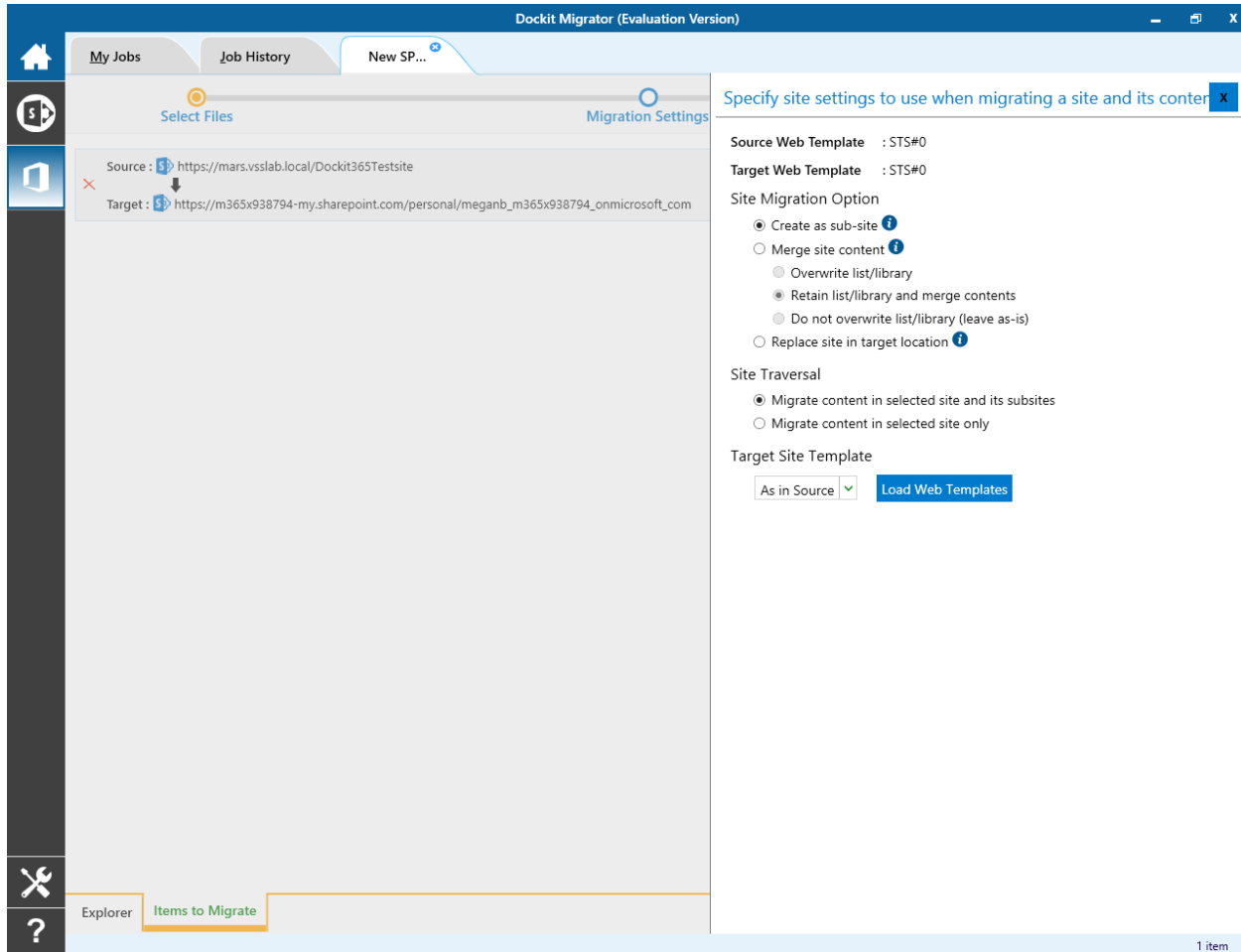
To specify migration options for site, click [Site Migration Options](#)

To specify migration options for List/Library, click [List/Library Migration Options](#)

- c. Click > button to proceed.

Site Migration Option

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



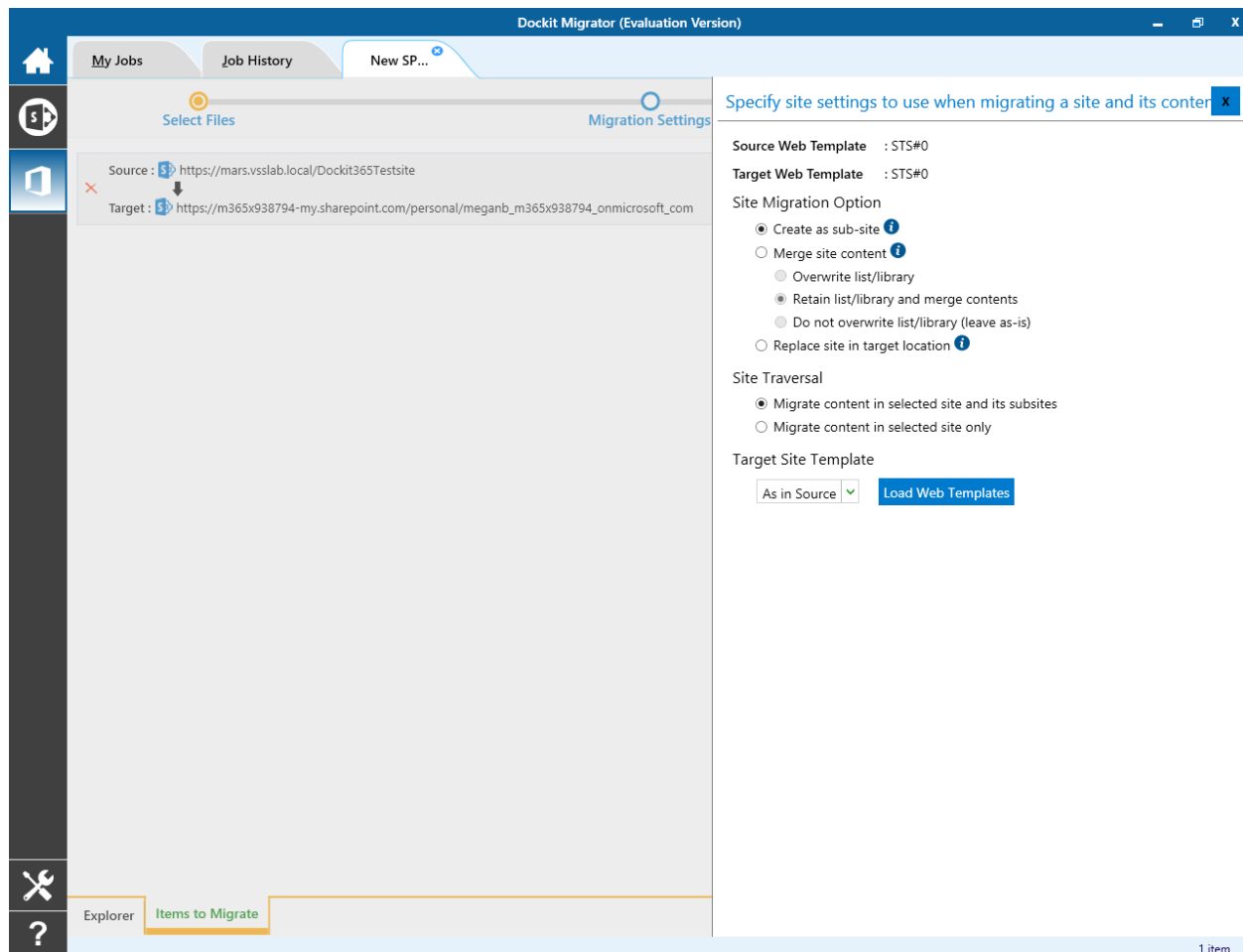
1. Select the site template to apply to the site from the list of available templates.

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

2. Select anyone of the following options given below to specify the content to be migrated from the source sites:
 1. **Create as sub site / replace sub site in target site** - The selected site in source location will be created as a sub-site in the target location. In case the target location contains a sub-site with the same title as the selected source site, then the source site content will be migrated to the sub-site in target location while retaining all sub-site content in the target site location.

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

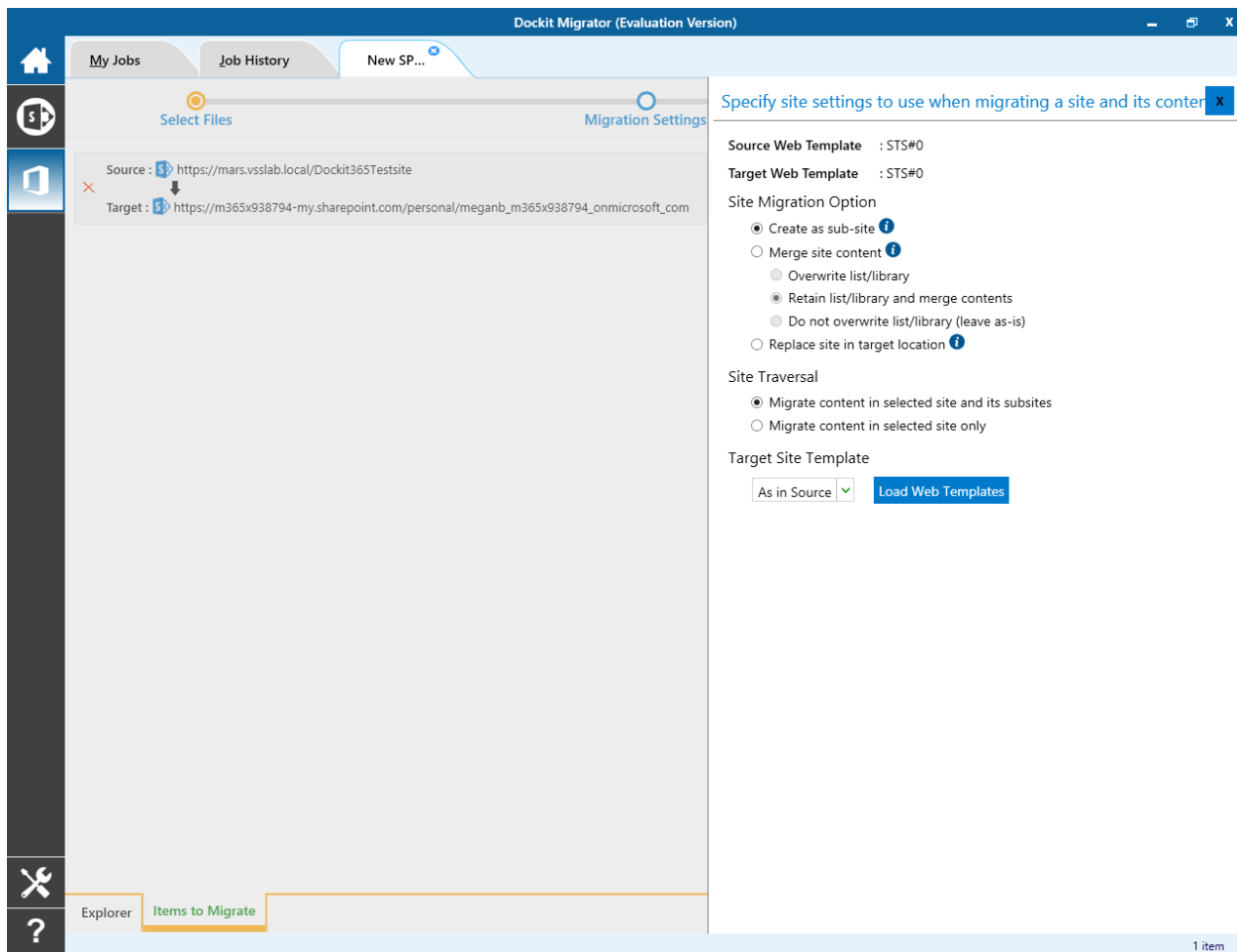
3. Site Traversal



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

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

4. Target Site Template

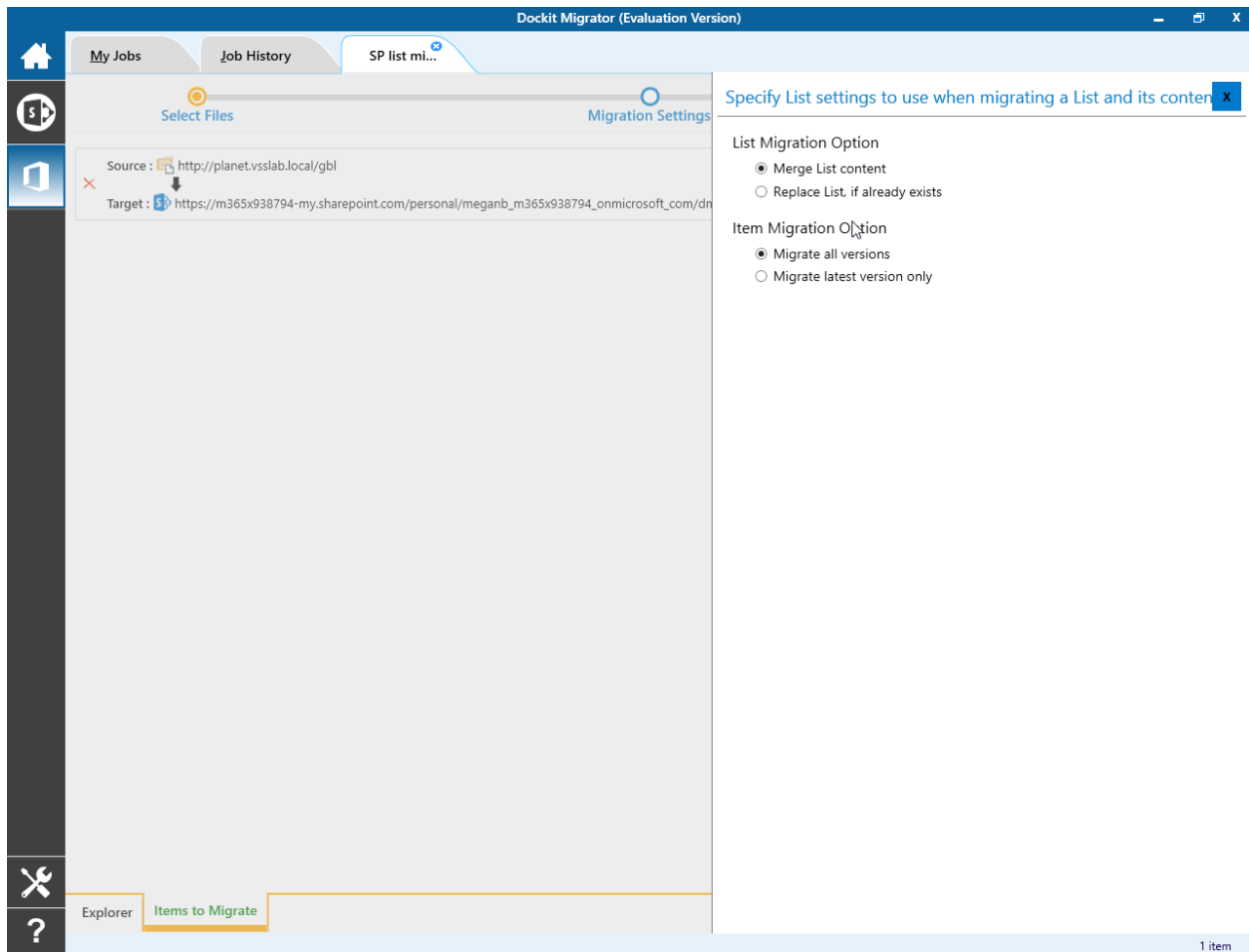


By Default, **Dockit Migrator** uses the same web template as in source SharePoint to create SharePoint site in target Office 365. However, the application allows you to change the web template of your choice. For this, you need to pick one from the dropdown box.

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

List Migration Option

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

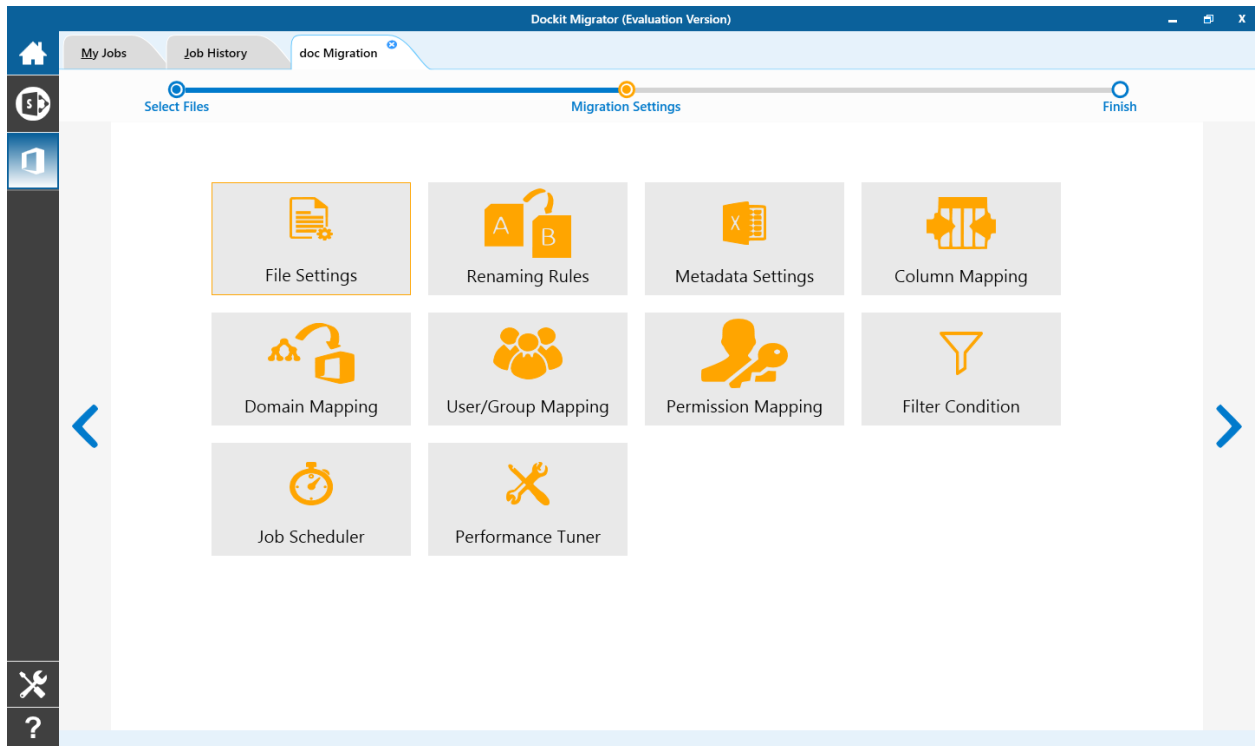


2. Select anyone of the following options given below to specify the content to be migrated from the source sites:

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

Migration Settings

1. Migration Settings will appear as shown below.



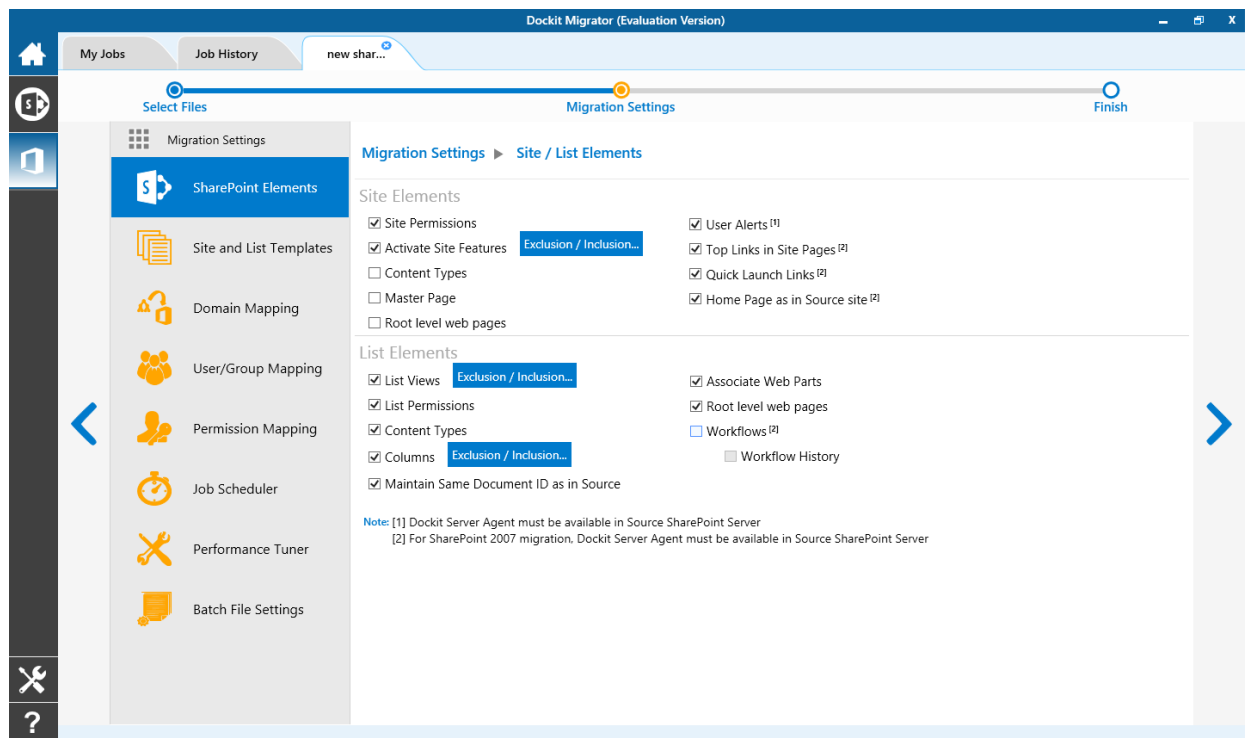
2. From this page, you can :

- [SharePoint Elements](#)
- [Site and List Templates](#)
- [Domain Mapping](#)
- [User/Group Mapping](#)
- [Permission Mapping](#)
- [Job Scheduler](#)
- [Performance Tuner](#)

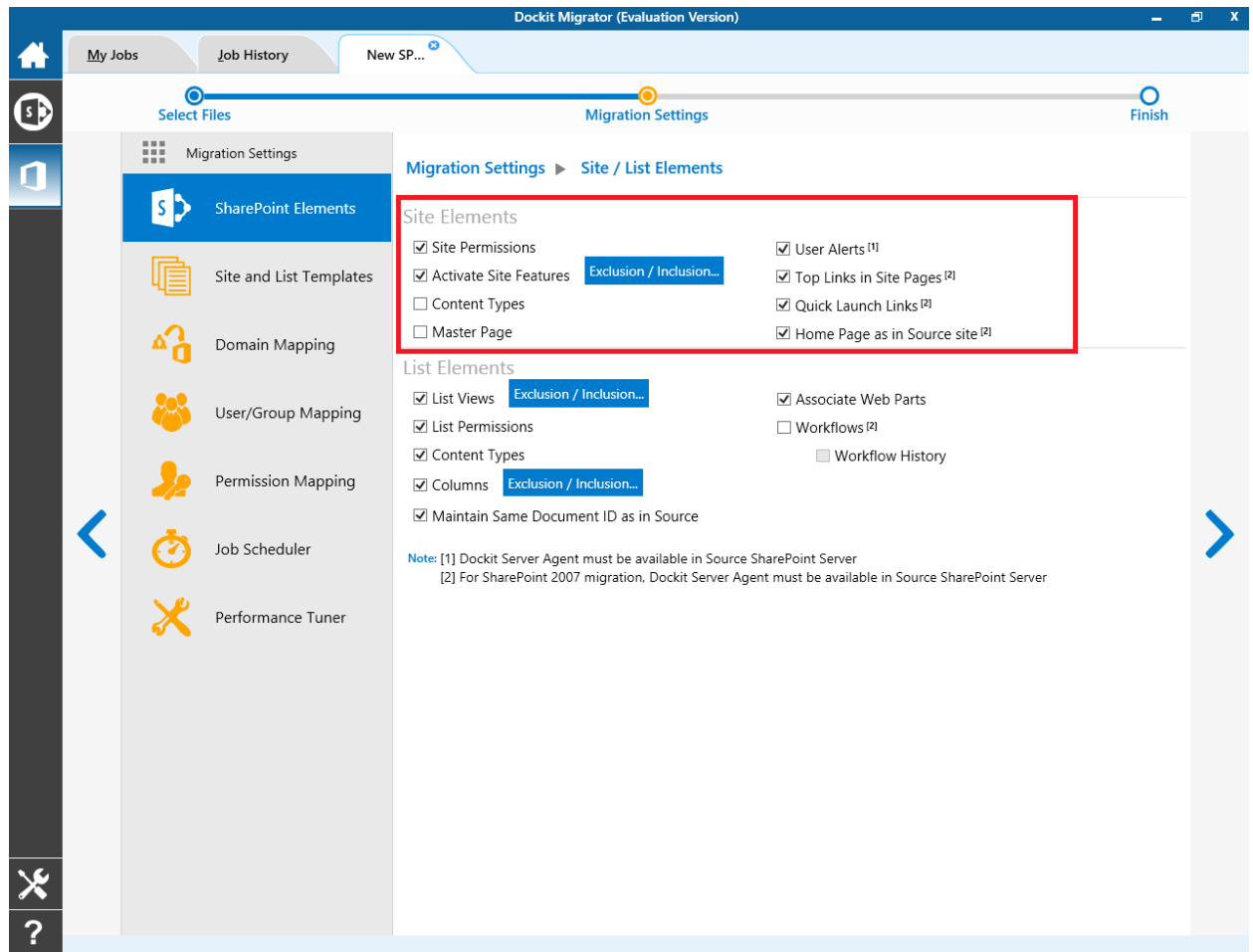
SharePoint Elements

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

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



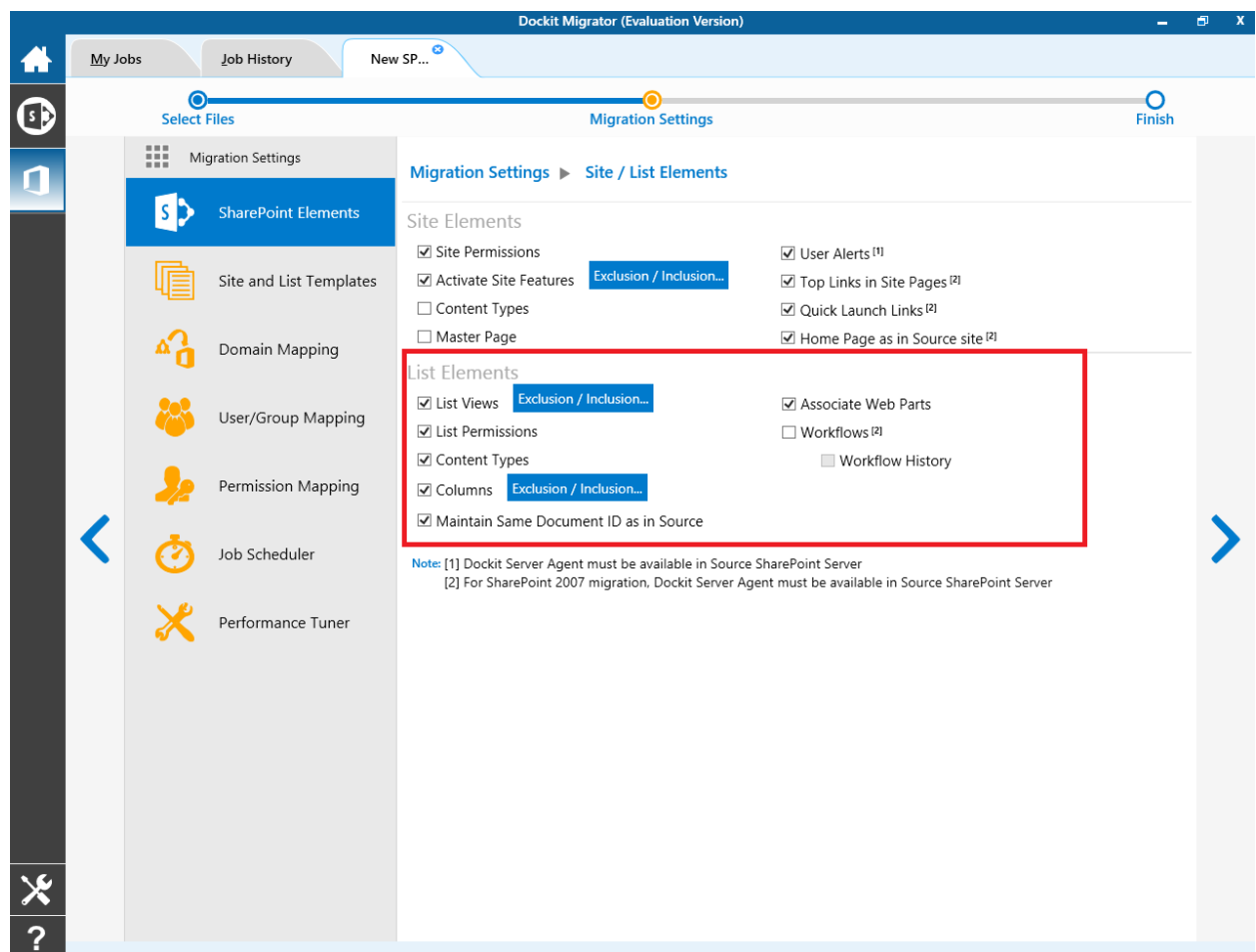
- Specify the site elements to migrate during a Site / Web level migration to a target Office 365 site.



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

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

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



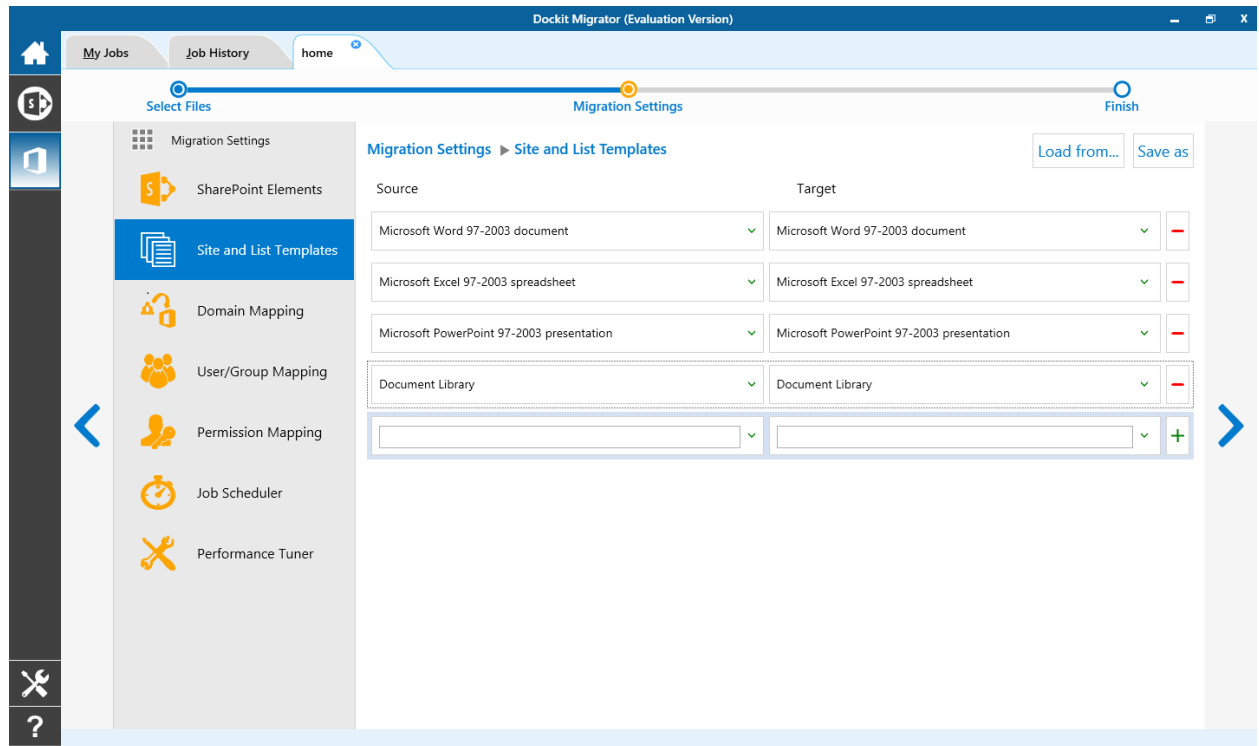
List Views:	To migrate list views.
List Permissions:	To migrate list permissions. Note: Dockit Server Agent is required in the <u>source SharePoint server</u> to migrate when performing migration from SharePoint 2007.
Content Types:	To create content types which are not available in the target SharePoint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

Site and List Templates

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

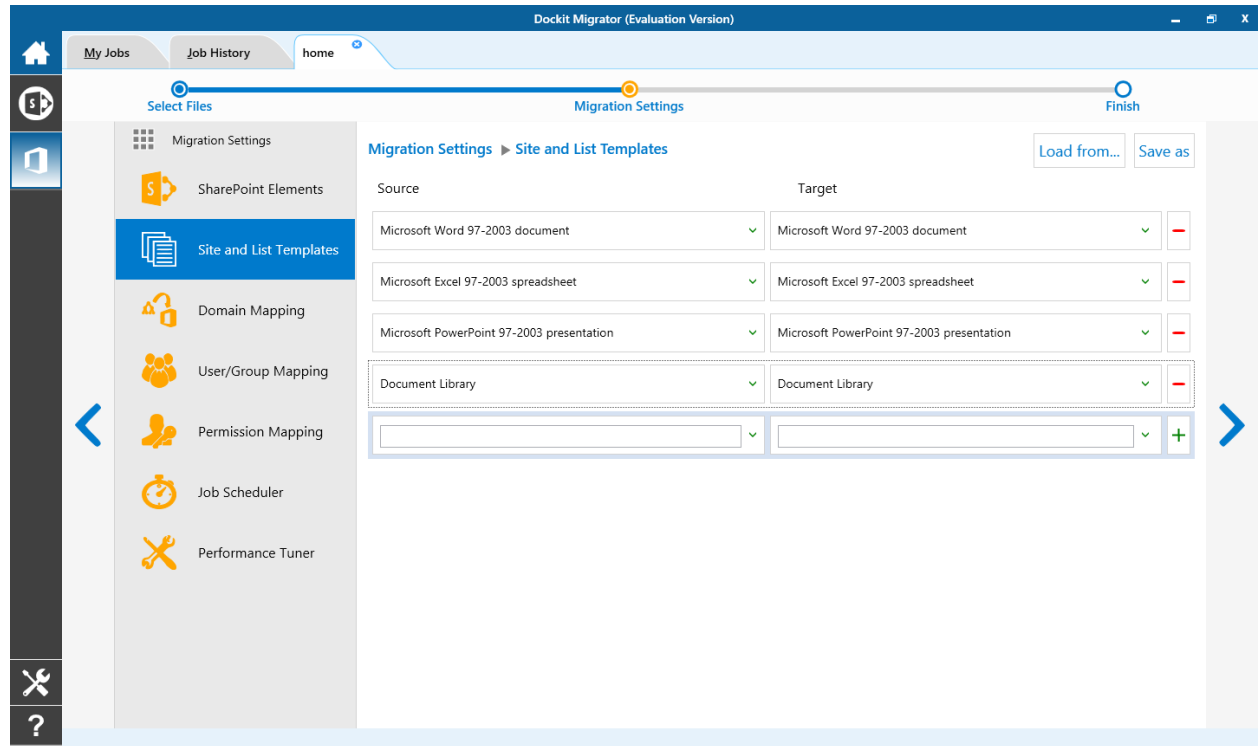
1. Source Template

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



2. Target Template

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



Renaming Rules

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

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

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

The renaming rules page will appear as shown below:

The screenshot shows the Dockit Migrator (Evaluation Version) interface. The top navigation bar includes 'My Jobs', 'Job History', and 'doc Migration'. The main content area is titled 'Migration Settings' and 'Renaming Rules'. The left sidebar lists various settings: Migration Settings, File Settings, Renaming Rules (selected), Metadata Settings, Column Mapping, Domain Mapping, User/Group Mapping, Permission Mapping, Filter Condition, and Job Scheduler. The main content area is divided into 'File' and 'Folder' sections. Each section has a 'Find' and 'Replace' table. The 'File' section has a 'Find' field with '#' and a 'Replace' field with '-'. The 'Folder' section has a 'Find' field with '#' and a 'Replace' field with '-'. There are also buttons to add (+) and remove (-) rules. At the bottom, there are fields to 'Truncate file name, max length (including file extension)' and 'Truncate folder name, max length', both set to 256.

1. Folder Renaming Rule:

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

Truncate folder names:

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

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

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

2. File Renaming Rule:

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

Truncate file names:

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

Select appropriate checkbox for file and enter a valid character length for file name.

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

Sample renaming rules:

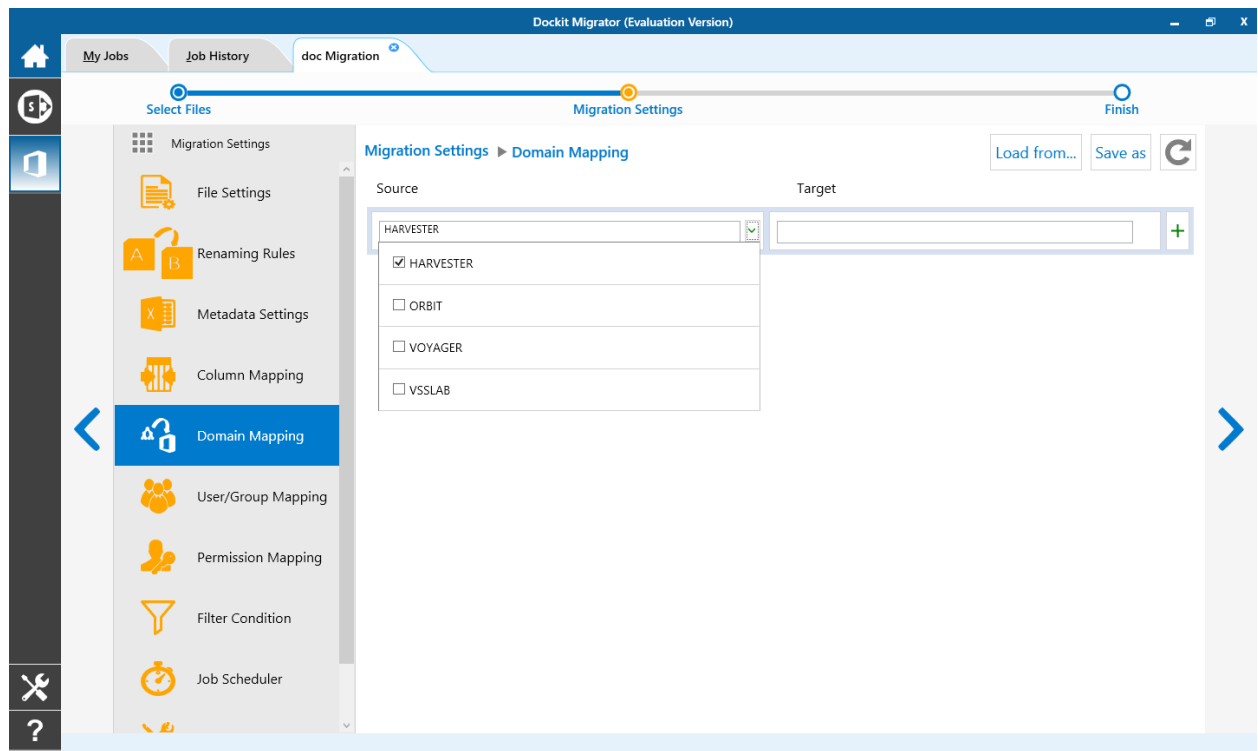
File Name	Find	Replace	Result	Remarks
SampleV1	*V1	{empty}	Sample	Truncate V1, if the file ends with V1
SampleV1	*V1	A	SampleA	Replace V1 with A, if the file name ends with V1
Hello_World	Hello_*	{empty}	World	Truncate Hello_, if the file name starts with Hello_
Hello_World	*_World	{empty}	Hello	Truncate _World, if file name ends with _World
SampleV1	v?	{empty}	Sample	Truncate V and the file name character following it (immediately succeeding character), if the file names contains V and followed by any one character.

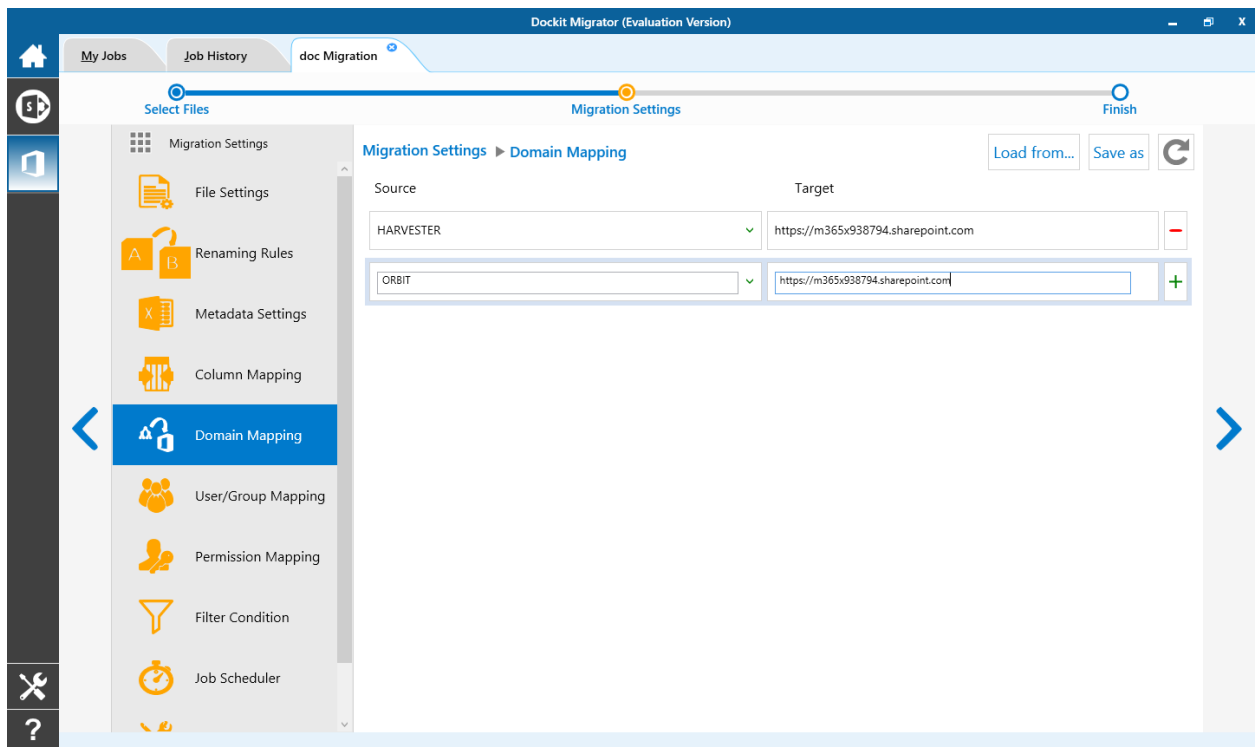
Sample	?p	{empty}	Sale	Truncate one character preceding the letter p in the file name.
SampleV12	V??	{empty}	Sample	Truncate two characters following the character / letter V in the file name.
SampleFileVersion	*File*	{empty}	SampleVersion	Truncate the word 'File' in any position in the file name.
Sample.Matrix	\.	Dot	SampleDotMatrix	Example of escape sequence for .
Sample?File	\?	Text	SampleTextFile	Example of escape sequence for ?
Hello*World	*	{empty}	HelloWorld	Example of escape sequence for *
Sample\$	\\$	Dollar	SampleDollar	Example of escape sequence for \$
Sample^File	\^	{empty}	SampleFile	Example of escape sequence for ^
Sample+Document	\+	Plus	SamplePlusDocument	Example of escape sequence for +
Hello<World	\<	{empty}	HelloWorld	Example of escape sequence for <
Hello>World	\>	{empty}	HelloWorld	Example of escape sequence for >
[Document	\[	Word	WordDocument	Example of escape sequence for [
Word]	\]	Document	WordDocument	Example of escape sequence for]
(File	\(	Sample	SampleFile	Example of escape sequence for (
Sample)	\)	Document	SampleDocument	Example of escape sequence for)

Domain Mapping

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

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





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

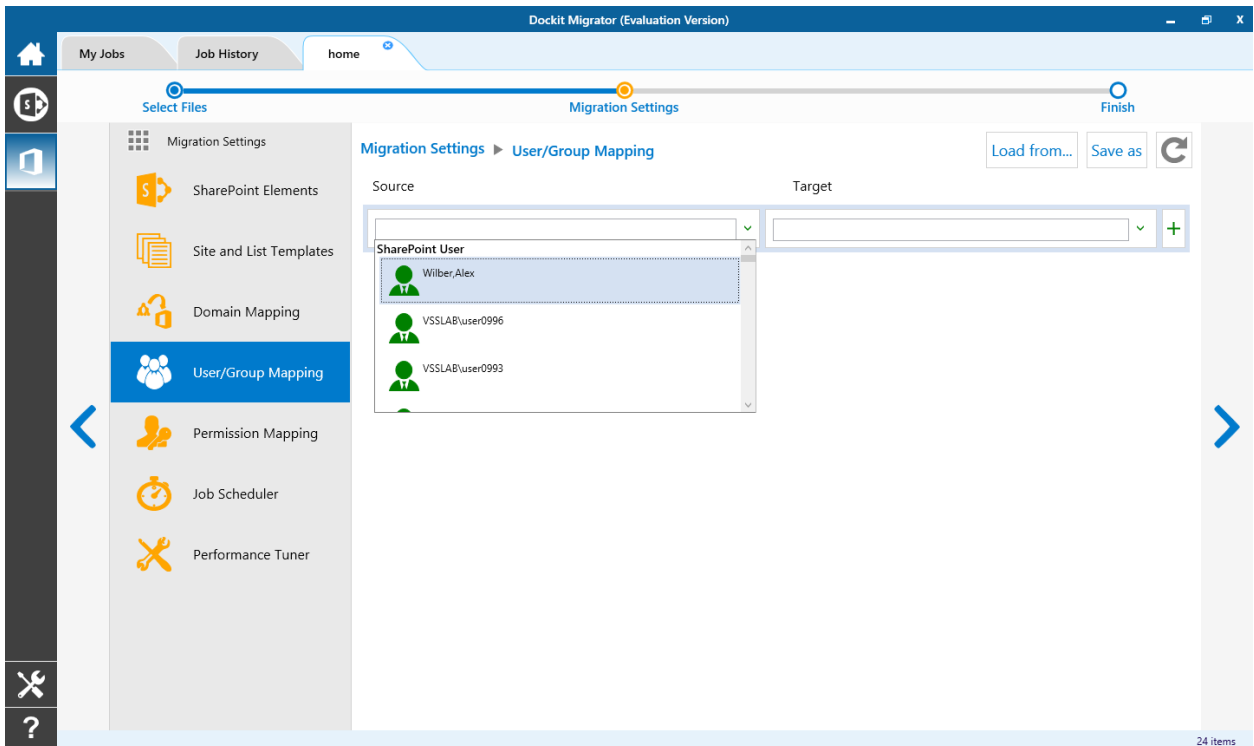
Note: As for entering free texts, multiple source domains can be entered, separated by comma.

User Mapping

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

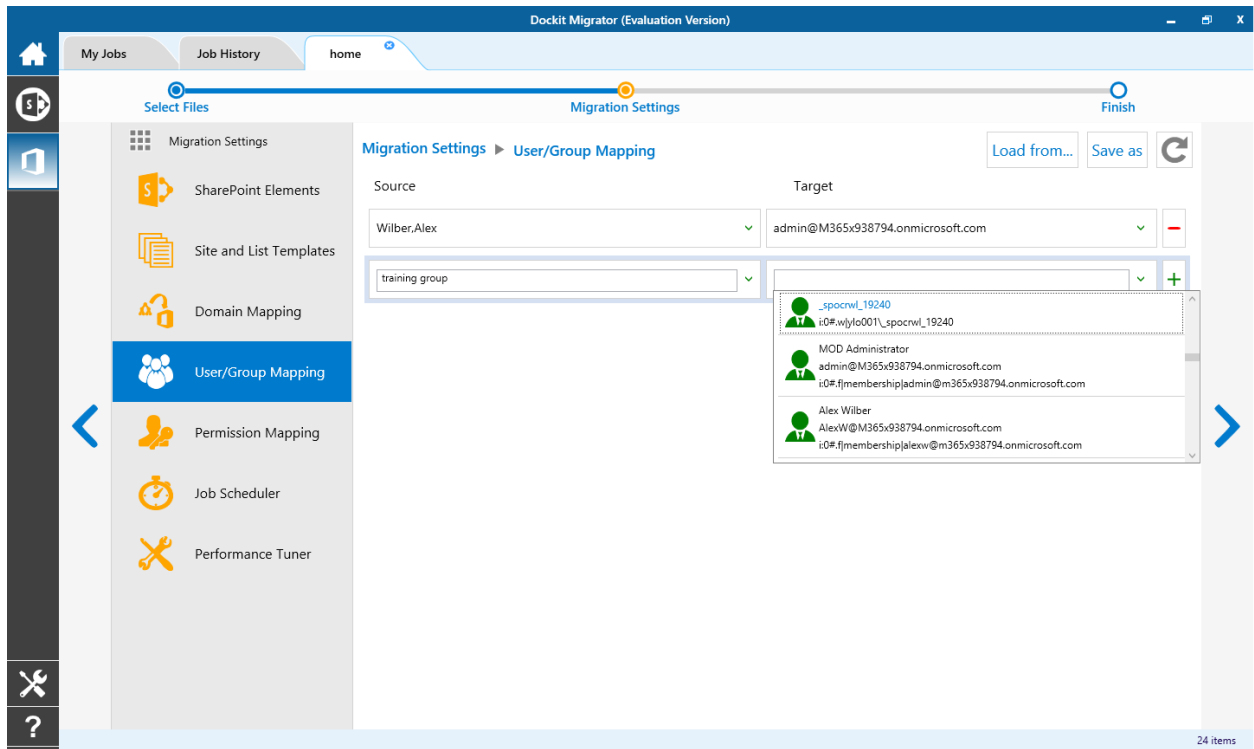
1. Source User

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



2. Target User

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



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

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

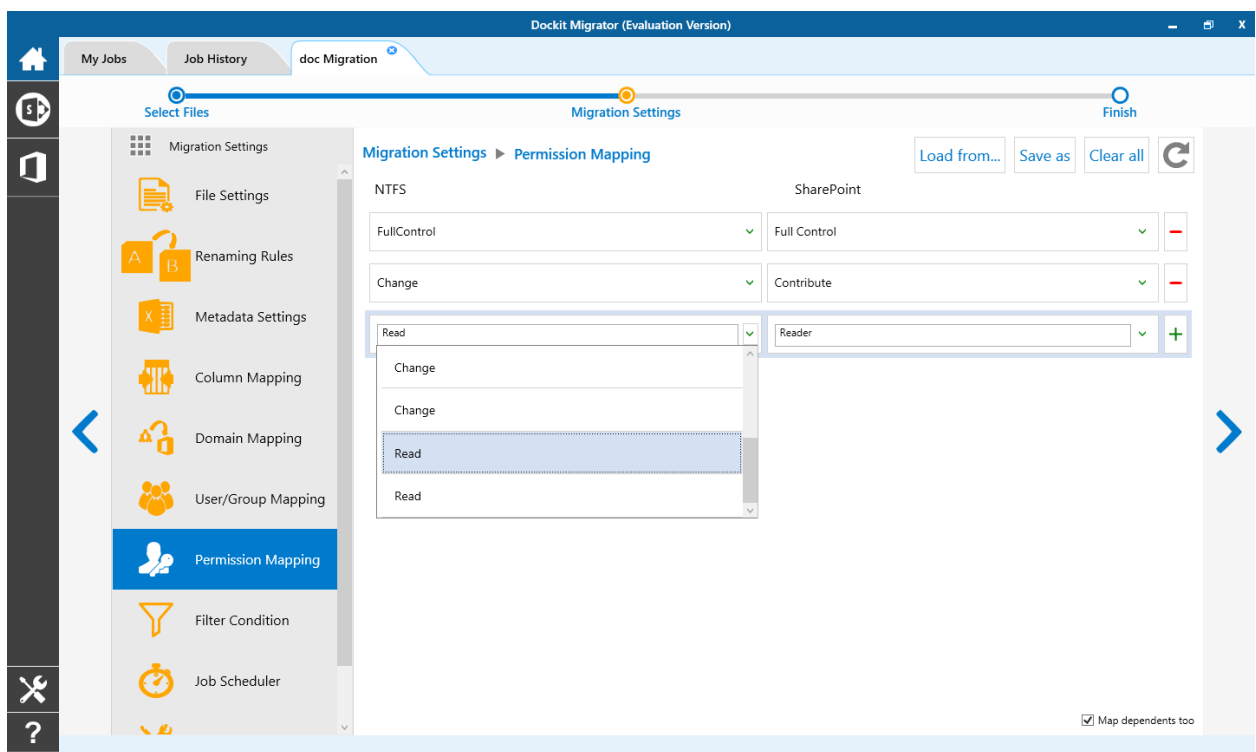
Permission Mapping

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

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

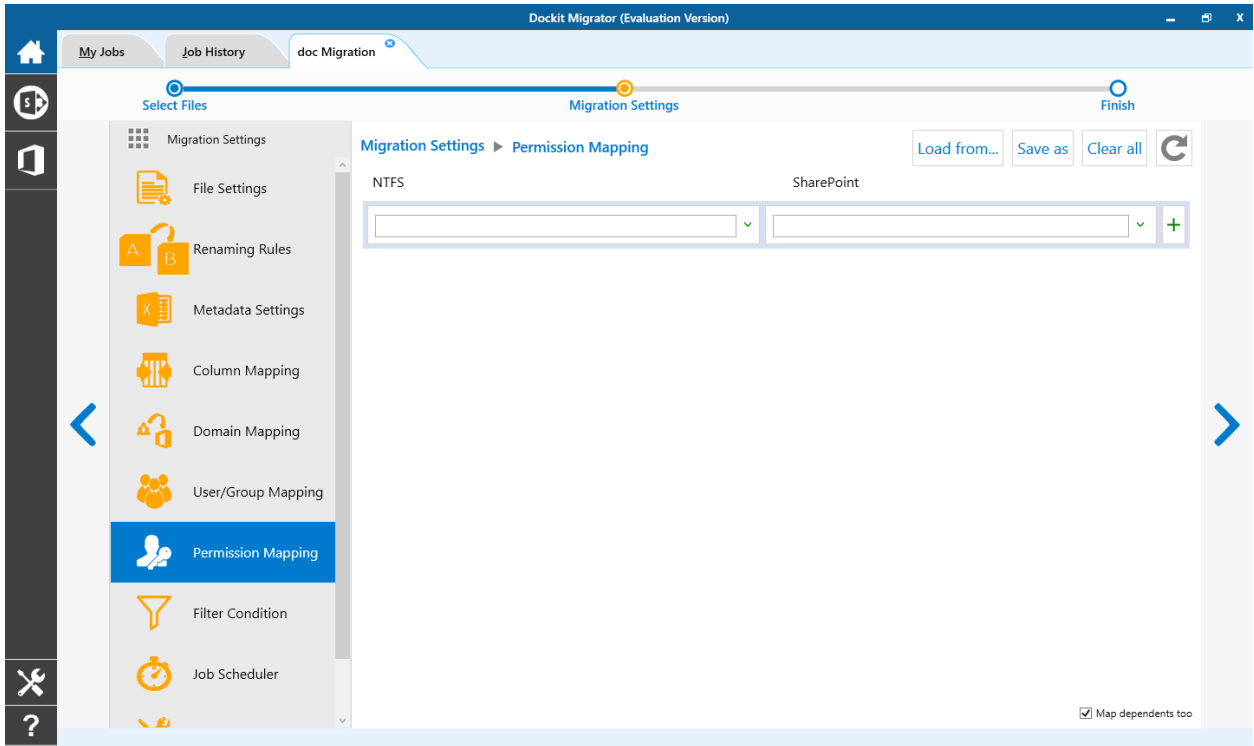
1. Source Permission

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



2. Target Permission

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



See the following sections for more information

- [User Mapping](#)
- [Domain Mapping](#)

Filter Conditions

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

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

File Filter

The screenshot shows the Dockit Migrator (Evaluation Version) interface. The top navigation bar includes 'My Jobs', 'Job History', and 'doc Migration'. The main area is titled 'Migration Settings' and 'Filter Condition'. The left sidebar lists various settings, with 'Filter Condition' selected. The main content area shows a table of available metadata and file properties for selection in filter conditions.

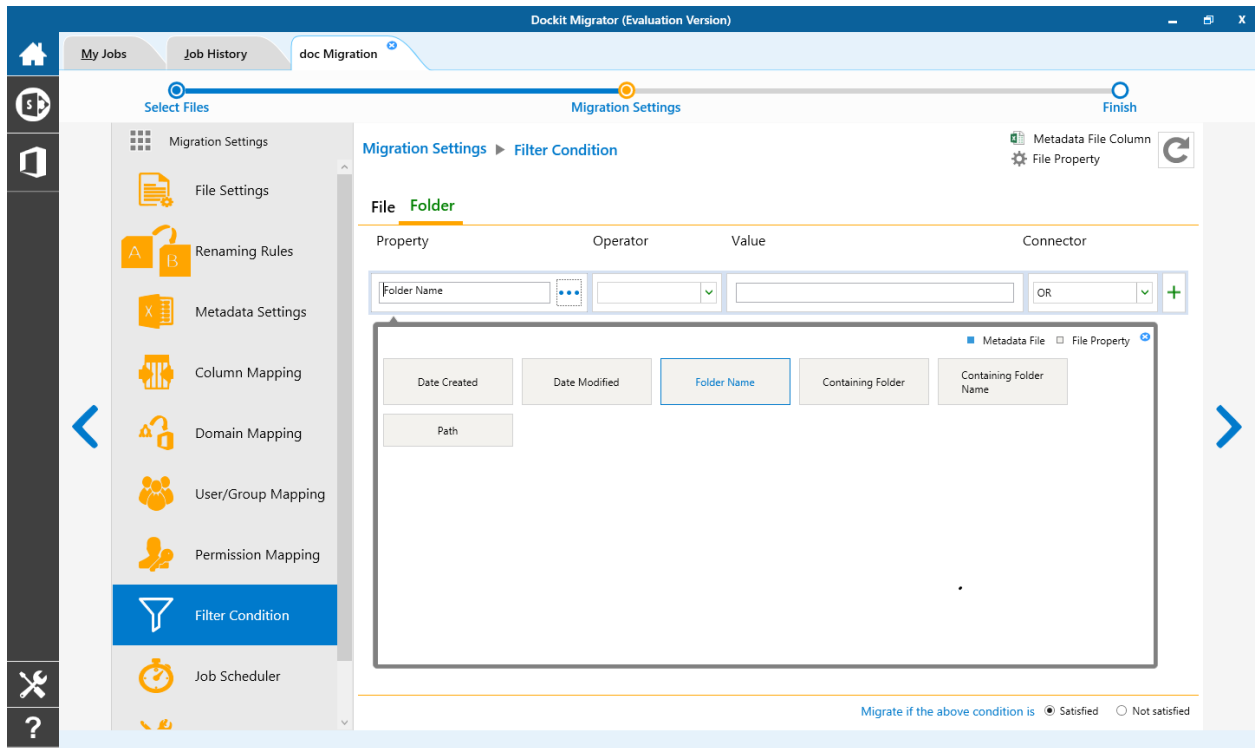
Property	Operator	Value	Connector
			OR

Metadata File File Property				
Title	Name	Subject	Author	Owner
Category	Keywords	Comments	Application Name	Byte Count
Character Count	Character Count With Spaces	Company	Date Created	Date Modified
Date Last Printed	Date Last Saved	Hidden Slide Count	Last Saved By	Line Count
Manager	Multimedia Clip Count	Note Count	Page Count	Paragraph Count
Presentation Format	Revision Number	Shared Document	Slide Count	Template
Thumbnail	Total Edit Time	Version	Word Count	File Name

At the bottom, there is a checkbox for 'Metadata File' and 'File Property', and a section for 'Migrate if the above condition is' with radio buttons for 'Satisfied' and 'Not satisfied'.

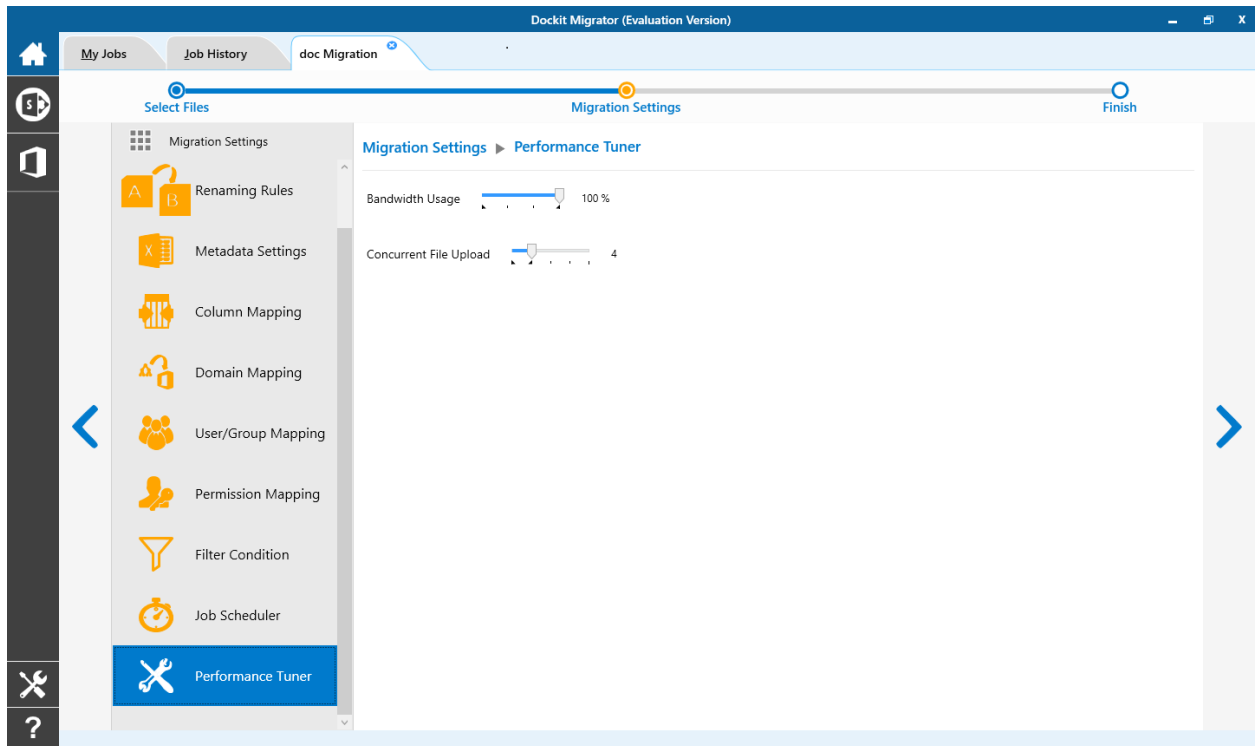
2. Add folder conditions in folder filter tab as shown as below.

Folder Filter



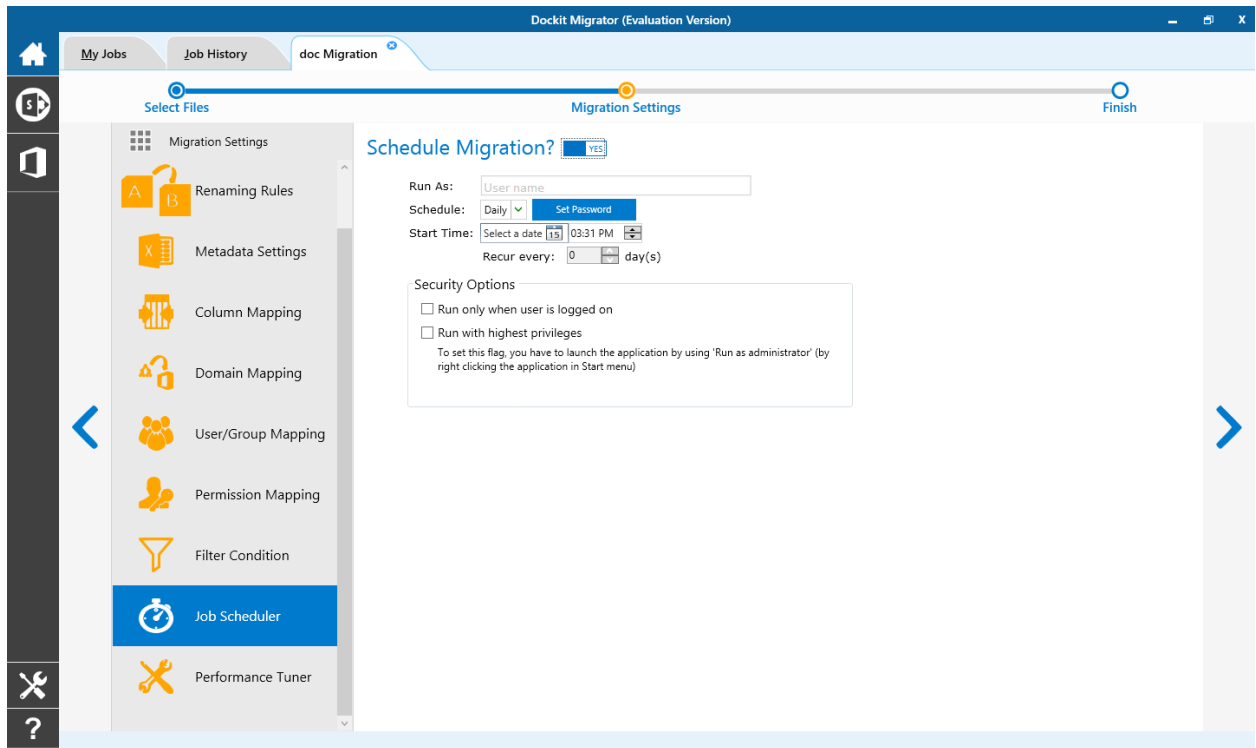
Performance Tuner

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



Job Scheduler

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



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

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

Job Summary

Job summary page display all configured settings and Items to migrate items. Job summary page will be appear as shown as below

Docket Migrator (Evaluation Version)

My Jobs | Job History | New SP...

Progress: Select Files | Migration Settings | Finish

Summary

Name : New SP Q365 Job

Description :

Source URL : <https://mars.vsslab.local>

Target URL : https://m365x938794-my.sharepoint.com/personal/meganb_m365x938794_onmicrosoft_com

Mapping:
Source: <https://mars.vsslab.local/Docket365Testsite>
Target: https://m365x938794-my.sharepoint.com/personal/meganb_m365x938794_onmicrosoft_com

Site Elements

☒ Site Permissions	☒ User Alerts ^[1]
☒ Activate Site Features	☒ Top Links in Site Pages ^[2]
☐ Content Types	☒ Quick Launch Links ^[2]
☐ Master Page	☒ Home Page as in Source site ^[2]

List Elements

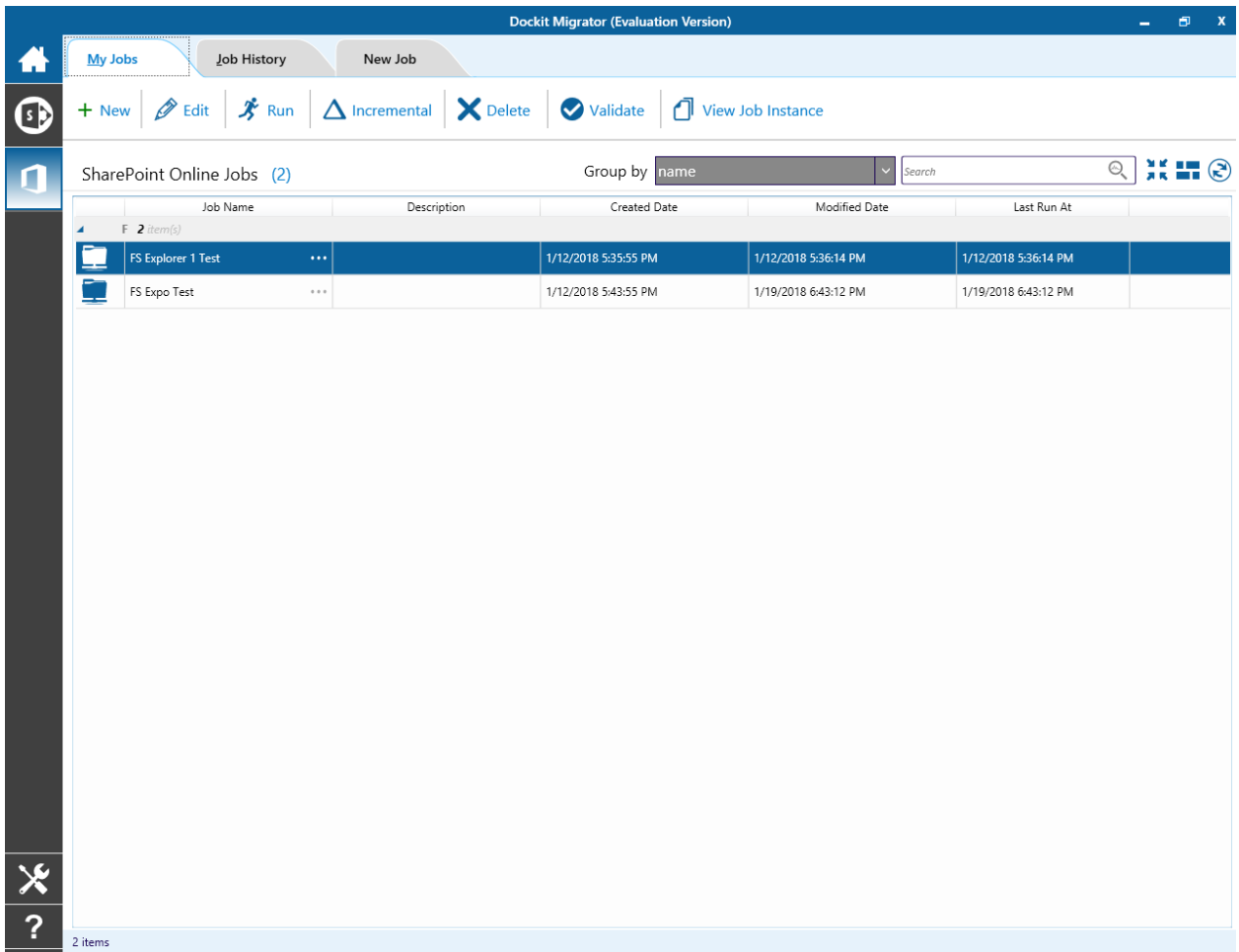
☒ List Views	☒ Associate Web Parts
☒ List Permissions	☐ Workflows ^[2]
☒ Content Types	☐ Workflow History
☒ Columns	
☒ Maintain Same Document ID as in Source	

Save & Close | Save & Start

SharePoint On-Premises to OneDrive Migration

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

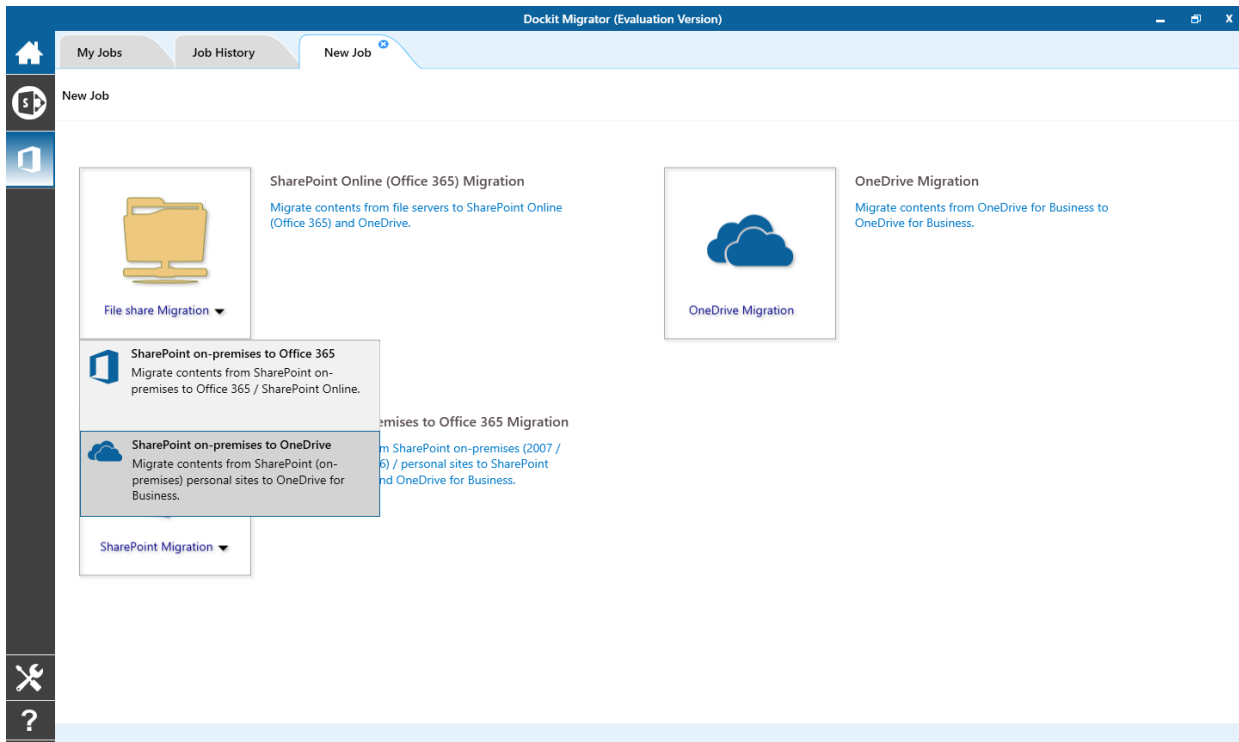
Click New option on My Jobs tab on Sharepoint Online (Office 365) migration page.



The screenshot displays the 'Docket Migrator (Evaluation Version)' application window. The 'My Jobs' tab is active, showing a list of migration jobs. The interface includes a top navigation bar with 'My Jobs', 'Job History', and 'New Job' tabs. Below this is a toolbar with icons for '+ New', 'Edit', 'Run', 'Incremental', 'Delete', 'Validate', and 'View Job Instance'. The main area shows a table titled 'SharePoint Online Jobs (2)' with columns for Job Name, Description, Created Date, Modified Date, and Last Run At. Two jobs are listed: 'FS Explorer 1 Test' and 'FS Expo Test'. The bottom status bar indicates '2 items'.

Job Name	Description	Created Date	Modified Date	Last Run At
FS Explorer 1 Test		1/12/2018 5:35:55 PM	1/12/2018 5:36:14 PM	1/12/2018 5:36:14 PM
FS Expo Test		1/12/2018 5:43:55 PM	1/19/2018 6:43:12 PM	1/19/2018 6:43:12 PM

Select **SharePoint on-premises to OneDrive** from **SharePoint Migration** from job category page as shown below.



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

Docket Migrator (Evaluation Version)

My Jobs Job History **New Job**

New Job

Job Name

Job Description

Source SharePoint Credential

Source URL

Authentication

Windows

User name

VSSPRO\viswanathan

Password

Enumerate personal site of:

☒ Current User

☐ Multiple Users
(e.g., https://contoso-my.sharepoint.com/personal/johndoe_contoso_onmicrosoft.com)

Target URL

Authentication

Federated Identity

User name

VSSPRO\viswanathan

Password

Connect

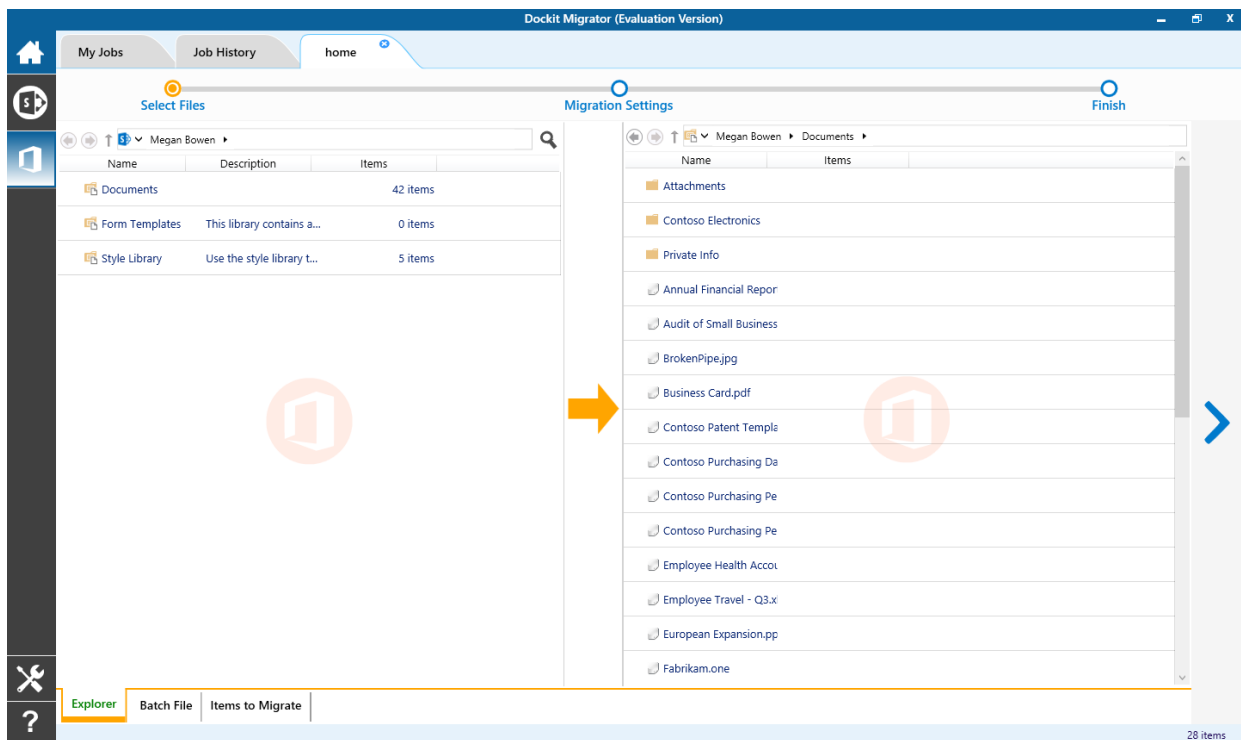
To specify a SharePoint site URL (both source SharePoint and target OneDrive) of a site from which you wish to migrate Libraries, Lists, folders, files and list items, perform the steps given below.

1. Specify a valid SharePoint site URL in source and specify valid OneDrive URL in target URL textbox.
2. Specify the Authentication type and user credentials to connect to the SharePoint URL using the options given below.
3. Specify the Authentication Type.
 - a) Windows
 - b) Forms
 - c) Cloud Identity
 - d) Federated Identity
4. Specify the user credentials

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

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

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

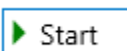


8. Click **Items to Migrate** on Right pane to check the list of items selected for migration, also you can remove files by clicking the Red X.

9. Specify [Migration Settings](#)

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

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



to initiate the migration process.

Batch File

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

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

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

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

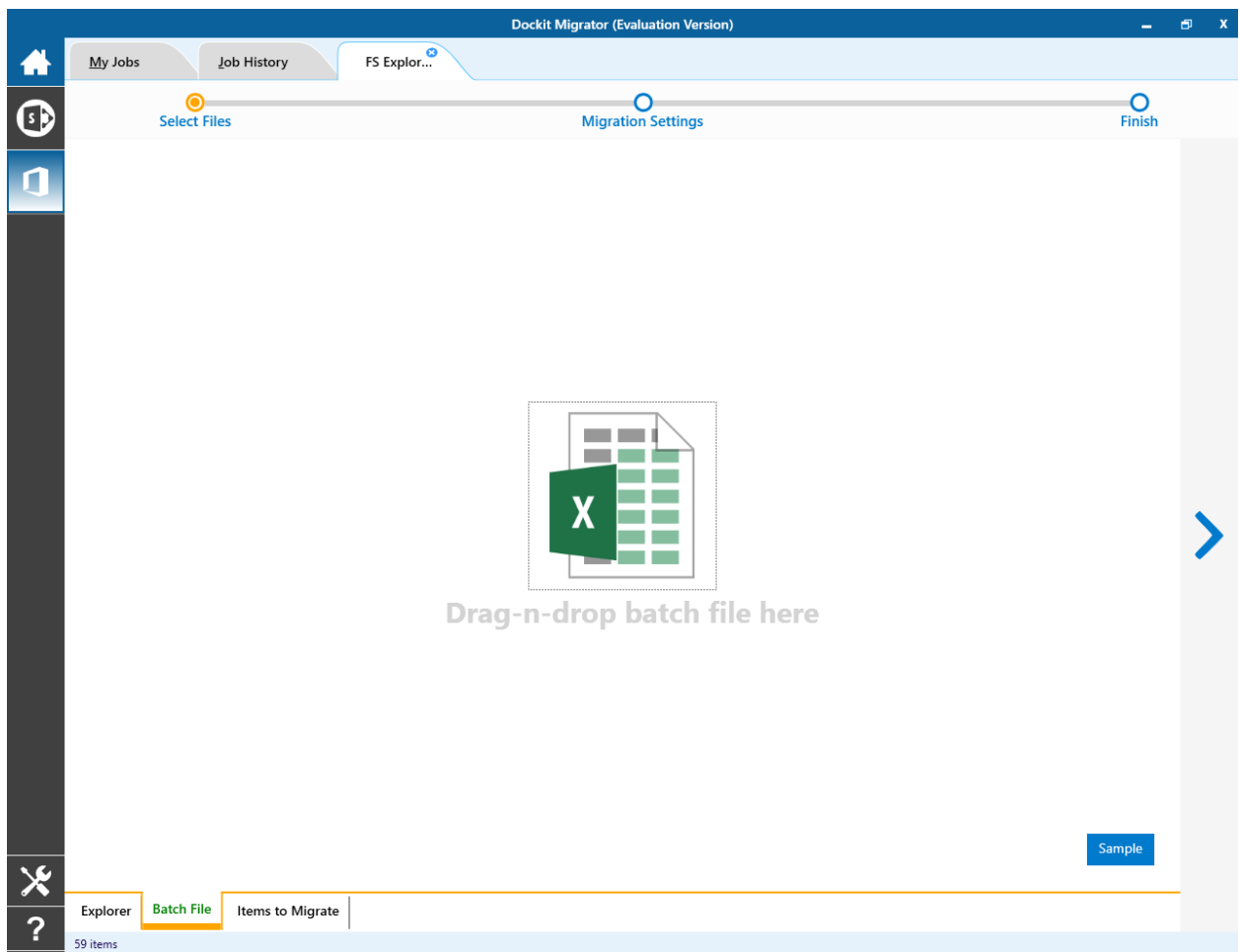
New Folder: The column 'New Folder' is an optional column in the batch descriptor file. Using this column, you can provide the relative path to be created in the respective destination location given under 'Destination Path' column prior to importing the contents. For instance, please see the batch descriptor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

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

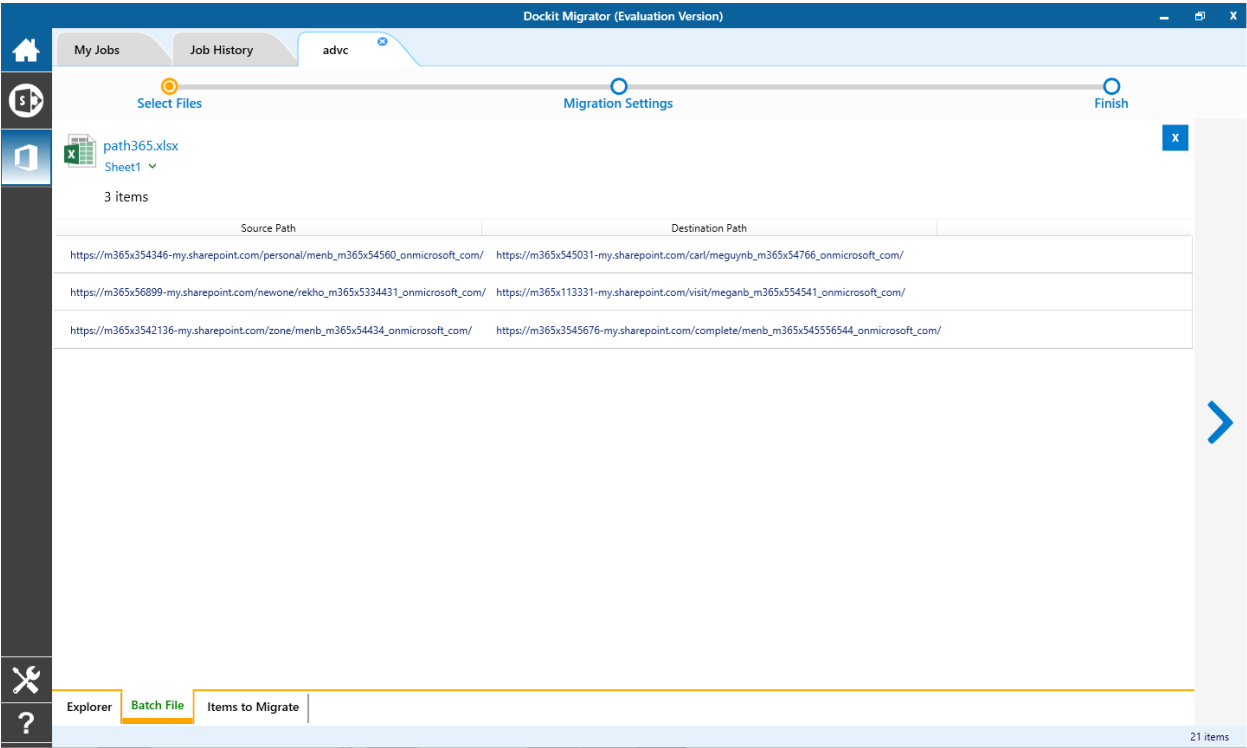
Docket Migrator automatically creates the folders (folder2/folder3) specified in the column 'New Folder' underneath the specified destination location (folder1). The 'model1' will be imported into the new destination location 'http://sharepoint/technical documents/folder1/folder2/folder3'.

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

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



Batch file content will be shown as below.

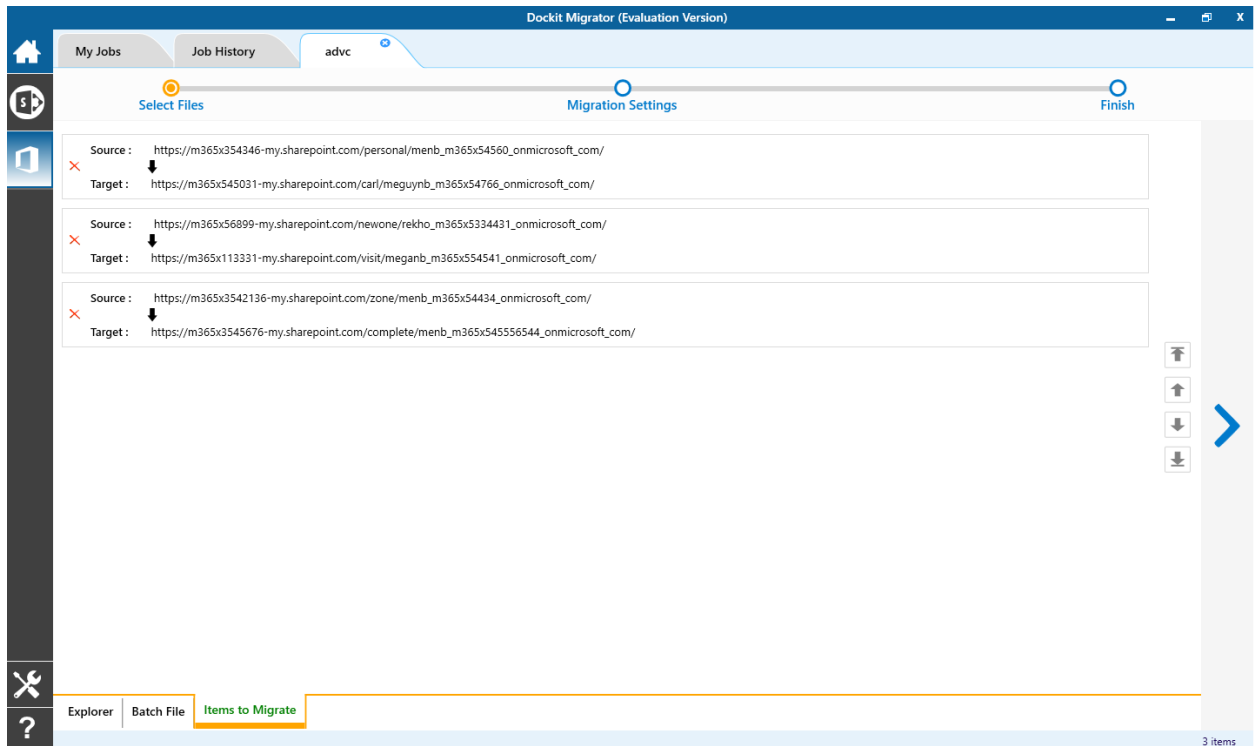


Batch file content will be added to Items to Migrate tab.

Items to migrate

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

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



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

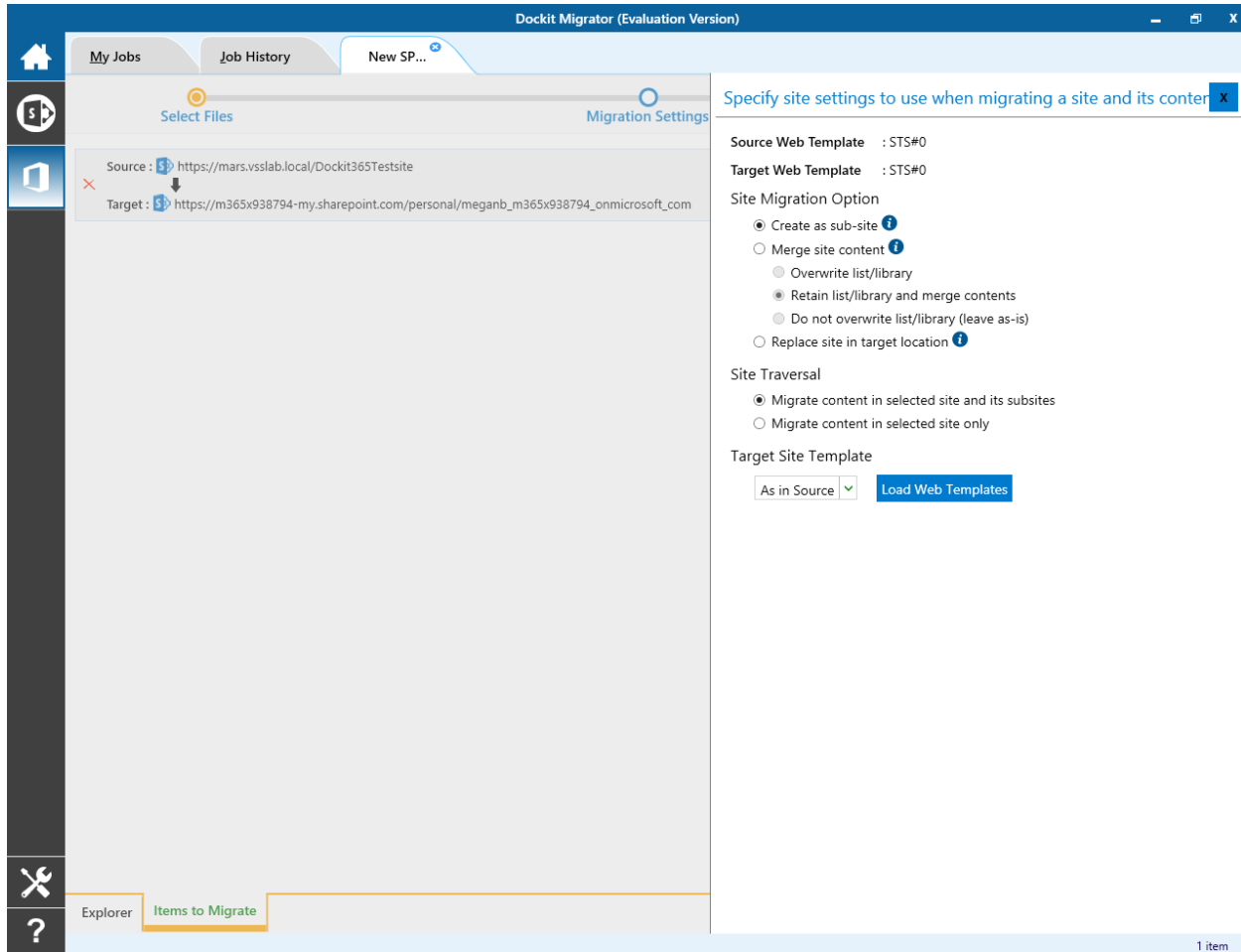
Traversal Options dialog will appear depending on the items added for migration

- a. To specify migration options for site, click [Site Migration Options](#)
- b. To specify migration options for List/Library, click [List/Library Migration Options](#)

1. Click > button to proceed.

Site Migration Option

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



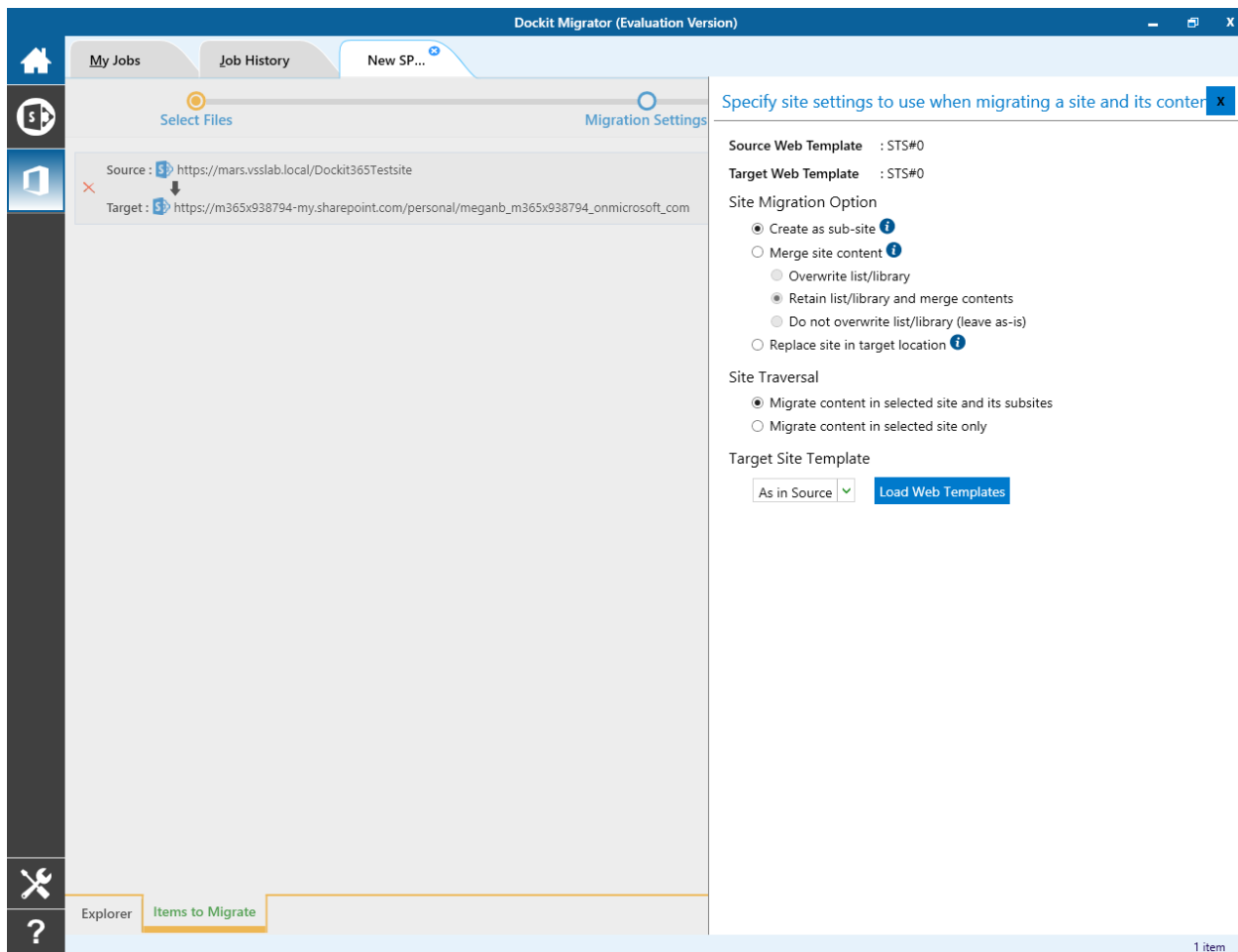
1. Select the site template to apply to the site from the list of available templates.

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

2. Select anyone of the following options given below to specify the content to be migrated from the source sites:
 4. **Create as sub site / replace sub site in target site** - The selected site in source location will be created as a sub-site in the target location. In case the target location contains a sub-site with the same title as the selected source site, then the source site content will be migrated to the sub-site in target location while retaining all sub-site content in the target site location.

5. **Merge sites** - The source site content will be migrated to the target site while retaining all site content in the target site location.
 - d. Overwrite list / library – this option overwrites list / library in the target location.
 - e. Retain list / library and merge contents only – this option retain list / library and merge contents only in target location.
 - f. Do not overwrite list / library (leave as-is) – this option will not overwrite list / library and its contents in target location.
6. **Replace site in target location** - In case the target location contains a sub-site with the same title as the selected source site, then the sub-site in target site will be deleted and completely replaced by the selected source site. Otherwise, the selected site in source location will be created as a sub-site afresh in the target location.

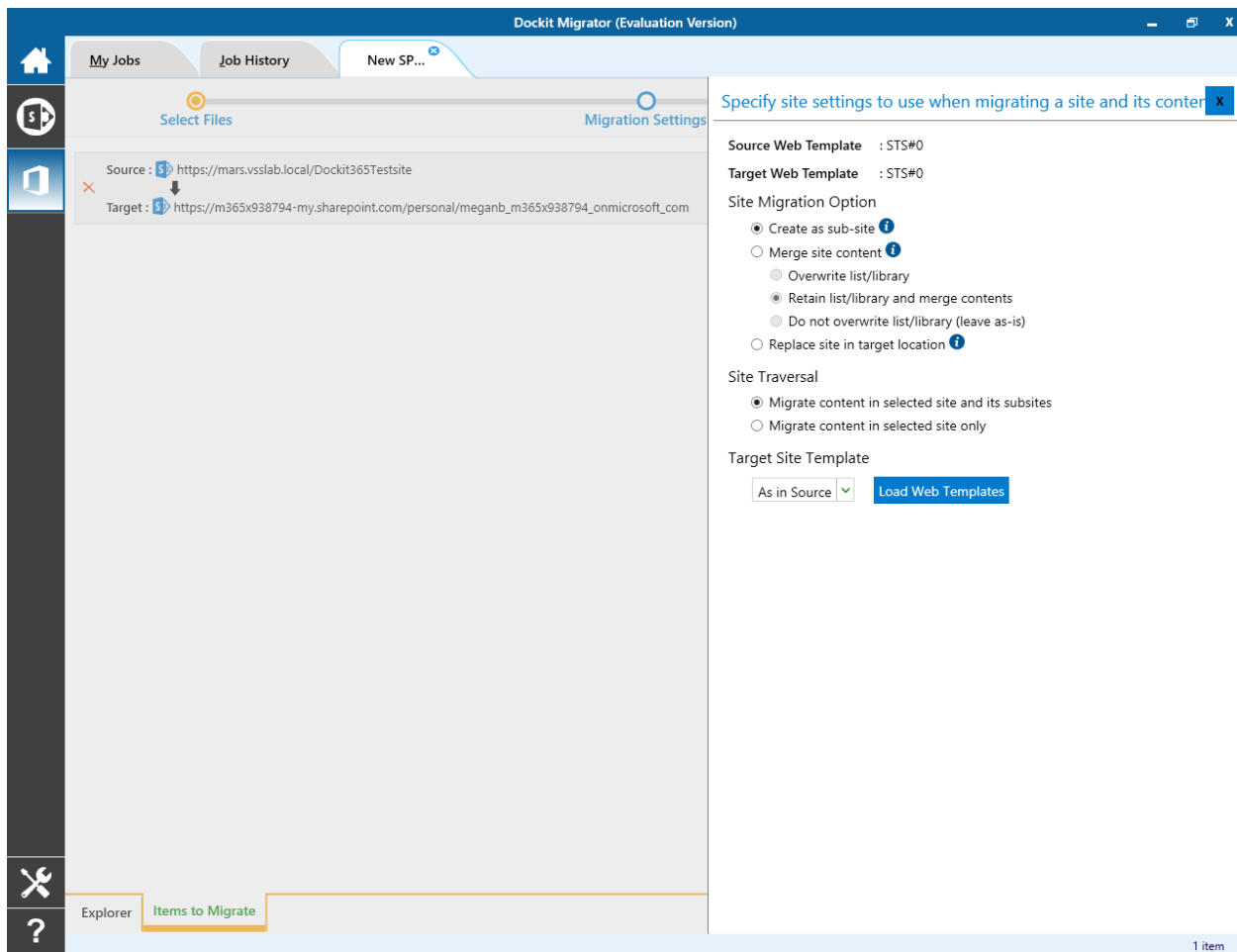
3. Site Traversal



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

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

4. Target Site Template

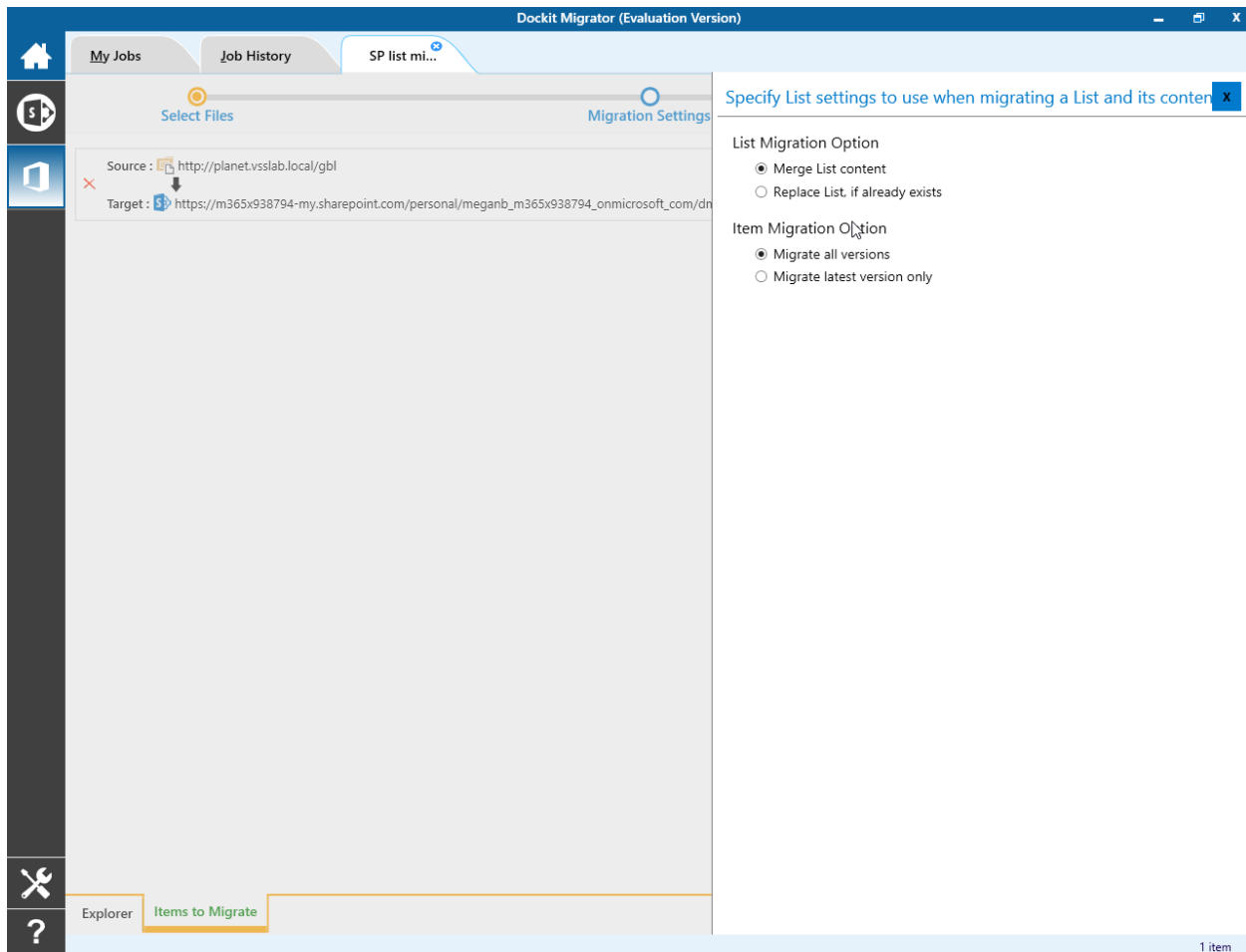


By Default, **Dockit Migrator** uses the same web template as in source SharePoint to create SharePoint site in target Office 365. However, the application allows you to change the web template of your choice. For this, you need to pick one from the dropdown box.

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

List Migration Option

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



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

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

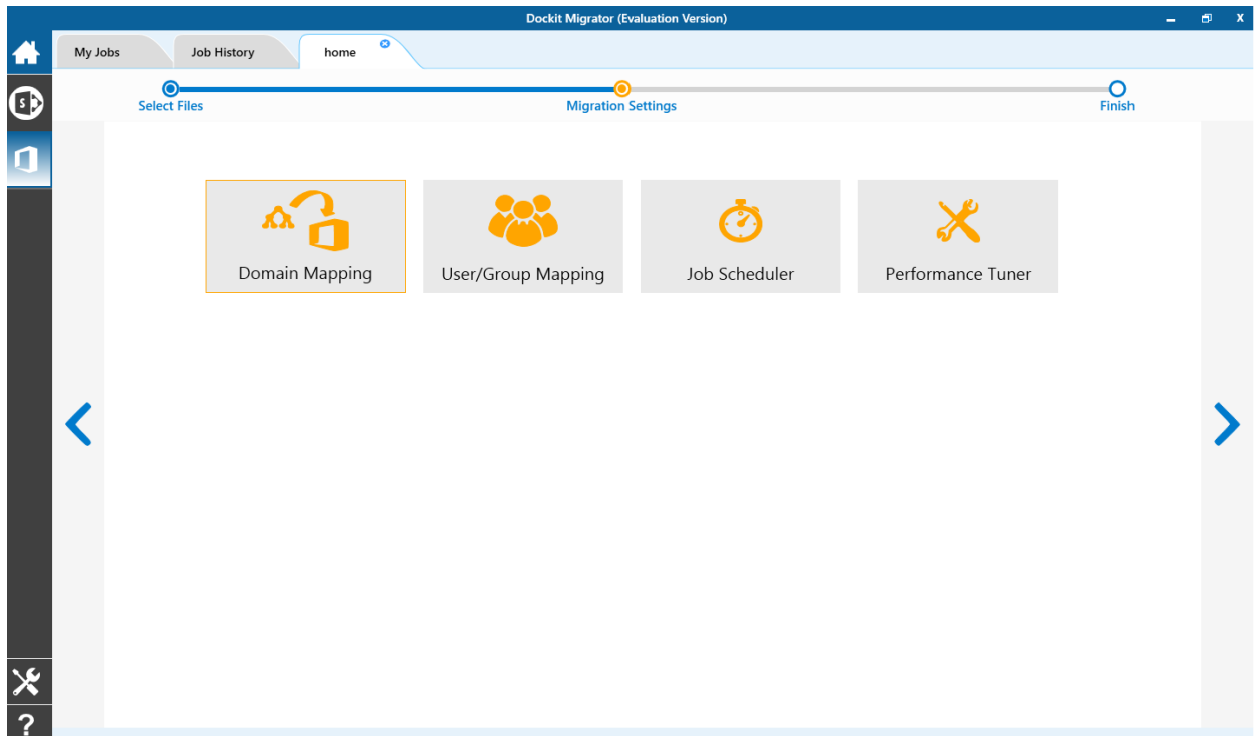
3. Select anyone of the following options given below to specify the item versions to be migrated from the source sites

- a) **Migrate all versions** - This option migrates all versions of the item / file.

b) Migrate Latest versions only- This option migrates the latest version of the item / file only.

Migration Settings

1. Migration Settings will appear as shown below.



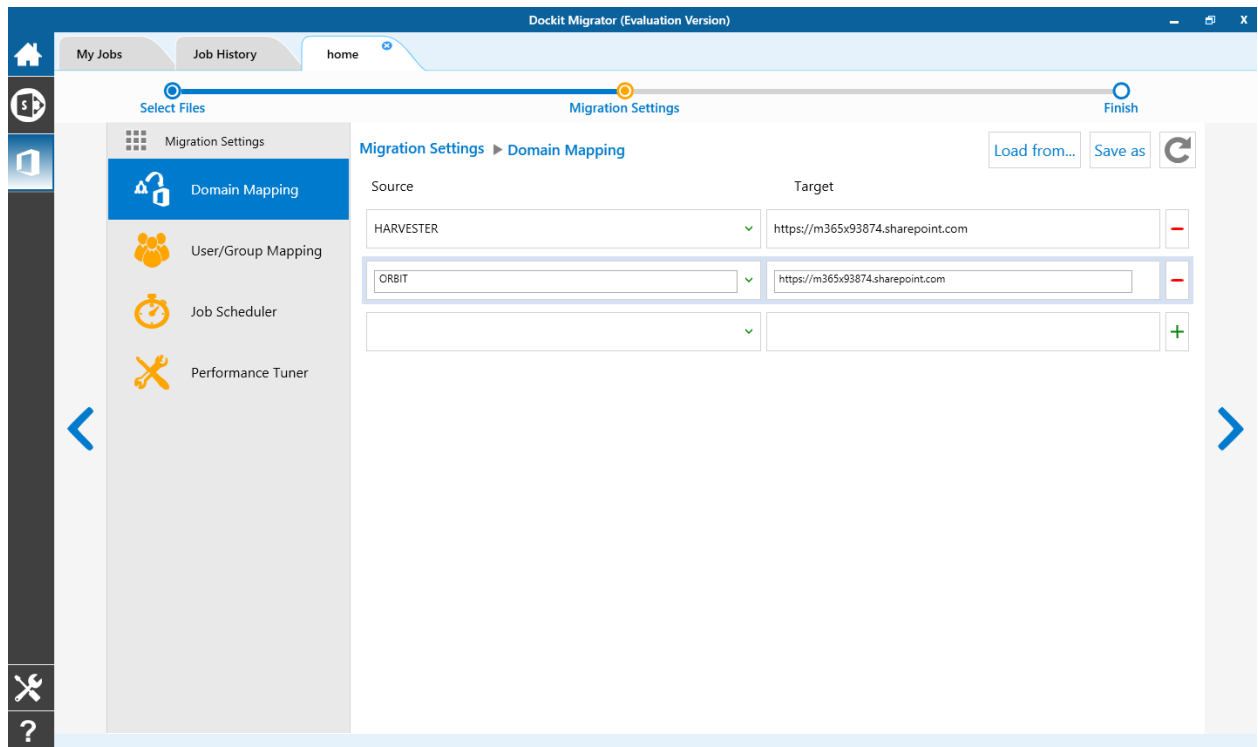
2. From this page, you can :

- [Domain Mapping](#)
- [User/Group Mapping](#)
- [Job Scheduler](#)
- [Performance Tuner](#)

Domain Mapping

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

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



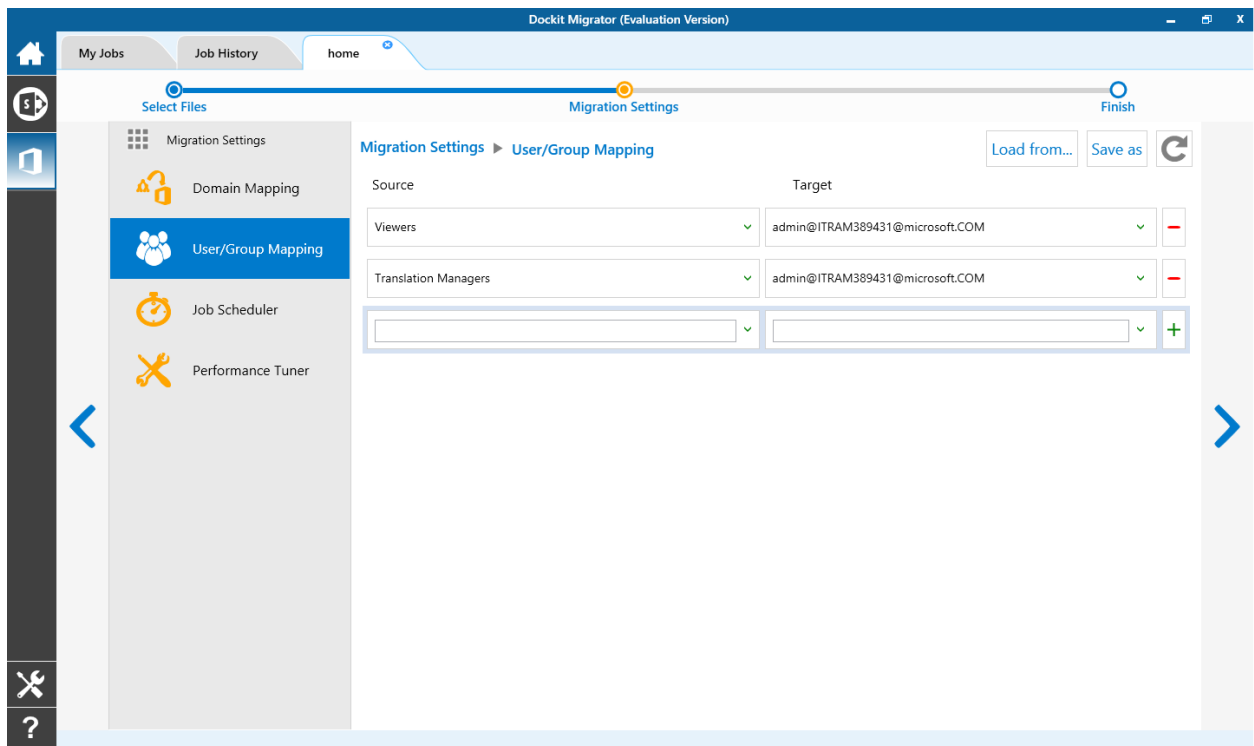
Select appropriate source domain from the domain list and enter the corresponding target domain name to create domain mapping. Dockit Migrator allows you to enter either domain names or UPN suffixes under the text boxes. For example research.vyapin.onmicrosoft.com etc...

User Mapping

Dockit Migrator uses user / group mapping to replace the unavailable users / groups with valid / new OneDrive users / groups when assigning user / groups or permissions for the folder / document during content migration from OneDrive environment to OneDrive. You can use this mapping for all Person or Group fields in OneDrive.

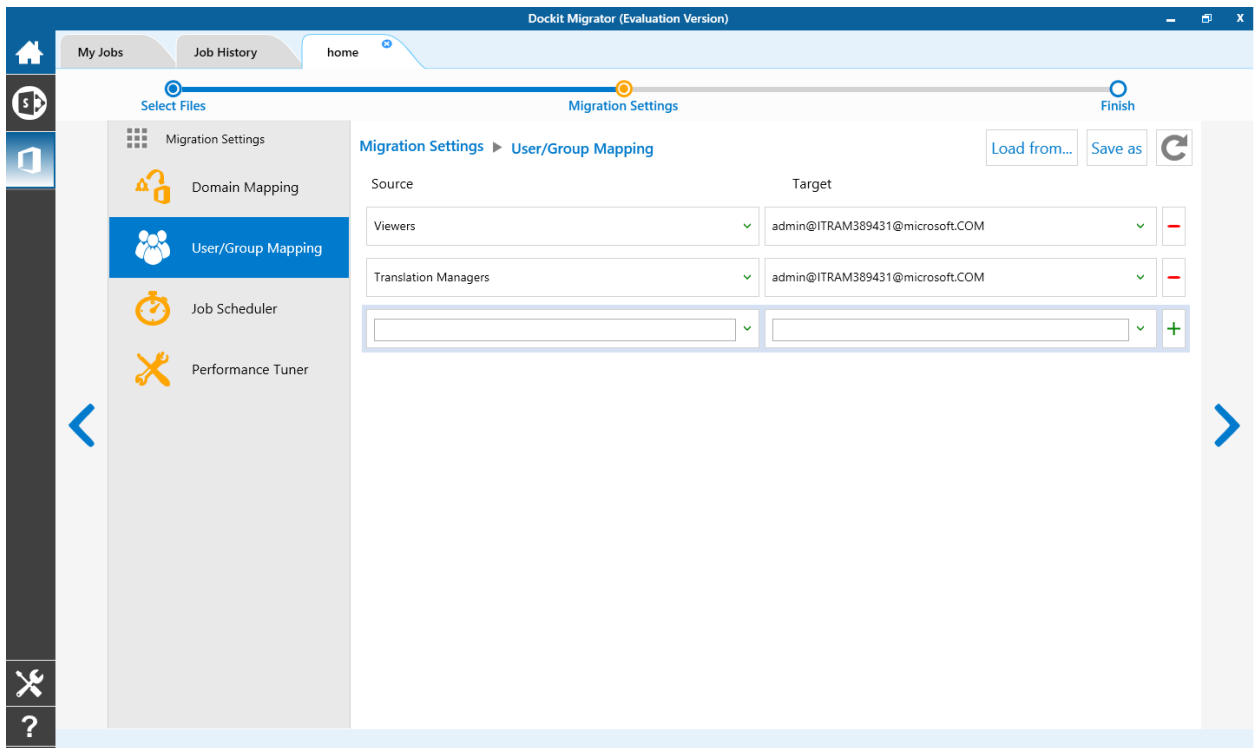
1. Source User

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



2. Target User

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

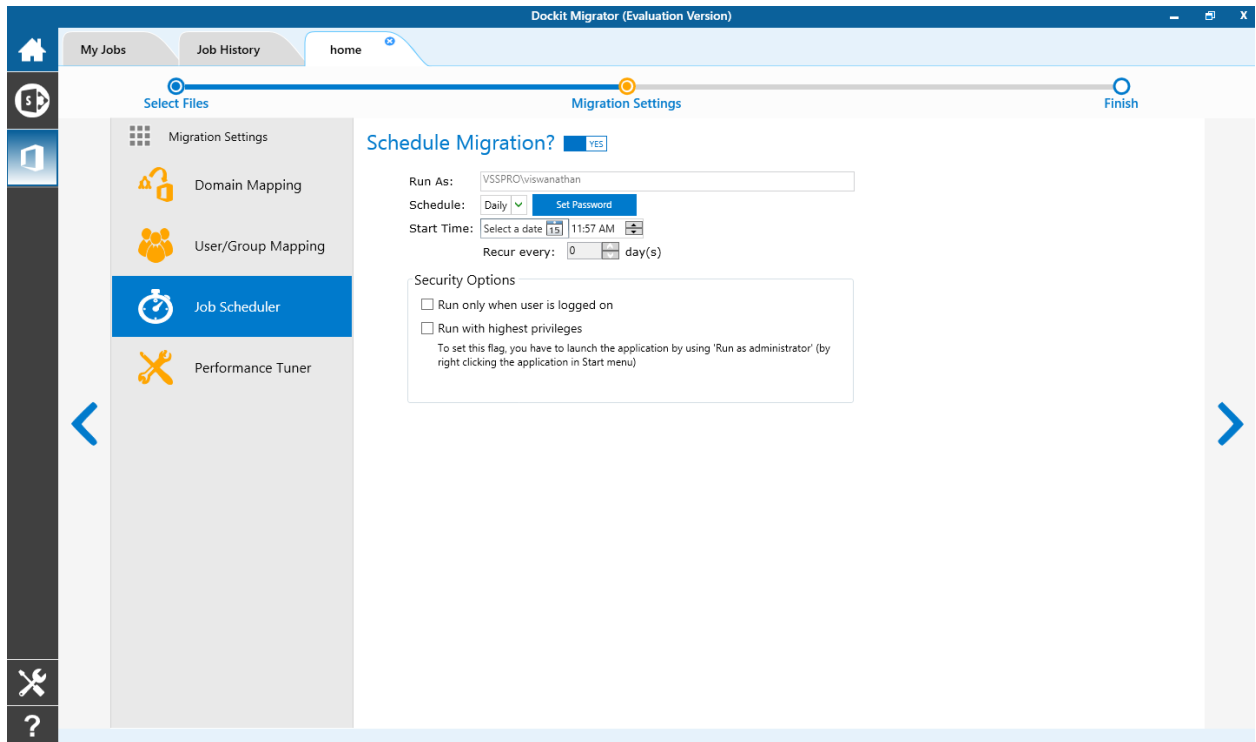


You also have the option to enter the user / group of your own in user mapping.

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

Job Scheduler

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

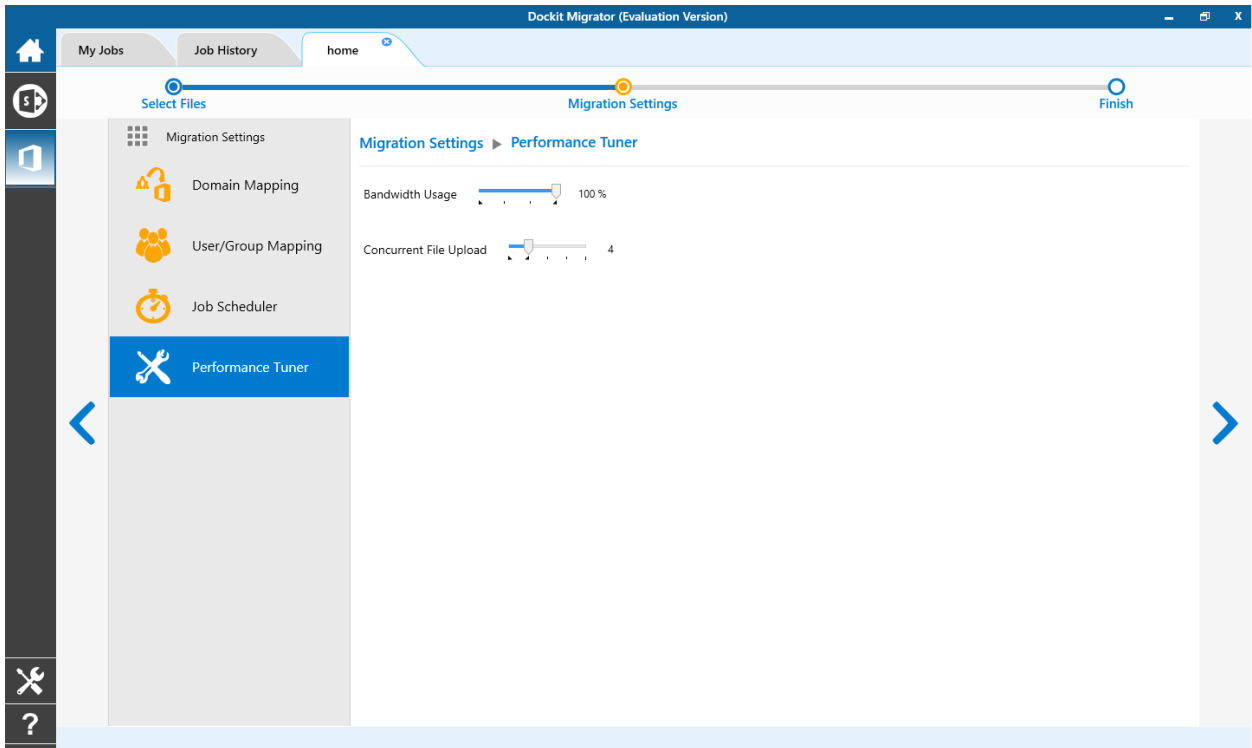


2. Dockit Migrator will create a schedule task in the Windows Scheduled Tasks with the given settings.

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

Performance Tuner

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



Job Summary

Job summary page display all configured settings and Items to migrate items. Job summary page will be appear as shown as below

Docket Migrator (Evaluation Version)

My Jobs Job History New SP...

Select Files Migration Settings Finish

Summary

Name : New SP O365 Job

Description :

Source URL : <https://mars.vsslab.local>

Target URL : https://m365x938794-my.sharepoint.com/personal/meganb_m365x938794_onmicrosoft_com

↓

<https://mars.vsslab.local/Docket365Testsite>

https://m365x938794-my.sharepoint.com/personal/meganb_m365x938794_onmicrosoft_com

Site Elements

☒ Site Permissions	☒ User Alerts ^[1]
☒ Activate Site Features	☒ Top Links in Site Pages ^[2]
☐ Content Types	☒ Quick Launch Links ^[2]
☐ Master Page	☒ Home Page as in Source site ^[2]

List Elements

☒ List Views	☒ Associate Web Parts
☒ List Permissions	☐ Workflows ^[2]
☒ Content Types	☐ Workflow History
☒ Columns	
☒ Maintain Same Document ID as in Source	

Save & Close Save & Start

OneDrive Migration

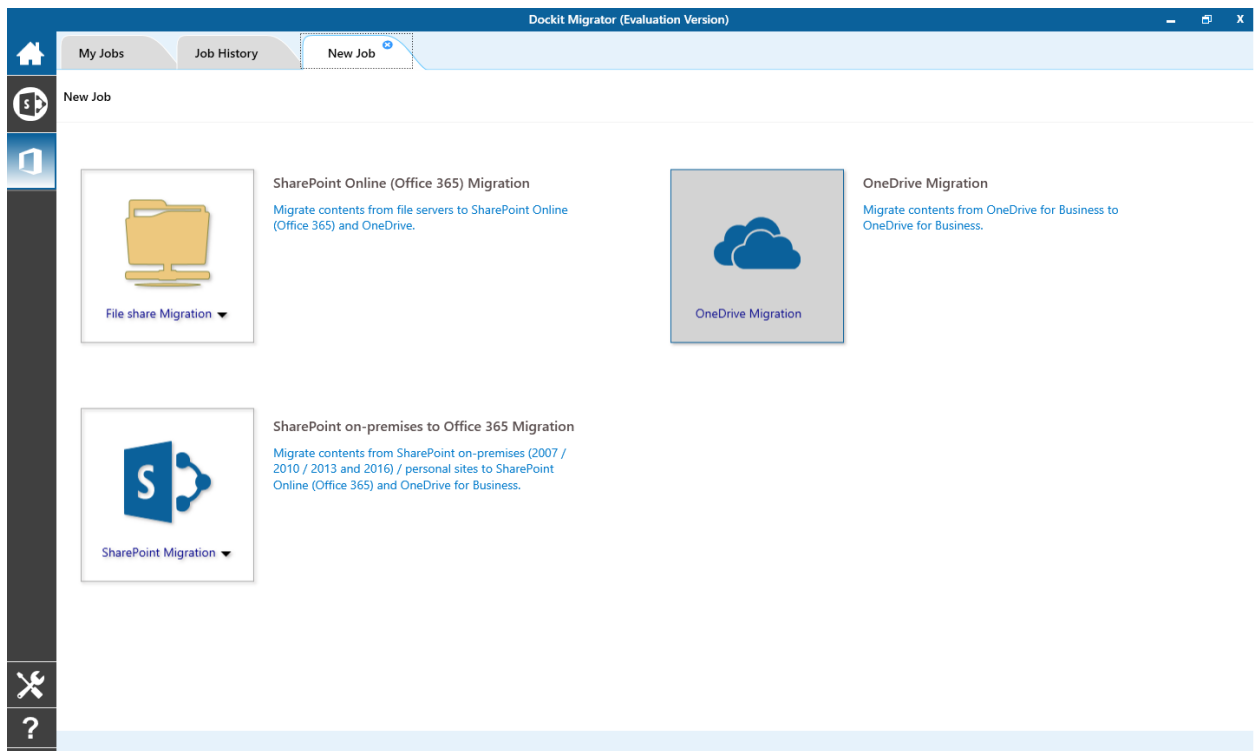
To create a new migration job to migrate sites, lists and libraries along their settings, metadata and permissions from OneDrive for Business to OneDrive for Business:

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

The screenshot shows the 'Docket Migrator (Evaluation Version)' application. The 'My Jobs' tab is active, displaying a table of 'SharePoint Online Jobs (2)'. The table has columns for Job Name, Description, Created Date, Modified Date, and Last Run At. Two jobs are listed: 'FS Explorer 1 Test' and 'FS Expo Test'. The interface includes a sidebar with navigation icons and a top bar with tabs for 'My Jobs', 'Job History', and 'New Job'. A toolbar at the top provides actions like '+ New', 'Edit', 'Run', 'Incremental', 'Delete', 'Validate', and 'View Job Instance'.

Job Name	Description	Created Date	Modified Date	Last Run At
FS Explorer 1 Test		1/12/2018 5:35:55 PM	1/12/2018 5:36:14 PM	1/12/2018 5:36:14 PM
FS Expo Test		1/12/2018 5:43:55 PM	1/19/2018 6:43:12 PM	1/19/2018 6:43:12 PM

Select OneDrive Migration from job category page as shown below.



The New Job page appears as shown below. Enter Job Name, Description (Optional) and specify source OneDrive and target OneDrive URL and its credentials and click Connect

Job Name

Job Description

OneDrive

Enumerate personal site of:

☒ Current User

☐ Multiple Users

(e.g., https://contoso-mysharepoint.com/personal/johndoe_contoso_onmicrosoft_com)

Source URL

Authentication

Windows

User name

Password

OneDrive

Enumerate personal site of:

☒ Current User

☐ Multiple Users

(e.g., https://contoso-mysharepoint.com/personal/johndoe_contoso_onmicrosoft_com)

Target URL

Authentication

Federated Identity

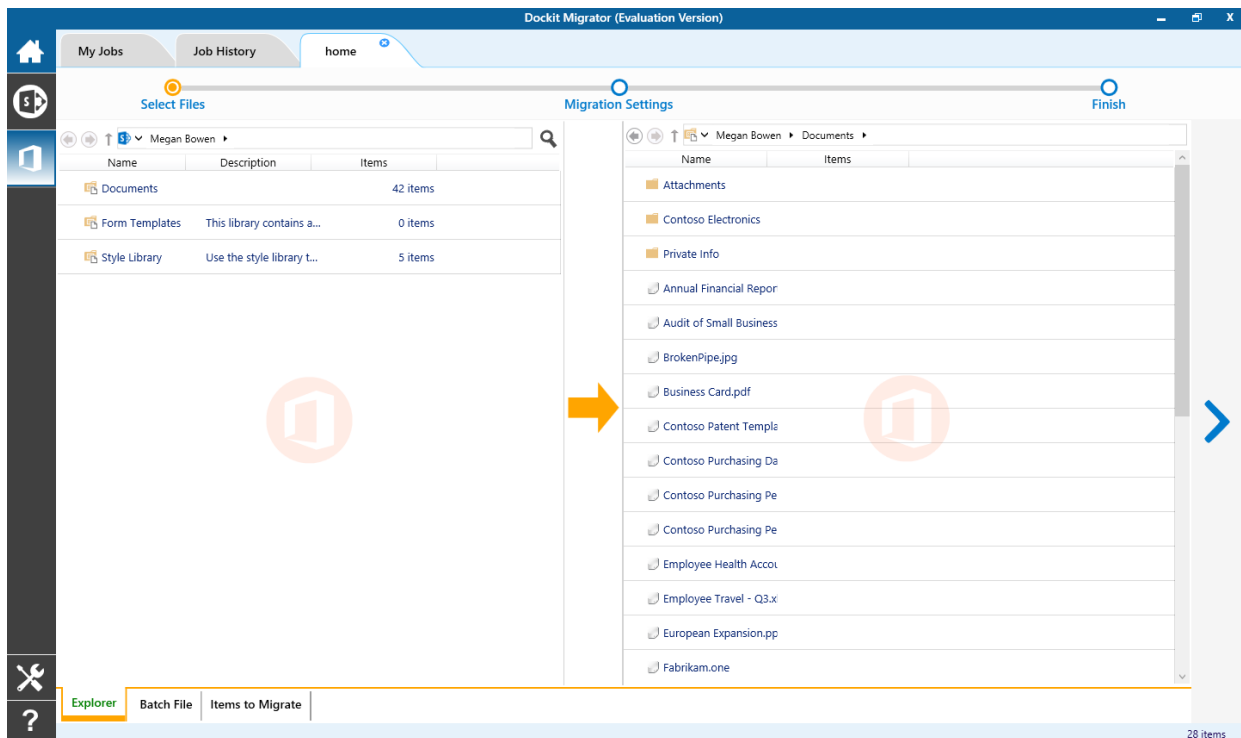
User name

Password

Connect

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

1. Specify a valid OneDrive site URL in source and specify valid OneDrive URL in target URL textbox.
2. Specify the Authentication type and user credentials to connect to the OneDrive URL using the options given below.
3. Specify the Authentication Type.
 - a)** Windows
 - b)** Forms
 - c)** Cloud Identity
 - d)** Federated Identity
4. Specify the user credentials
5. Specify the user context stored in the user profile (OR) Enter the user name in any ONE of the following formats:DOMAIN NAME\USER NAME,UserName@DomainName, UserName and its corresponding password. Dockit Migrator will initiate Windows authentication or Forms authentication depending on configuration in the OneDrive site.
6. Click Connect button to proceed.
7. Drag and Drop files from source OneDrive (Left Pane) to target OneDrive site (Right Pane) or Select content and Right click file share, select Add to OneDrive.

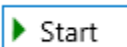


8. Click **Items to Migrate** on Right pane to check the list of items selected for migration, also you can remove files by clicking the Red X.

9. Specify [Migration Settings](#)

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

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



to initiate the migration process.

Batch File

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

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

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

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

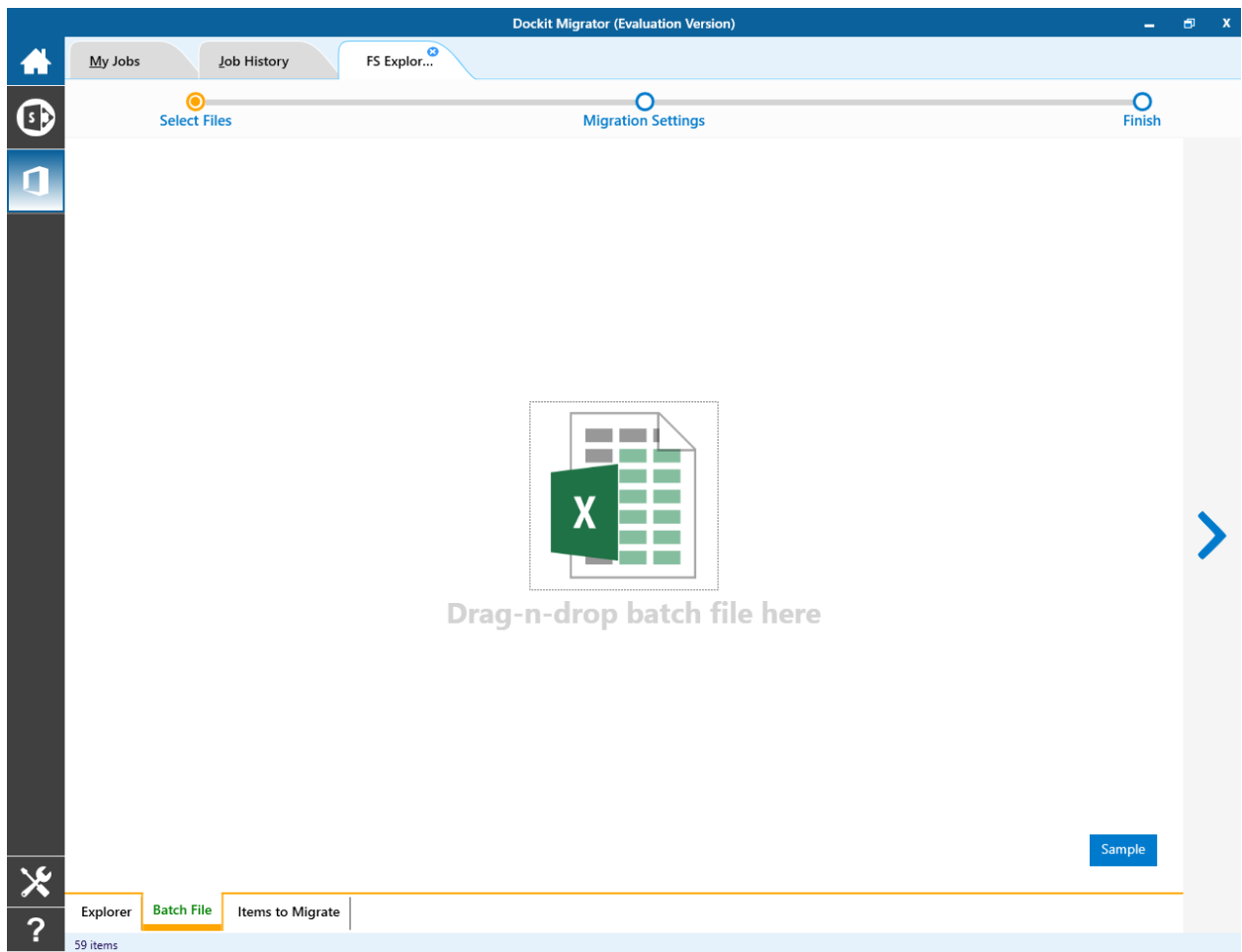
New Folder: The column 'New Folder' is an optional column in the batch descriptor file. Using this column, you can provide the relative path to be created in the respective destination location given under 'Destination Path' column prior to importing the contents. For instance, please see the batch descriptor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

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

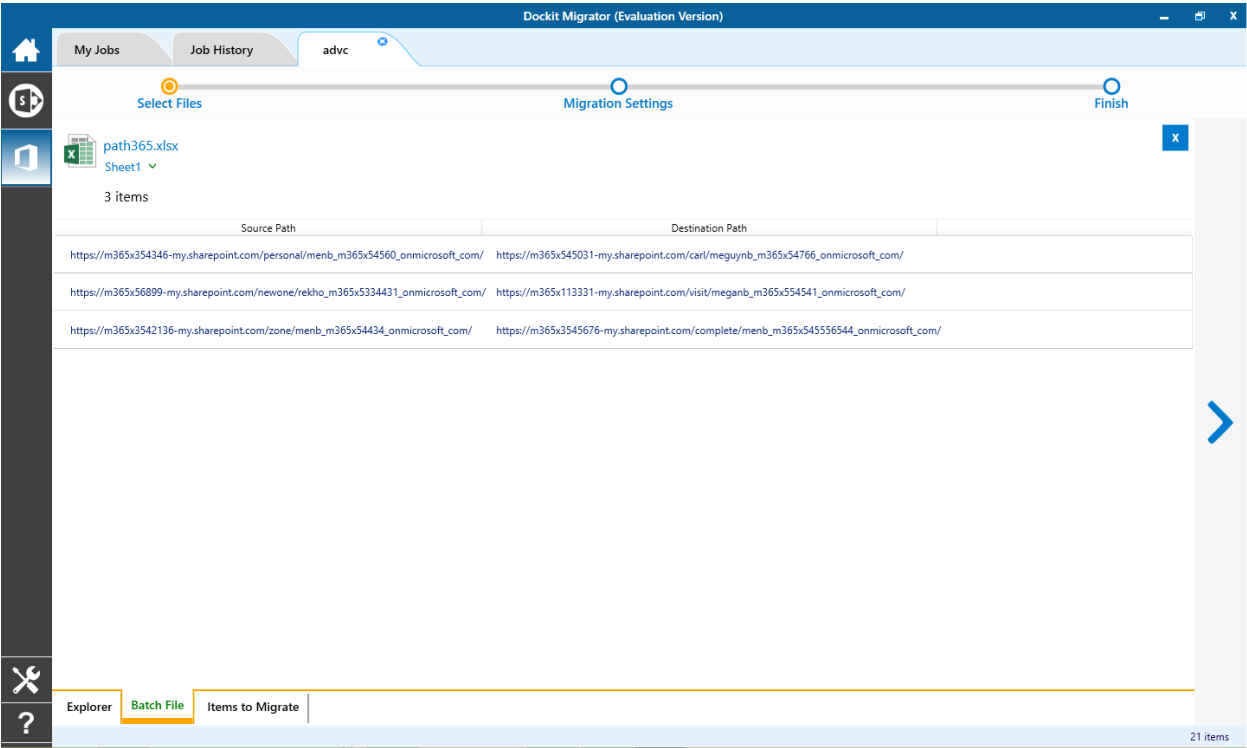
Docket Migrator automatically creates the folders (folder2/folder3) specified in the column 'New Folder' underneath the specified destination location (folder1). The 'model1' will be imported into the new destination location 'http://sharepoint/technical documents/folder1/folder2/folder3'.

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

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



Batch file content will be shown as below.

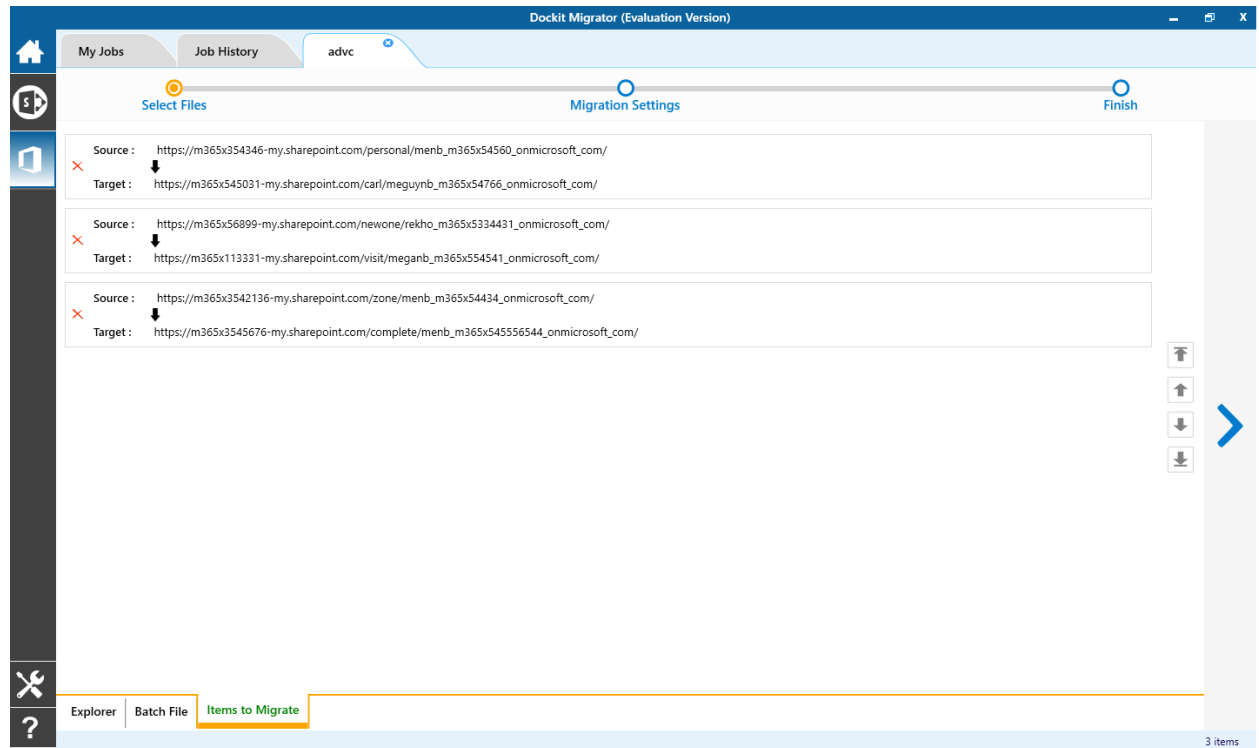


Batch file content will be added to Items to Migrate tab.

Items to migrate

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

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



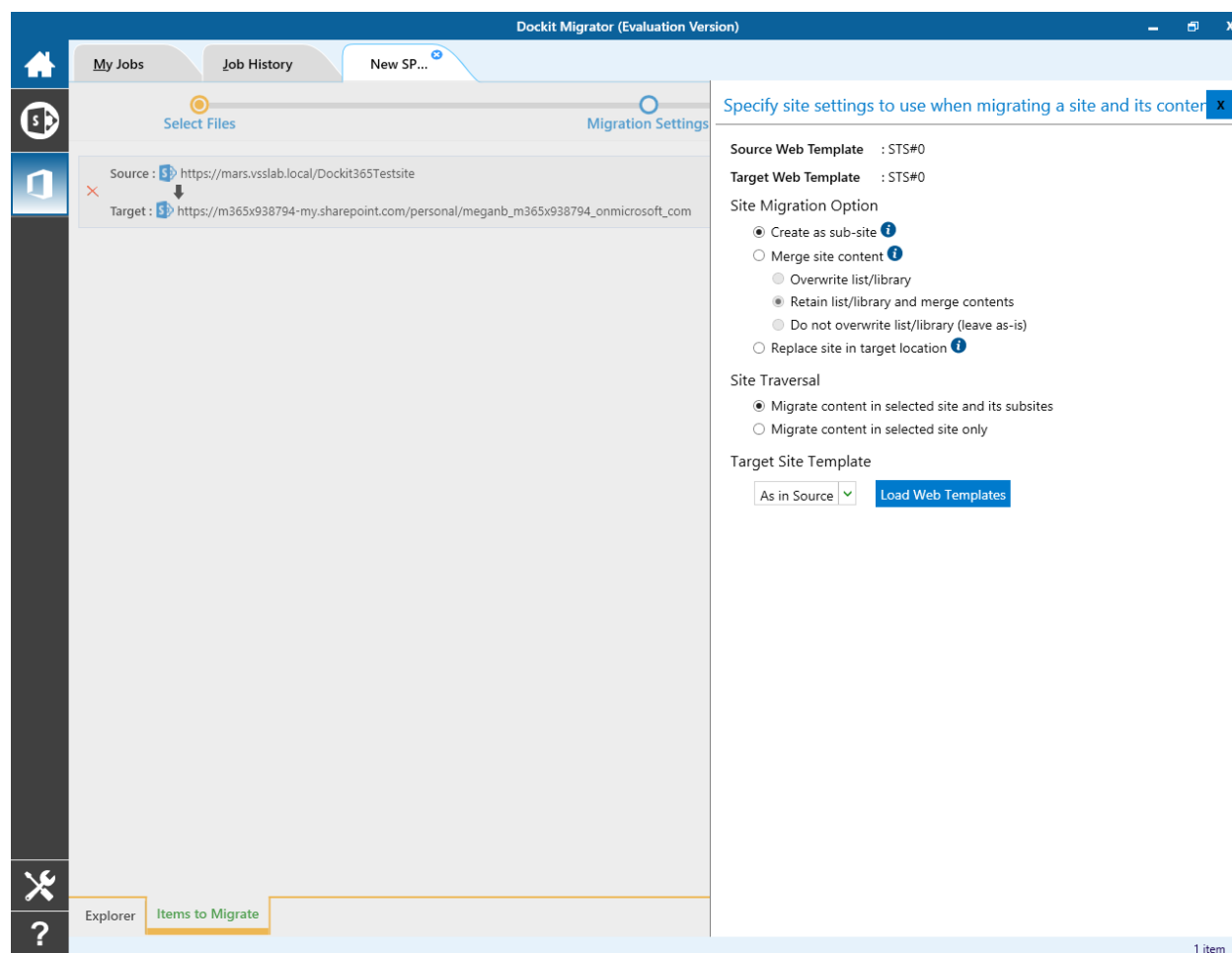
2. The selected Lists and Libraries are added for import will be displayed in the Items to Migrate page. The import process order can be changed by the navigation buttons available in the right side of the page. You can remove the items added for import by clicking Red X.

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

- c. To specify migration options for site, click [Site Migration Options](#)
 - d. To specify migration options for List/Library, click [List/Library Migration Options](#)
3. Click > button to proceed.

Site Migration Option

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



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

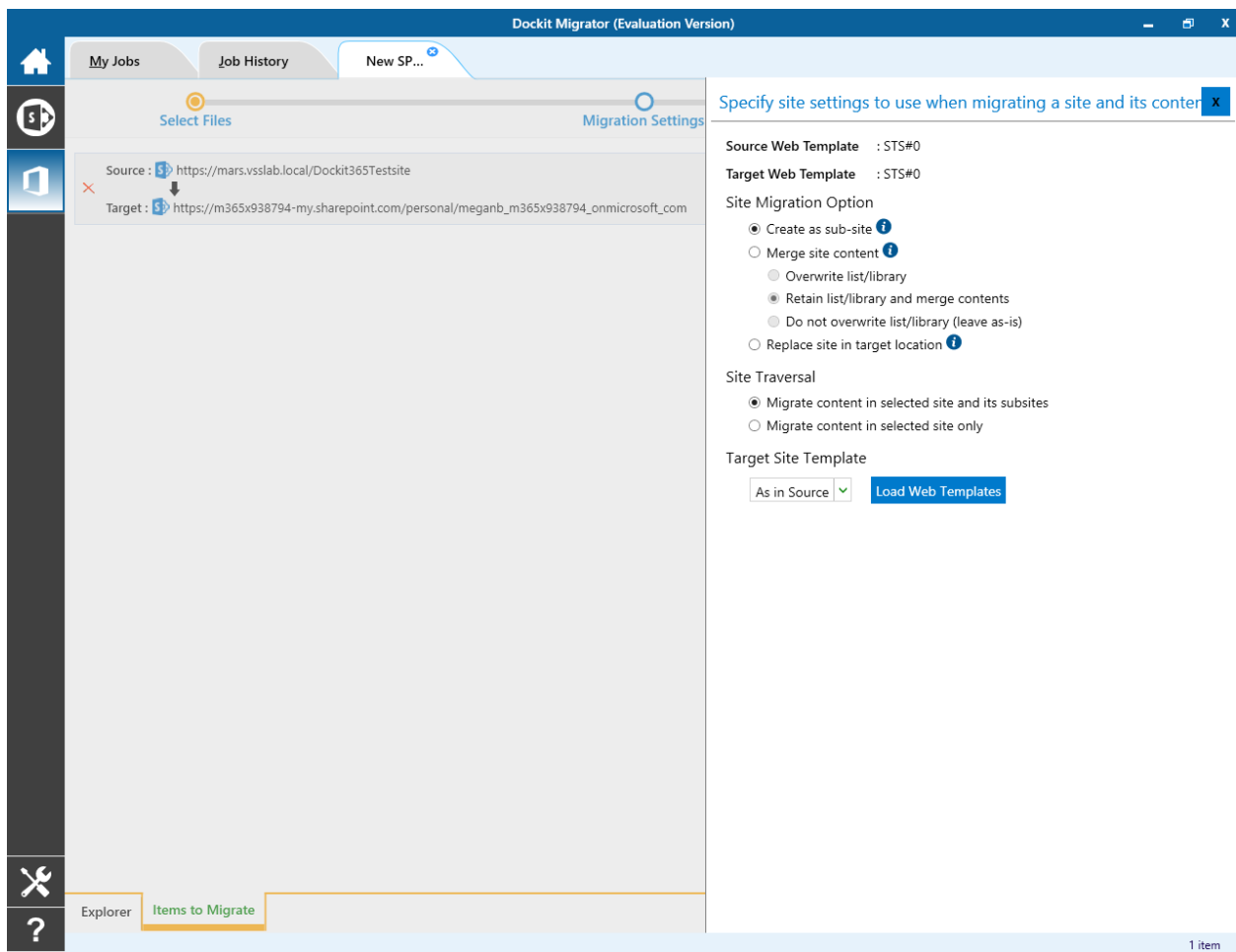
Note: Selecting **As in source** Option requires Docket Migrator Server Agent to be installed in the source server as well.

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

- a) **Create as sub site / replace sub site in target site** - The selected site in source location will be created as a sub-site in the target location. In case the target location contains a sub-site with the same title as the selected source site, then the source site content will be migrated to the sub-site in target location while retaining all sub-site content in the target site location.

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

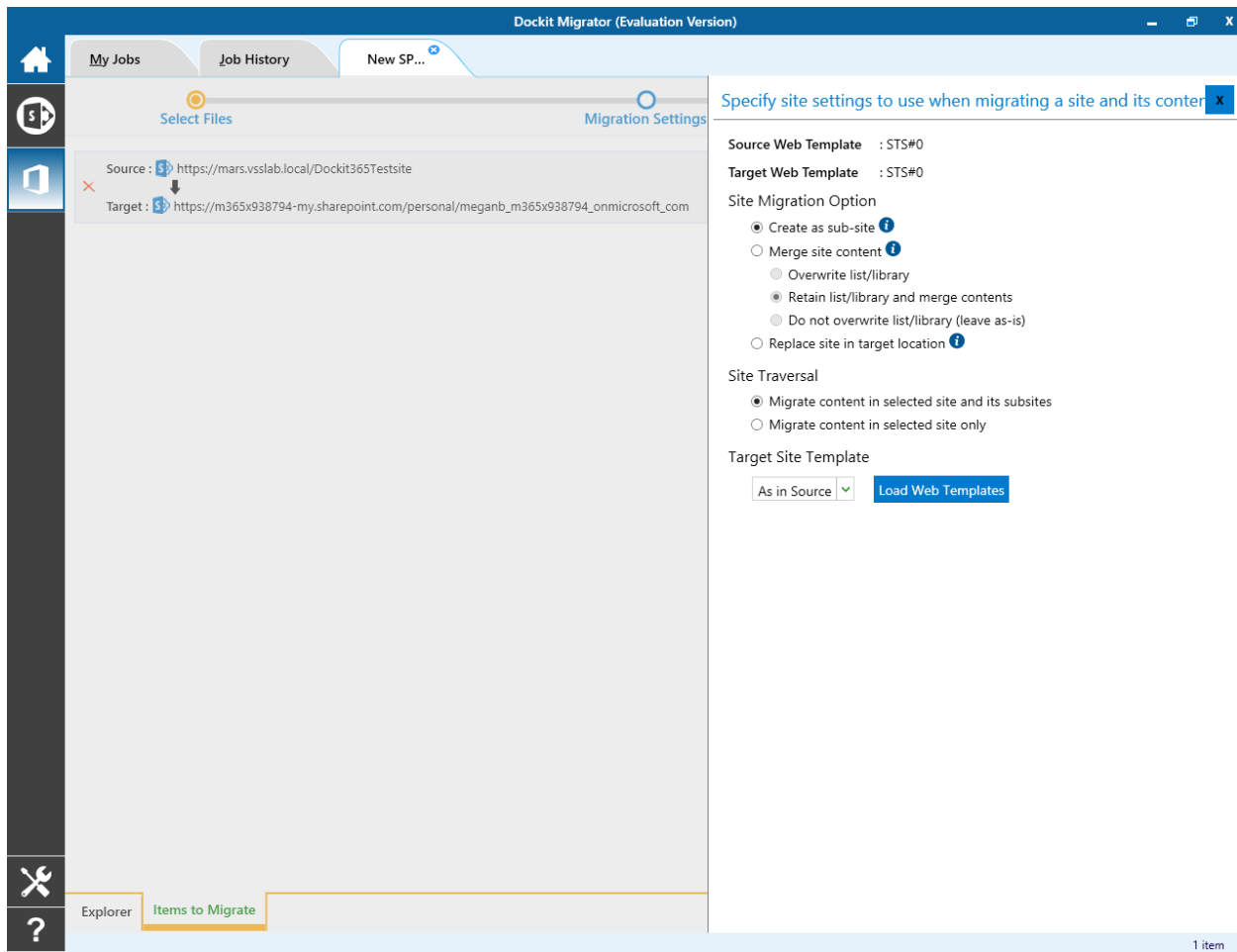
3. Site Traversal



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

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

4. Target Site Template

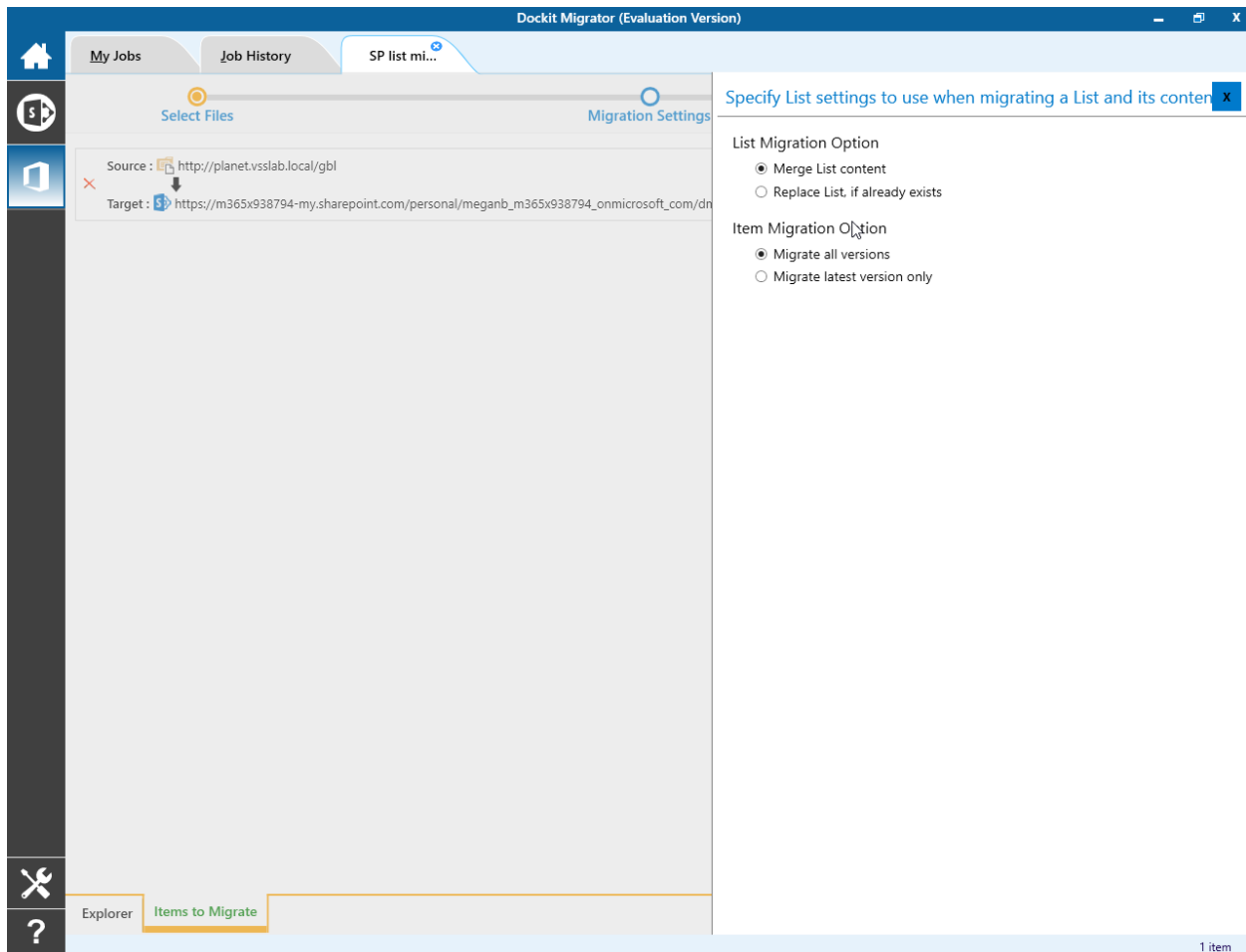


By Default, **Dockit Migrator** uses the same web template as in source site to create site in target. However, the application allows you to change the web template of your choice. For this, you need to pick one from the dropdown box.

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

List Migration Option

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



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

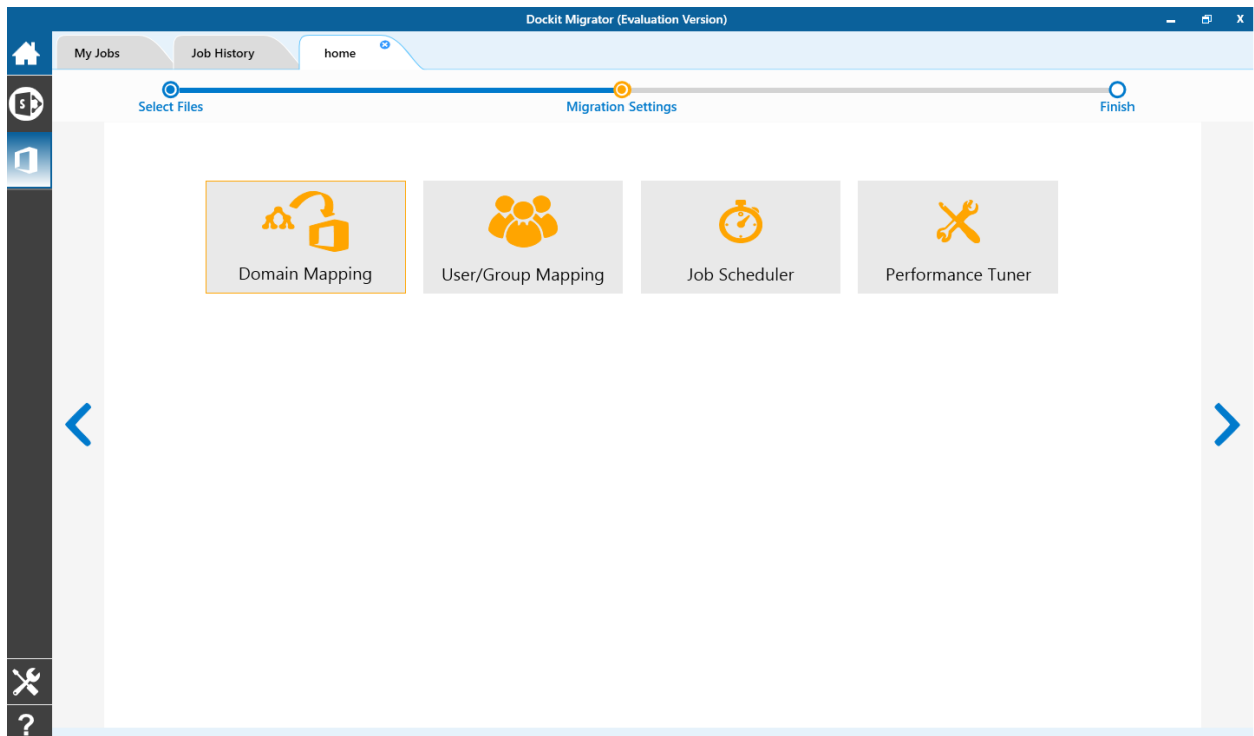
- a) **Merge list contents** - This option merge the list contents only with the following options
- b) **Replace list, if it already exists**- This option replaces the list in the target location, if the list already exists in the target location.

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

- c) **Migrate all versions** - This option migrates all versions of the item / file.
- d) **Migrate Latest versions only**- This option migrates the latest version of the item / file only

Migration Settings

e. Migration Settings will appear as shown below.



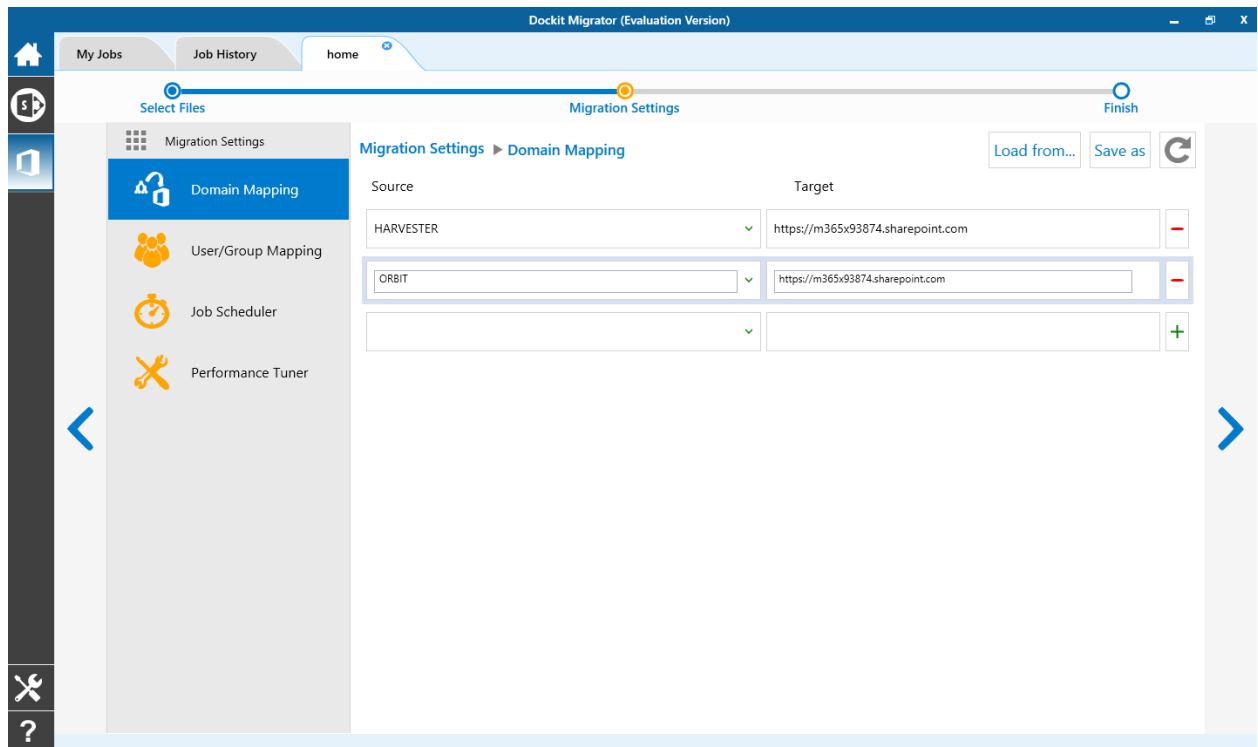
f. From this page, you can :

- [Domain Mapping](#)
- [User/Group Mapping](#)
- [Job Scheduler](#)
- [Performance Tuner](#)

Domain Mapping

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

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



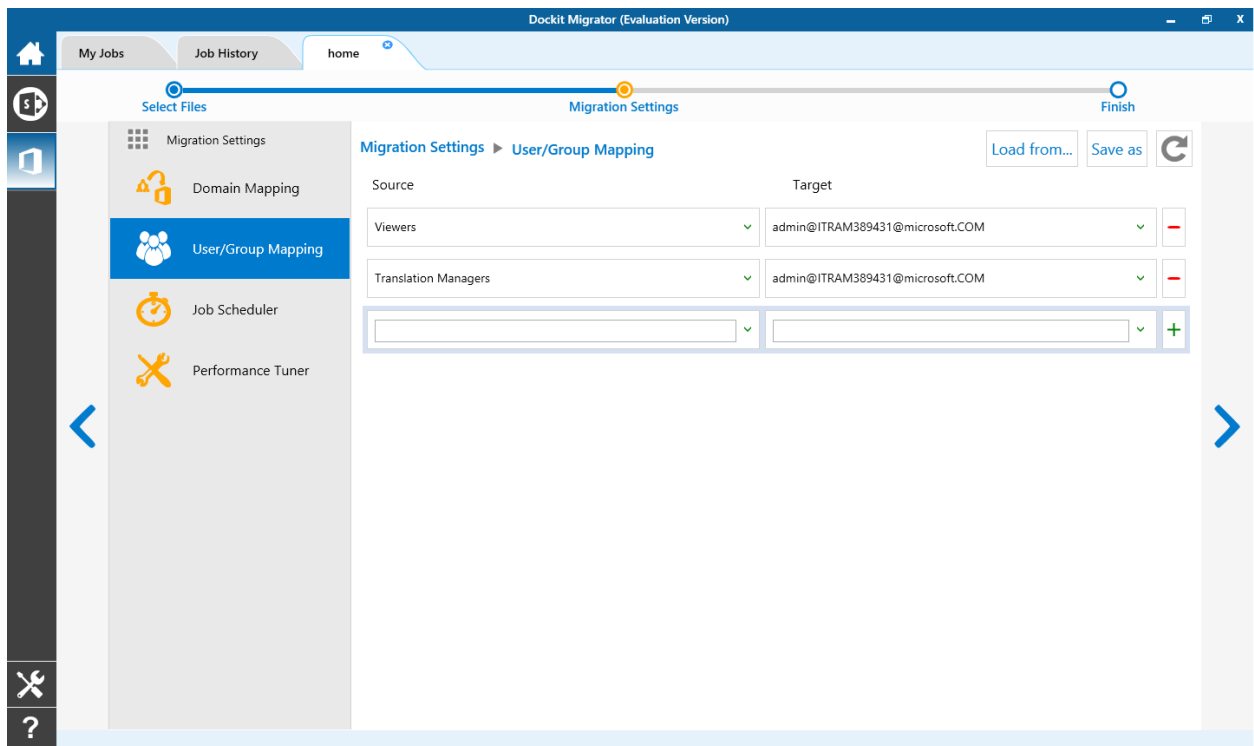
Select appropriate source domain from the domain list and enter the corresponding target domain name to create domain mapping. Dockit Migrator allows you to enter either domain names or UPN suffixes under the text boxes. For example research.vyapin.onmicrosoft.com etc...

User Mapping

Dockit Migrator uses user / group mapping to replace the unavailable users / groups with valid / new OneDrive users / groups when assigning user / groups or permissions for the folder / document during content migration from OneDrive environment to OneDrive. You can use this mapping for all Person or Group fields in OneDrive.

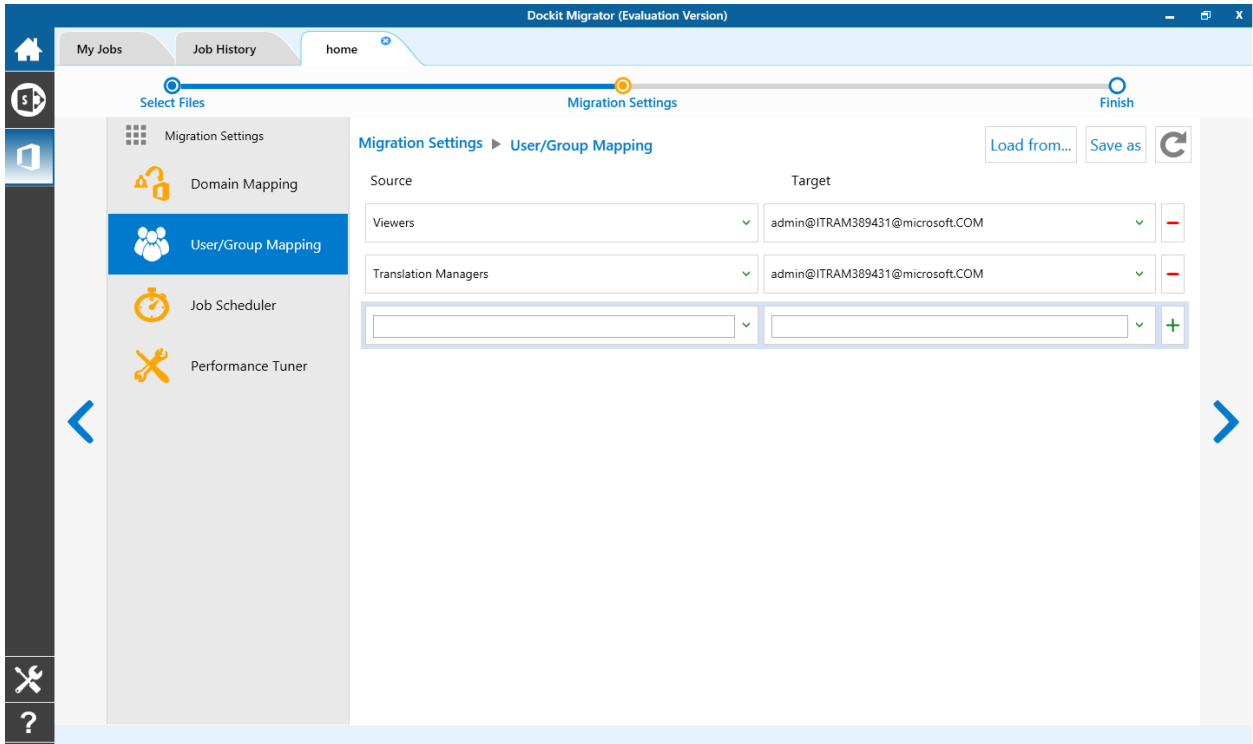
1. Source User

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



2. Target User

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

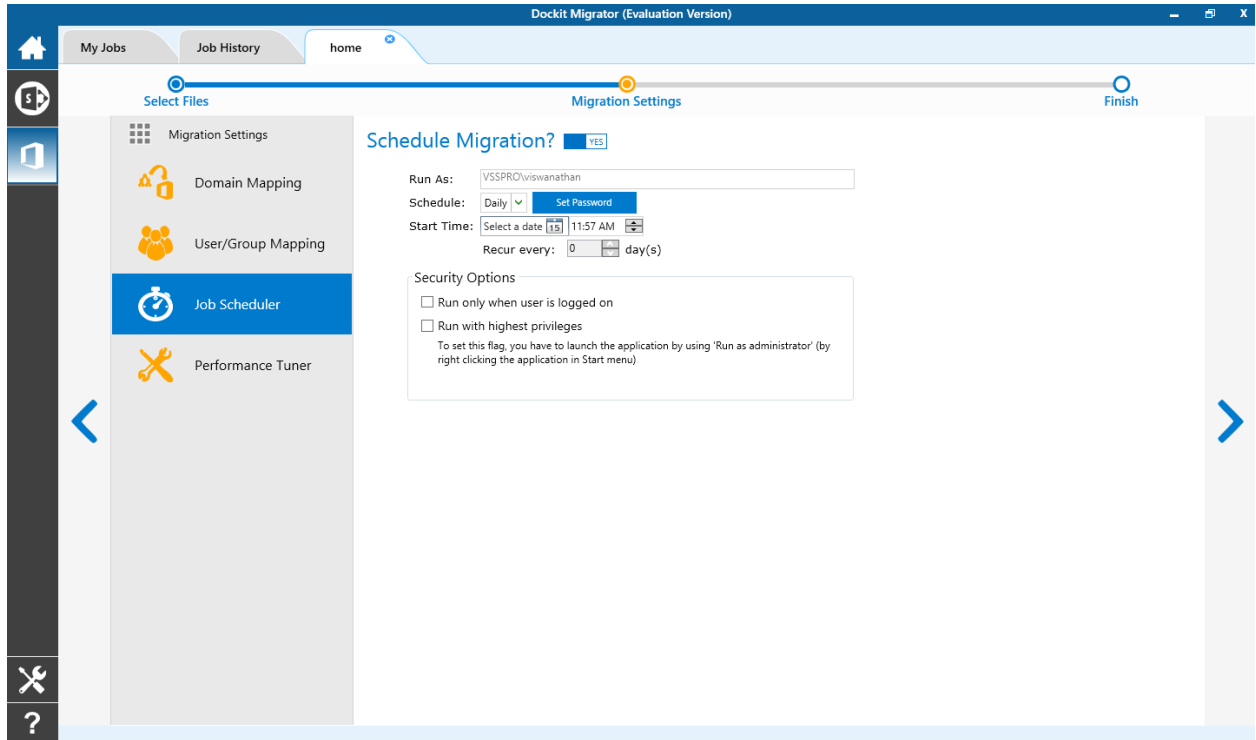


You also have the option to enter the user / group of your own in user mapping.

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

Job Scheduler

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

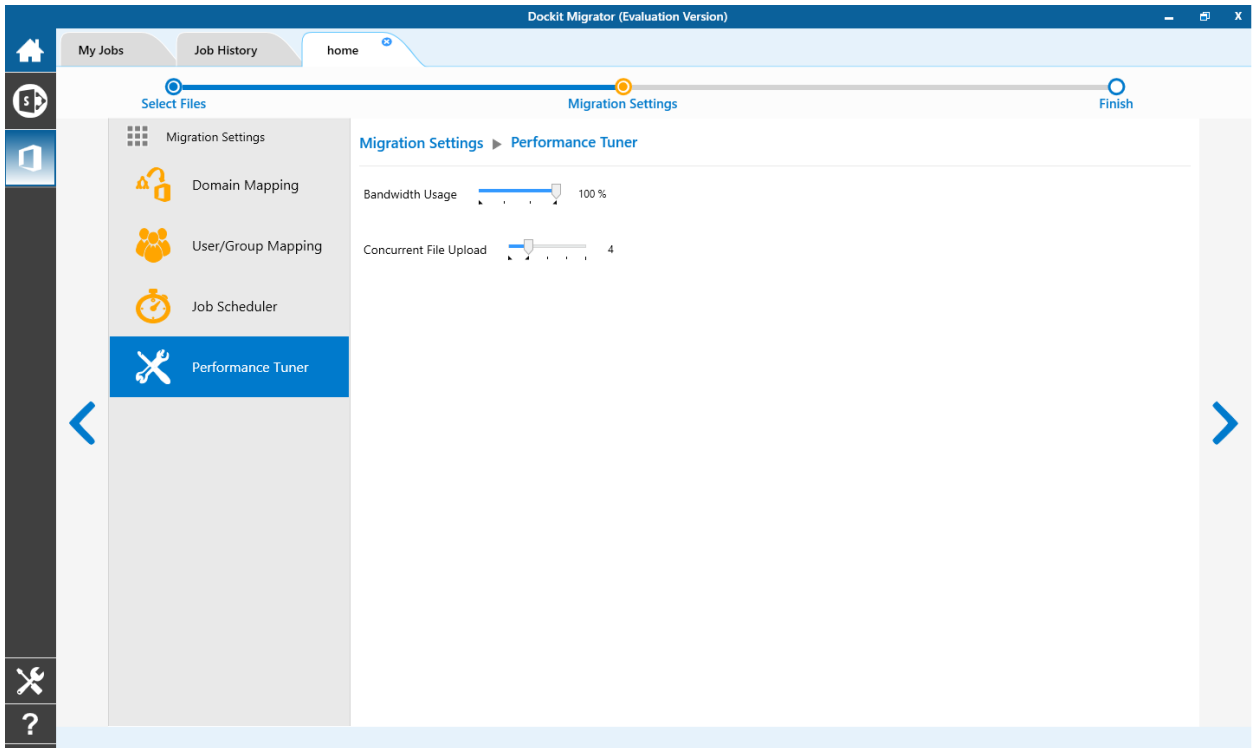


2. Docket Migrator will create a schedule task in the Windows Scheduled Tasks with the given settings.

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

Performance Tuner

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



Job Summary

Job summary page display all configured settings and Items to migrate items. Job summary page will be appear as shown as below

Docket Migrator (Evaluation Version)

My Jobs | Job History | New SP...

Select Files | Migration Settings | Finish

Summary

Name : New SP O365 Job

Description :

Source URL : <https://mars.vsslab.local>

Target URL : https://m365x938794-my.sharepoint.com/personal/meganb_m365x938794_onmicrosoft_com

Source Path: <https://mars.vsslab.local/Docket365Testsite>

Target Path: https://m365x938794-my.sharepoint.com/personal/meganb_m365x938794_onmicrosoft_com

Site Elements

☒ Site Permissions	☒ User Alerts ^[1]
☒ Activate Site Features	☒ Top Links in Site Pages ^[2]
☐ Content Types	☒ Quick Launch Links ^[2]
☐ Master Page	☒ Home Page as in Source site ^[2]

List Elements

☒ List Views	☒ Associate Web Parts
☒ List Permissions	☐ Workflows ^[2]
☒ Content Types	☐ Workflow History
☒ Columns	
☒ Maintain Same Document ID as in Source	

Save & Close | Save & Start

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. Explorer Mode Option:

Follow the steps in the [Explorer Mode \(File Share to SharePoint Migration\)](#) Option task wizard. The relevant section for importing file versions has been described below:

The selected folders and files added for import will be displayed in the **Items added for import** grid. Dockit processes the top-level folders and files added for import in the order in which it appears in the **Items added for import** grid. The import process order can be changed by the **navigation** buttons available in the right side of the grid. You may use this order sequence feature appropriately, when you have to import different file versions (with the same name) in the specified sequence. This feature is extremely powerful when you have different file versions organized in version folder names.

For example, let us say, you have different versions of files organized in the folder structure named as - C:\My Documents\Sales Proposals\version1, C:\My Documents\Sales Proposals\version2, C:\My Documents\Sales Proposals\version3 etc. You can add the folders version1, version2, version3 etc. to the destination location in this intended order or use the navigation buttons to the right of the grid to order them. Dockit will automatically process the added folders / files in the order in which it appears in the grid. Select **Create new version** option in the [File Settings](#) wizard step to handle file versions correctly.

2. Batch File Mode Option:

Follow the steps in [Batch file Mode \(File Share to SharePoint Migration\)](#) option task wizard. The relevant section for importing file versions has been described below:

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

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

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

Select **Create new version** option in the [File Settings](#) wizard step to handle file versions correctly.

Importing document versions using the Folders & Files Renaming Rules engine:

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

For instance, all document versions of the same file are stored in a single folder as stated below and you would like to 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):

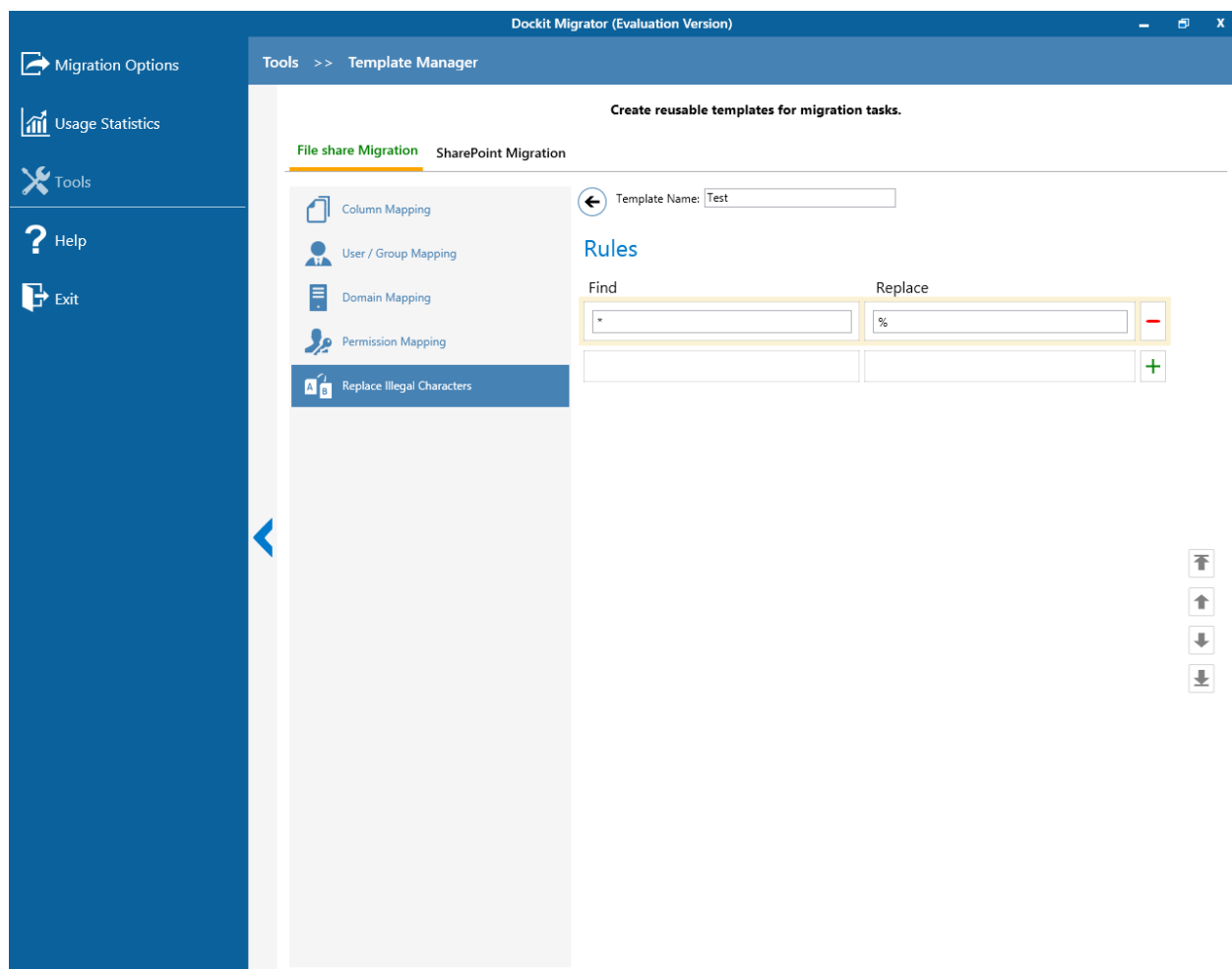
Create a batch descriptor file as given below:

```
"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"
```

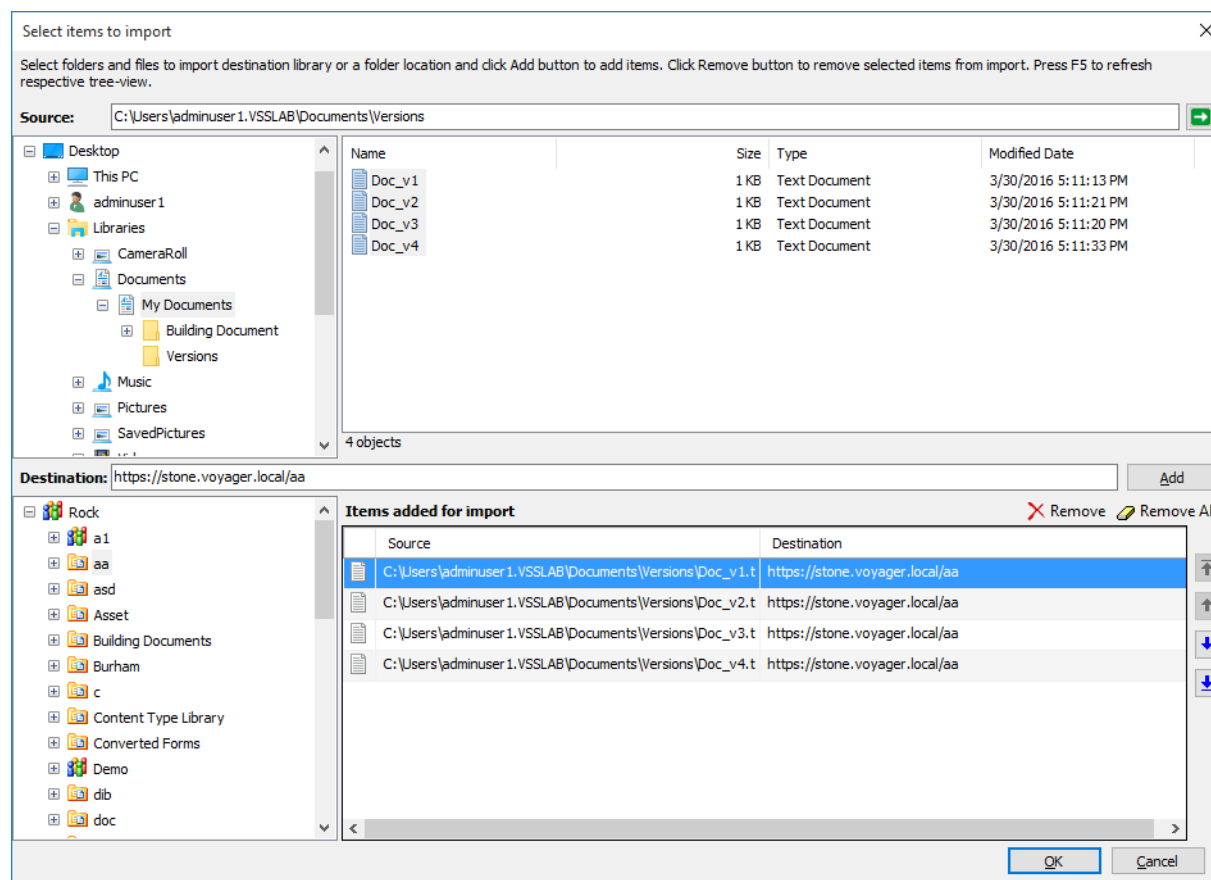
Please ensure that files are arranged / ordered with correct version sequence in the batch descriptor file. Dockit processes the files in the order in which they appear in the batch descriptor file.

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.

Dokit Task Wizard - Sample1

Step 2 of 10: Items to import

Select folders or files to import by clicking 'Browse...' button.

Delete?	Source Path	Destination Location	Contains	Folder Traversal Option	
	D:\Sample Files\Account Files	https://alpine.vsslab.local/De	60 Files, 3 Folders, 2.85 MB	Import all files and folders	...
	D:\Sample Files\Audit Files	https://alpine.vsslab.local/De	10 Files, 0 Folders, 96.9 KB	Import all files and folders	...
	D:\Sample Files\Image Files	https://alpine.vsslab.local/De	32 Files, 1 Folders, 1.82 MB	Import all files and folders	...

Total: 0 item(s), 0 KB

Refresh Size
 Browse...

Renaming Rules:

Folder Renaming Rule : Folder Rule
File Renaming Rule : File Rule

☐ Truncated folder names, max length 128
☐ Truncated file names, max length 128

☐ **Perform Incremental Migration / One-way Sync**

☒ Documents modified or newly created, since last migration using Dokit
 (Last migration date: NONE)
 ☐ Documents modified or newly created, since last update in SharePoint
 ☐ Documents modified or newly created This Week

< Back
 Next >
 Finish
 Cancel

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 Dokit Task Wizard to validate the task and avoid common errors.

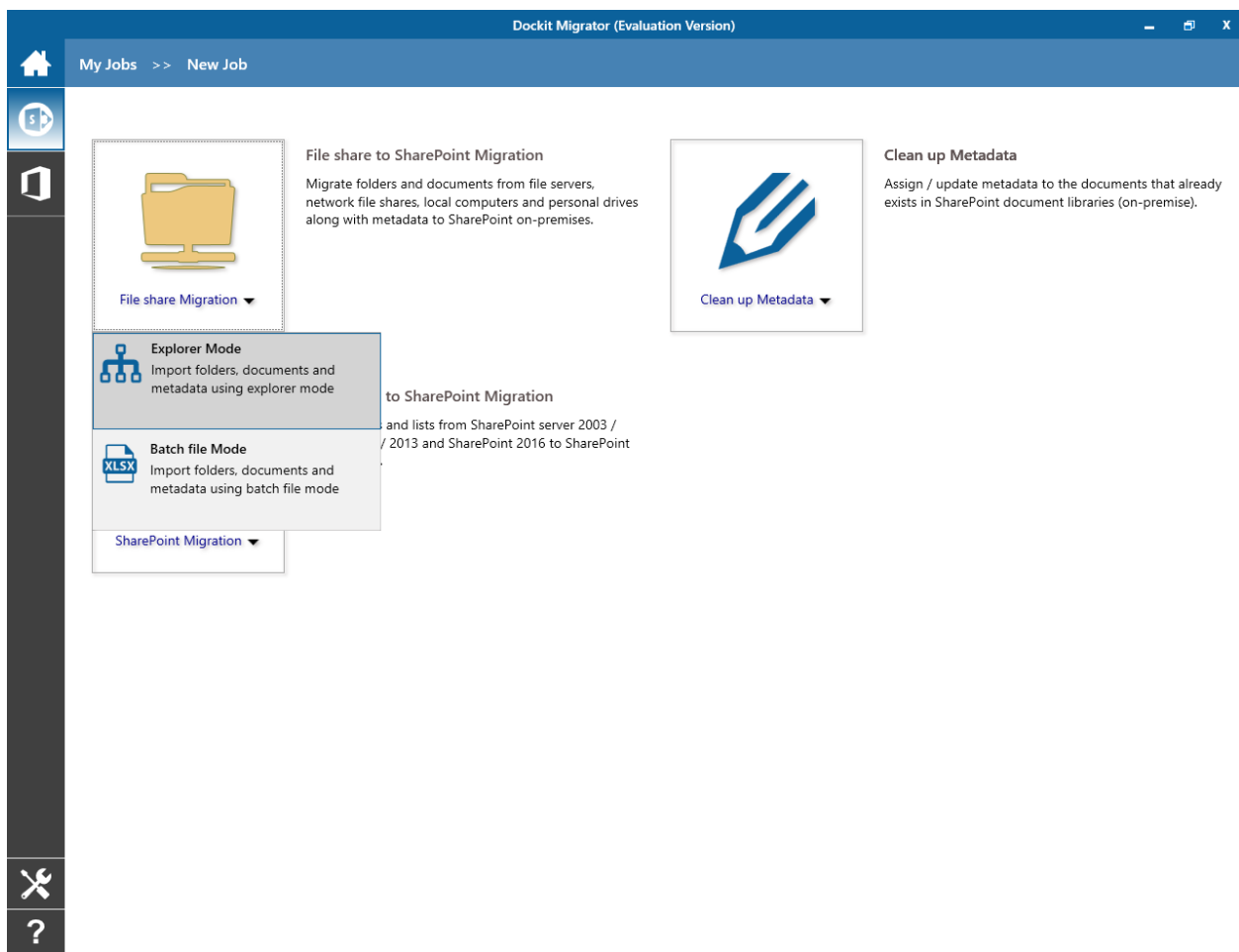
Create Document Sets

Dockit enables you to create the folders as document set and update the metadata for document sets in SharePoint library. In order to create a new document, set, you must specify the folder content type as a 'Document Set'.

Based on the specified content type, Dockit will decide whether to create the source folder as a standard folder or document set in the destination document library. If the specified content type is 'Document Set' derived content type, Dockit will create the new document sets (named with source folder names) and import the files available in the source folders depending upon the folder options specified in Dockit import task wizard.

Please follow the instructions given below to create document sets and import documents into the new document sets created in SharePoint:

In Dockit Migrator application, create a task by clicking **Explorer mode** from **File Share migration** option in **New Job** page as shown below.



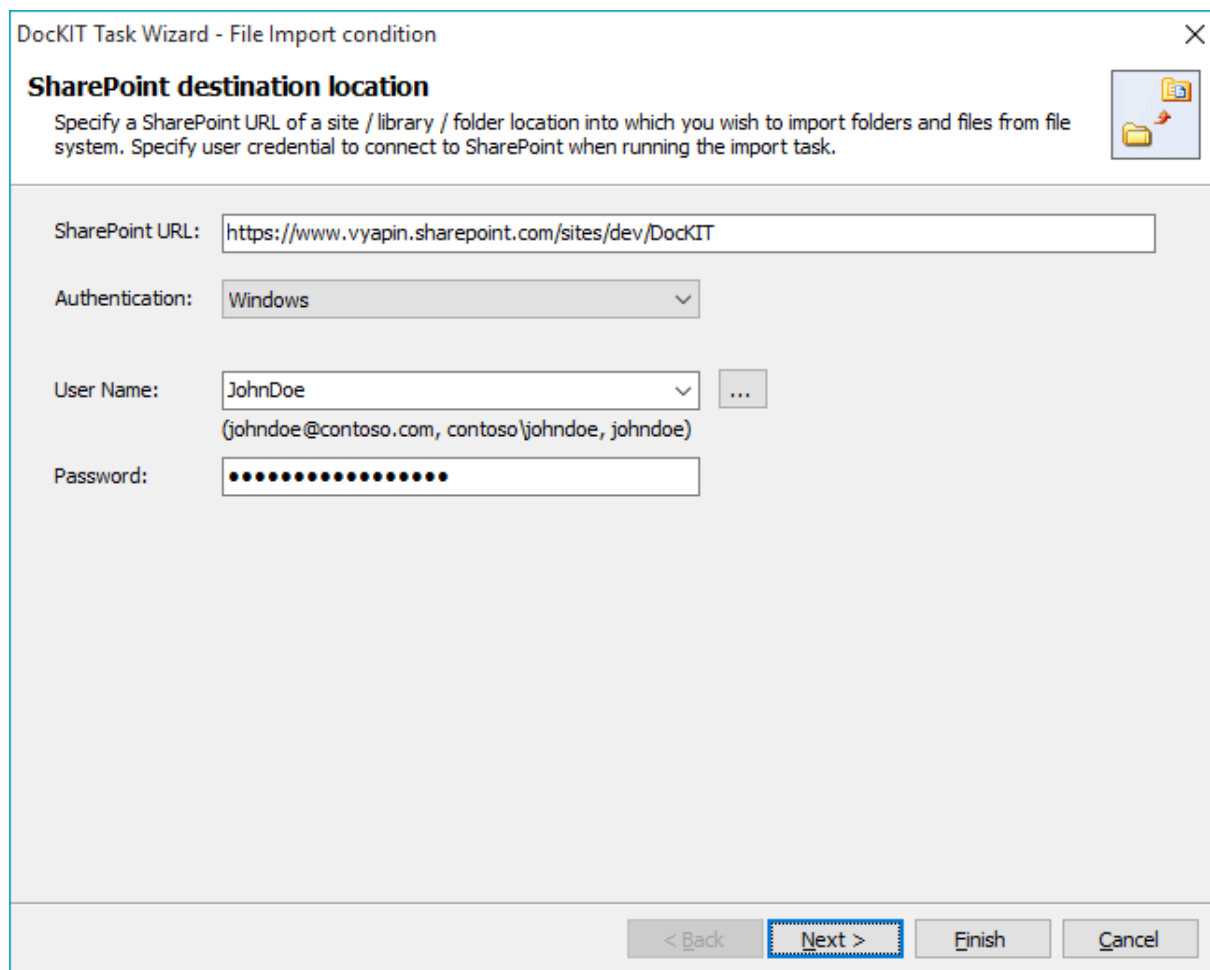
Note: You can also use **Batch File Mode** option from **Import folders, files and metadata to SharePoint Libraries** to create folders as new document sets from remote computer. In this section, we will discuss using the **Explorer Mode** option from **Import folders, files and**

metadata to SharePoint Libraries import task option to describe how to use Dockit Task Wizard to create folders as new document sets in SharePoint.

Specify a SharePoint URL of a site / library / folder location to which you wish to import folders and files from the file system. Specify the users credentials to connect to the SharePoint URL specified in **Step 1 of 15: SharePoint destination location** step in Dockit Task Wizard.

1. Dockit expects the user name specified in SharePoint Login dialog / user account specified in the Run As parameter in the scheduled task to be a:
 - Member of administrators group in the local server and remote SQL Server (or)
 - Application pool user account (or)
 - Owner of the site where the destination library resides

in order to create the document, set.



DockIT Task Wizard - File Import condition

SharePoint destination location

Specify a SharePoint URL of a site / library / folder location into which you wish to import folders and files from file system. Specify user credential to connect to SharePoint when running the import task.

SharePoint URL:

Authentication:

User Name: ...
(johndoe@contoso.com, contoso\johndoe, johndoe)

Password:

< Back Next > Finish Cancel

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

Then the templates dialog will appear as shown below:

Docket Task Wizard - File share Migration

Step 3 of 9: Column Mapping
Map metadata properties to the desired SharePoint columns.

Column Mapping Template: **Blank** Save As Reset..

Source Column	Target Column	Default Value
Name	Name	
Created by	Created By	
Modified by	Modified By	
Created	Created	
Modified	Modified	
Approval Status	Approval Status	

Assign Content Type

Document Content Type: **Content Type**

Folder Content Type: **Folder Content Type**

Specify the content type to be assigned for document / folder. You can create a folder as document set by providing the document set content type name under 'Folder Content Type'. If left blank, default content type configured in the target SharePoint library will be set.

< Back **Next >** Finish Cancel

5. In the dialog, specify the folder content type as any 'Document Set' derived content type to create a document set using one of the options given below:
 - a. **Specify the content type** - Specify any 'Document Set' derived content type to create a document set and assign this specific content type to it. If the content type specified in the textbox does not exist, Docket 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, Docket 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, Docket will create the folder and will assign the default content type of the library for the newly created folders.
6. Click **Next** and proceed the subsequent steps.

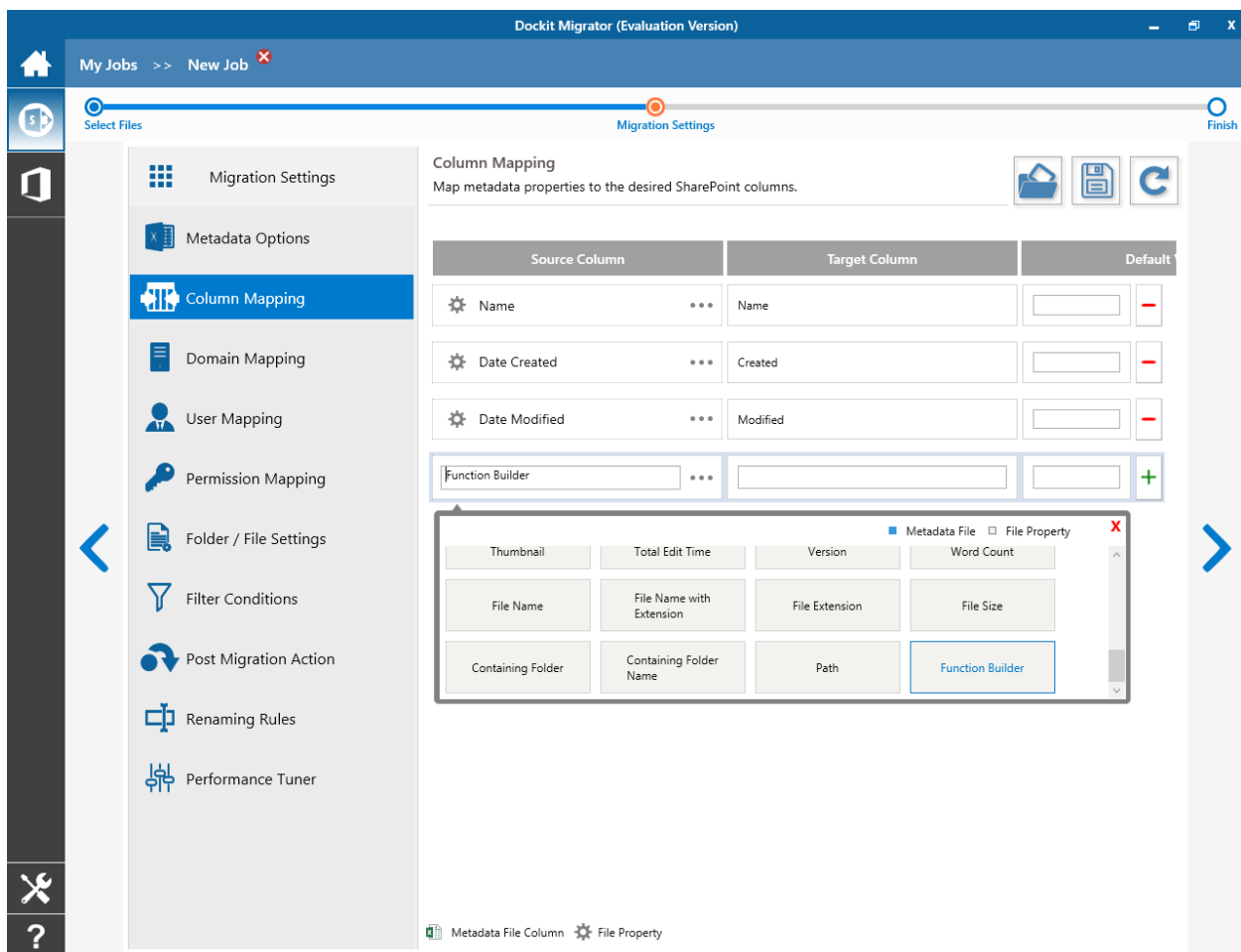
Function Builder

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

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

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

1. Select 'Function Builder' under 'Column Mapping' as Source from the list as shown below:

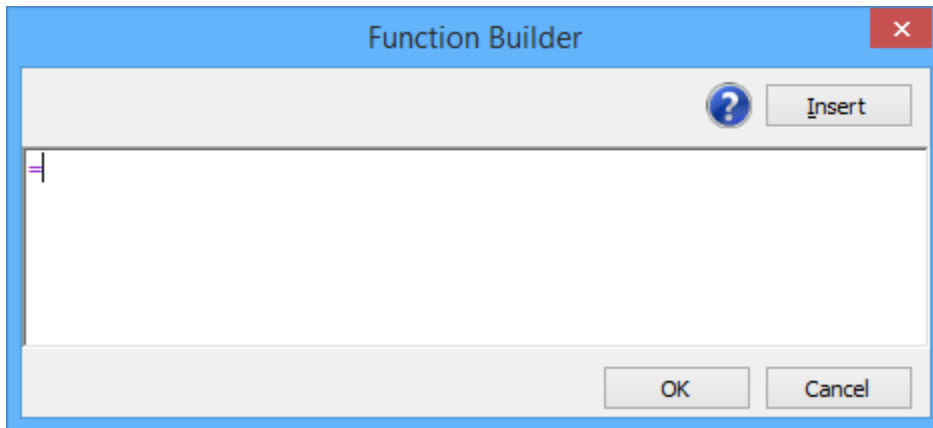


The screenshot shows the Dockit Migrator (Evaluation Version) interface. The 'Column Mapping' section is active, displaying a table with Source Column, Target Column, and Default columns. The 'Function Builder' option is selected in the Source Column dropdown. A modal window titled 'Function Builder' is open, displaying a grid of metadata file columns and file properties. The 'Function Builder' option is highlighted in the grid.

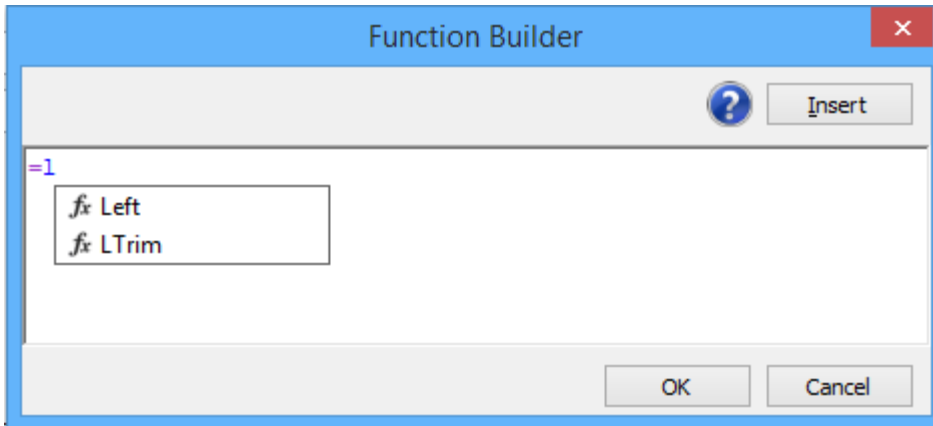
Source Column	Target Column	Default
Name	Name	
Date Created	Created	
Date Modified	Modified	
Function Builder		

Metadata File Columns: Thumbnail, Total Edit Time, Version, Word Count, File Name, File Name with Extension, File Extension, File Size, Containing Folder, Containing Folder Name, Path, Function Builder.

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

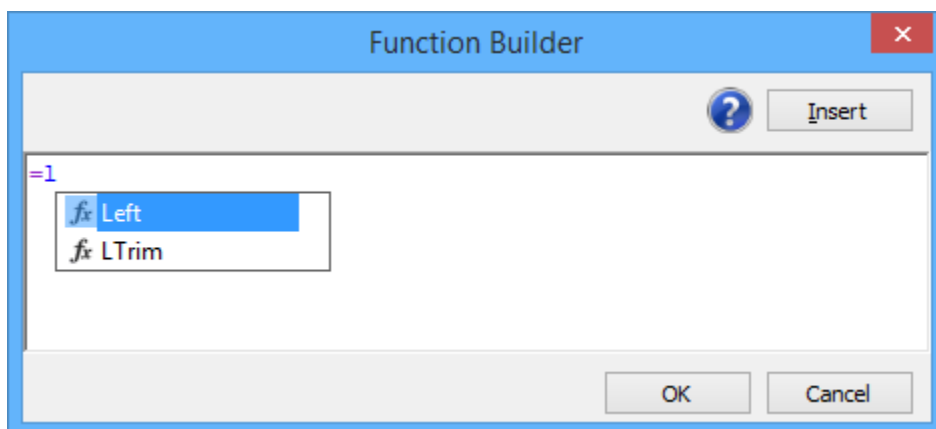


3. Enter a character in a textbox. If a character or substring starts with the built-in function name, suggestion list will appear as shown below:

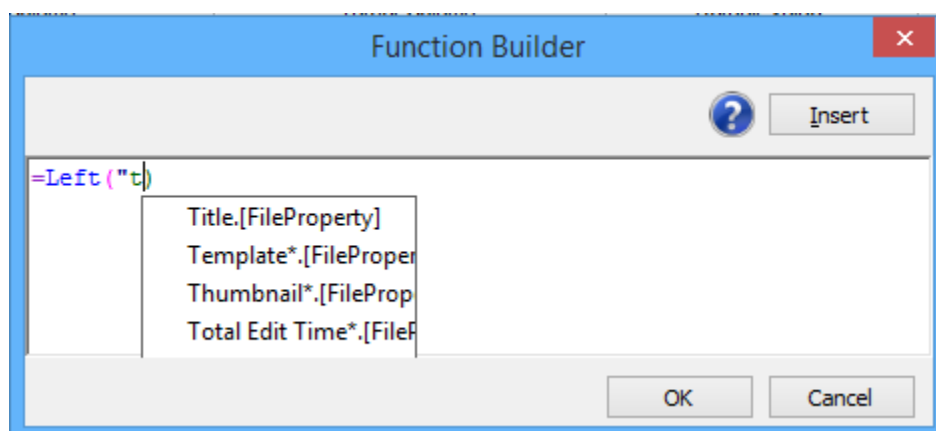


4. Select a function name from the list and press Enter key or Double Click to add the selected function to the function builder.

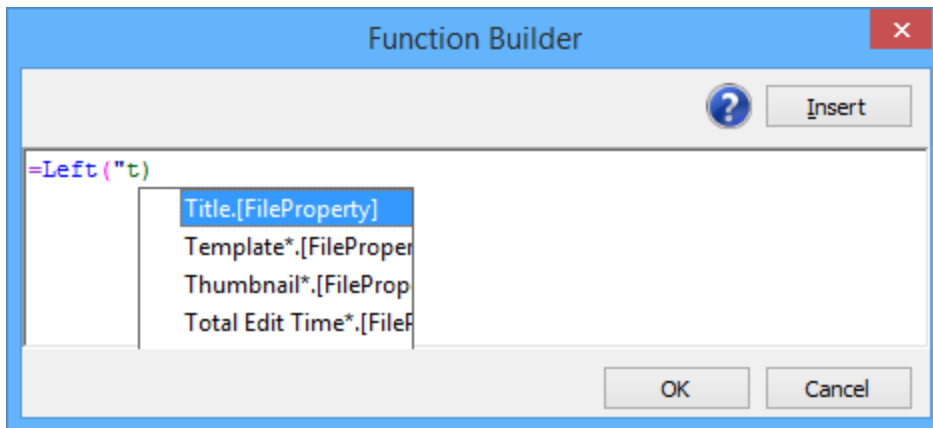
NOTE: You can also add the built-in function to the function builder by click 'Insert button' and select a function in the function list.



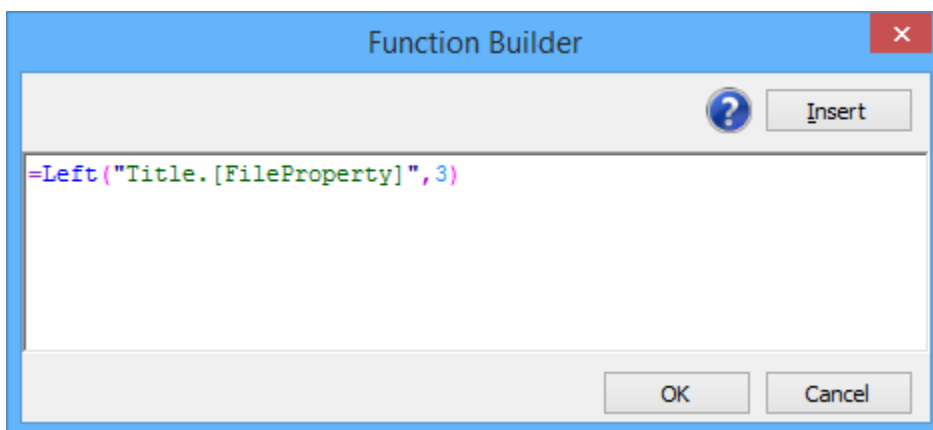
5. To add a file property or column in the metadata file as a parameter to the function, Enter a double quotes followed by character or sub string of a property. If the character starts with file property name or metadata file column name, then suggestion list will appear as shown below:



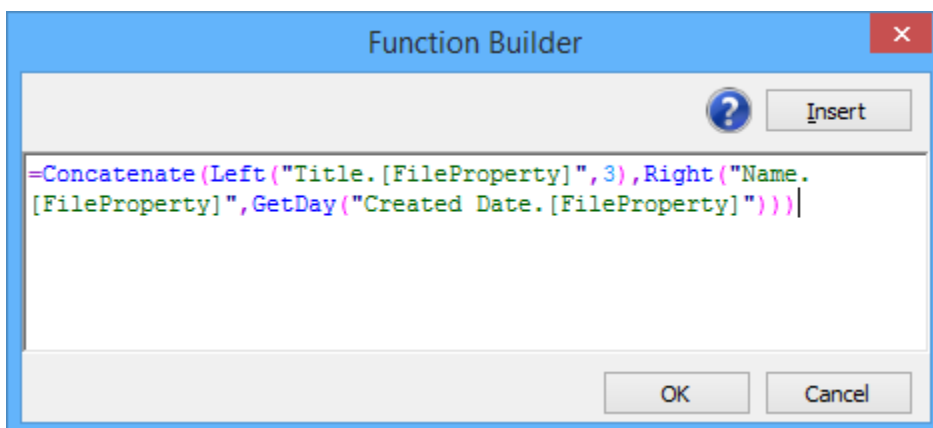
6. Select a property name and press Enter key or Double Click to add as a parameter for the function



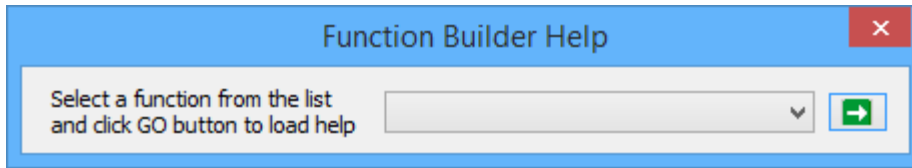
7. You can also provide a free text or integer as parameters for the function, if desired.



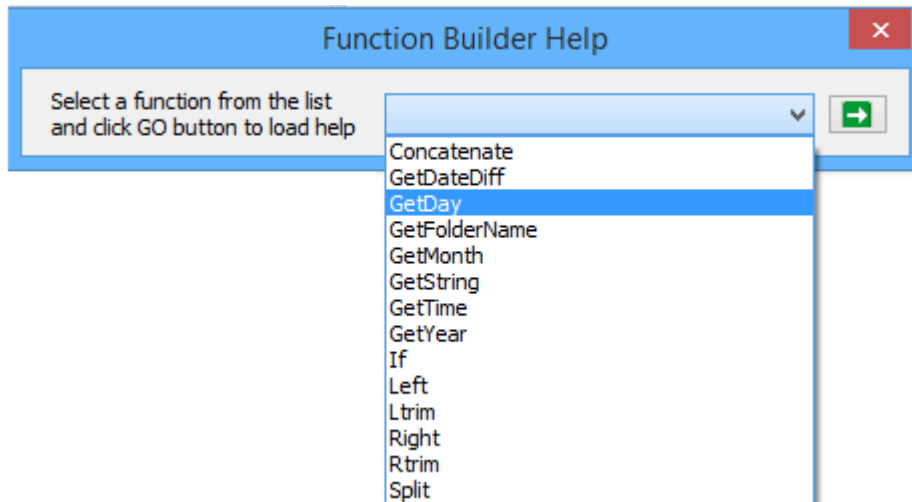
8. You can also use nested functions too as shown below:



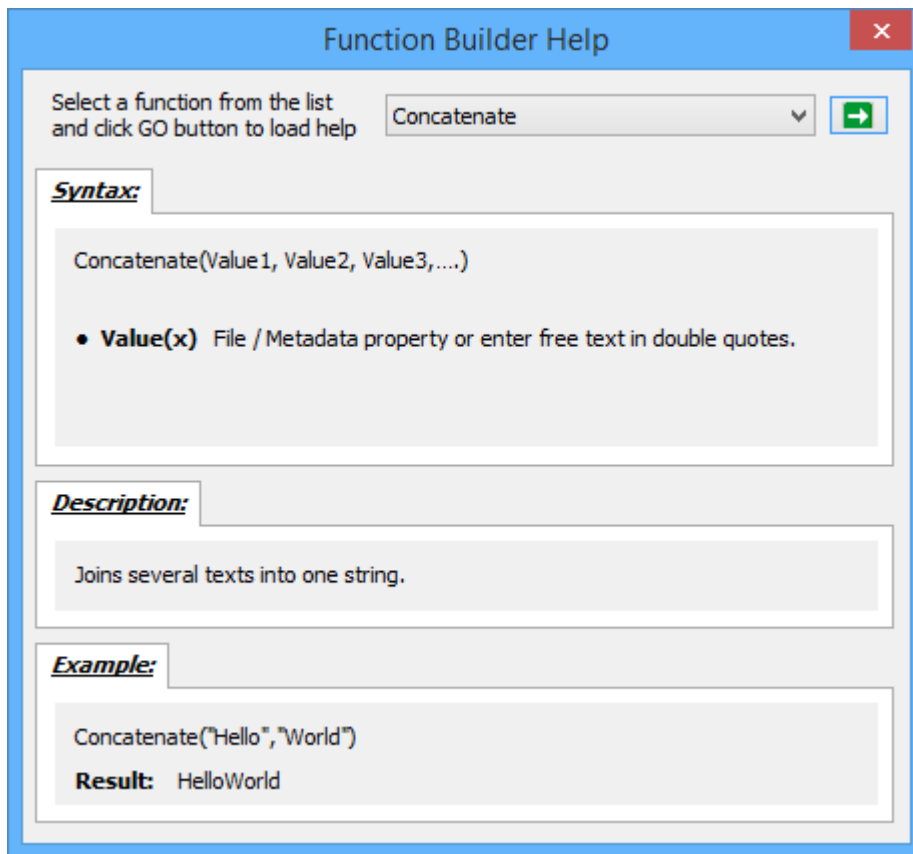
9. Click the question mark image in the function builder to show the information about built-in function in Dockit.



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 <i>Value</i> from the given value <i>Sample Value</i> and returns <i>Sample</i>
LTrim ("Demo Version",5)			Version	LTrim function truncate

				<i>s Demo</i> from the given value and returns <i>Version</i>
GetFolderName("path.[fileproperty]" ,2)		<i>C:\Sample Folder\Test\De mo.txt</i>	Sampl e Folder	Returns the name of the folder at level two in the full path
GetDay("Created Date.[fileproperty]")		11/21/1986	21	Returns the date value 21 from the date.
GetMonth("Modified Date.[fileproperty]", "MMM")		11/21/1986	Nov	Returns the month value in MMM format from the date.
GetYear("Date Field.[metadata file]", "YY")	09/21/ 1990		90	Returns the year value in YY format from the given date.
GetTime("Time field.[metadata file]")	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. <i>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.</i>
E:\Documents\Sample Report.pdf	Continent North America Country United States	Continent North America Country United States States Washington;Continent North	If there are duplicates in the same term sets, it is

		America Country United States States California; Continent North America Country United States States Alaska	recommended to use Absolute Term Path as stated in this example. Docket will assign the specified term to the associated column.
--	--	--	--

You can also specify options to create unavailable terms as part of document import. Docket 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:

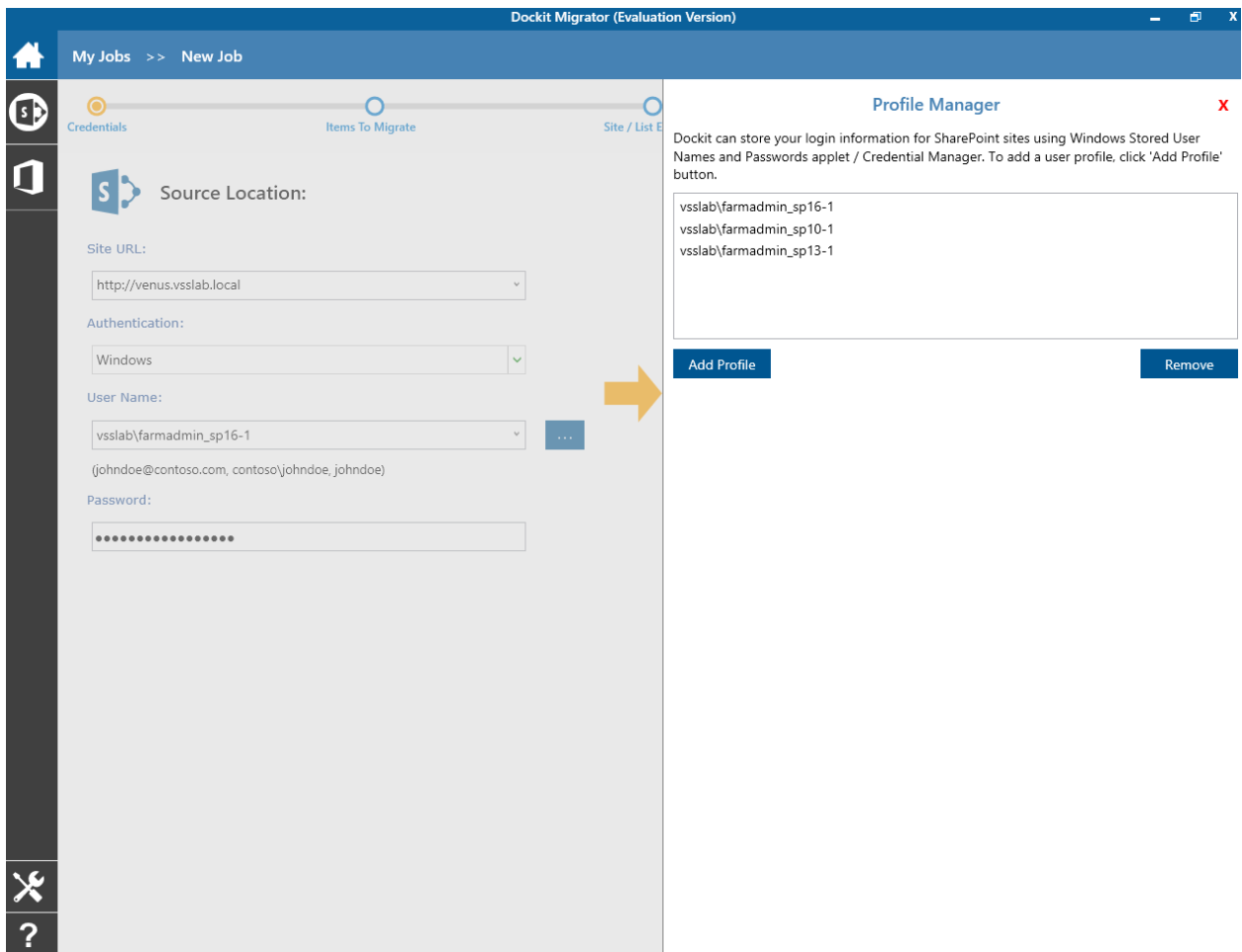
- Migrating content from SharePoint 2003 / 2007 / 2010 / 2013 / 2016 environment to SharePoint 2007 / 2010 / 2013 / 2016 environment
- Migrating content between two different SharePoint 2007 / 2010 / 2013 / 2016 server farms
- Migrating content using Laptop / PC that is not part of the SharePoint domain

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:

The screenshot shows the Dockit Migrator (Evaluation Version) interface. The main window has a sidebar with icons for home, SharePoint, and a question mark. The top bar shows 'My Jobs >> New Job'. The main area has three tabs: 'Credentials', 'Items To Migrate', and 'Site / List E'. The 'Credentials' tab is active, showing a 'Source Location' section with a SharePoint icon and a 'Site URL' field containing 'http://venus.vsslab.local'. Below this is an 'Authentication' section with a 'Windows' dropdown. The 'User Name' section has a dropdown showing 'vsslab\\farmadmin_sp16-1' and a button with three dots. Below this is a 'Password' field with masked characters. A yellow arrow points from the three dots button to the 'New User Profile' dialog box. The dialog box has a title bar 'Profile Manager' with a close button. It contains a text area with three entries: 'vsslab\\farmadmin_sp16-1', 'vsslab\\farmadmin_sp10-1', and 'vsslab\\farmadmin_sp13-1'. Below this is an 'Add Profile' button and a 'Remove' button. The 'New User Profile' section has fields for 'User name' (containing 'vsslab\\farmadmin_sp07-1'), 'Password' (masked), and 'Confirm Password' (masked). At the bottom are 'Add' and 'Close' buttons.

Click **Add** button.

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

[illegible]

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

Behavior of stored user names and passwords

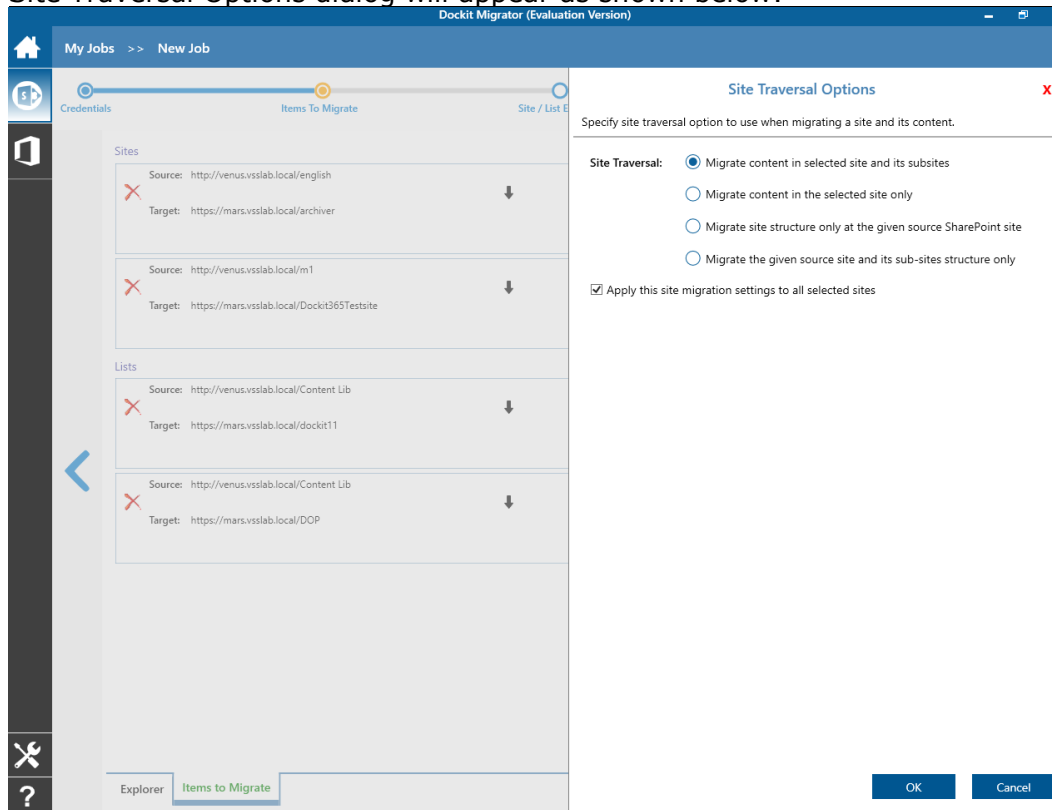
<http://support.microsoft.com/kb/281660>

Stored User Name and Password Best practices

[http://technet.microsoft.com/en-us/library/cc784749\(Ws.10\).aspx](http://technet.microsoft.com/en-us/library/cc784749(Ws.10).aspx)

Site Traversal Options

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



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. Docket will not traverse the sub-sites within the selected site.

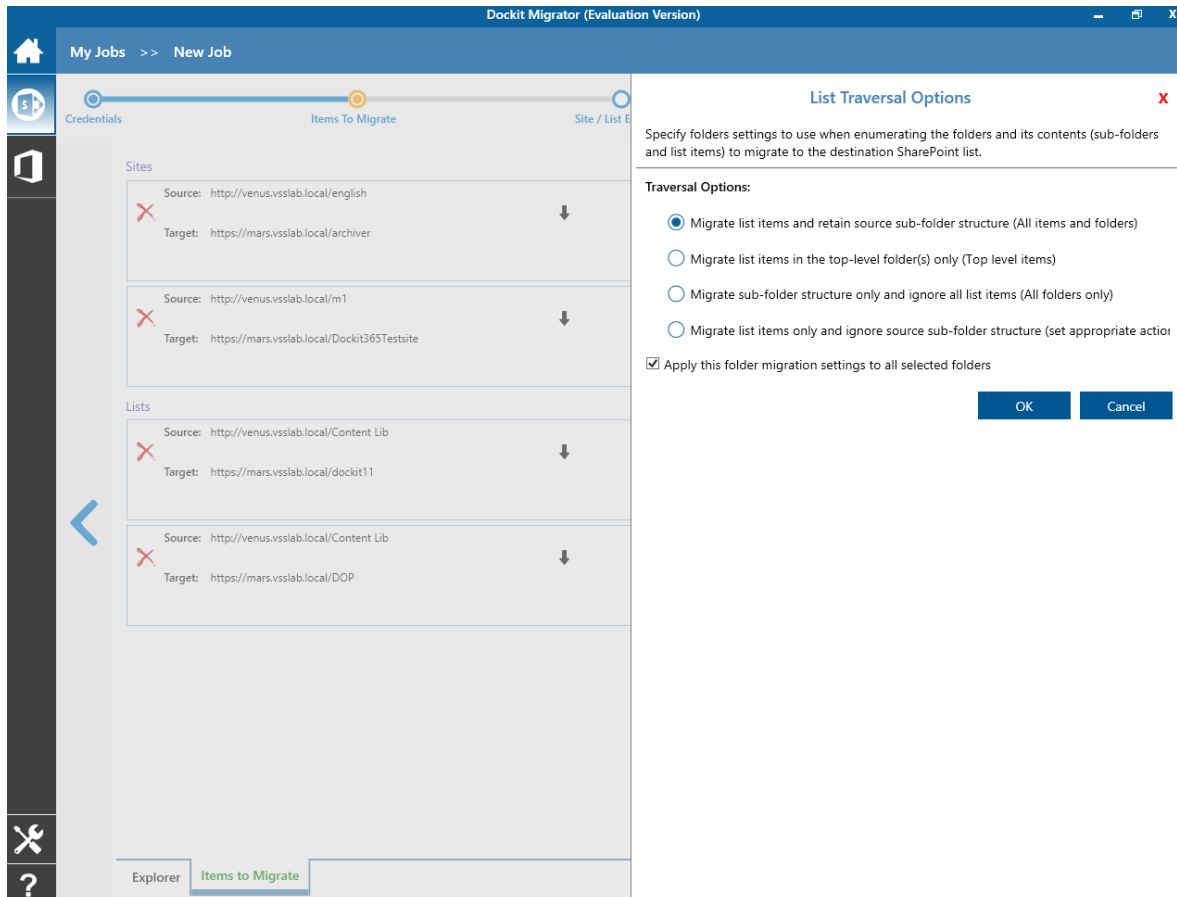
Migrate site structure only at the given source SharePoint site - This option migrates site structure only at the given source SharePoint site. Docket will not traverse the sub-sites within the selected site.

Migrate the given source site and its subsites structure only - This option migrates site structure only at the given source SharePoint site and its sub sites.

Click **OK** to proceed.

List Traversal Options

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



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

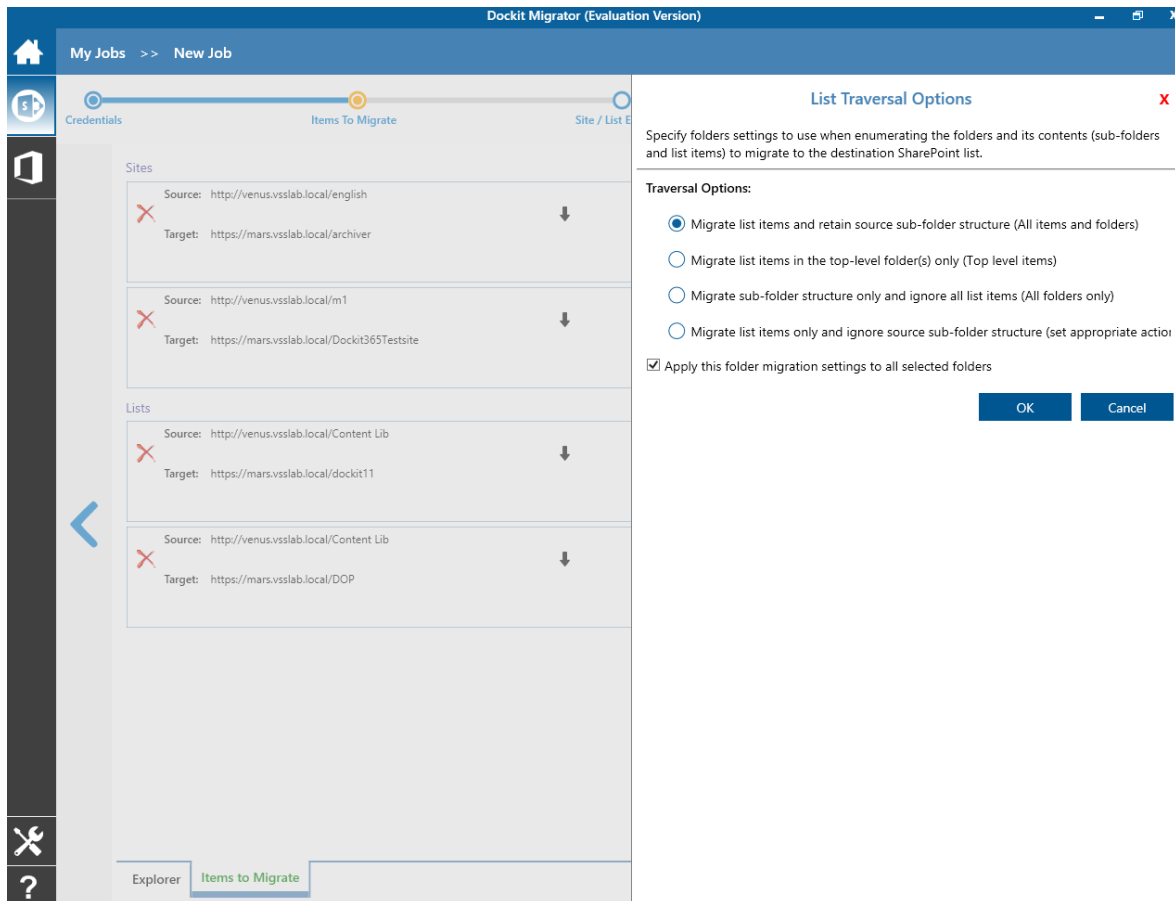
- Migrate all list items and folders** - This options migrates folders and files exactly as they are in source SharePoint list. The source list structure will be retained in the destination location.
- Migrate list items in the top level only** - This option migrate files available in the top-level only. Docket will not traverse the subfolders within the top-level folders.
- 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.
- Migrate list items and ignore folder structure (All items only)** - This option migrates files only and ignore its source folder structure in the source SharePoint list.

Note: Specify the appropriate options in File Settings step to handle situations where same filenames may be available for more than one file in different source folder hierarchy (sub-folders).

3. Click **OK** to proceed.

Library Traversal Options

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



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

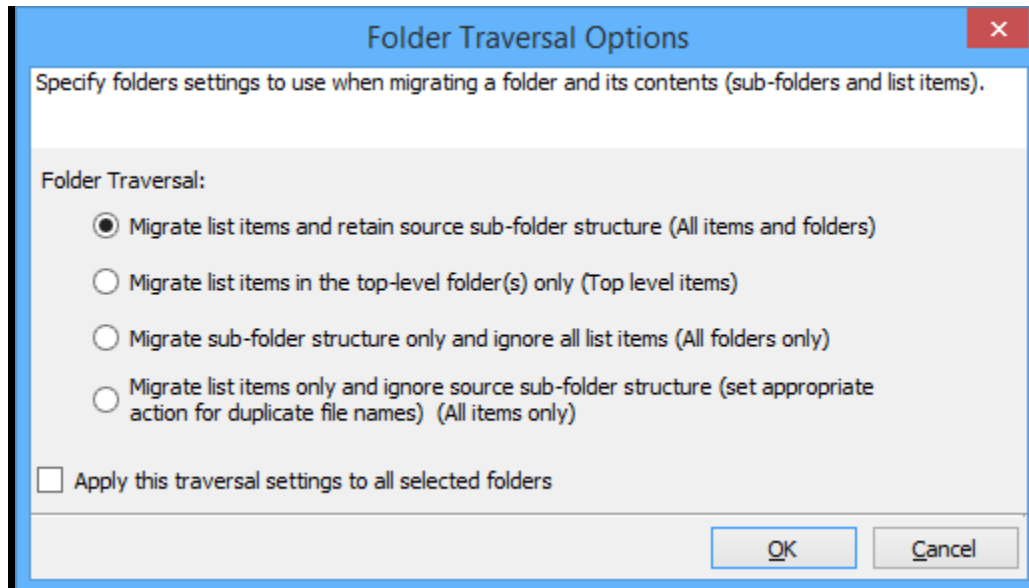
- Migrate all list items and folders** - This options migrates folders and files exactly as they are in source SharePoint library. The source library structure will be retained in the destination location.
- Migrate list items in the top level only** - This option migrate files available in the top-level only. Docket will not traverse the subfolders within the top-level folders.
- 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.
- Migrate list items and ignore folder structure (All items only)** - This option migrates files only and ignore its source folder structure in the source SharePoint library.

Note: Specify the appropriate options in File Settings step to handle situations where same filenames may be available for more than one file in different source folder hierarchy (sub-folders).

3. Click **OK** to proceed.

Folder Traversal Options

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



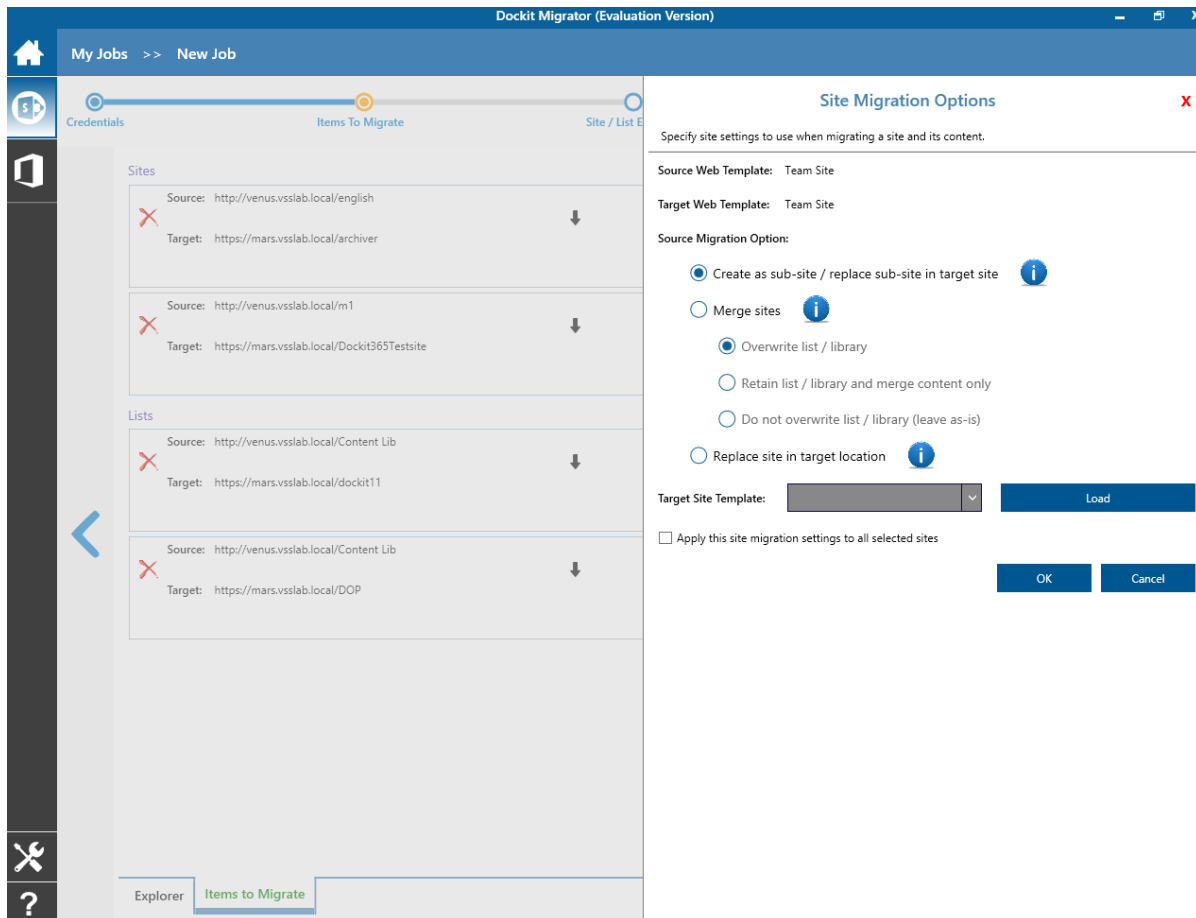
2. Select the appropriate option to create the selected folder by selecting the option buttons (Yes / No).
3. Select anyone of the list traversal options given below to specify the contents to be migrated from source lists:
 - a. **Migrate list items and retain source sub-folder structure(All items and folders)** - This options migrates folders and files exactly as they are in source SharePoint list. The source folder structure will be retained in the destination location.
 - b. **Migrate list items in the top-level folders only (Top level items)** - This option migrate files available in the top-level folders only. Dockit will not traverse the subfolders within the top-level folders.
 - c. **Migrate sub-folder structure only and ignore all list items (All folders only)** - This option creates the sub-folder structure in the destination location and ignores all list items that are available within the added folder and its sub-folders.
 - d. **Migrate list items only and ignore source sub-folder structure (All items only)** - This option migrates files only and ignore its source folder structure in the source SharePoint list.

Note: Specify the appropriate options in File Settings step to handle situations where same filenames may be available for more than one file in different source folder hierarchy (sub-folders).

4. Click **OK** to proceed.

Site Migration Options

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



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

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

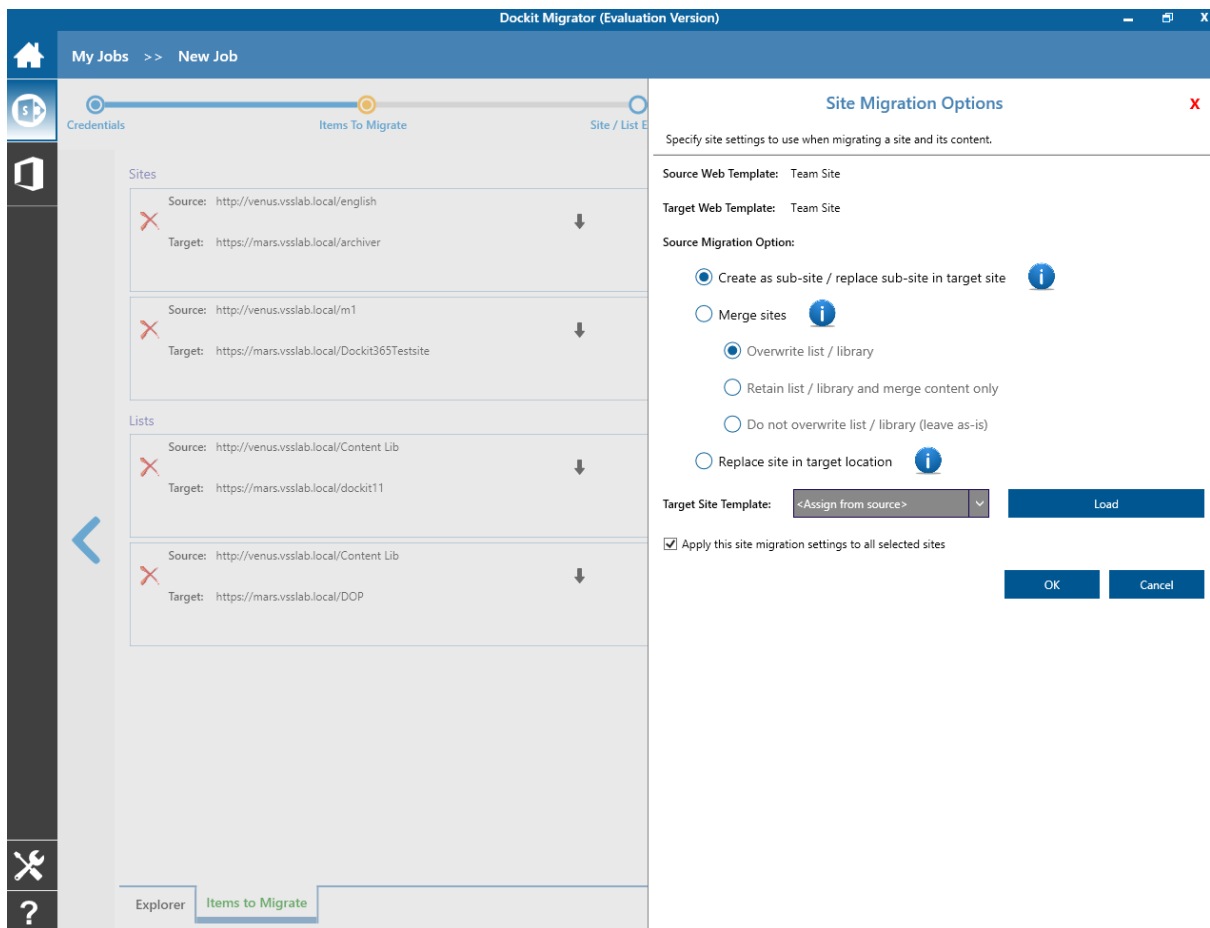
3. Select any one of the following options given below to specify the content to be migrated from the source sites:

- **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.

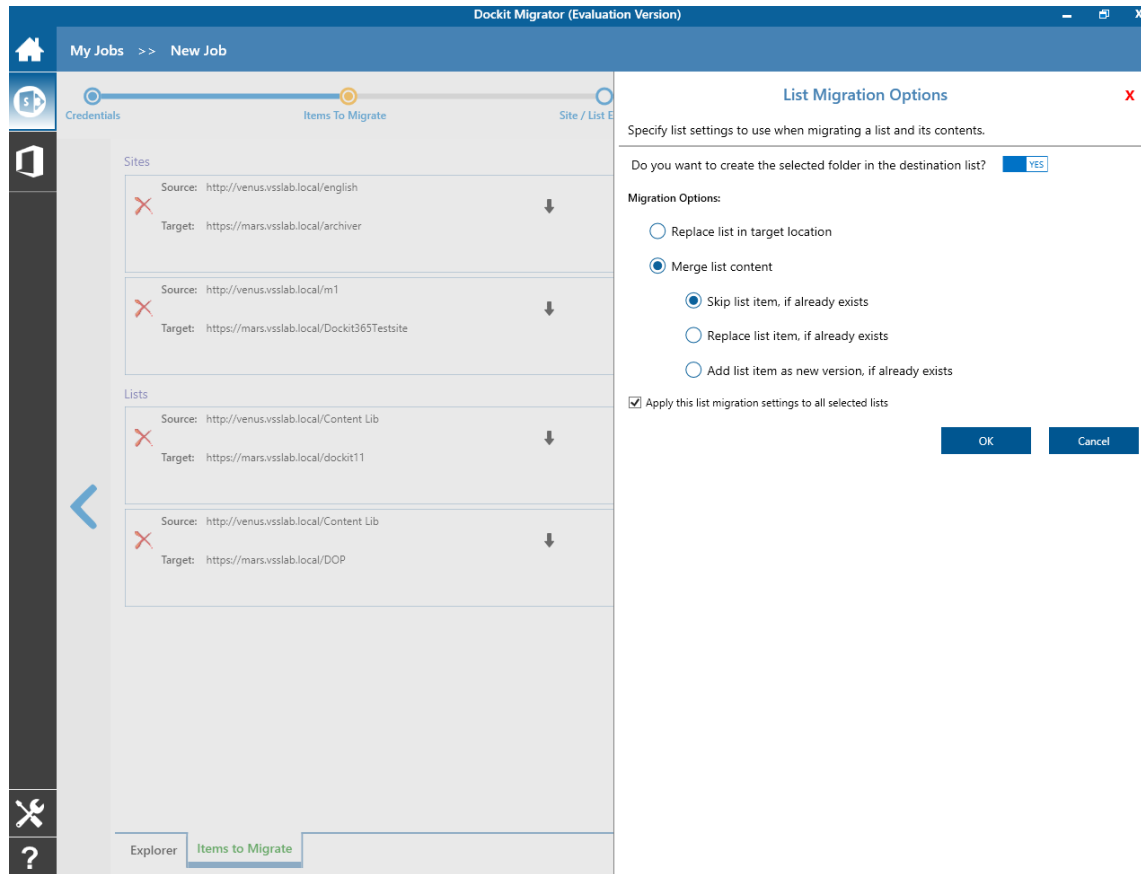
4. Select the option to apply this migration settings to all selected sites.

5. Click **OK** to proceed.



List Migration Options

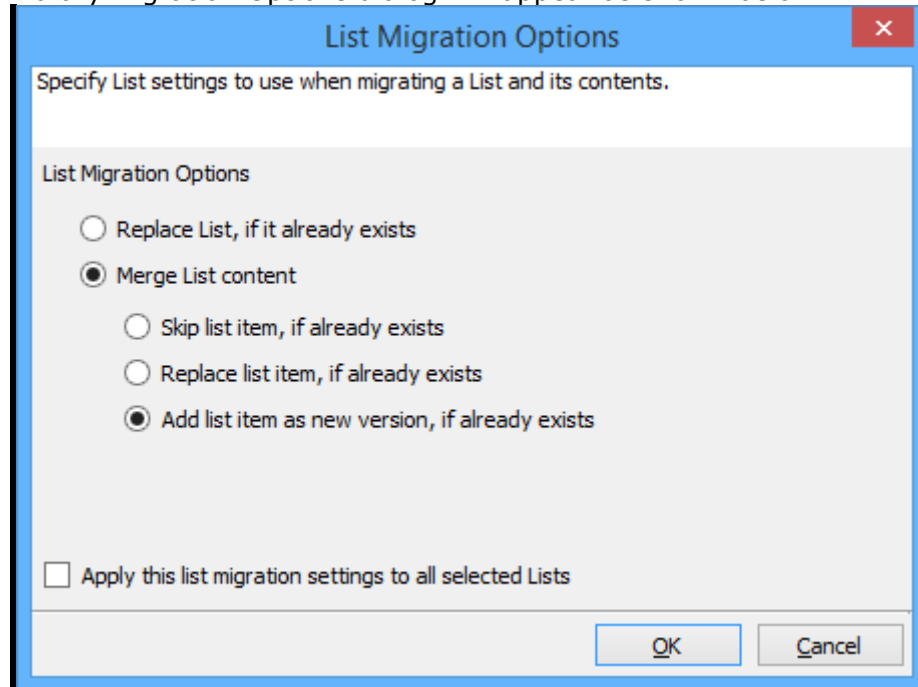
1. List Migration Options dialog will appear as shown below:



2. Select anyone of the list migration options given below to specify the contents to be migrated from source lists:
 - a. **Replace list, if it already exists** - This option replaces the list in the target location, if the list already exists in the target location.
 - b. **Merge list contents** - This option merge the list contents only with the following options.
 - c. **Skip list item, if already exists** - This option skips the list item in the target location, if it already exists.
 - d. **Replace list item, if already exists** - This option replaces the list item in the target location, if it already exists.
 - e. **Add list item as new version, if already exists** - Add the list item as new version in target location, if the list item already exists.
3. Select this option to apply this migration settings to all selected lists.
4. Click **OK** to proceed.

Library Migration Options

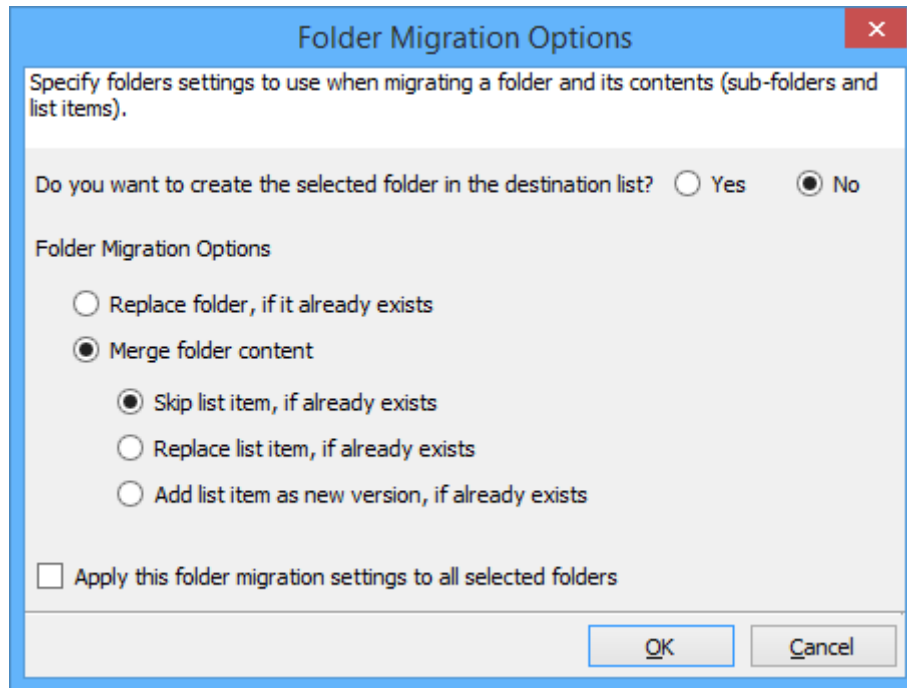
1. Library Migration Options dialog will appear as shown below:



2. Select anyone of the list migration options given below to specify the contents to be migrated from source lists:
 - a. **Replace list, if it already exists** - This option replaces the list in the target location, if the list already exists in the target location.
 - b. **Merge list contents** - This option merge the list contents only with the following options
 - c. **Skip list item, if already exists** - This option skips the list item in the target location, if it already exists.
 - d. **Replace list item, if already exists** - This option replaces the list item in the target location, if it already exists.
 - e. **Add list item as new version, if already exists** - Add the list item as new version in target location, if the list item already exists.
3. Select this option to apply this migration settings to all selected lists.
4. Click **OK** to proceed.

Folder Migration Options

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

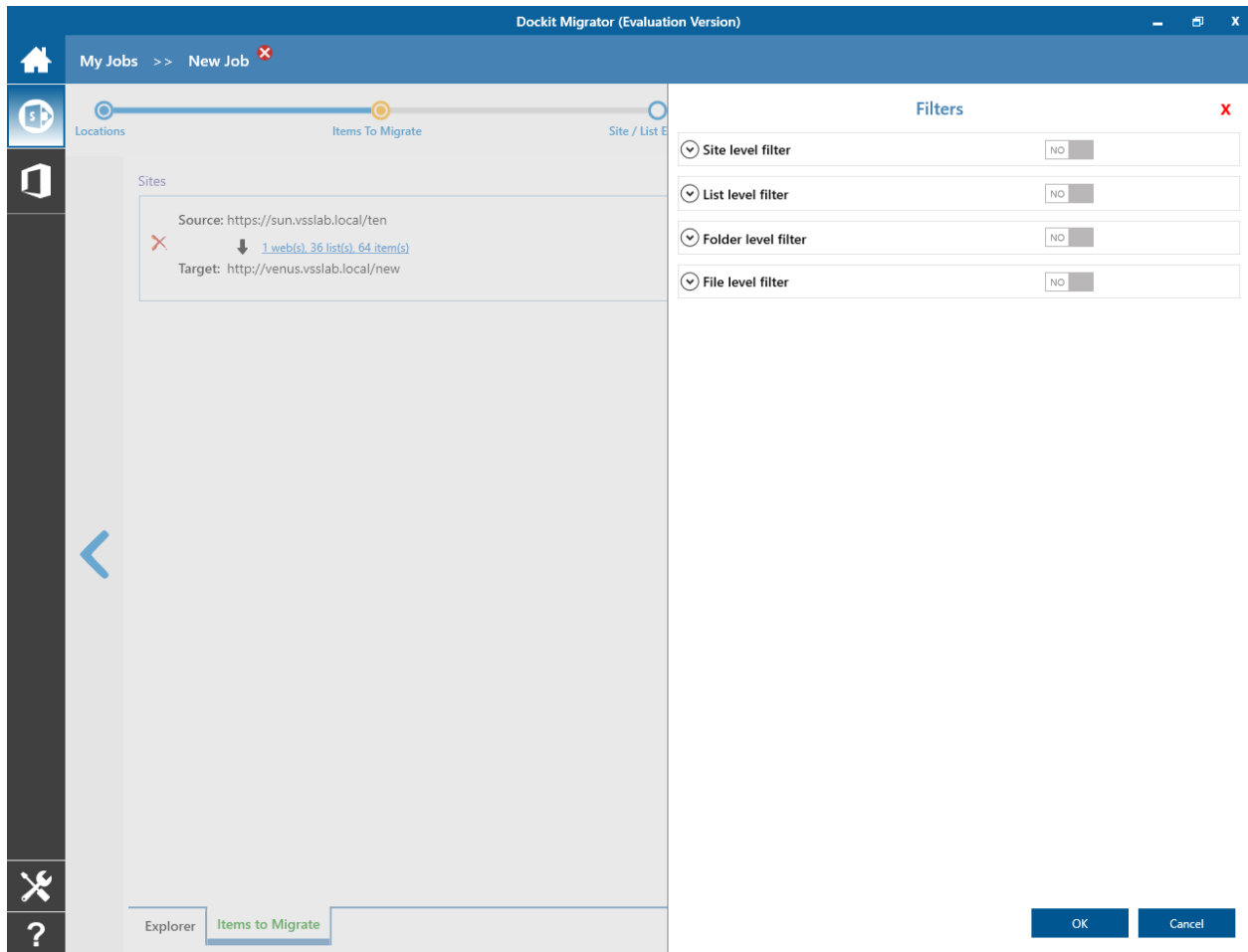


2. Select the appropriate option to create the selected folder by selecting the option buttons (Yes / No).
3. Select anyone of the list migration options given below to specify the contents to be migrated from source lists:
 - a. **Replace folder, if it already exists** - This option replaces the folder in the target location, if the list already exists in the target location.
 - b. **Merge folder contents** - This option merge the folder contents only with the following options.
 - c. **Skip list item, if already exists** - This option skips the list item in the target location, if it already exists.
 - d. **Replace list item, if already exists** - This option replaces the list item in the target location, if it already exists.
 - e. **Add list item as new version, if already exists** - Add the list item as new version in target location, if the list item already exists.
4. Click **OK** to proceed.

Filter Conditions

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** page will appear as shown below:

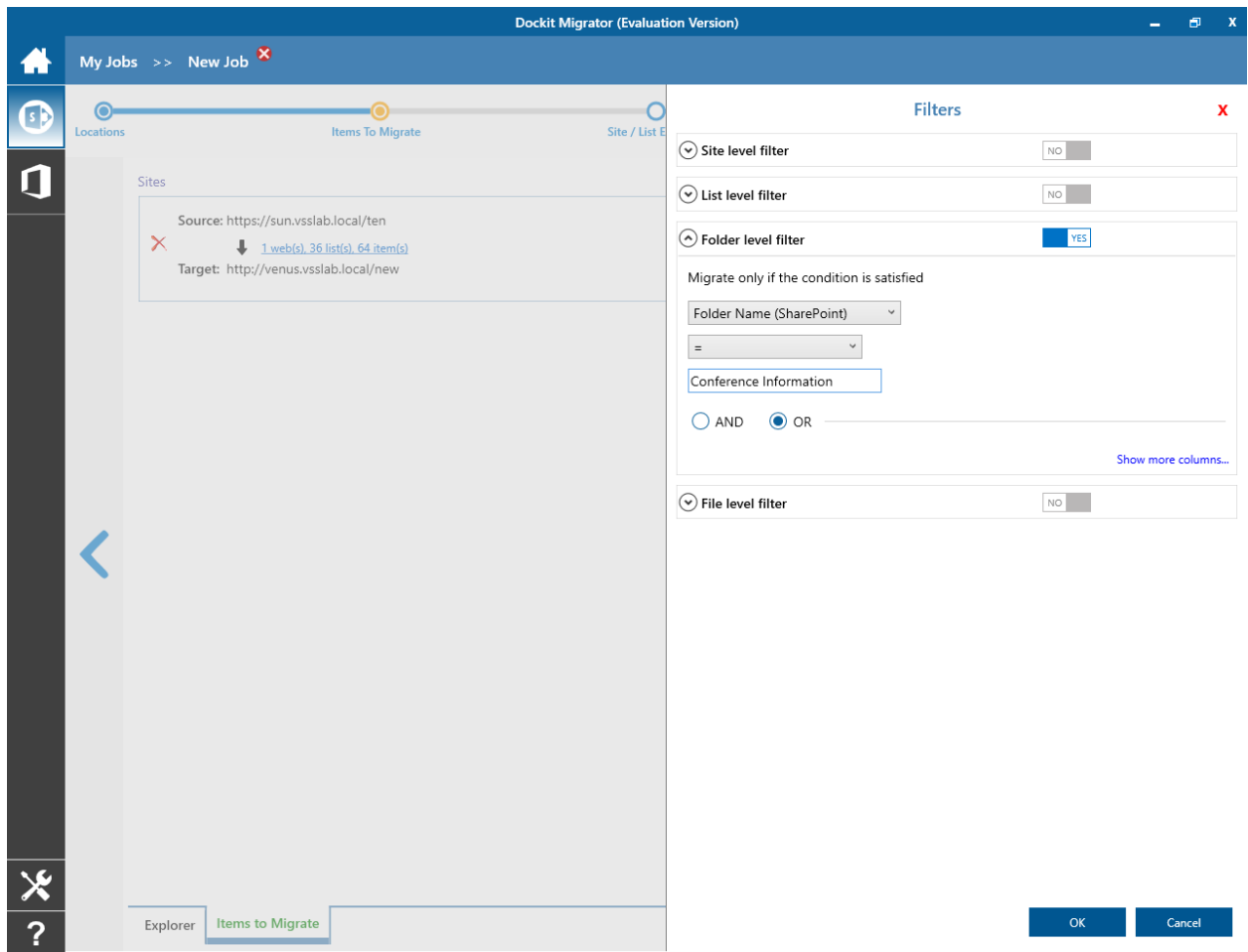


2. Select any one of the following options given below:

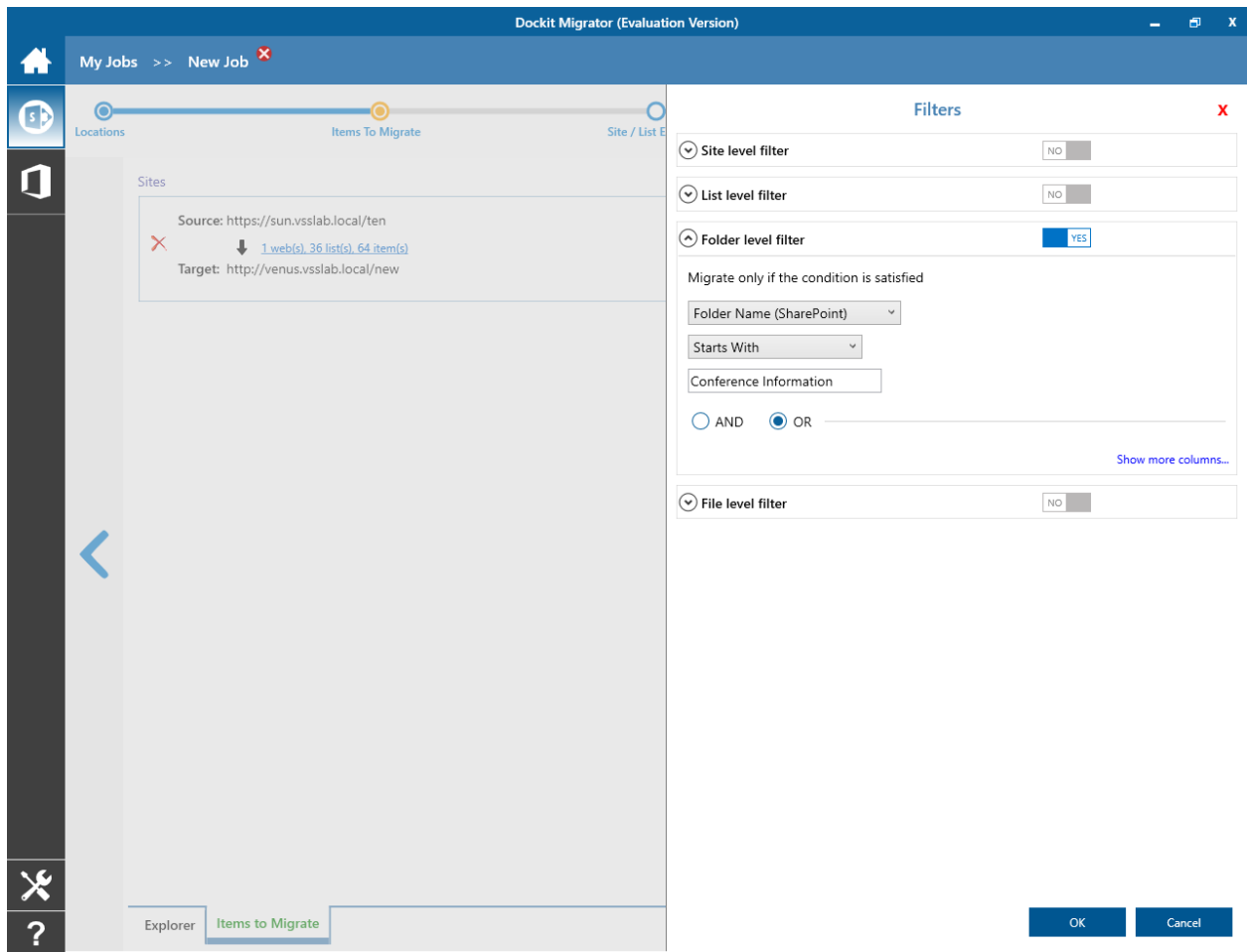
- a. **Web Level** - Migrate the source webs that satisfy the given migration filter.
- b. **List Level** - Migrate the source lists that satisfy the given migration filter.
- c. **Folder Level** - Migrate the folders that satisfy the given migration filter.
- d. **List Item Level** - Migrate the files / items that satisfy the given migration filter.

3. Option that has discussed below is **Folder Level Filter**.

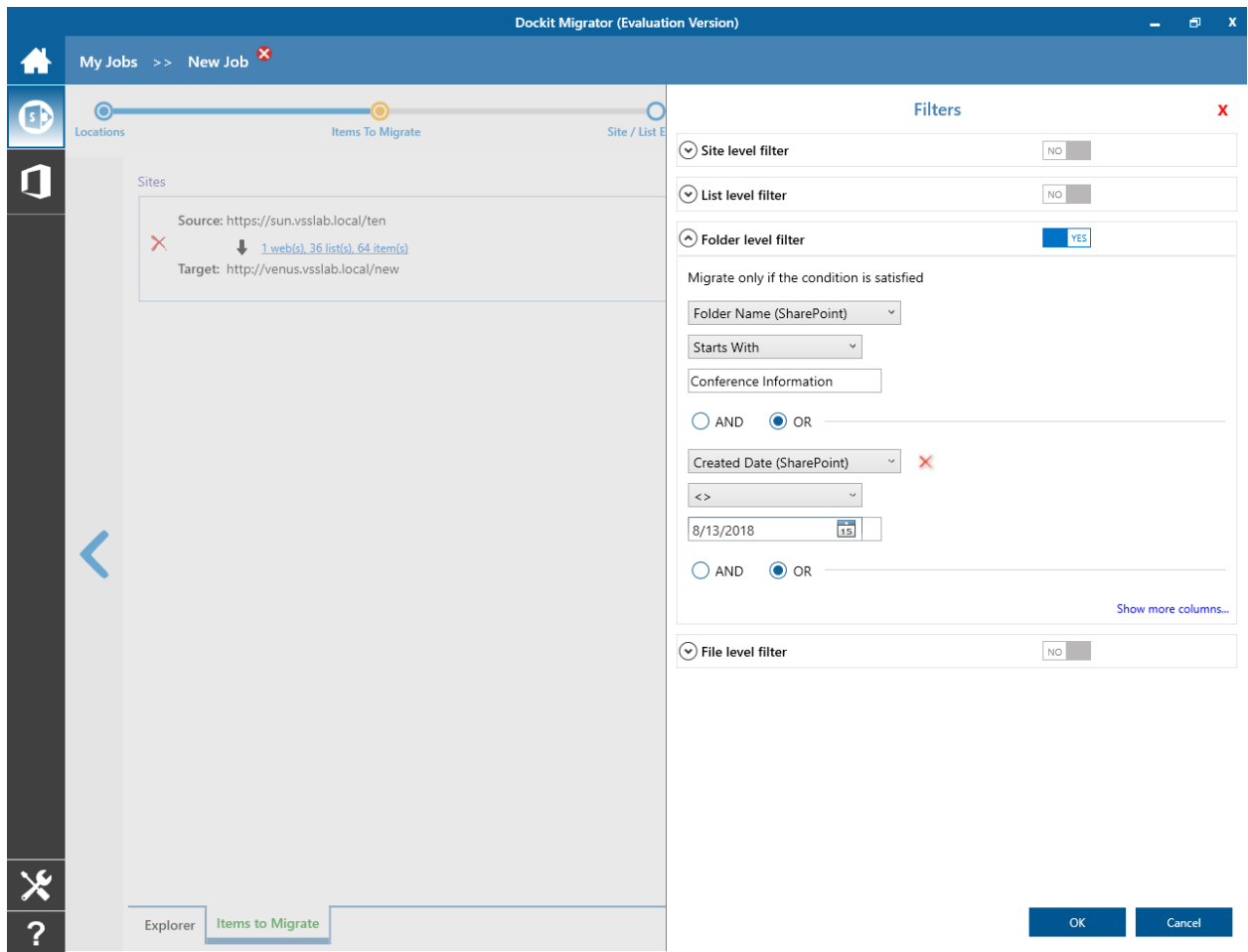
4. Specify condition to apply at the folder level. For example, you can Import folders when ['Folder Name'='Conference Information'].



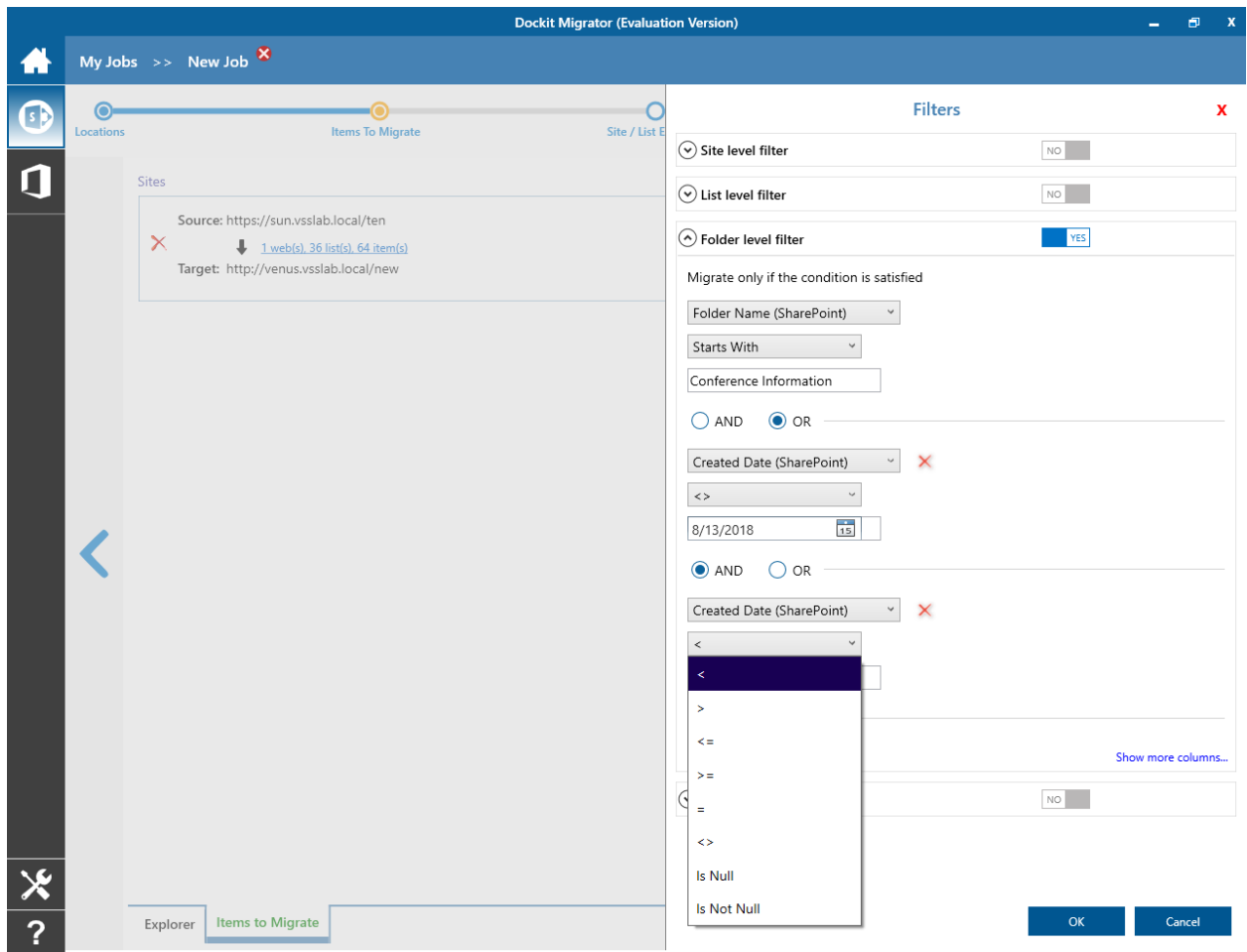
5. Specify rule that must be satisfied before creating folders to SharePoint. For example, you can create folders only when ['Folder Name' Starts With 'Conference Information'].



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'.
- Once you specify the respective webs, lists, files and folders filter condition, click **OK** to proceed or click **Cancel** to discard changes.

Folders & File Renaming Rules

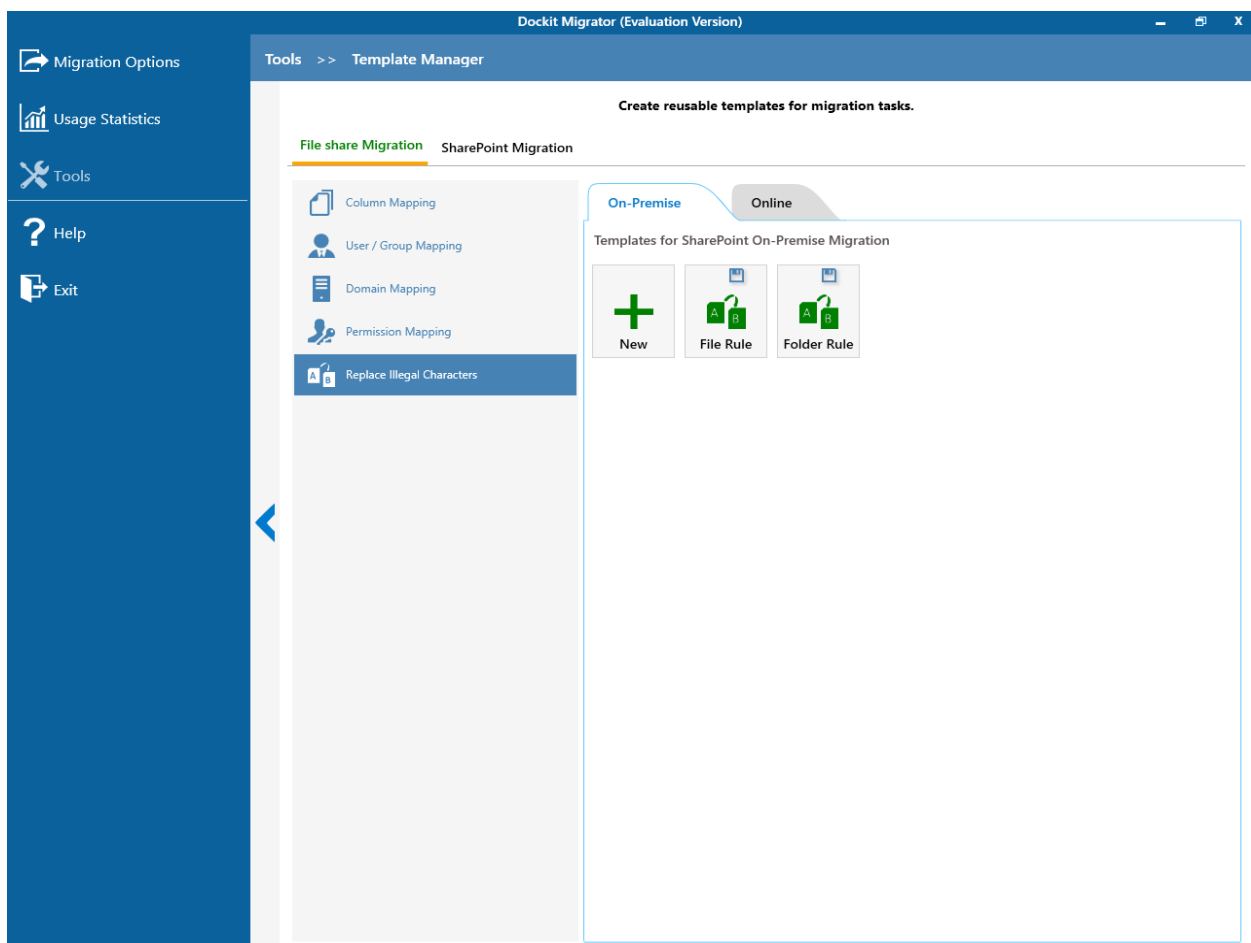
SharePoint does not permit certain characters in folder and file names. Dockit provides an ability to rename invalid character(s) to valid character(s) and also support any character(s) to be renamed using rules, thereby eliminating the tedious step of renaming the source folders / files. You can create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

Dockit provides two default renaming rules ('File Rule', 'Folder Rule') for renaming files and folders respectively. These rules will replace the invalid SharePoint characters with hyphen (-) character.

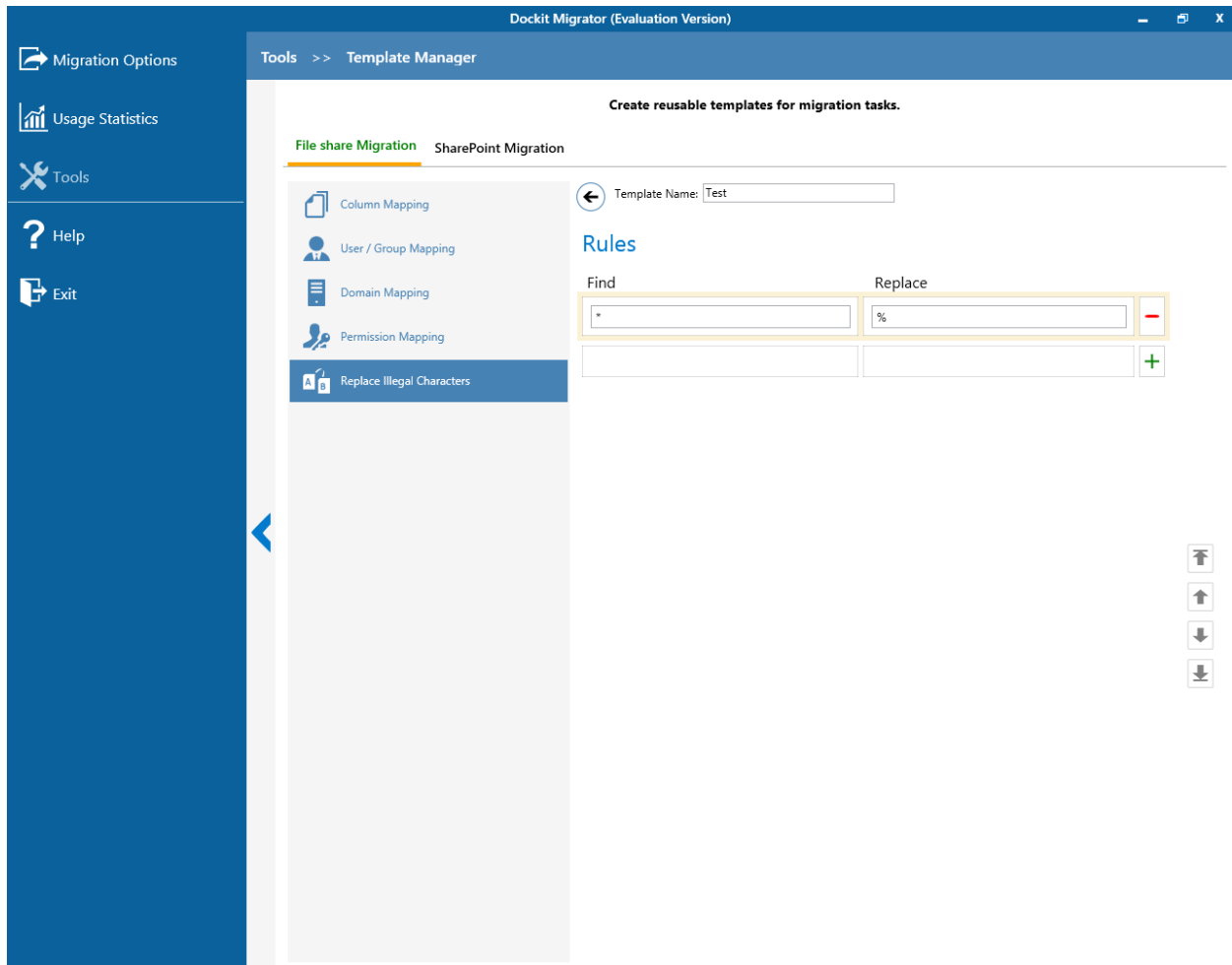
Dockit uses 'Regular Expressions' technique which enables you to create generic renaming rules in order to specify the pattern for file name conventions in Folder & File Renaming rules page. The 'regular expressions' technique is widely used in software where pattern matching is crucial.

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

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



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



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

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

Sample Renaming Rules

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](#)
- [Quick Migration](#)
- [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.

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 ';'. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists.	"Windows 7; 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. 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 / 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"

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" 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.

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 ';'. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists.	"Windows 7; 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. 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 / 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"

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" 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	";#Windows Live;;#Mail;#Windows Photo Gallery;#"	Windows Live;#Mail; Windows Photo Gallery

Choice field column in SharePoint.		
------------------------------------	--	--

Sample format of a CSV / TEXT metadata file:

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

"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 Replace Illegal Characters tool available in Tools menu. Assign the naming rule name in your import task.
String was not recognized as a valid Date Time	Ensure that the date value given in metadata file is in correct format. If the given date value format is different from the current system date time format, then specify the appropriate

	Date Time format mask to use in your import task.
Lookup ID not found	Ensure that the given column value is available in the Lookup field reference list and column. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: if the specified column value is of folder type, the ID of the folder will not be assigned.
User or Group ID not found	Ensure that the given user or group name exists in the respective site. Unavailability of user or group name causes this error.
User ID not found	Ensure that the given user name exists in the corresponding SharePoint Site. This error may occur if the specified user name does not exist.
Multiple User IDs found	The user value specified to assign in SharePoint People / Group column must be unique in the SharePoint repository and Active Directory Services. This error may occur if the specified user value has multiple user entries with the same name in SharePoint.
The column values could not be assigned for this file since there was no corresponding entry in the external metadata file.	Ensure that the given Path or Destination Path in metadata file exists in Source and Destination

	library respectively. Differences in metadata file and original source location will also result in this error. Also, ensure that the metadata values are provided for all documents that are imported.
The '<value>' could not be assigned for the choice field '<field name>' since there is no matching value defined in the choice field definition.	Ensure that the given choice value is available in the corresponding Choice field definition in SharePoint library. If the given value is unavailable, Dockit reports this message and the value will not be updated in SharePoint. Note: if you wish to add newer values (that is not available in the field definition) during import process, specify 'Yes' value for 'Allow Fill-in' option available in Choice field column settings in SharePoint library. The 'Allow Fill-in' option in Choice field column is used as a flag in Dockit to specify whether to add newer value to the choice field definition during import process.
The '<value>' could not be assigned for the taxonomy field '<field name>' since there are no matching value defined in the taxonomy field definition.	Ensure that the specified term value is available in the corresponding managed metadata field termset definition in SharePoint library. If the given value is unavailable and the selected termset is not opened for new term creation, Dockit reports this message and the term value will not be updated in SharePoint.
'<value>' - Not a valid list item URL in the site collection.	Ensure that the given list item URL is a valid list item's URL. 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 <i>Dockit Server Agent</i> is installed.
Required column(s) may be empty.	Some of the required fields in a SharePoint library may be empty. Ensure all mandatory columns have values in the respective files added for import.
Checkin operation failed	Checkin operation will fail, in case mandatory fields of SharePoint library do not have values (empty) provided to them at the time of check-in.
Checkout operation failed	Checkout operation will fail in case access is denied (or) file is already locked by some other user.
Content Type <name> could not be found in the library	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 for On-premise task

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** screen. The default path of <Application Data Folder> is as follows:

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

Troubleshooting for Online tasks

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

1. *Error log file* - e.g., <Application Data Folder>\Log\DockitErrorLog.txt
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 ' JobHistory ' folder.
 - a. *Activity log file* - e.g., <Application Data Folder>\JobHistory\Dockit Task\20121222-183919\logs\ActivityLog.txt
 - b. *Error log file* - e.g., <Application Data Folder>\ JobHistory \Dockit Task\20121222-183919\logs\ActivityErrors.txt
 - c. *Metadata log file* - e.g., <Application Data Folder>\ JobHistory \Dockit Task\20121222-183919\logs\MetadataErrors.txt
 - d. *Dockit error log file* - e.g., <Application Data Folder>\ JobHistory \Dockit Task\20121222-183919\logs\DockitErrorLog.txt
 - e. *Move Activity log file* - e.g., <Application Data Folder>\ JobHistory \Dockit Task\20121222-183919\logs\MoveActivityLog.txt
 - f. *Task settings file* - e.g., <Application Data Folder>\ JobHistory \Dockit Task\20121222-183919\settings\Details.xml
 - g. *Library settings file* - e.g., <Application Data Folder>\ JobHistory \Dockit Task\20121222-183919\settings\LibrarySettings.xml
 - h. *Process details file* - e.g., <Application Data Folder>\ JobHistory \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** 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