

# User Manual

## DocKIT for SharePoint-2010



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# 1 DocKIT Introduction

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## 1.1 About DocKIT

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DocKIT for SharePoint 2010 allows you to migrate data, documents and, their associated metadata properties from network file shares, file servers and local hard drives to SharePoint 2010 and SharePoint 2007. DocKIT supports Microsoft SharePoint Server 2010 / Microsoft SharePoint Foundation 2010 and Microsoft Office SharePoint Server 2007 (MOSS 2007) / Microsoft Windows SharePoint Services v3.0 (WSS 3.0) environments.

DocKIT software has been specifically designed to comprehensively address content migration needs of companies from file shares to Microsoft SharePoint. DocKIT provides granular level control over the contents migrated to the SharePoint repository.

- Simple solution which does not require end-user training to import documents and its associated metadata properties to SharePoint.
- Consolidate documents and data from different file server and network shares locations into many SharePoint list types across several Sites - Document libraries, Picture libraries, Tasks, Calendar, Contacts, Survey, Discussion Boards, Announcements, Links, Issue Tracking and Custom Lists.
- Auto-generate folder structures, file list and metadata in various file share locations that are to be migrated to SharePoint using the built-in metadata extractor tool.
- Hassle-free software installation using a simple wizard.
- Migrate contents to multiple SharePoint servers in your network from a single desktop or client
- Easily retain source content metadata when migrating them to SharePoint:
  - Retain document summary properties of source documents namely - Title, Subject, Author, Category, Keywords and Comments and MS-Office custom properties in SharePoint.
  - Retain the original Created Date, Last Modified Date, Created By and Modified By fields in the equivalent system fields in SharePoint for each folder / document migrated to SharePoint.



## **CHAPTER-1–DocKIT Introduction**

- Maintain document versions as in source.
  - Associate metadata stored in a CSV / Excel / TXT file to the respective documents in SharePoint lists.
  - Rename source folder & file names and make them SharePoint-friendly file names based on file naming rules.
- Invoke migration task using a command-line or Windows Task Scheduler interface in any external application or batch file.

### ***DocKIT Web Service***

*DocKIT Web Service* component has been developed to address the specific needs of users who desire to import documents' System Dates (Created Date and Last Modified Date), System Users (Created By and Modified By), Content Approval (Approved, Pending and Draft) and Target Audiences (Global Audience group or Security/Distribution group) from original source to the Microsoft Office SharePoint Server (MOSS 2007) / Windows SharePoint Services v3.0 (WSS v3.0) / Microsoft SharePoint Foundation 2010 / Microsoft SharePoint Server 2010 site libraries. DocKIT Web Service enhances the following functionality:

- Update Created Date, Last Modified Date, Created By, Modified By and Content Approval (Approved, Pending and Draft) for folders / files / list items
- Update 'Target Audiences' for folders / files from a Global Audience group or Security/Distribution group
- Update the system fields regardless of the platform architecture (32-bit or 64-bit platform)
- Update Business data / External data, Managed Metadata fields in SharePoint
- Create new Document Sets in SharePoint document library
- Integrate seamlessly with DocKIT client application

### 1.2 Technical Support

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

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

- 1) Version of DocKIT that you are evaluating or you has registered with us. (Version information could be found in the "About" Screen and in "Help").
- 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 Server 2010 / Microsoft SharePoint Foundation 2010 / MOSS 2007/ WSS 3.0 servers.
- 3) Hardware configuration of the computer where DocKIT and MOSS 2007 / WSS 3.0 / Microsoft SharePoint Foundation 2010 / Microsoft SharePoint Server 2010 applications are installed.
- 4) 'Service Pack' version of Windows Server & Microsoft SharePoint Server 2010 / Microsoft SharePoint Foundation 2010 / MOSS 2007/ WSS 3.0 running currently.
- 5) "DockKITErrLog.txt" available in the common application data path of DocKIT (e.g., <Application Data Folder>\DockIT6x\Log\DockKITErrLog.txt).
- 6) DockKIT error logs and activity log files (ActivityLog.txt, ActivityErrors.txt, MetadataErrors.txt and DockKITErrLog.txt) stored in the application data path.  
For example: <Application Data Folder>\DockIT6x\TaskHistory\*<taskname>*\<timestamp>.

#### **NOTE:**

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

- Windows XP, Windows Server 2003 - C:\Documents and Settings\All Users\Documents
- Windows 7/ Vista, Windows Server 2008 - C:\Users\Public\Documents

### 1.3 System Requirements

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#### **DocKIT for SharePoint 2010 application**

Windows 7 / Vista / XP (or) Windows Server 2008 / 2003 with the latest service packs (32-bit or 64-bit platform)

Microsoft Office 2010 / 2007 Suite or Microsoft Office 2007 Compatibility Pack or higher (required when importing Microsoft Office 2010 / 2007 format based file properties)

#### **DocKIT Web Service**

Windows Server 2008 R2 web front-end server(s) or application server(s) running Microsoft SharePoint Server 2010 or Microsoft SharePoint Foundation 2010

(OR)

Windows Server 2008 / 2003 web front-end server(s) or application server(s) running Microsoft Office SharePoint Server 2007 or Windows SharePoint Services v3.0 (32-bit or 64-bit platform).

#### **Installation Instructions**

In order to update the Created Date, Last Modified Date, Created By, Modified By, Content Approval Status & Comments, Target Audiences (Global Audience group or Security/Distribution group), Document Set, Managed Metadata and BDC / BCS (External Data) fields from a remote computer, please install DocKIT client application and web service component as stated below:

- *DocKIT.msi* - DocKIT for SharePoint 2010 application can be installed on a Windows 7/ Vista / XP (or) Windows Server 2008 / 2003. You can use this setup file to install DocKIT application in the SharePoint Server or any client computer running Windows 7 / Vista / XP (32-bit or 64-bit platforms).
  
- *DocKIT Web Service* component must be installed on a Windows Server 2003 (or) Windows Server 2008 running Microsoft Office SharePoint Server 2007 or Windows SharePoint Services v3.0 (32-bit or 64-bit platform) or Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010. *DocKIT Web Service* must be installed in all the destination SharePoint servers (web front end servers or application servers in a SharePoint farm) to enable aforementioned features.

## CHAPTER-1–DocKIT Introduction

- For SharePoint 2007 servers,  
Use *DockITWebService\_2007\_x86.msi* in order to install in 32-bit Windows Server 2003 (or) Windows Server 2008  
  
Use *DockITWebService\_2007\_x64.msi* in order to install in 64-bit Windows Server 2003 (or) Windows Server 2008
- For SharePoint 2010 servers,  
  
Use *DockITWebService\_2010.msi* in order to install in 64-bit Windows Server 2008

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

### 1.4 How to Activate the Software?

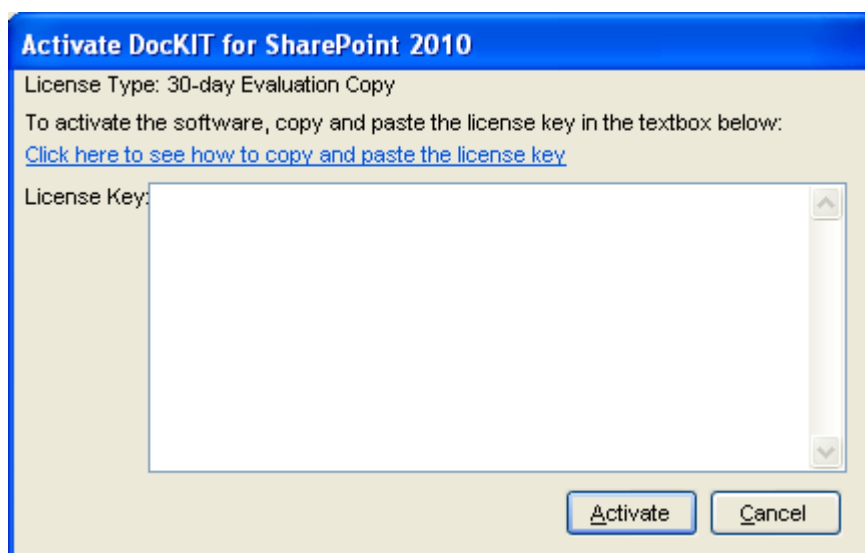
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Once you purchase the software online or through any one of our resellers, you will receive a sale notification through e-mail from our sales department. We will send you an e-mail with the necessary instructions to activate the software.

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

- **Company Name:** End-user Company Name
- **Location:** City & Country for the Company Name given above

Please allow 12 to 24 hours from the time of purchase for our sales department to process your orders.



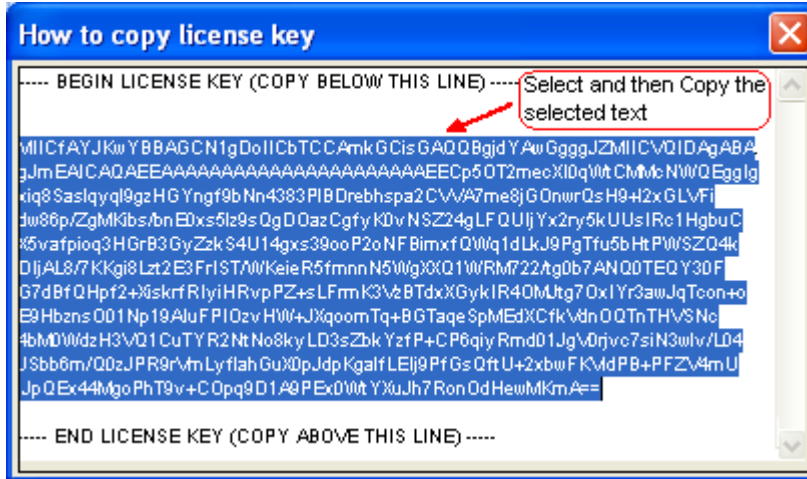
**Image 1 - Activate screen**

Perform the following steps to activate the software:

- 1) Download evaluation/trial copy of software from the respective product page available in our website at <http://www.vyapin.com/>
- 2) Install the software on the desired computer.
- 3) You will receive a license key through e-mail as soon as the purchase process is complete.
- 4) Click 'Activate' in Help -> About -> Activate menu to see the Activate dialog (as shown in Image 1).

## CHAPTER-1–DocKIT Introduction

- 5) Copy the license key sent to you through email and pastes it in the 'License Key' textbox. For help on how to copy the license key, click 'Click here to see how to copy and paste the license key' link in the Activate dialog (as shown in Image 2).



**Image 2 - How to copy license key screen**

## 2 DocKIT Template Manager

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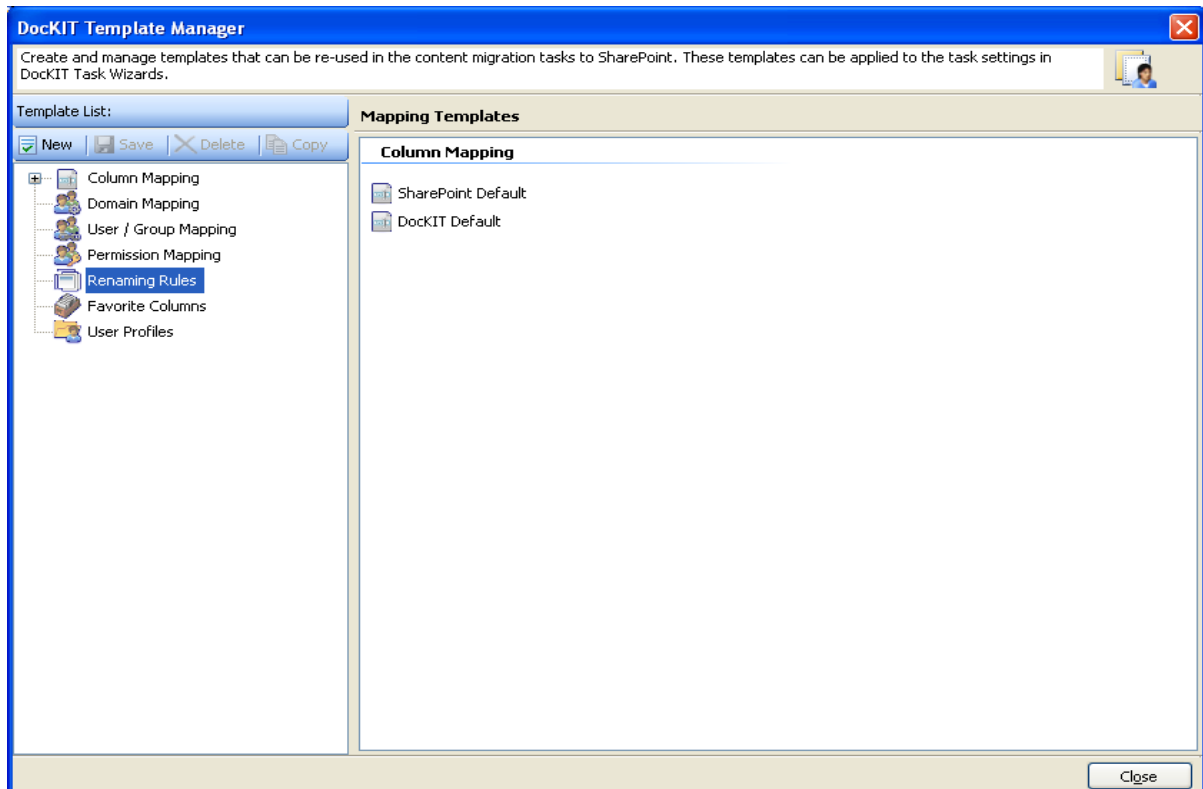
- Introduction
- Managing Templates
- DocKIT Templates

### 2.1 Introduction

---

#### 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.



## CHAPTER-2-DockIT Templates

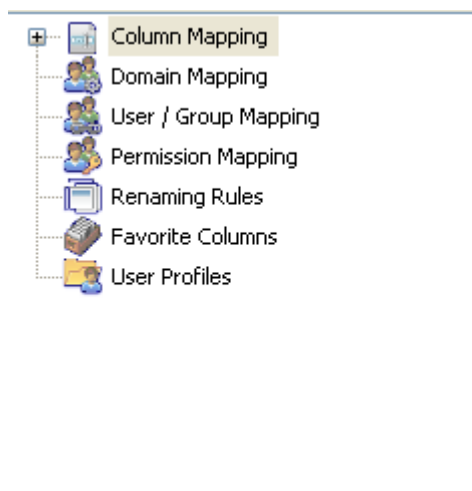
DockIT Template Manager consists of two panes along with toolbar to manage templates.

### 1) Template Tree Pane

### 2) Template List Pane

#### Template Tree Pane

Template tree pane contains seven parent nodes (groups) representing the template groups provided by DockIT. The templates created by users are listed out as sub node for these parents' nodes according to the nature of the template. By default, DockIT provide two templates under column mapping group (node), namely, 'SharePoint Default' and 'DockIT Default'. These column mapping templates cannot be edited but can be saved in a different template name for further customization under column mapping group. Also template related operations can be performed by using template actions toolbar.



#### Template Actions Toolbar

Template actions toolbar contains all the commands (or actions) to work with the various templates



Action	Description
New	Click New to create a new template. For more information, click Create a new template
Save	Click Save to save the changes made to the selected template.
Delete	Click Delete to delete a template from the list.
Copy	Click Copy to copy an existing template in a different name. For more information, click Copy an existing template



## CHAPTER-2-DockIT Templates

### Template List Pane


Template list pane displays the all the available templates. It provides the information configured in the template about the selected template in template tree pane. Templates can be configured by using the appropriate options available for the selected template.

#### Column Mapping

---

 SharePoint Default

 DockIT Default

 test CTYPE


#### Domain Mapping

---

 kk


#### User / Group Mapping

---

 test user

#### Permissions Mapping

---

 Share Permissions

### 2.2 Managing Templates

---

- **Create new template**
- **Copy an existing template**
- **Delete an existing template**

### 2.3 Create a New Template

---

You can create a template and reuse it as a saved template in the DockIT task.

To create a new template:

- 1) Click New or Press Ctrl + N in Column Mapping Template dialog.



- 2) Then the New Template dialog will appear as shown below:



- 3) Enter a template name in New Template dialog and click Save.
- 4) Saved template will be added to the Template List pane.
- 5) Select the newly added template to add/edit column to the template. Click Managing columns for more information.

### 2.4 Edit an Existing Template

---

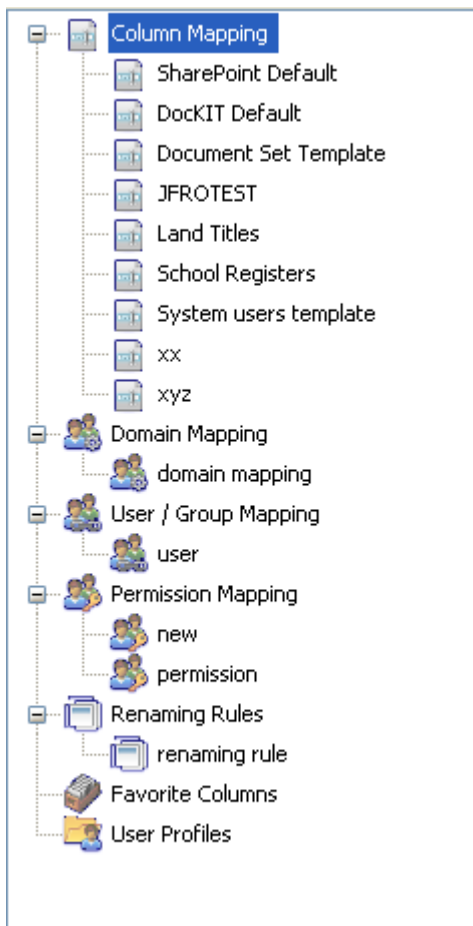
You can edit an existing mapping template (s) by selecting an appropriate template under the respective group and make the appropriate changes to the mapping settings, finally save the modified template and close the DockIT Template Manager dialog.

### 2.5 Delete an existing template

---

To delete a Template:

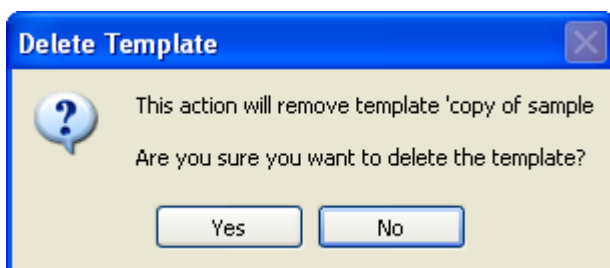
- 1) Select a template from **Template Tree** pane.



- 2) Click Delete or Press Del key in DockIT Template Manager Dialog.



- 3) Click Yes in **Delete Template** message-box shown below:



**NOTE:** Deleting a template will permanently delete the selected template from the template list along with settings.

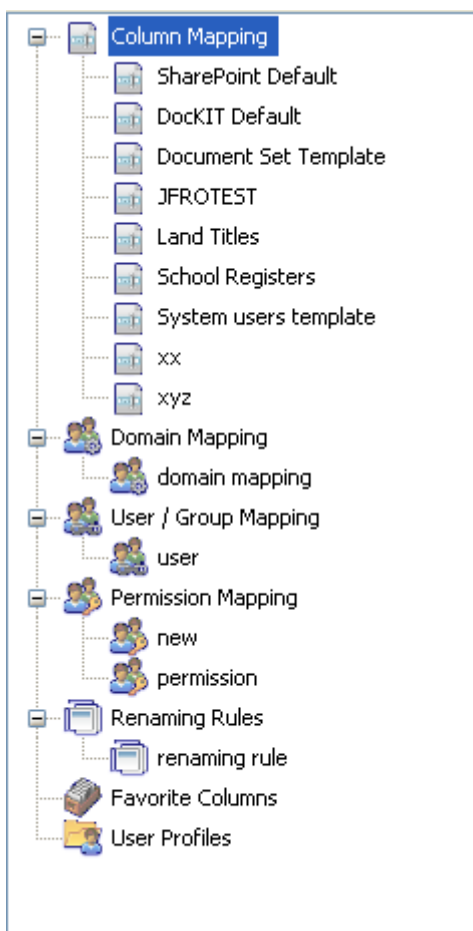
### 2.6 Copy an existing template

---

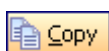
You can copy and create (save as) a new template using an existing DockIT Template to modify a few settings from the existing template.

To copy an existing mapping template:

- 1) Select a template from the **Template Tree** pane.

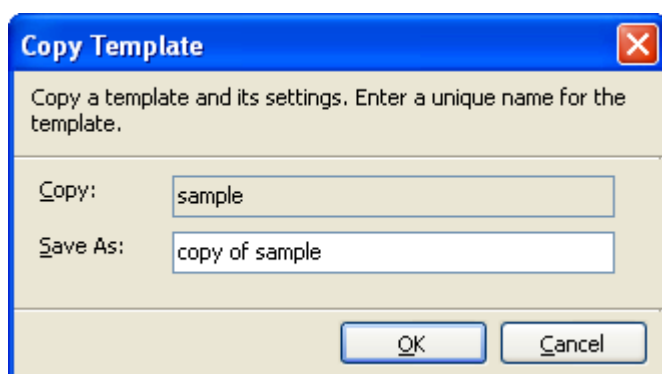


- 2) Click **Copy** in DockIT Template Manager Dialog.



- 3) In Copy Template dialog, enter a new template name in **Save As** text-box.

## CHAPTER-2-DockIT Templates



- 4) Click **OK** to create a new template with the same column mapping settings specified in the selected template.

### 2.7 DocKIT Templates

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- **Column Mapping Template**
- **Domain Mapping Template**
- **User / Group Mapping Template**
- **Permission Mapping Template**
- **Folder & File Renaming Rules**
- **Favorite Columns**
- **Profile Manager**

### 2.8 Column Mapping Template

---

- **Introduction**
- **Mapping Sources**
- **Managing Columns**
- **Mapping SharePoint System columns**

### 2.9 Introduction

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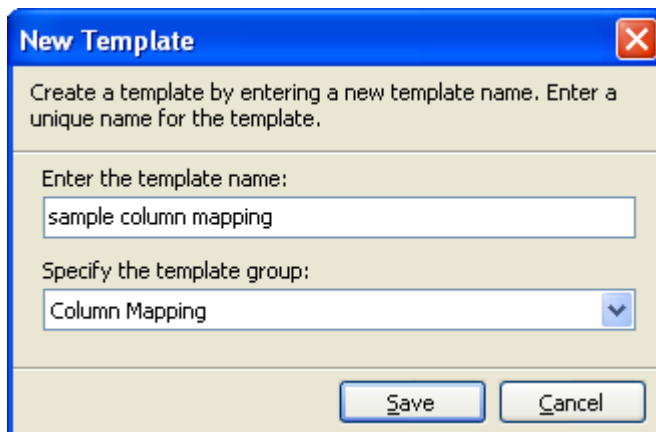
#### Column Mapping Template

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 group under DockIT Template Manager tool available under Templates Menu in the Task Manager.

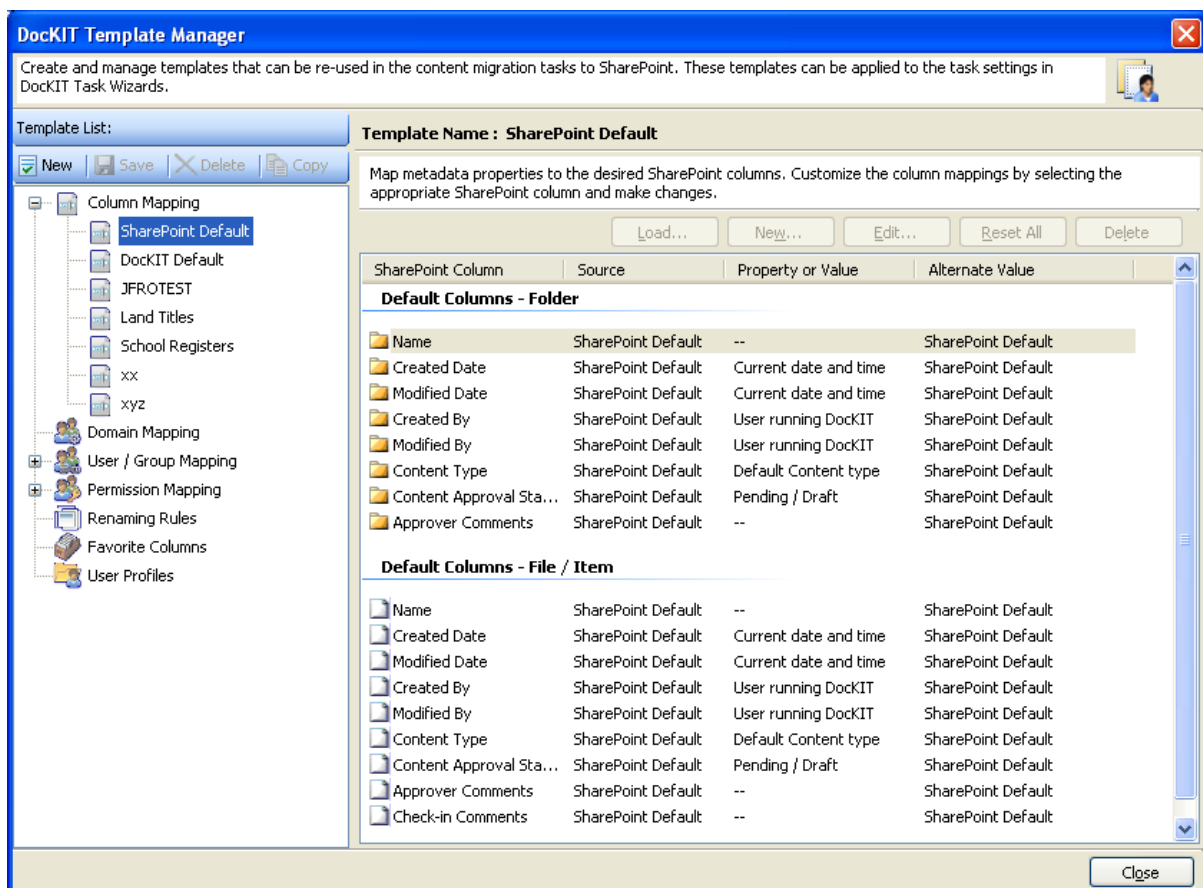
To create a new column mapping template

## CHAPTER-2-DockIT Templates

Select New from the Templates Tools pane. The new template dialog will appear as shown below:



Enter an unique name for the template. Select 'Column Mapping' under the list of available template groups and click save button. The new template will be added under 'Column Mapping' node in template tree view as shown below:



## CHAPTER-2-DockIT Templates

### Column Mapping Template view

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

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

- 1) Column mapping pane
- 2) Column mapping actions toolbar

### 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 : xyz

Map metadata properties to the desired SharePoint columns. Customize the column mappings by selecting the appropriate SharePoint column and make changes.

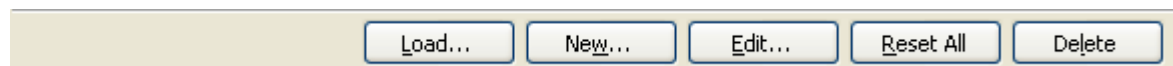
Load... New... Edit... Reset All Delete

SharePoint Column	Source	Property or Value	Alternate Value
<b>Default Columns - Folder</b>			
Name	SharePoint Default	--	SharePoint Default
Created Date	SharePoint Default	Current date and time	SharePoint Default
Modified Date	SharePoint Default	Current date and time	SharePoint Default
Created By	SharePoint Default	User running DockIT	SharePoint Default
Modified By	SharePoint Default	User running DockIT	SharePoint Default
Content Type	SharePoint Default	Default Content type	SharePoint Default
Content Approval Sta...	SharePoint Default	Pending / Draft	SharePoint Default
Approver Comments	SharePoint Default	--	SharePoint Default
<b>Default Columns - File / Item</b>			
Name	SharePoint Default	--	SharePoint Default
Created Date	SharePoint Default	Current date and time	SharePoint Default
Modified Date	SharePoint Default	Current date and time	SharePoint Default
Created By	File System	Owner in file system	user
Modified By	File System	Author in file system	user
Content Type	SharePoint Default	Default Content type	SharePoint Default
Content Approval Sta...	SharePoint Default	Pending / Draft	SharePoint Default
Approver Comments	SharePoint Default	--	SharePoint Default
Check-in Comments	SharePoint Default	--	SharePoint Default

## CHAPTER-2-DockIT Templates

### Column Mapping Toolbar

Column Mapping actions toolbar contain all the commands (or actions) to customize the Column Mapping associated with the selected Template.

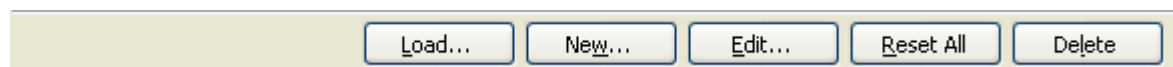


Action	Description
Load	Click Load to load file properties like Title, Subject, Author, Category, Keywords and Comments and custom properties of MS Office documents.
New	Click New to add a new SharePoint column to the mapping.
Edit	Click Edit to edit the existing mapping column(s).
Reset All	Click Reset All Button to reset the mapping to its default position.
Delete	Click Delete to delete a column from the mapping.

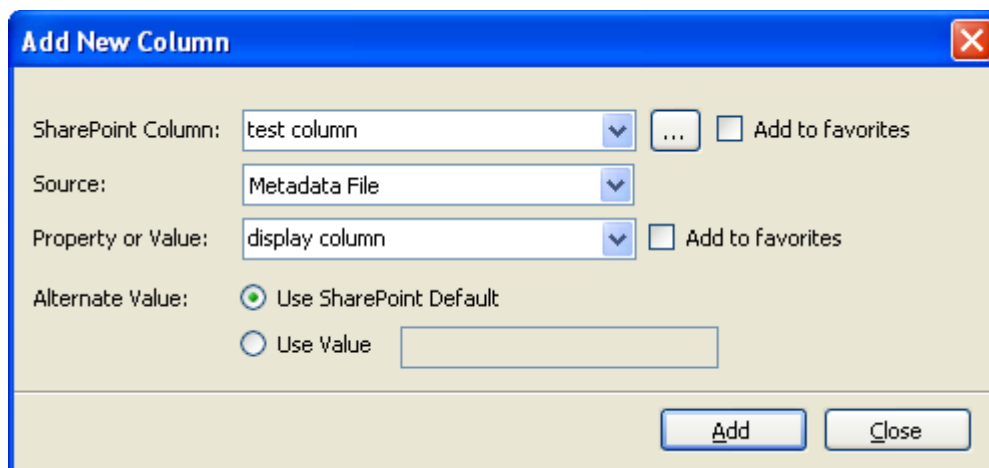
## 2.10 Managing Columns

### Add new Column to the Column Mapping

**New...**- Click **New...** Button to add a new column to the column mapping:



Once you click the button, **Add New Column** dialog will appear as shown below:



In Add New Column dialog, enter a SharePoint column name. You can use (...) button to browse for the SharePoint columns.

Select a source type (Mapping Sources) like Metadata File, File Properties, Custom Property, File System, Specific Value, Use Function) and enter the corresponding value.



## CHAPTER-2-DocKIT Templates

Specify a suitable alternate value option (Use SharePoint Default or Use Value) to be used if the original source type value fails.

Click **Add to favorites** to add the column to the list of favorite columns.

You can easily load *File Properties* and custom properties of MS Office documents to a template for mapping by using the **Load** button in Column Mapping pane.

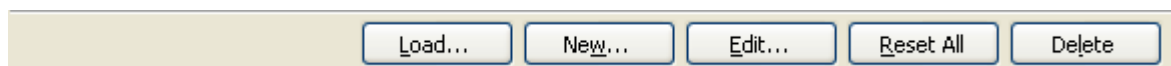
Click **Add to favorites** to add the column to the list of favorite columns.

You can easily load File Properties and custom properties of MS Office documents to a template for mapping by using the Load button in Column Mapping pane.

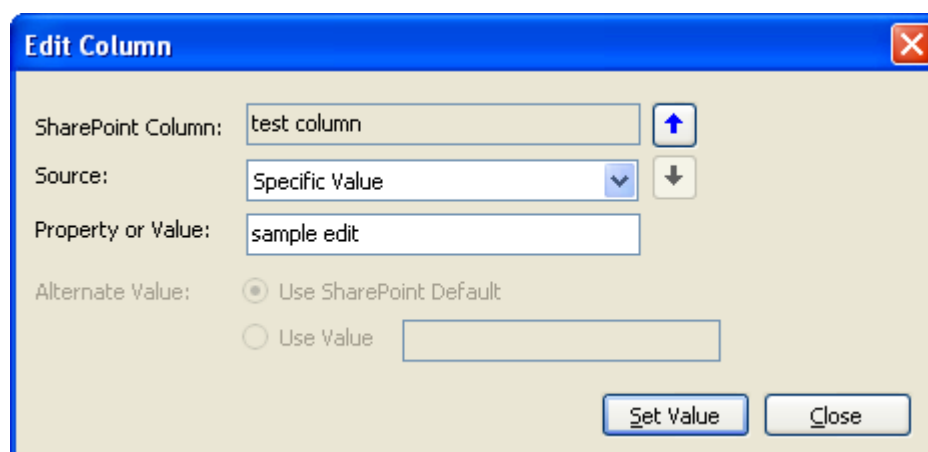
Click Add Button to add the custom column to the mapping. Click Close to close the dialog.

### Edit Column in the Column Mapping

**Edit...** - Click *Edit Button* to edit the existing mapped column(s). You can edit both the system and custom SharePoint columns.



Select a *default SharePoint* column of a folder or file / item or any custom column entry from the list and click **Edit** button in the column mapping button pane or press Enter key. Edit Column dialog will appear as shown below:

The 'Edit Column' dialog box has a blue title bar with the text 'Edit Column' and a close button (X). The main area is light beige. It contains the following fields and controls:

- 'SharePoint Column:' text label followed by a text box containing 'test column' and an up arrow button.
- 'Source:' text label followed by a dropdown menu showing 'Specific Value' and a down arrow button.
- 'Property or Value:' text label followed by a text box containing 'sample edit'.
- 'Alternate Value:' text label followed by two radio buttons: 'Use SharePoint Default' (which is selected) and 'Use Value' (which is unselected). The 'Use Value' option is followed by an empty text box.
- At the bottom right, there are two buttons: 'Set Value' and 'Close'.

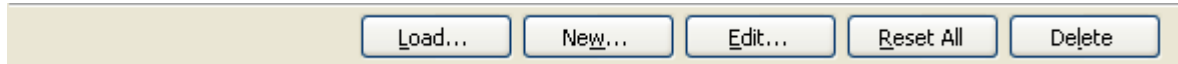
Change the *source* type (*Mapping Sources*), alternate value accordingly and click **Set value** to save the settings. Click **Close** to close the dialog.

You can use up-down arrows to change the mapping settings for the columns available above or below in the column list.

## CHAPTER-2-DockIT Templates

### Delete Column from the Column Mapping

**Delete** - Click Delete Button to delete the selected column mapping entry in the column mapping pane.



**NOTE:** Delete Button will be enabled only if a custom column is selected in the column mapping.

## 2.11 Mapping SharePoint Default Columns

---

### SharePoint Default Columns

DockIT allows you to assign metadata for various SharePoint system columns as mentioned below. You can also refer to different mapping sources for SharePoint system columns in Mapping Sources section.

- **Name**
- **System Dates**
- **System Users**
- **Content Type**
- **Content Approval Status**
- **Approver Comments**
- **Check-in Comments**

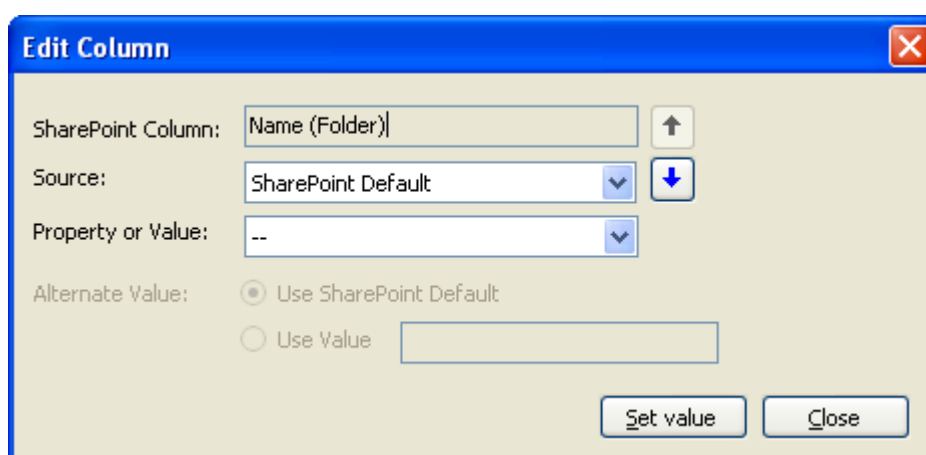
### 2.12 Name

---

You can assign the name for import folders / file in SharePoint.

#### 1) Assign Folder Name

Select the Name column under **Default Columns - Folder** from the list and click Edit button in the column mapping button pane or press Enter key or Double click the select item. The **Edit Column** Dialog will appear as shown below:



2) Select one of the Folder name options as given below:

- a) **SharePoint Default** - The imported source folder name will be assigned to the name fields.
- b) **Metadata File** - The name for the folder can also be assigned from the external metadata file by including the column name in the metadata file. This option allows each folder to have its own name.
- c) **Specific Value** - The specified value can be assigned as a folder name.
- d) **Use Function** - The calculated value from the custom function build by the user using the DockIT's function builder will be assigned as a folder name.

3) Specify the alternate value to be taken and assigned, if the folder name cannot be assigned or unavailable:

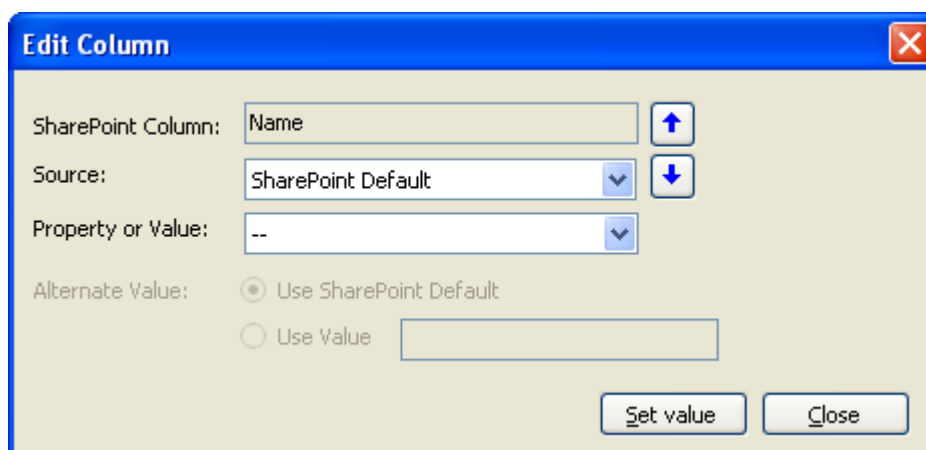
- a) **Use SharePoint Default** - DockIT will assign SharePoint Default value as a folder name.
- b) **Use Value** - DockIT will assign the user specified alternate value as a folder name.

4) Click **Set value** button to set the selected name options and value for folder in mapping.

## CHAPTER-2-DockIT Templates

### 5) Assign File Name

- 6) Select the Name column under **Default Columns - File / Item** from the list and click Edit button in the column mapping button pane or press Enter key or Double click the select item. The **Edit Column** Dialog will appear as shown below:



- 7) Select one of the Folder name options as given below:
- a) **SharePoint Default** - The imported source folder name will be assigned to the name fields.
  - b) **Metadata File** - The name for the folder can also be assigned from the external metadata file by including the column name in the metadata file. This option allows each folder to have its own name.
  - c) **Specific Value** - The specified value can be assigned as a folder name.
  - d) **Use Function** - The calculated value from the custom function build by the user using the DockIT's function builder will be assigned as a folder name.
- 8) Specify the alternate value to be taken and assigned, if the folder name cannot be assigned or unavailable:
- a) **Use SharePoint Default** - DockIT will assign SharePoint Default value as a folder name.
  - b) **Use Value** - DockIT will assign the user specified alternate value as a folder name.
- 9) Click **Set value** button to set the selected name options and value for folder in mapping.

### 2.13 System Dates

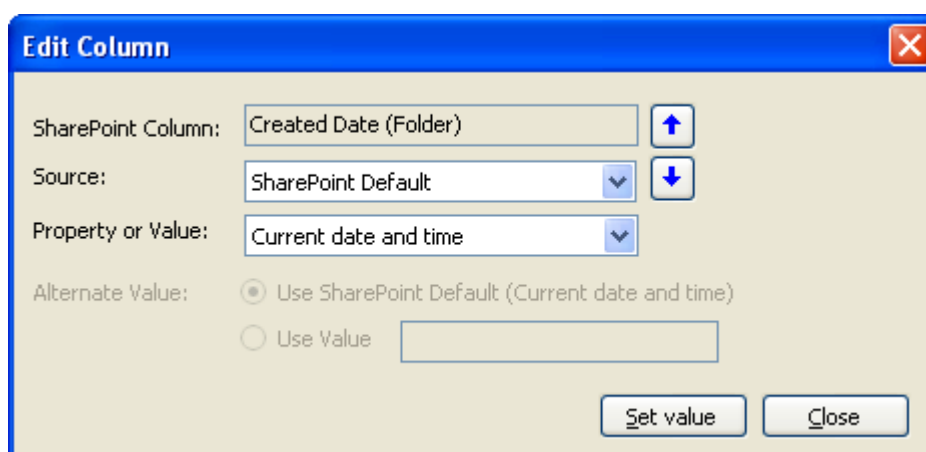
---

#### Created Date and Modified Date

To assign System Dates (Created Date and Last Modified Date) for the folder and file.

##### 1) Assign Folder System Dates (Created Date and Last Modified Date)

Select the appropriate date field (Created Date or Modified Date) column under **Default Columns - Folder** from the list and click Edit button in the column mapping button pane or press Enter key or Double click the select item. Then the Edit Column Dialog will appear as shown below:



**NOTE:** You can use Up and Down button in the dialog to navigate the columns in the list.

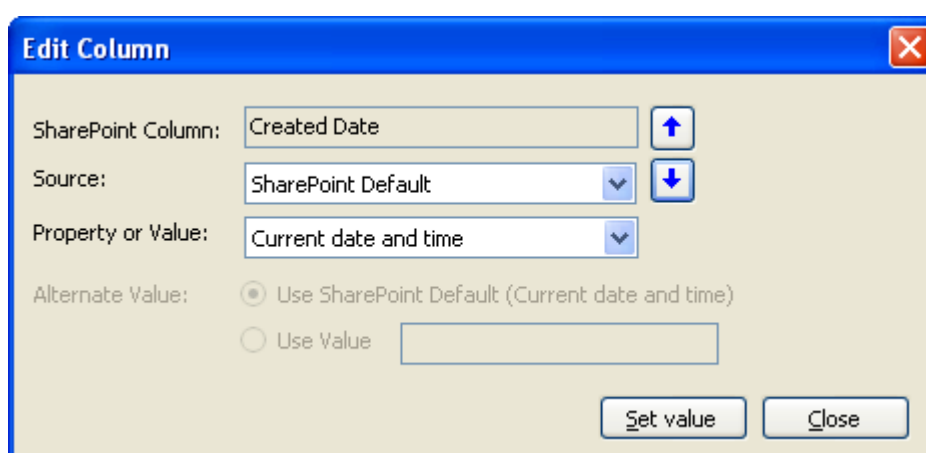
##### 2) Select one of the Folder System Date options given below:

- a) **SharePoint Default** - The current imported date and time will be assigned.
- b) **Metadata File** - The date fields can be assigned from the external metadata file by including the respective date field columns (e.g., CDate, LModDate) in the metadata file. This option allows each folder to have its own system dates. The date mask specified in Metadata Options Step will be used to parse the date value.
- c) **File System** - DockIT will propagate the original Created Date and Last Modified Date fields as available in the Windows File System (NTFS).
- d) **Specific Value** - The specified value can be assigned to the system date field.

##### 3) Specify the alternate value to be taken and assigned, if the value cannot be assigned or unavailable:

## CHAPTER-2-DockIT Templates

- a) **Use SharePoint Default** - DockIT will automatically assign current Date and time.
  - b) **Use Value** - DockIT will assign the user specified alternate value to the system date field.
- 4) Click **Set value** button to set the selected system date field options and value for folder in mapping.
- 5) **Assign File System Dates (Created Date and Last Modified Date)**
- 6) Select the appropriate date field (Created Date or Modified Date) under **Default Columns - File / Item** from the list and click Edit button in the column mapping button pane or press Enter key or Double click the select item. Then the Edit Column Dialog will appear as shown below:



- 7) Select one of the Folder name options as given below:
- a) **SharePoint Default** - The current imported date and time will be assigned.
  - b) **Metadata File** - The date fields can be assigned from the external metadata file by including the respective date field columns (e.g., CDate, LModDate) in the metadata file. This option allows each file to have its own system dates. The date mask specified in Step 3: Metadata Options will be used to parse the date value. If the metadata value is unavailable, invalid or in case of any failure while parsing the date value, DockIT will assign the values depends upon the alternate value specified by the users.
  - c) **File Properties** - The date fields can be assigned from the selected file summary property. This option allows each file to have its own system dates. If the metadata value is unavailable, invalid or in case of any failure while parsing the date value, DockIT will assign the values depends upon the alternate value specified by the users.
  - d) **Custom Property (MS-Office documents only)** - The date field values can also be assigned from the custom property of the MS-Office document. DockIT can assign the date fields from the custom property value of the respective MS-Office documents. If the custom property value is unavailable,

## CHAPTER-2-DockIT Templates

invalid or in case of any failure while reading the date value, DockIT will assign the values depends upon the alternate value specified by the users.

- e) **File System** - DockIT will propagate the original Created Date and Last Modified Date fields as available in the Windows File System (NTFS).
  - f) **Specific Value** - The specified value can be assigned to the system date field.
- 8) Specify the alternate value to be taken and assigned, if the folder name cannot be assigned or unavailable:
- a) **Use SharePoint Default** - DockIT will assign SharePoint Default value as a folder name.
  - b) **Use Value** - DockIT will assign the user specified alternate value as a folder name.
- 9) Click **Set value** button to set the selected date field options and value for file in mapping.

### 2.14 System Users

---

#### Created By and Modified By

To assign System Users (Created By and Modified By) for the folder and files

##### 1) Assign Folder System Users (Created By and Modified By)

Select the appropriate user field (Created by or Modified By) column under **Default Columns - Folder** from the list and click Edit button in the column mapping button pane or press Enter key or Double click the select item. Then the **Edit Column** Dialog will appear as shown below:

The screenshot shows the 'Edit Column' dialog box with the following configuration:

- SharePoint Column: Created By (Folder)
- Source: SharePoint Default
- Property or Value: User running DockIT
- Alternate Value:  Use SharePoint Default (User running DockIT)  Use Value

**NOTE:** You can use Up and Down button in the dialog to navigate the columns in the list.

## CHAPTER-2-DockIT Templates

The user value can be the *Login Name or Display Name or E-Mail address* of the user. DockIT will search the site users list and assign the ID of the matching user to the People or Group column of the respective folder. Do not use multiple values.

The user value can be specified in any one of the following formats:

**Login name:** Login name of the user in domain\username format. e.g., DockITDomain\user1.

**Display Name** - Display name of the user. e.g., John Doe.

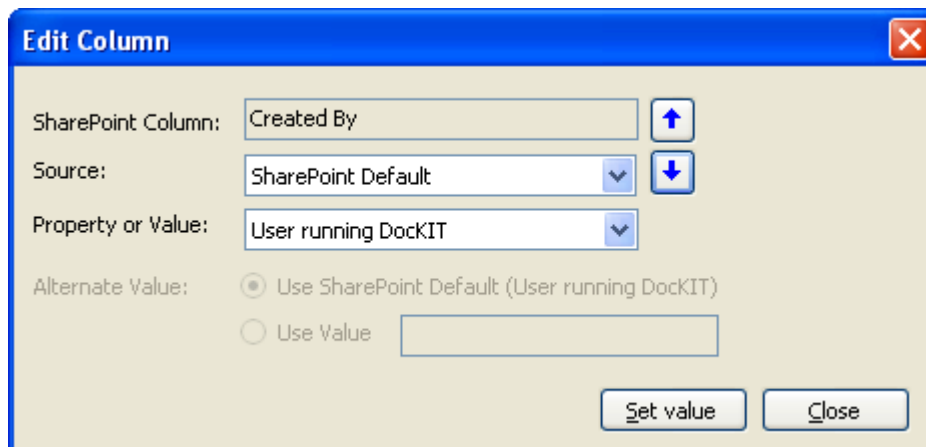
**E-mail address** - E-mail address of the user in someone@example.com format.

- 2) Select one of the Folder System Users options given below:
  - a) **SharePoint Default** - The current user running DockIT will be assigned.
  - b) **Metadata File** - The system users can also be assigned from the external metadata file by including the folder system users column names in the metadata file. This option allows each folder to have its own system users, so long as the stated user already exists in the SharePoint library. If the user value in the metadata file does not exist, the alternate value specified by the users will assigned automatically.
  - c) **File System** - The folder system users can be assigned from the file system by using the 'Owner' value in the file system. The Owner value of the folder maintained by Windows file system (NTFS) will be assigned to the respective SharePoint system user's fields. If the user value in the file system does not exist or the value is empty, the alternate value specified by the users will assigned automatically.
  - d) **Specific Value** - The specified user value will be assigned to the respective user fields.
- 3) Specify the alternate value to be taken and assigned, if the value cannot be assigned or unavailable:
  - a) **Use SharePoint Default** - DockIT will automatically assign current user running DockIT.
  - b) **Use Value** - DockIT will assign the user specified alternate value to the system user field.
- 4) Click **Set value** button to set the selected system user field options and value for folder in mapping.



### 5) Assign File System Users (Created By and Modified By)

- 6) Select the appropriate user field (Created By or Modified By) under **Default Columns - File / Item** from the list and click Edit button in the column mapping button pane or press Enter key or Double click the select item. The **Edit Column Dialog** will appear as shown below:



**NOTE:** You can use Up and Down button in the dialog to navigate the columns in the list.

The user value can be the **Login Name or Display Name or E-Mail address** of the user. DockIT will search the site users list and assign the ID of the matching the user to the People or Group column of the respective file. Do not use multiple values.

**The user value can be specified in any one of the following formats:**

**Login name** - Login name of the user in domain\username format. e.g., DockITDomain\user1.

**Display Name** - Display name of the user. e.g., John Doe.

**E-mail address** - E-mail address of the user in **someone@example.com** format.

- 7) Select one of the File System User options as given below:
- a) **SharePoint Default**- The current user running DockIT will be assigned.
  - b) **Metadata File** - The system users can also be assigned from the external metadata file by including the file system users column name in the metadata file. This option allows each file to have its own system users, so long as the stated user already exists in the SharePoint library. If the user value in the metadata file does not exist, DockIT will assign the values depends upon the alternate value specified by the users.

## CHAPTER-2-DockIT Templates

- c) File Properties** - The user fields can be assigned from the selected file summary property. This option allows each file to have its own system dates. If the user value in the property does not exist, DockIT will assign the values depends upon the alternate value specified by the users.
- d) Custom Property (MS-Office documents only)** - The date field values can also be assigned from the custom property of the MS-Office document. DockIT can assign the date fields from the custom property value of the respective MS-Office documents. If the custom property value is unavailable user value in the property does not exist, DockIT will assign the values depends upon the alternate value specified by the users.
- e) File System** - The folder system users can be assigned from the file system by using the 'Owner' value in the file system. The Owner value of the folder maintained by Windows file system (NTFS) will be assigned to the respective SharePoint system user's fields. If the user value in the file system does not exist or the value is empty, the alternate value specified by the users will assigned automatically.
- f) Specific Value** - The specified user value will be assigned to the respective user fields. If the specified user is invalid or if the user is unavailable, SharePoint by default will set the user to be the user account performing the import into the SharePoint library.

Specify the action to be taken, if the specified user does not exist in the destination library:

- a) Use SharePoint Default** - DockIT will automatically assign current user running DockIT.
- b) Use Value** - DockIT will assign the user specified alternate value to the system user field.

Click **Set value** button to set the selected date field options and value for file in mapping.

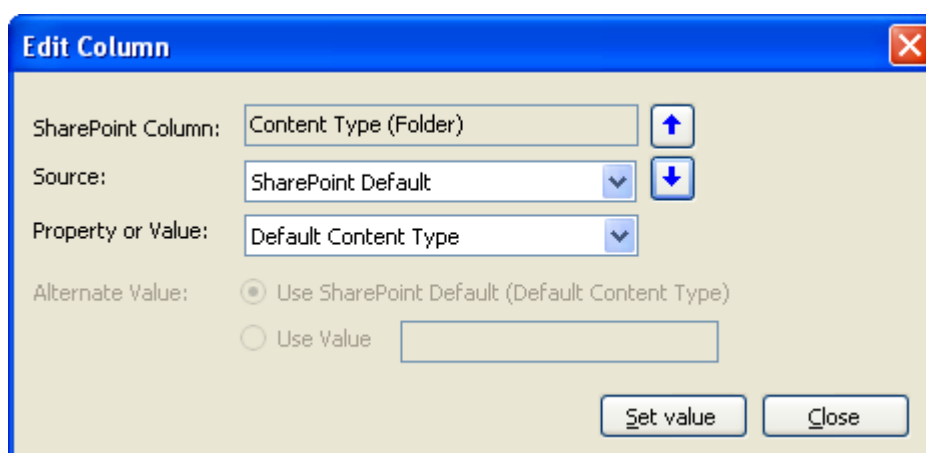
### 2.15 Document Set / Content Type

---

To specify the content type to be assigned to the documents / items:

#### 1) Assign Folder Content Type

Select the Content Type column under **Default Columns - Folder** from the list and click Edit button in the column mapping button pane or press Enter key or Double click the select item. Then the **Edit Column** Dialog will appear as shown below:



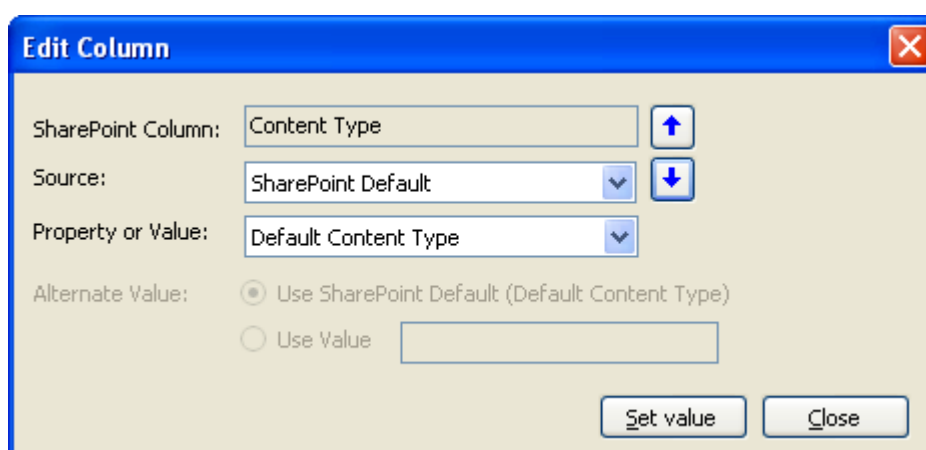
**NOTE:** You can use Up and Down button in the dialog to navigate the columns in the list.

#### 2) Specify the folder content type using one of the options given below:

- a) SharePoint Default** - Default content type of the destination library / list will be assigned as content type for the entire folder.
- b) 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 folder to have its own content type, so long as the stated content type already exists in the SharePoint library / list. If the content type specified in the metadata file does not exist, DockIT will assign the content type as per the alternate value settings defined by the user.
- c) Specific Value** - Specified content type value will be assigned to the folders. The default content type of the library / list will be assigned to the folders, if the content type specified in the textbox does not exist.

## CHAPTER-2-DockIT Templates

- d) **Use Function** - DockIT will assign the calculate value as a content type for all the folders. The value is based on the function build
- 3) Specify the alternate value to be taken and assigned, if the value cannot be assigned or unavailable:
  - a) **Use SharePoint Default** - DockIT will automatically assign default content type of the destination library / list.
  - b) **Use Value** - DockIT will assign the user specified alternate value as a folder content type.
- 4) Click **Set value** button to set the selected content type setting options and value for folder in mapping.
- 5) **Assign File Content Type**
- 6) Select the Content Type column under **Default Columns - File / Item** from the list and click Edit button in the column mapping button pane or press Enter key or Double click the select item. Then the Edit Column Dialog will appear as shown below:



- 7) Specify the file content type settings using one of the options given below:
  - a) **SharePoint Default** - Default content type of the destination library / list will be assigned as content type for all the documents / items.
  - b) **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 to have its own content type, so long as the stated content type already exists in the SharePoint library. If the content type value available in the metadata file does not exist, DockIT will assign the content type depends upon the alternate value settings.
  - c) **Custom Property (MS-Office documents only)** - The content type value can also be specified by the custom property name of the file. DockIT can have the content type value from custom property value of the respective file. This option also allows each document to have its own content type, so long

## CHAPTER-2-DockIT Templates

as the stated content type already exists in the SharePoint library. If the content type value available in the custom property does not exist, DockIT will assign the content type depends upon the alternate value settings.

- d) Specific Value** - The content type value will be assigned to the documents / items. If the content type specified in the textbox does not exist, DockIT will assign the content type depends upon the alternate value settings.
  - e) Use Function** - The calculated value from the custom function build by the user using the DockIT's function builder will be assigned as a content type for all documents / items. If the content type value does not exist, DockIT will assign the content type depends upon the alternate value settings.
- 8)** Specify the alternate value to be taken and assigned, if the value cannot be assigned or unavailable:
- a) Use SharePoint Default** - DockIT will automatically assign default content type of the destination library / list.
  - b) Use Value** - DockIT will assign the user specified alternate value as a file / item content type.
- 9)** Click **Set Value** button to set the content type options and value for file / item in mapping.

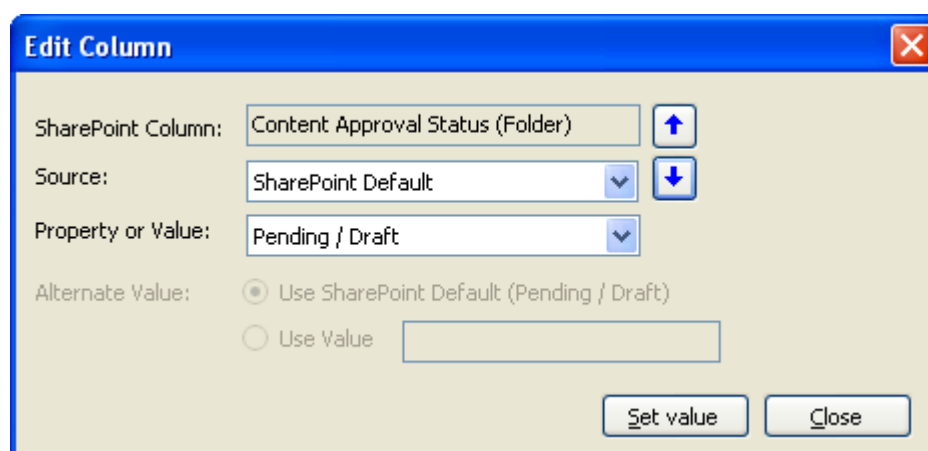
### 2.16 Content Approval Status

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To specify the content approval status to be set after importing a folder / file to a SharePoint library:

#### 1) Assign Folder Content Approval Status

Select the Content Approval Status column under **Default Columns - Folder** from the list and click Edit button in the column mapping button pane or press Enter key or Double click the select item. Then the **Edit Column** Dialog will appear as shown below:



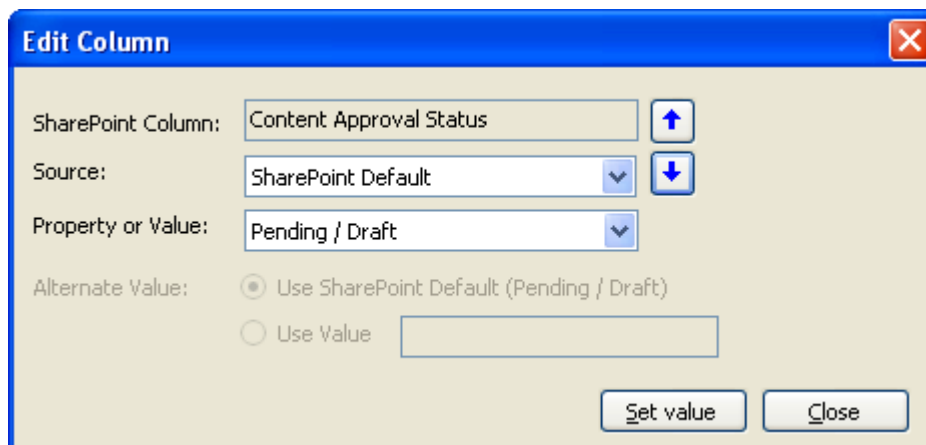
**NOTE:** You can use Up and Down button in the dialog to navigate the columns in the list.

- 2) Specify the folder content approval status options using one of the options given below:
  - a) **SharePoint Default** - Default Approval Status (e.g., Pending or Draft) will be assigned as Approval Status automatically by SharePoint for all folders.
  - b) **Metadata File** - The approval status value can also be assigned from the external metadata file by including the approval status column name in the metadata file. This option allows each folder to have its own approval status, so long as the stated approval status is valid status (*Approved, Rejected, Pending, Draft and Scheduled*) in the SharePoint library. The approval status will be assigned based on the alternate value settings to the folder, if the approval status specified in the metadata file is invalid.
  - c) **Specific Value** - Specified approval status value will be assigned to the folder. You can specify the approval status - *Approved, Rejected, Pending, Draft and Scheduled* from the dropdown list.

## CHAPTER-2-DockIT Templates

**NOTE:** The Content Approval Status will be assigned only if the destination library has Content Approval enabled.

- 3) Specify the alternate value to be taken and assigned, if the value cannot be assigned or unavailable:
  - a) **Use SharePoint Default** - DockIT will automatically assign Default Approval Status (e.g., Pending or Draft) of the destination library / list.
  - b) **Use Value** - DockIT will assign the user specified alternate value as an approval status.
- 4) Click **Set value** button to set the selected content type setting options and value for folder in mapping.
- 5) **Assign File Content Approval Status**
- 6) Select the Content Approval Status column under **Default Columns - File / Item** from the list and click Edit button in the column mapping button pane or press Enter key or Double click the select item. Then the **Edit Column** Dialog will appear as shown below:



- 7) Specify the file content approval status options using one of the options given below:
  - a) **SharePoint Default** - Default Approval Status (e.g., Pending or Draft) will be assigned as Approval Status automatically by SharePoint for all the files.
  - b) **Metadata File** - The approval status value can also be assigned from the external metadata file by including the approval status column name in the metadata file. This option allows each file to have its own approval status, so long as the stated approval status is valid status (*Approved, Rejected, Pending, Draft and Scheduled*) in the SharePoint library. The approval status will be assigned based on the alternate value settings to the folder, if the approval status specified in the metadata file is invalid.

## CHAPTER-2-DocKIT Templates

**c) Custom Property (MS-Office documents only)** - The approval status value can also be specified by the custom property name of the file. DocKIT can have the approval status value from custom property value of the respective file.

**d) Specific Value** - Specified approval status value will be assigned to the file. You can specify the approval status - *Approved, Rejected, Pending, Draft and Scheduled* from the dropdown list.

**NOTE:** The Content Approval Status will be assigned only if the destination library has Content Approval enabled.

**8)** Specify the alternate value to be taken and assigned, if the value cannot be assigned or unavailable:

**a) Use SharePoint Default** - DocKIT will automatically assign Default Approval Status (e.g., Pending or Draft) of the destination library / list.

**b) Use Value** - DocKIT will assign the user specified alternate value as an approval status.

**9)** Click **Set Value** button to set the content type options and value for file / item in mapping.



### 2.17 Approver Comments

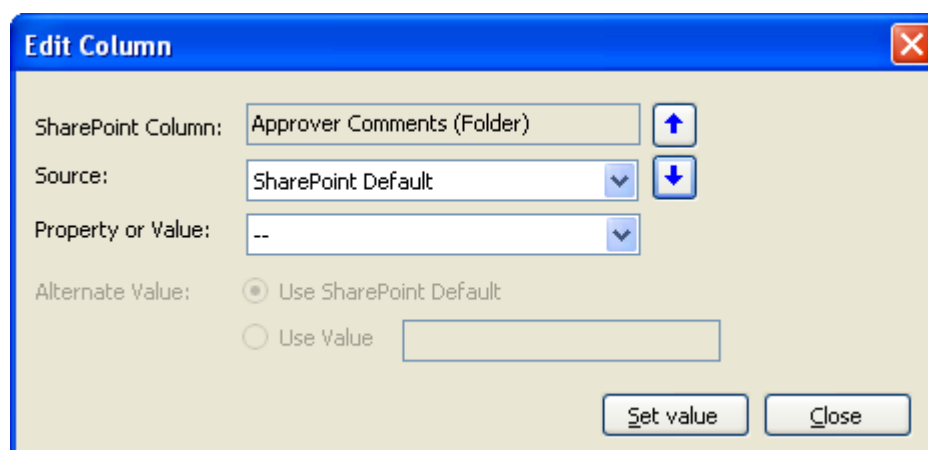
---

To specify the content approval status comments to be set, after importing a folder / file to a SharePoint library:

**NOTE:** Approver Comments Field is an optional one and it is enabled only if the Content Approval Status is set.

#### 1) Assign Folder Approval Status Comments

Select the Approver Comments column under **Default Columns - Folder** from the list and click Edit button in the column mapping button pane or press Enter key or Double click the select item. Then the **Edit Column** Dialog will appear as shown below:



**NOTE:** You can use Up and Down button in the dialog to navigate the columns in the list.

2) Specify the folder content approval status options using one of the options given below:

**a) SharePoint Default** - Default Approval Status Comments (e.g., Pending or Draft) will be assigned as Approver Comments automatically by SharePoint for all folders.

**b) Metadata File** - The approval status comments can also be assigned from the external metadata file by including the approval status comments column name in the metadata file.

**c) Specific Value** - You can also specify the approval status comments that must be assigned to the folder (Optional).

You can also specify the generic comment string using the following keyword identifiers in **Approver Comments** textbox:

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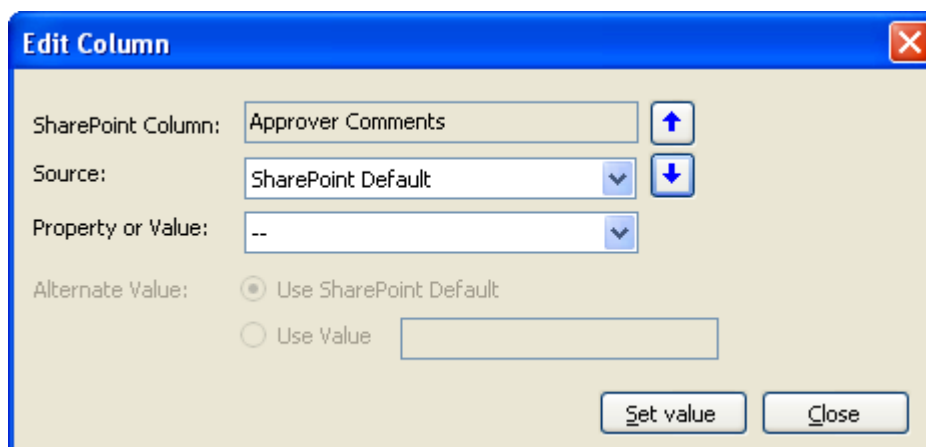
- **<User name>** - Substitutes current import user who performs DocKIT update. For example, *Document was updated by <user name>*.
- **<Approval status>** - Substitutes the approval status of the document in SharePoint. For example, *Document was <approval status>*.
- **<Date and time>** - Substitutes the current date and time. For example, *Document was <approval status> at <date and time>*.

**NOTE:** Approval Status Comments will be assigned only if the destination library has Content Approval enabled and Content Approval is set.

3) Click **Set value** button to set the selected content type setting options and value for folder in mapping.

### 4) Assign File Approval Status Comments

5) Select the Content Approval Status column under **Default Columns - File / Item** from the list and click Edit button in the column mapping button pane or press Enter key or Double click the select item. Then the **Edit Column** Dialog will appear as shown below:



The screenshot shows the 'Edit Column' dialog box. It has a blue title bar with the text 'Edit Column' and a close button (X). The main area is light gray and contains the following fields and controls:

- 'SharePoint Column': A text box containing 'Approver Comments' and an upward arrow button.
- 'Source': A dropdown menu showing 'SharePoint Default' and a downward arrow button.
- 'Property or Value': A dropdown menu showing '--'.
- 'Alternate Value': Two radio buttons. The first is 'Use SharePoint Default' and is selected. The second is 'Use Value' and is unselected, followed by an empty text box.
- At the bottom right, there are two buttons: 'Set value' and 'Close'.

6) Specify the file content approval status options using one of the options given below:

- SharePoint Default** - Default Approval Status Comments (e.g., Pending or Draft) will be assigned as Approver Comments automatically by SharePoint for all files / items.
- Metadata File** - The approval status comments can also be assigned from the external metadata file by including the approval status comments column name in the metadata file.
- Custom Property (MS-Office documents only)** - The approval status comments can also be specified by the custom property name of the file.

## CHAPTER-2-DocKIT Templates

**d) Specific Value** - You can also specify the approval status comments that must be assigned to the file / item (Optional).

You can also specify the generic comment string using the following keyword identifiers in **Approver Comments** textbox:

- o **<User name>** - Substitutes current import user who performs DocKIT update. For example, *Document was updated by <user name>*.
- o **<Approval status>** - Substitutes the approval status of the document in SharePoint. For example, *Document was <approval status>*.
- o **<Date and time>** - Substitutes the current date and time. For example, *Document was <approval status> at <date and time>*.

**NOTE:** Approval Status Comments will be assigned only if the destination library has Content Approval enabled and Content Approval is set.

- 7) Click **Set Value** button to set the approval status comments options and value for file / item in mapping.

### 2.18 Check-in Comments

---

To specify the check - in comments to be set after importing a file to a SharePoint library:

**NOTE:** Check -in Comments is applicable only for file.

#### 1) Assign File Check -in Comments

- 2) Select the Check-in Comments column under Check-in Comments column under **Default Columns - File / Item** from the list and click Edit button in the column mapping button pane or press Enter key or Double click the select item. Then the **Edit Column** Dialog will appear as shown below:

The screenshot shows the 'Edit Column' dialog box. The 'SharePoint Column' field is set to 'Check-in Comments'. The 'Source' dropdown is set to 'SharePoint Default'. The 'Property or Value' dropdown is set to '--'. The 'Alternate Value' section has 'Use SharePoint Default' selected. The 'Set value' and 'Close' buttons are visible at the bottom right.

## CHAPTER-2-DockIT Templates

**3) Specify the file check** - in comments options using one of the options given below: one of the options given below:

**a) SharePoint Default** - Default check-in comments will be assigned as comment automatically by SharePoint for all files.

**b) Metadata File** - The file check-in comments can also be assigned from the external metadata file by including the check-in comments column name in the metadata file.

**c) Specific Value** - You can also specify the check-in comments that must be assigned to the file.

You can also specify the generic comment string using the following keyword identifiers in **Check-in comments** textbox:

- o **<User name>** - Substitutes current import user who performs DockIT update. For example, *Document was updated by <user name>*.
- o **<Task name>** - Substitutes current import task name using which the document is updated in SharePoint. For example, *Document was updated using <task name> in DockIT*.

**d) Use Function** - You can also assign the calculated values as the file check-in comments with the help of DockIT function builder.

**4) Click Set Value** button to set the file check-in comments options and value for file / item in mapping.

**2.19 Assigning Metadata**

DockIT accepts various sources for assigning metadata values to SharePoint columns. During column mapping, you can set to assign metadata for a SharePoint column from different sources as mentioned below:

<b>Source</b>	<b>Description</b>
Metadata File	Allows mapping a SharePoint column to a column in an external metadata file.
File Properties	Allows mapping a SharePoint column to <b>File Properties</b> (like Title, Subject, Author, Category, Keywords and Comments) and custom properties of MS Office documents.
Custom Property	Allows entering a property name that is part of the document.
File System	Allows mapping certain default fields (Author, Owner, Created Date, and Modified Date) in file system.
Specific Value	You can enter a specific value to be assigned for a SharePoint column.
Use Function	Allows assigning a value for SharePoint column using Function Builder. You can create functions that facilitate you to prepare dynamic values based on metadata file column, file properties or free text.

**Assigning metadata properties in SharePoint using DockIT**

*1. Assigning metadata for a document / file*

<b>SharePoint Column</b>	<b>Possible Sources</b>	<b>Additional Remarks</b>
Created Date & Modified Date	<ul style="list-style-type: none"> <li>✓ File System</li> <li>✓ External Metadata File</li> <li>✓ Custom Properties in Office documents</li> <li>✓ Specific Value</li> </ul>	<p><b>In the case of File System,</b></p> <ul style="list-style-type: none"> <li>▪ Created Date in file system</li> <li>▪ Modified Date in file system</li> </ul>

## CHAPTER-2-DockIT Templates

Created By & Modified By	<ul style="list-style-type: none"> <li>✓ File System</li> <li>✓ External Metadata File</li> <li>✓ Custom Properties in Office documents</li> <li>✓ Specific value</li> </ul>	<p><b>In the case of File System,</b></p> <ul style="list-style-type: none"> <li>▪ Author value in file system</li> <li>▪ Owner value in file system</li> </ul>
Content Type	<ul style="list-style-type: none"> <li>✓ Specific value as in DockIT task wizard</li> <li>✓ Custom Properties in Office documents</li> <li>✓ External Metadata File</li> <li>✓ Use Function</li> </ul>	
Approval Status & Approver Comments	<ul style="list-style-type: none"> <li>✓ Specific value as in DockIT task wizard</li> <li>✓ Custom Properties in Office documents</li> <li>✓ External Metadata File</li> </ul>	
Other columns including custom columns (user-defined)	<ul style="list-style-type: none"> <li>✓ Custom Properties</li> <li>✓ External Metadata File</li> <li>✓ Use Function</li> <li>✓ File system</li> <li>✓ File Properties</li> <li>✓ Use Function</li> </ul>	In the case of MS Office documents, custom properties will be auto-propagated by default.

### II. Assigning metadata for a folder

SharePoint Column	Possible Sources	Additional Remarks
Created Date & Modified Date	<ul style="list-style-type: none"> <li>✓ File System</li> <li>✓ External Metadata File</li> <li>✓ Specific Value</li> </ul>	<p><b>In the case of File System,</b></p> <ul style="list-style-type: none"> <li>▪ Created Date in file system</li> <li>▪ Modified Date in file system</li> </ul>
Created By & Modified By	<ul style="list-style-type: none"> <li>✓ File System</li> <li>✓ External Metadata File</li> <li>✓ Specific value</li> </ul>	<p><b>In the case of File System,</b></p> <ul style="list-style-type: none"> <li>▪ Author value in file system</li> </ul>

## CHAPTER-2-DockIT Templates

		<ul style="list-style-type: none"> <li>▪ Owner value in file system</li> </ul>
Content Type	<ul style="list-style-type: none"> <li>✓ Specific value as in DockIT task wizard</li> <li>✓ External Metadata File</li> <li>✓ Use Function</li> </ul>	
Approval Status & Approver Comments	<ul style="list-style-type: none"> <li>✓ Specific value as in DockIT task wizard</li> <li>✓ External Metadata File</li> </ul>	
Other columns including custom columns (user-defined)	<ul style="list-style-type: none"> <li>✓ Custom Properties</li> <li>✓ External Metadata File</li> <li>✓ Use Function</li> <li>✓ File system</li> <li>✓ File Properties</li> <li>✓ Use Function</li> </ul>	

**NOTE:** DockIT will assign metadata values from the listed sources to the respective SharePoint System columns (Created, Modified, Created By, Modified By, Content Type, Approval Status, and Approver Comments) and custom columns based on the settings specified in the mapping template used in the metadata options step of DockIT import task wizard.

## CHAPTER-2-DockIT Templates

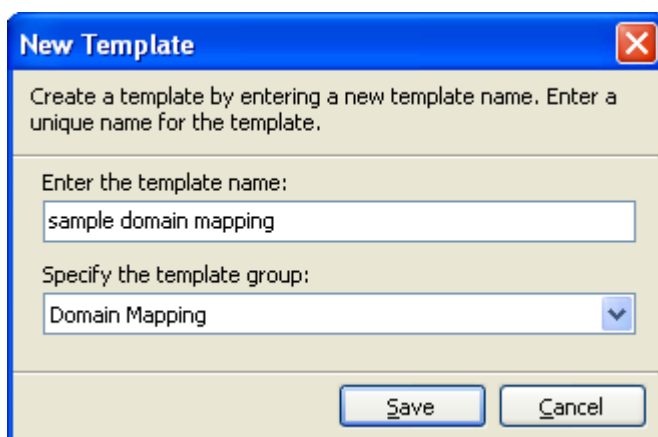
### 2.20 Domain Mapping Template

---

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 dialog will appear as shown below:

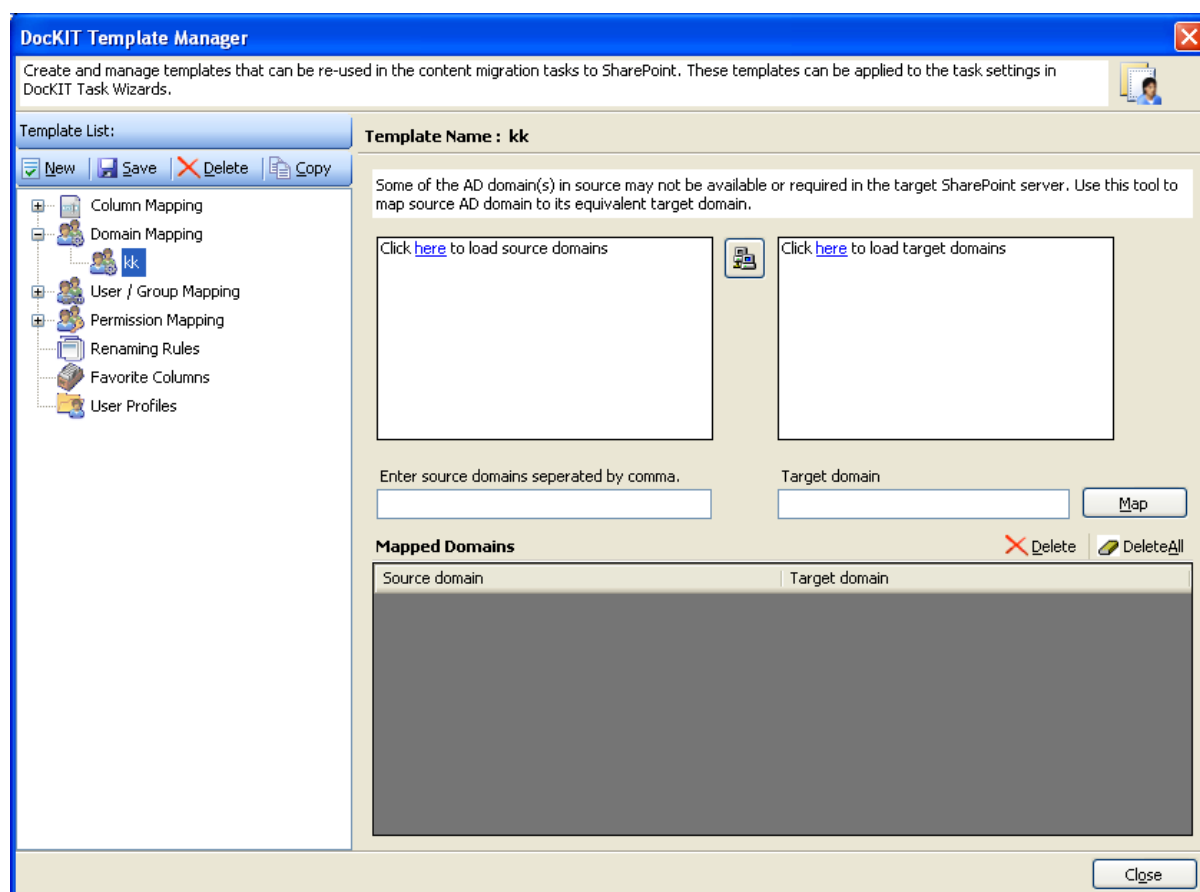


The screenshot shows a 'New Template' dialog box with a blue title bar and a close button. The main area is light beige and contains the following text: 'Create a template by entering a new template name. Enter a unique name for the template.' Below this is a text input field labeled 'Enter the template name:' containing the text 'sample domain mapping'. Below that is a dropdown menu labeled 'Specify the template group:' with 'Domain Mapping' selected. At the bottom are 'Save' and 'Cancel' buttons.

Enter an unique template name for the template. Select 'Domain Mapping' under the list of available template groups and click Save button. The new template will be added under 'Domain Mapping' node in template tree view as shown below:



## CHAPTER-2-DockIT Templates



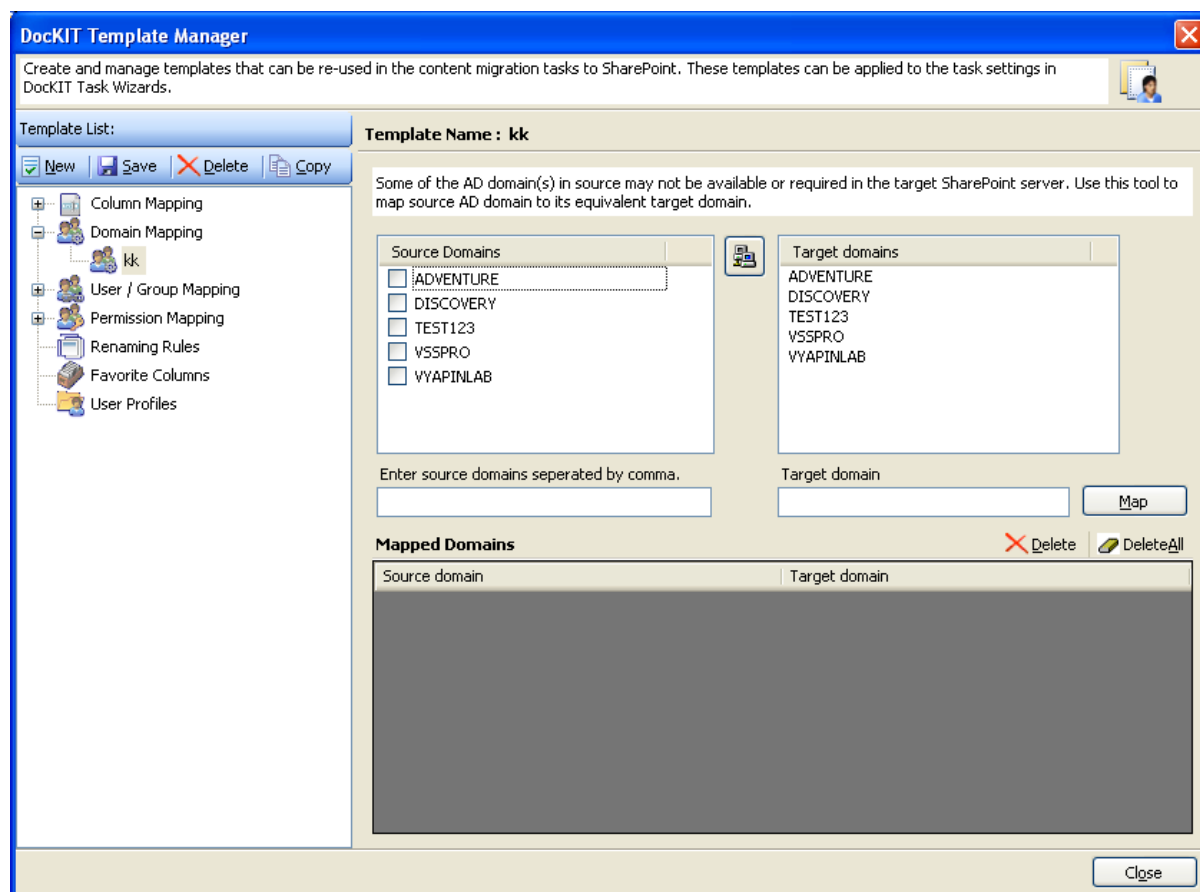
Domain Mapping Template consists of following panes to configure domain mapping:

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

DockIT domain mapping template enables you to load the list of domains available with the network either by clicking 'here' (click here to load) or load domain button.

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.

## CHAPTER-2-DockIT Templates



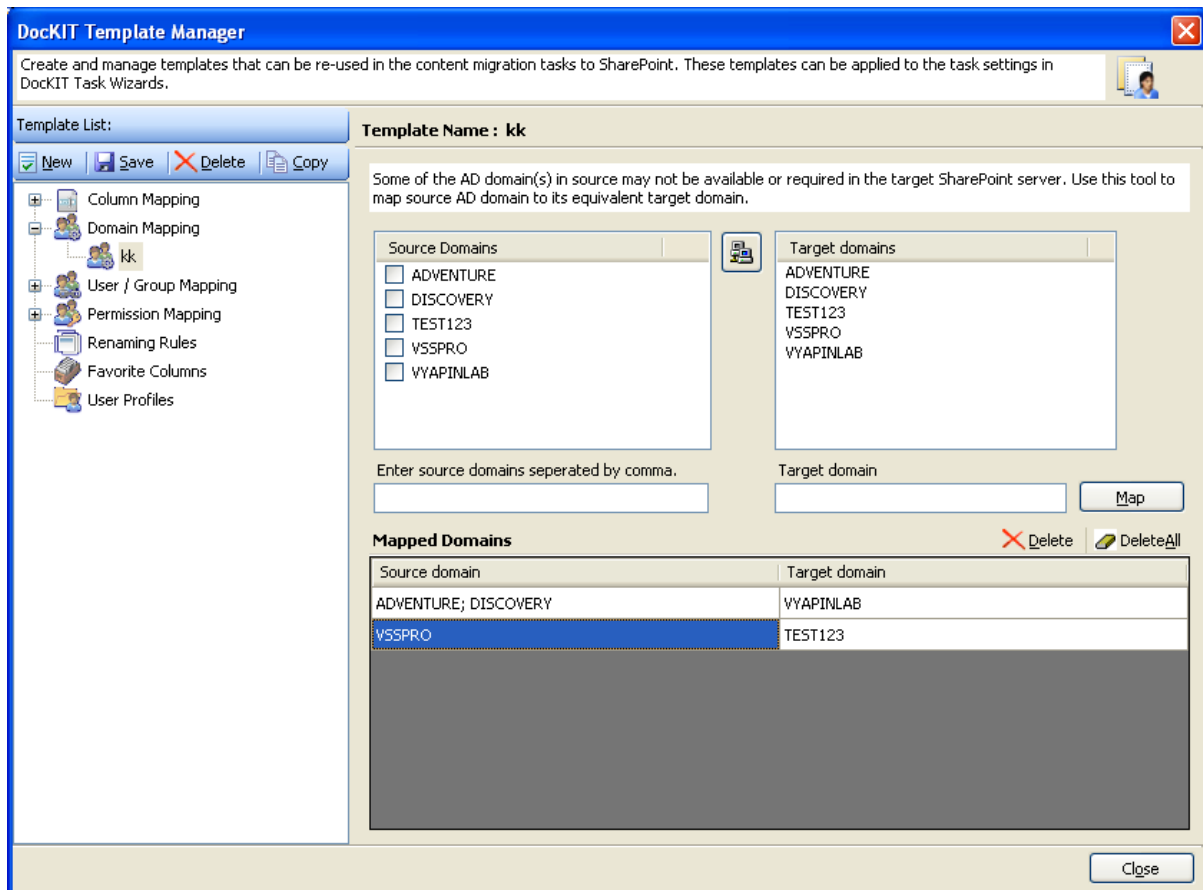
Then you have to select the appropriate source domain (s) from the source domain list and select the target domain to map from the list of available target domains. Then finally click Map button to map the domains.

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

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

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

## CHAPTER-2-DockIT Templates



### Action

Delete  
Delete All

### Description

Click Delete to delete a mapped data from the domain mapping.  
Click Delete All to clear the domain mapping.

## CHAPTER-2-DockIT Templates

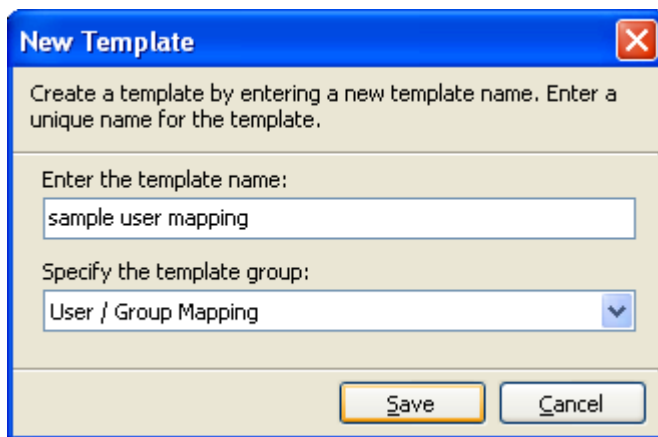
### 2.21 User / Group Mapping Template

---

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,

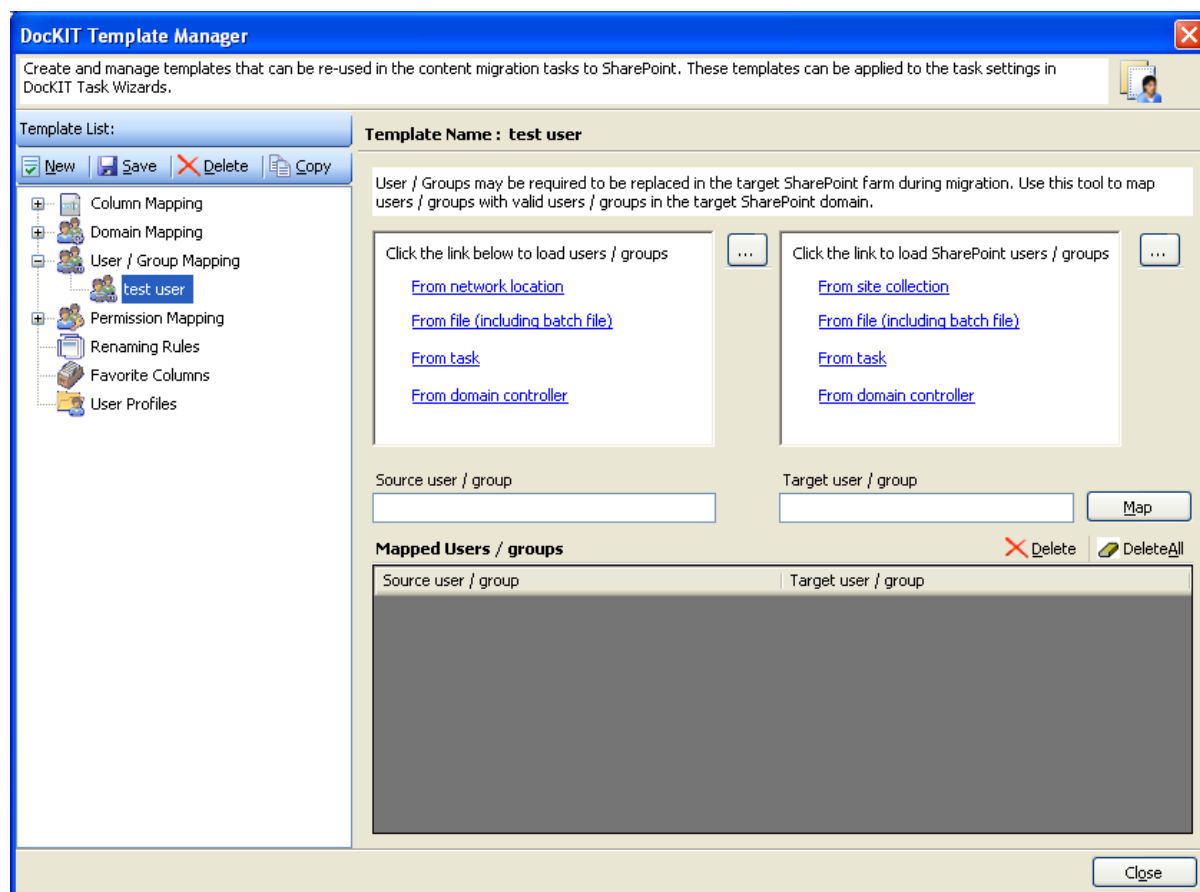
Select New from the Templates Tools pane. The new template dialog will appear as shown below:



The screenshot shows a 'New Template' dialog box. The title bar is blue with the text 'New Template' and a close button (X). The main content area is light beige and contains the following text: 'Create a template by entering a new template name. Enter a unique name for the template.' Below this is a text input field labeled 'Enter the template name:' containing the text 'sample user mapping'. Below that is a dropdown menu labeled 'Specify the template group:' with 'User / Group Mapping' selected. At the bottom are 'Save' and 'Cancel' buttons.

Enter a unique template name for the template. Select 'User / Group Mapping' under the list of available template groups and click Save button. The new template will be added under 'User / Group Mapping' node in template tree view as shown below:

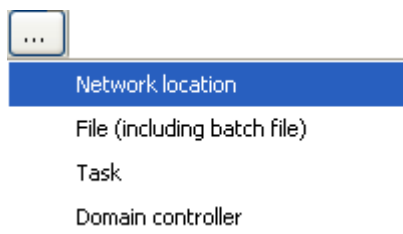
## CHAPTER-2-DockIT Templates



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 links in the source load options pane or load source users / groups menu as shown below. For more information, click Source users / groups loading options.

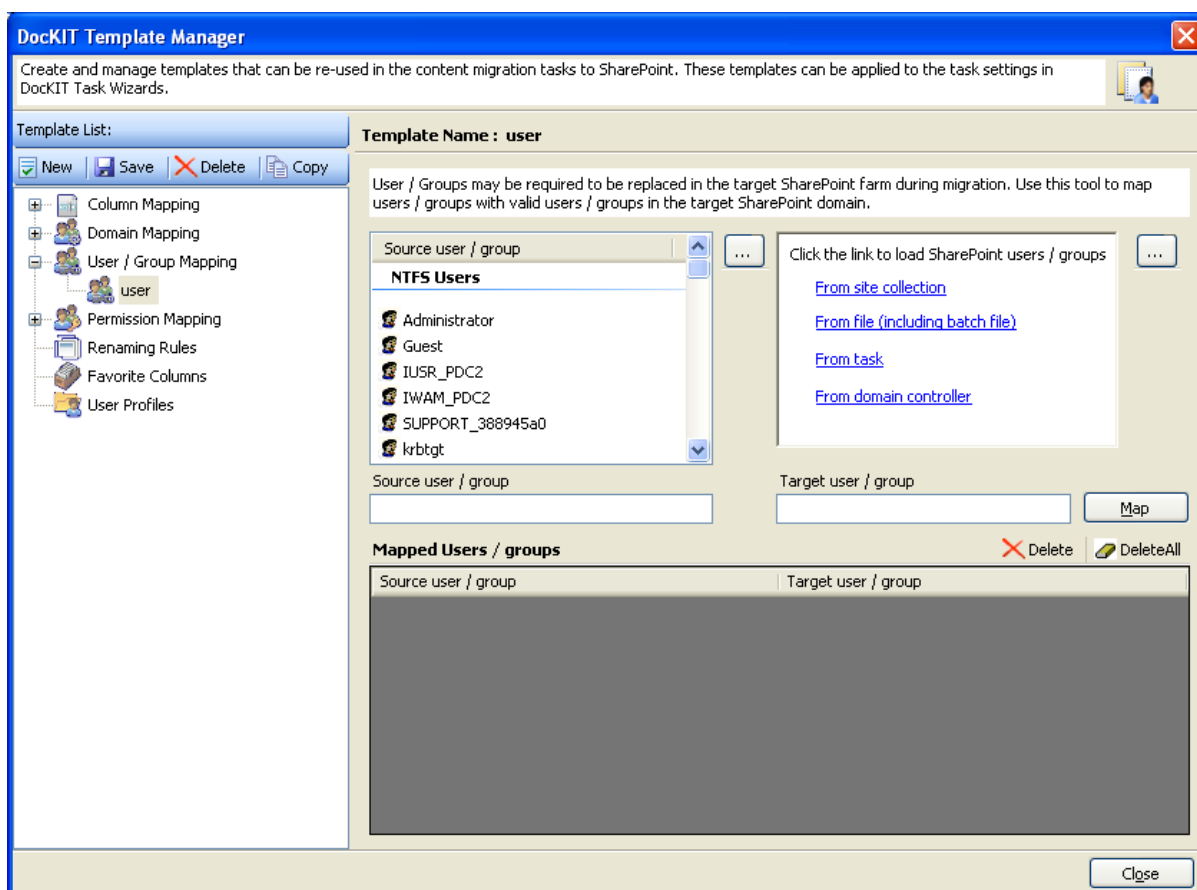


Available options to load source users / groups

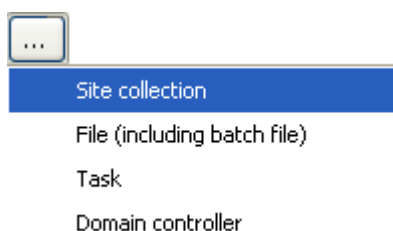
## CHAPTER-2-DockIT Templates

- 1) Load from network
- 2) Load from file (including batch file)
- 3) Load from task
- 4) Load from domain controller

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:



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

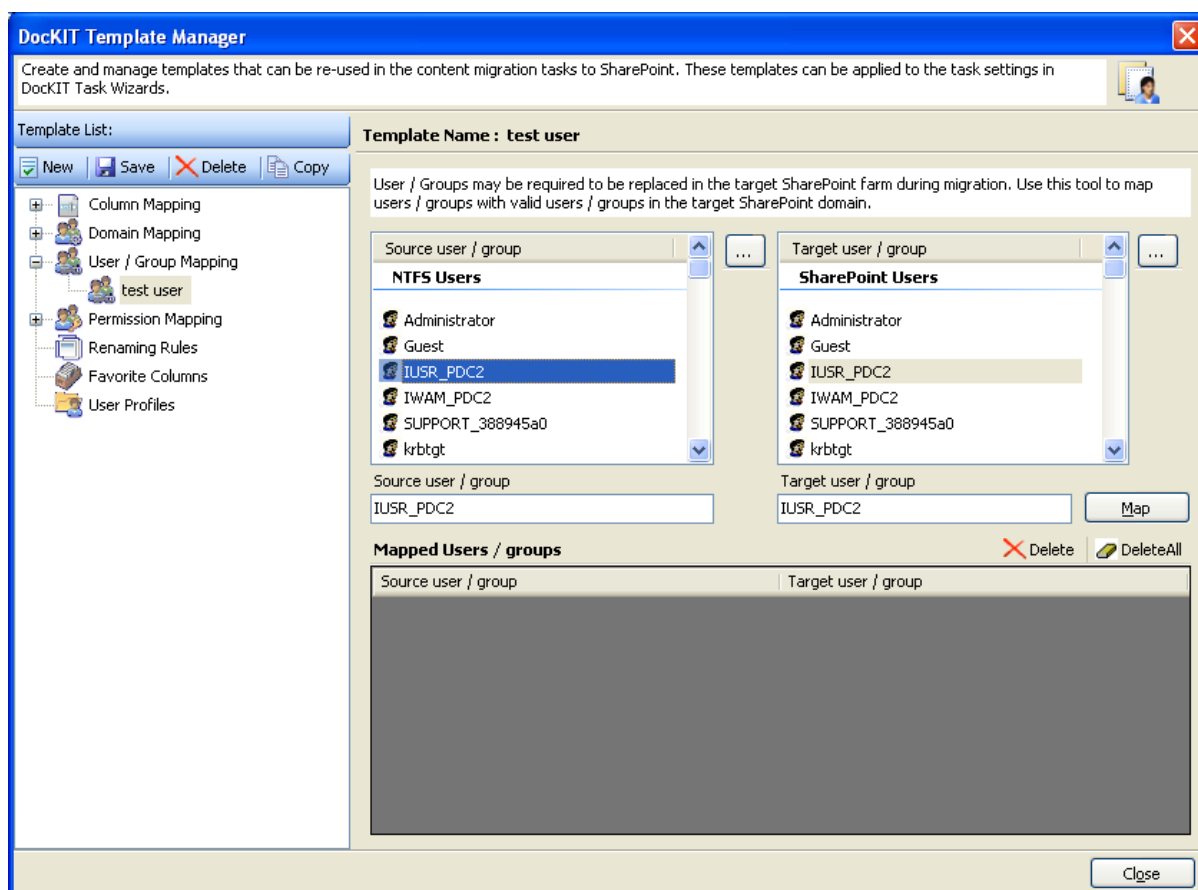


Available options to load target users / groups

## CHAPTER-2-DockIT Templates

- 1) Load from site collection
- 2) Load from file (including batch file)
- 3) Load from task
- 4) Load from domain controller

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

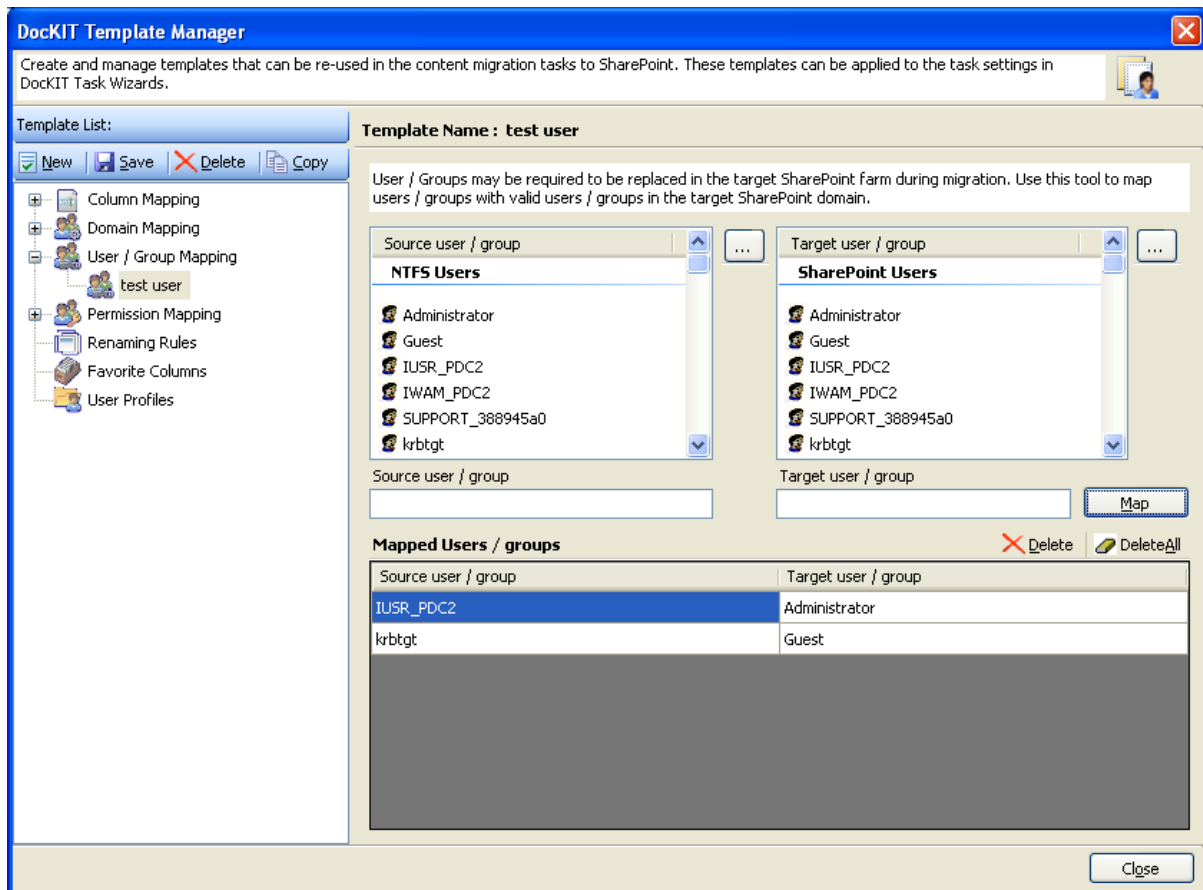


Then you have to select the appropriate source user / group from the source users / groups list and select the target user / group to replace from the list of available target users / groups. Then finally click Map button to map the users / groups.

You can also have the option to enter the user / group names of your own in the respective textboxes and finally click Map button to map.

Once you click Map button, selected user / group are mapped and the mapped data is displayed in the user / group mapping pane as shown below:

## CHAPTER-2-DockIT Templates



### Action

Delete All  
Delete

### Description

Click Delete All to clear the entire user / group mapping.  
Click Delete to delete the selected data from mapping.



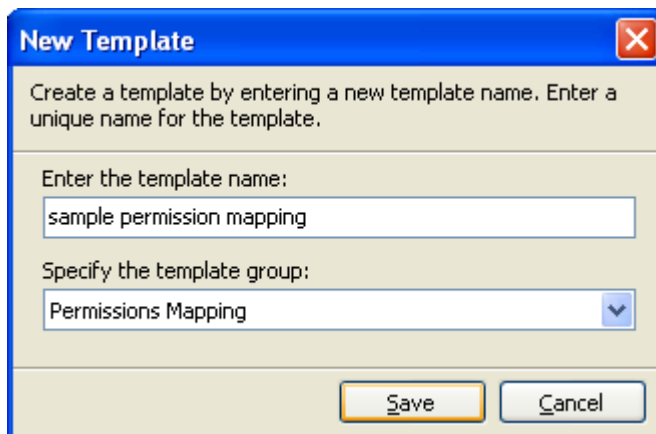
### 2.22 Permission Mapping Template

---

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

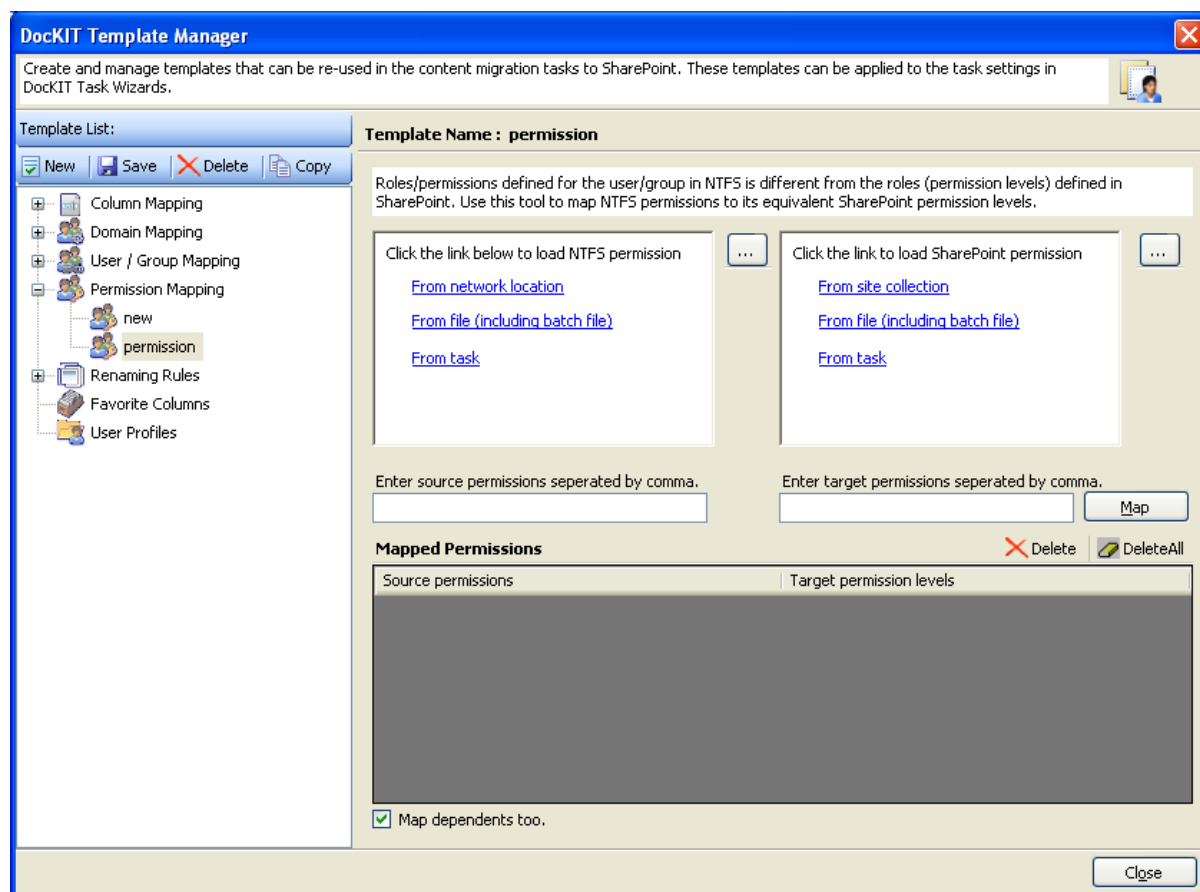
To create a new permission mapping template,

Select New from the Templates Tools pane. The new template dialog will appear as shown below:



Enter an unique template name for the template. Select 'Permissions Mapping' under the list of available template groups and click Save button. The new template will be added under 'Permissions Mapping' node in template tree view as shown below:

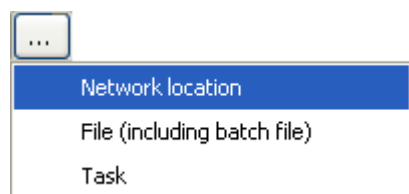
## CHAPTER-2-DockIT Templates



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 various options either by clicking the appropriate links in the source load options pane or load source permissions menu as shown below:

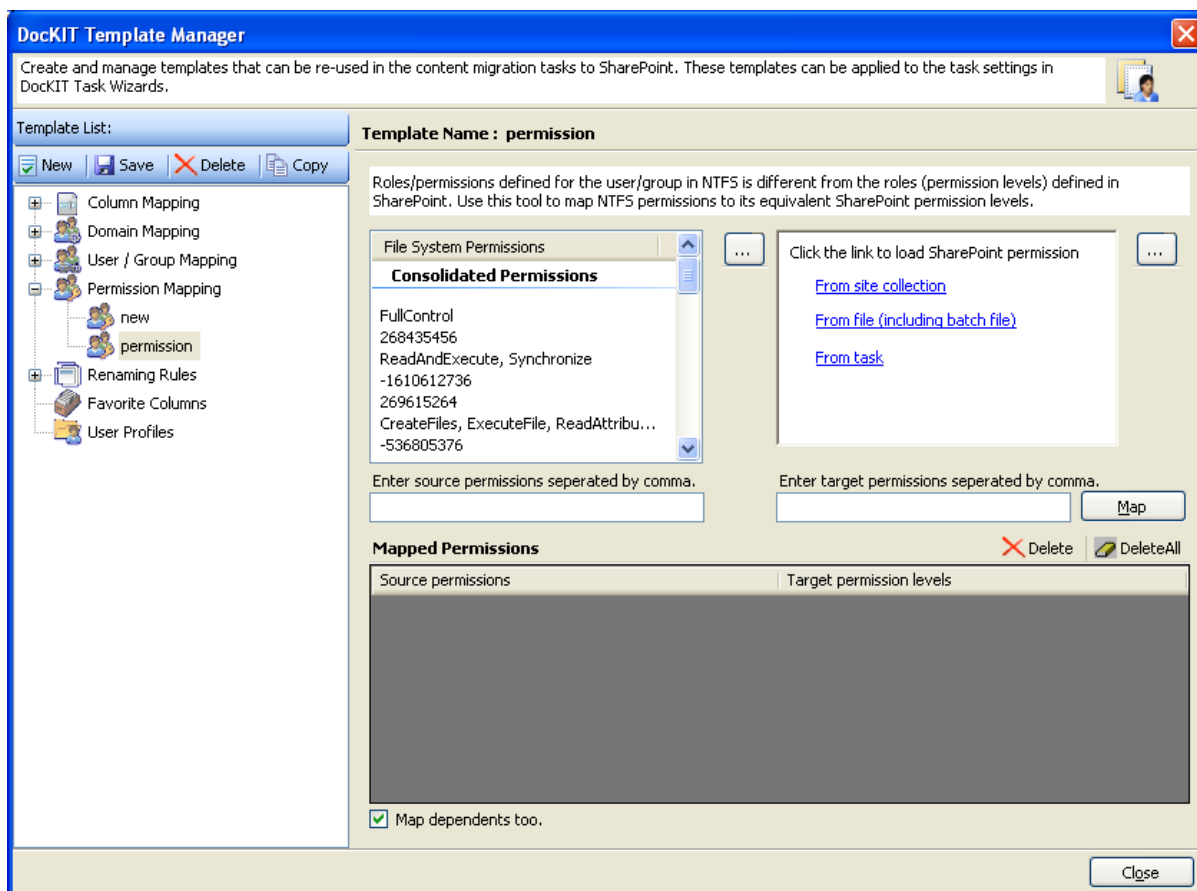


Available options to load source permissions

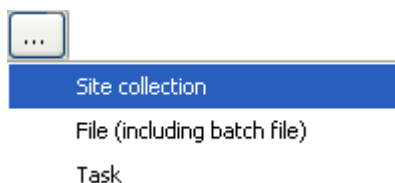
- 1) Load from network
- 2) Load from file (including batch file)
- 3) Load from task

## CHAPTER-2-DockIT Templates

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 various options either by clicking the appropriate links in the target load options pane or load target permissions menu as shown below:

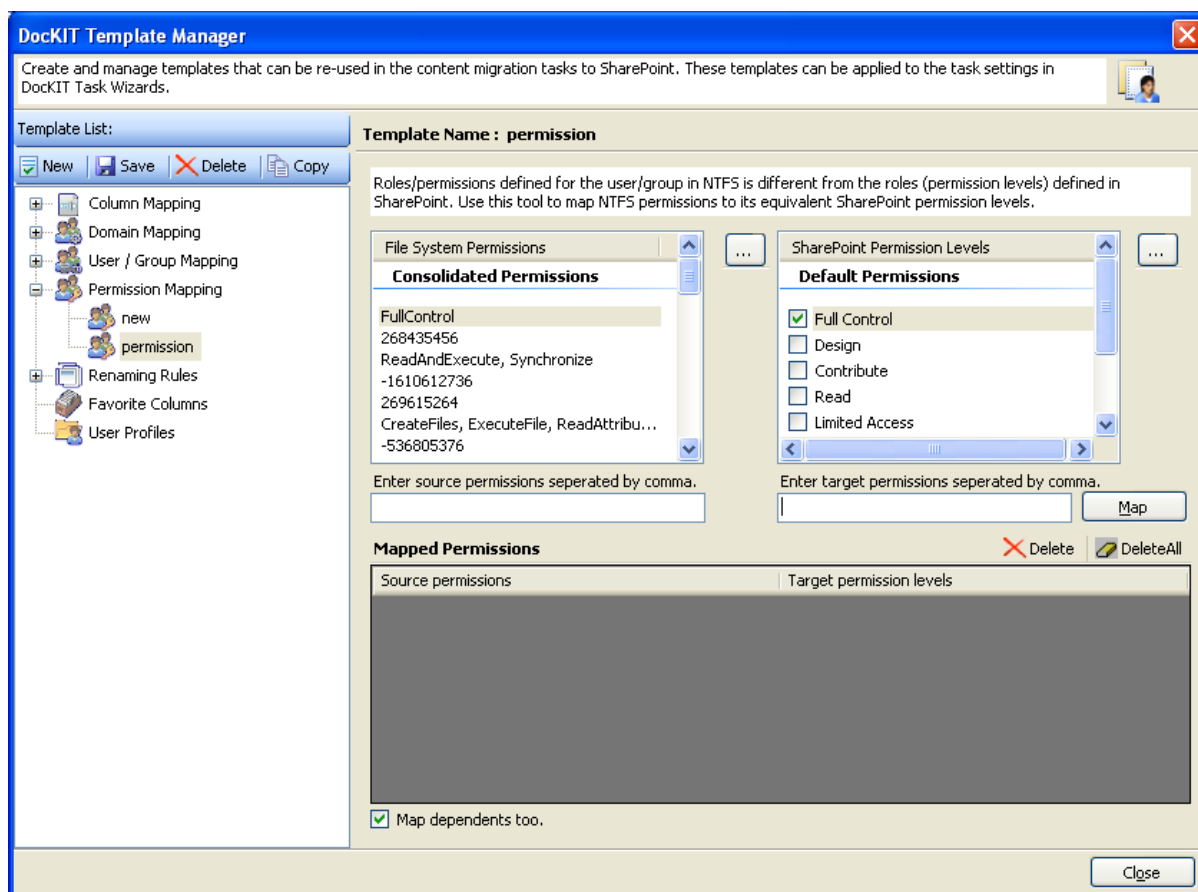


Available options to load target permissions

- 1) Load from site collection
- 2) Load from file (including batch file)
- 3) Load from task

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:

## CHAPTER-2-DockIT Templates

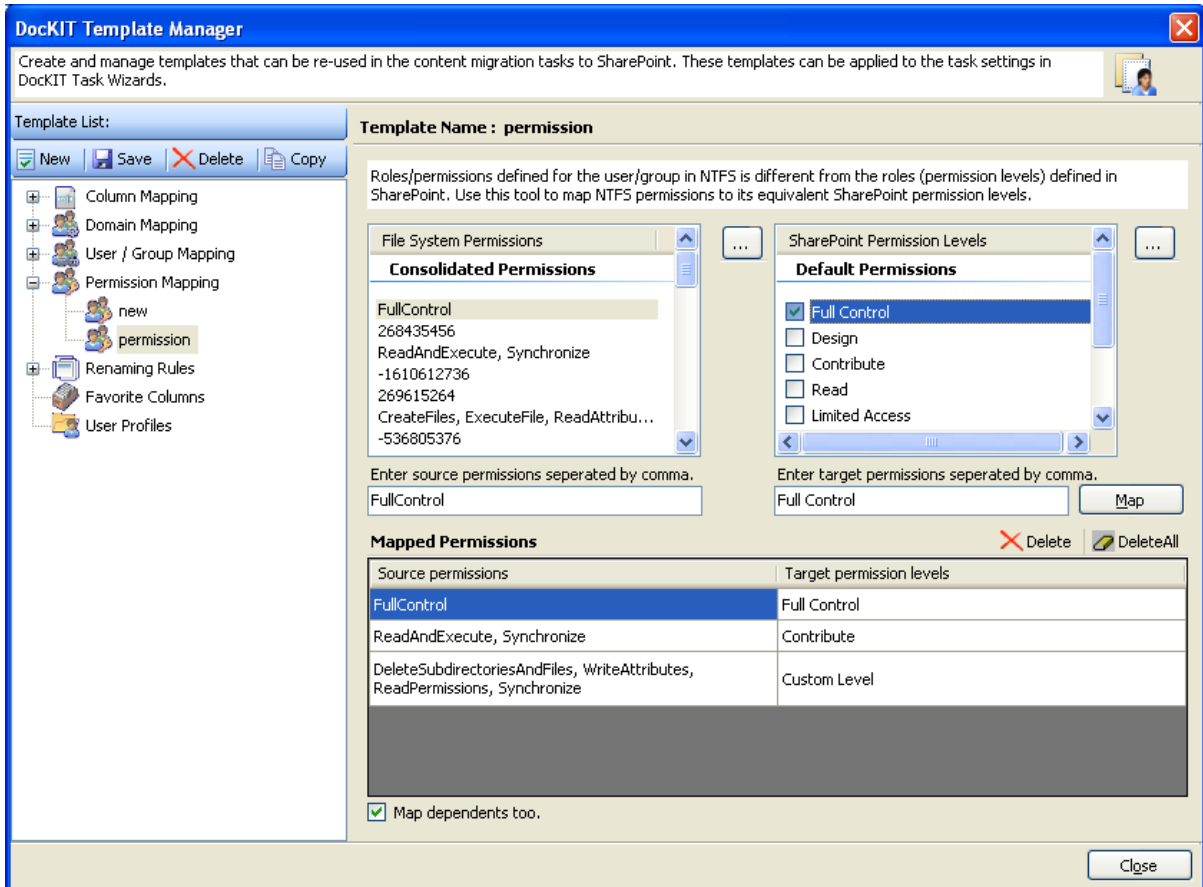


Then you have to select the appropriate source permissions from the source permissions list and select equivalent target permission level(s) to replace from the list of available target permission level(s). Then finally click Map button to map permissions.

You can also have the option to enter the permission name(s) / levels(s) of your own in the respective textboxes and finally click Map button to map.

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

## CHAPTER-2-DockIT Templates



**Map dependents too** - This option enables you to assign equivalent SharePoint permission levels for the dependent NTFS permission (which are mapped in the template), even though its parent permission is not mapped to the SharePoint permission levels explicitly.

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), In this case, with the Map dependents too option is checked, DockIT assigns Contribute and Read permission levels for the imported item in SharePoint for the users/groups who have Full control NTFS permissions in the file.

**Action**  
Delete All  
Delete

**Description**  
Click Delete All to clear the entire permission mapping.  
Click Delete to delete the selected data from mapping.

### 2.23 Folder & File Renaming Rules

---

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

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

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 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.

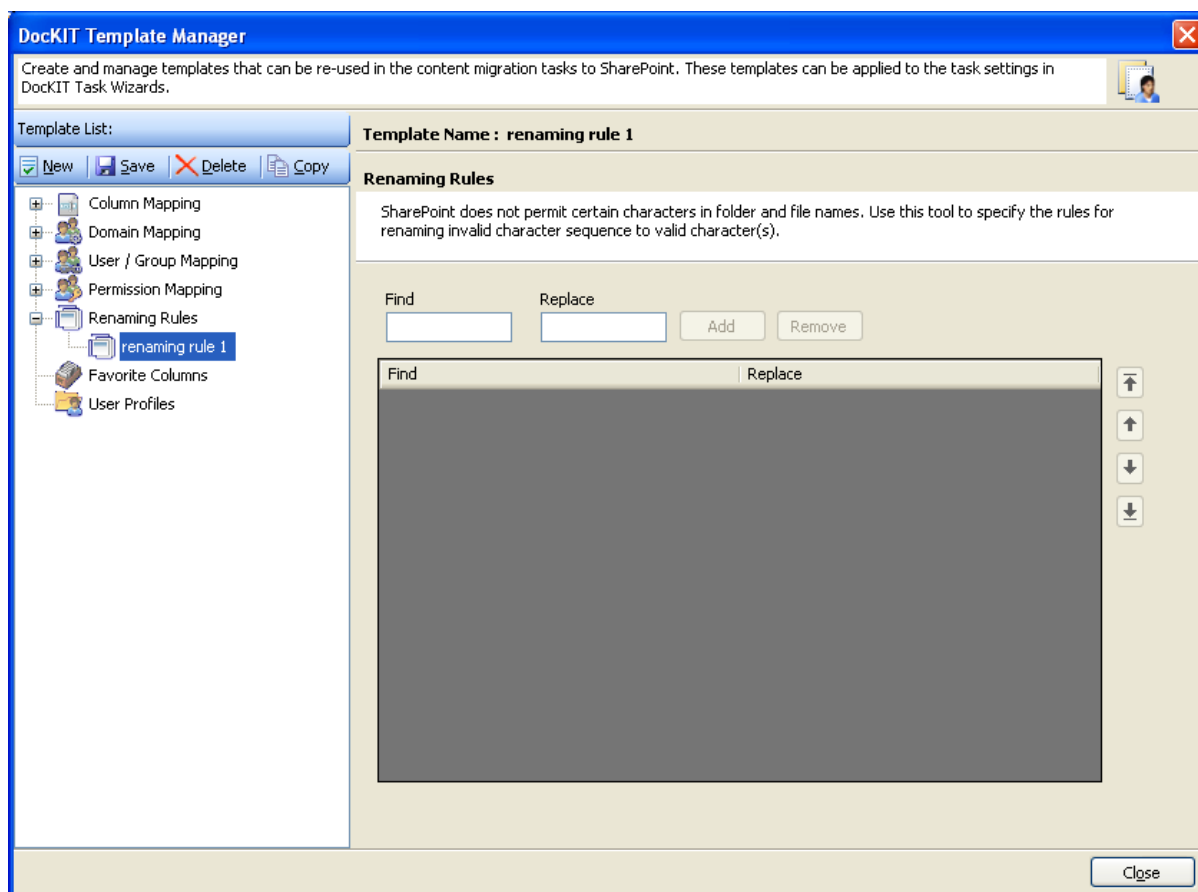
To specify a rule for invalid character sequence to valid character sequence:

- 1) Select New from the Templates Tools pane. The new template dialog will appear as shown below:



- 2) Enter a unique template name for the template. Select 'Renaming Rules' under the list of available template groups and click save button. The new template will be added under 'Renaming Rules' node in template tree view as shown below:

## CHAPTER-2-DockIT Templates



- 3) 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.
- 4) You can Edit the existing renaming rule by selecting the appropriate rule.
- 5) 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.
- 6) 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

## CHAPTER-2-DocKIT Templates

### 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}	Sample Version	Truncate the word 'File' in any position in the file name.
Sample. Matrix	\.	Dot	Sample	Example of escape



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			DotMatrix	sequence for.
Sample?File	\?	Text	Sample TextFile	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	SamplePlus Document	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 )

### 2.24 Profile Manager

---

Use this tool to create a user profile in **Windows Stored User Names and Passwords applet / Credential Manager**, in order to specify the user context to run DockIT import tasks. The stored user profile will be very useful when you are trying to perform the following import tasks in scheduled manner using DockIT:

- Importing contents between two different Windows Domain Forest
- Importing contents from SharePoint residing in completely disconnected / untrusted Windows Domain
- Importing contents using Laptop / PC that is not part of the SharePoint domain
- Importing contents using Forms Based Authentication (FBA)

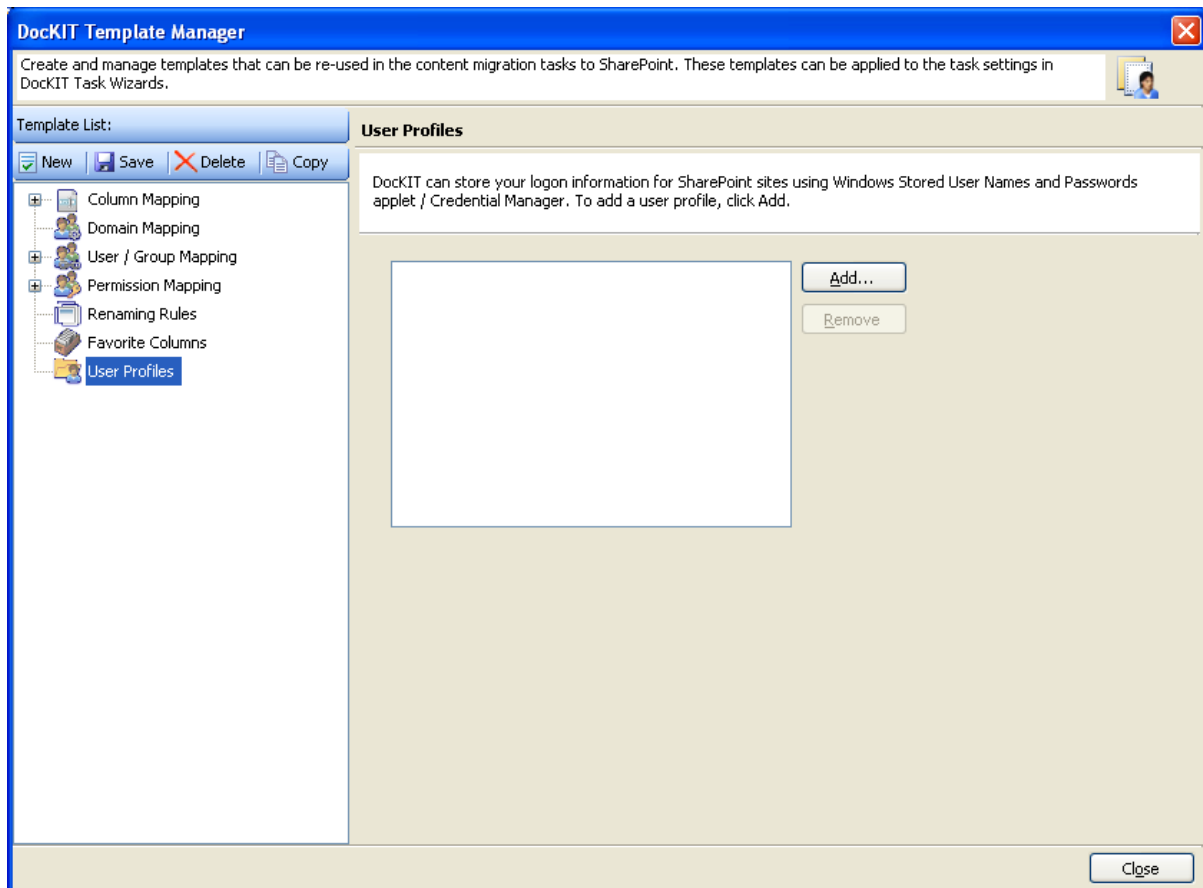
The stored user profile persists for all subsequent logon sessions on the same computer where DockIT is installed. The stored user profiles are visible to other logon sessions on the same computer.

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 / Credential Manager** and can be used by DockIT application only. The credential information is stored securely in a *256 bit encrypted format* in **Windows Stored User Names and Passwords applet / Credential Manager**.

- 1) In order to create a DockIT stored user profile, select User Profiles node from Template tree view as shown below:

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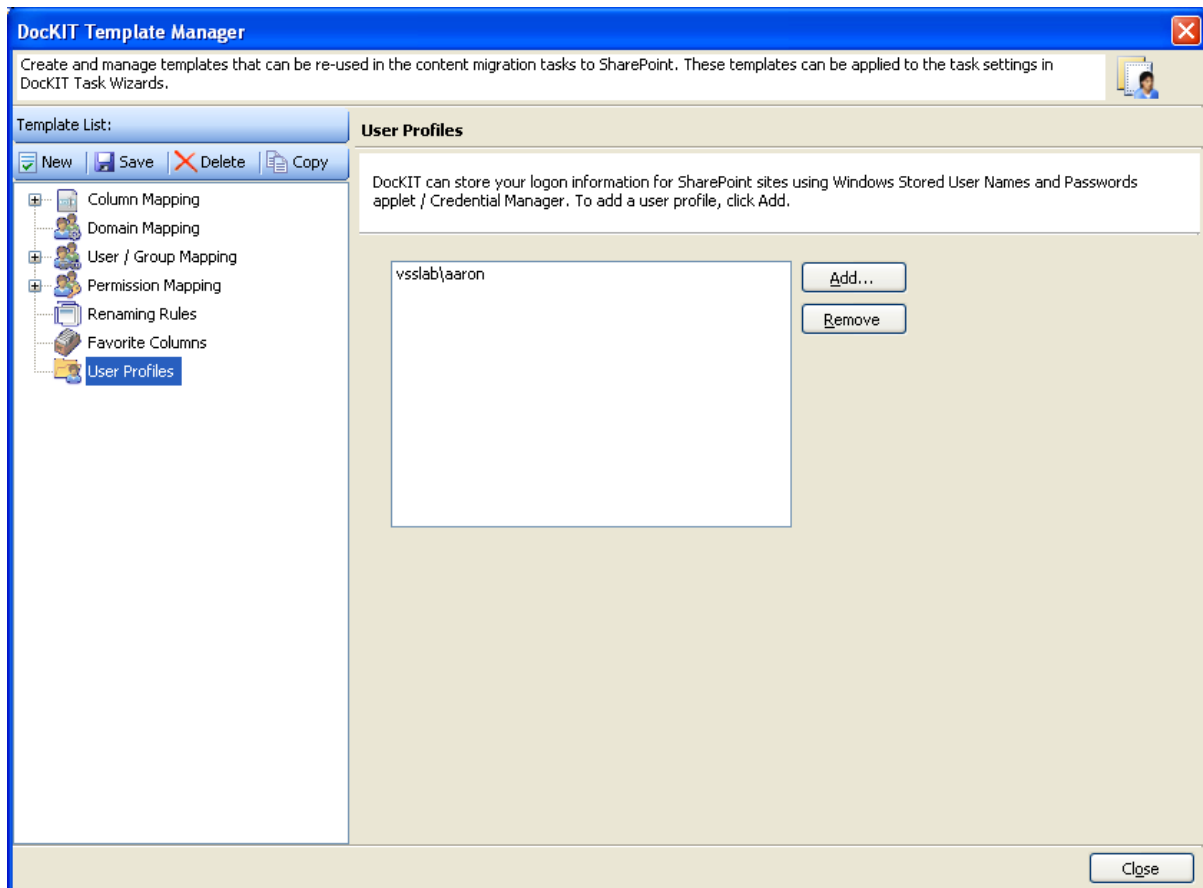
- 2) In order to add user profile, click **Add** button and provide user information in the **New User Profile** as shown below:



Click **OK**

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

## CHAPTER-2-DockIT Templates



Henceforth, the stored user profile can be used as credential input in DockIT application in order to connect to the SharePoint environment.

#### 4) Additional References:

##### **Behavior of stored user names and passwords**

<http://support.microsoft.com/kb/281660>

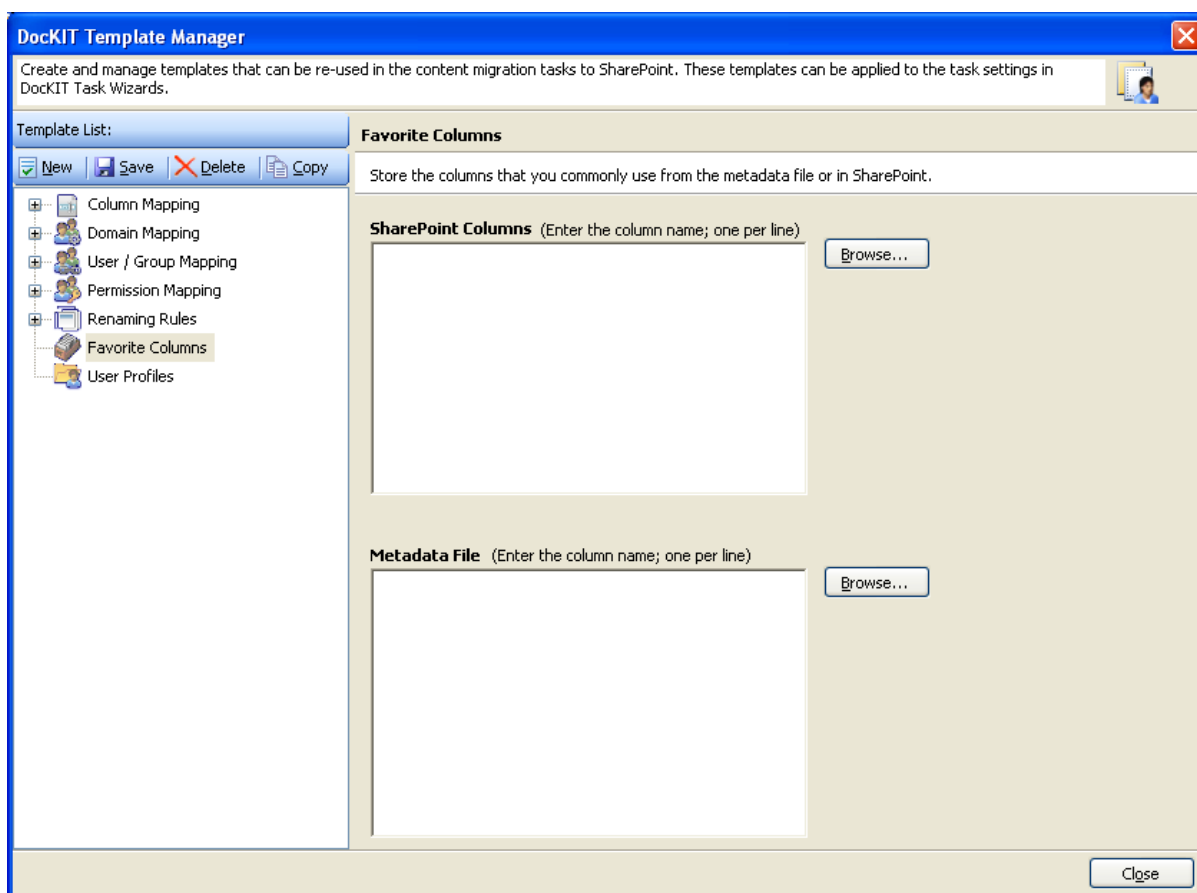
##### **Stored User Name and Password Best practices**

[http://technet.microsoft.com/en-us/library/cc784749\(WS.10\).aspx](http://technet.microsoft.com/en-us/library/cc784749(WS.10).aspx)

### 2.25 Favorite Columns

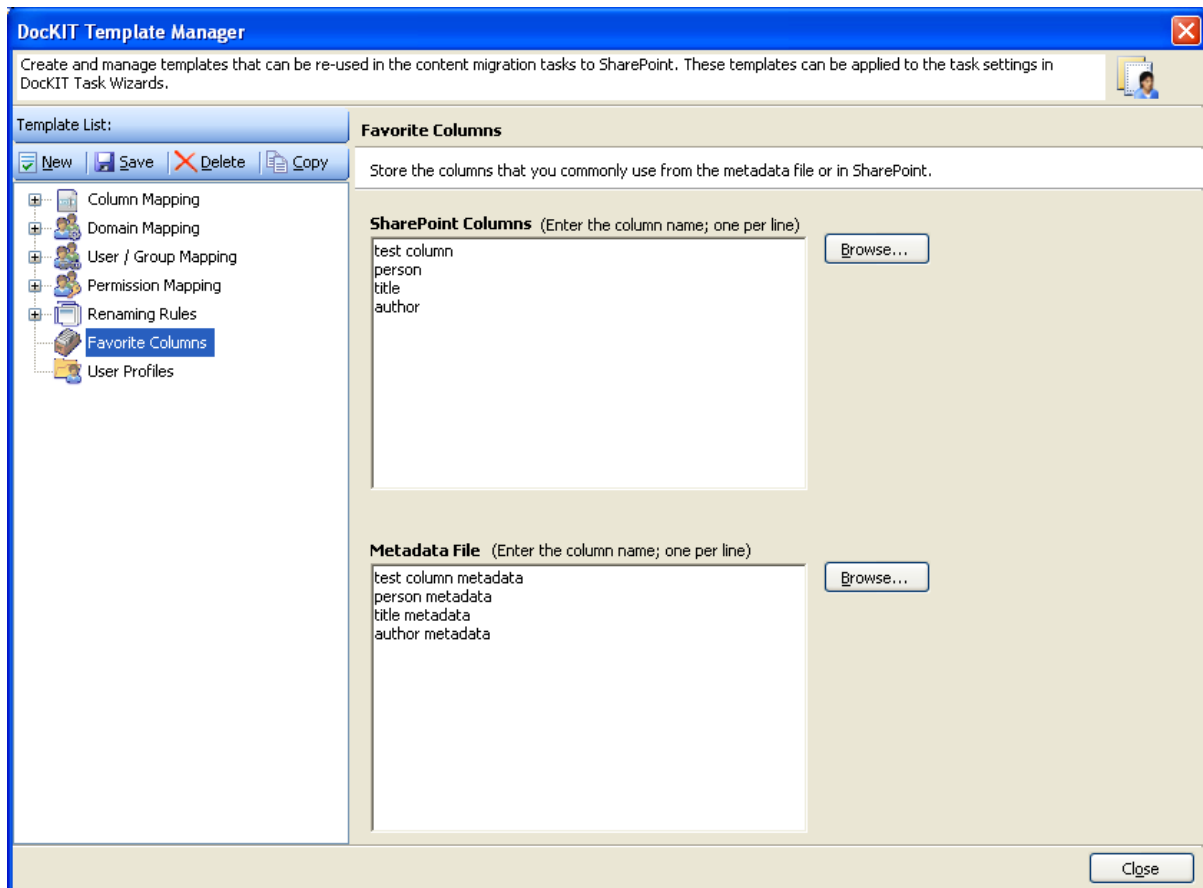
Use this tool to store the columns commonly used from the metadata file / SharePoint.

- 1) In order to add columns to favorite list, select Favorite node from the list of available nodes in Template treeview as shown below:



- 2) In order to add favorite SharePoint columns, you can enter the column name one per line under SharePoint Columns. Similarly, for metadata columns, you can enter the column name one per line under Metadata File.
- 3) The newly added favorite columns will be shown in the **Favorite Columns** dialog as below:

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Henceforth, the stored favorite columns can be used in Column mapping template.

- 5) You can use **Browse...** Button in SharePoint Columns and Metadata File columns sections to browse for the SharePoint Columns and Metadata file columns by connecting to SharePoint site and loading metadata file respectively.

## 3 DocKIT Features

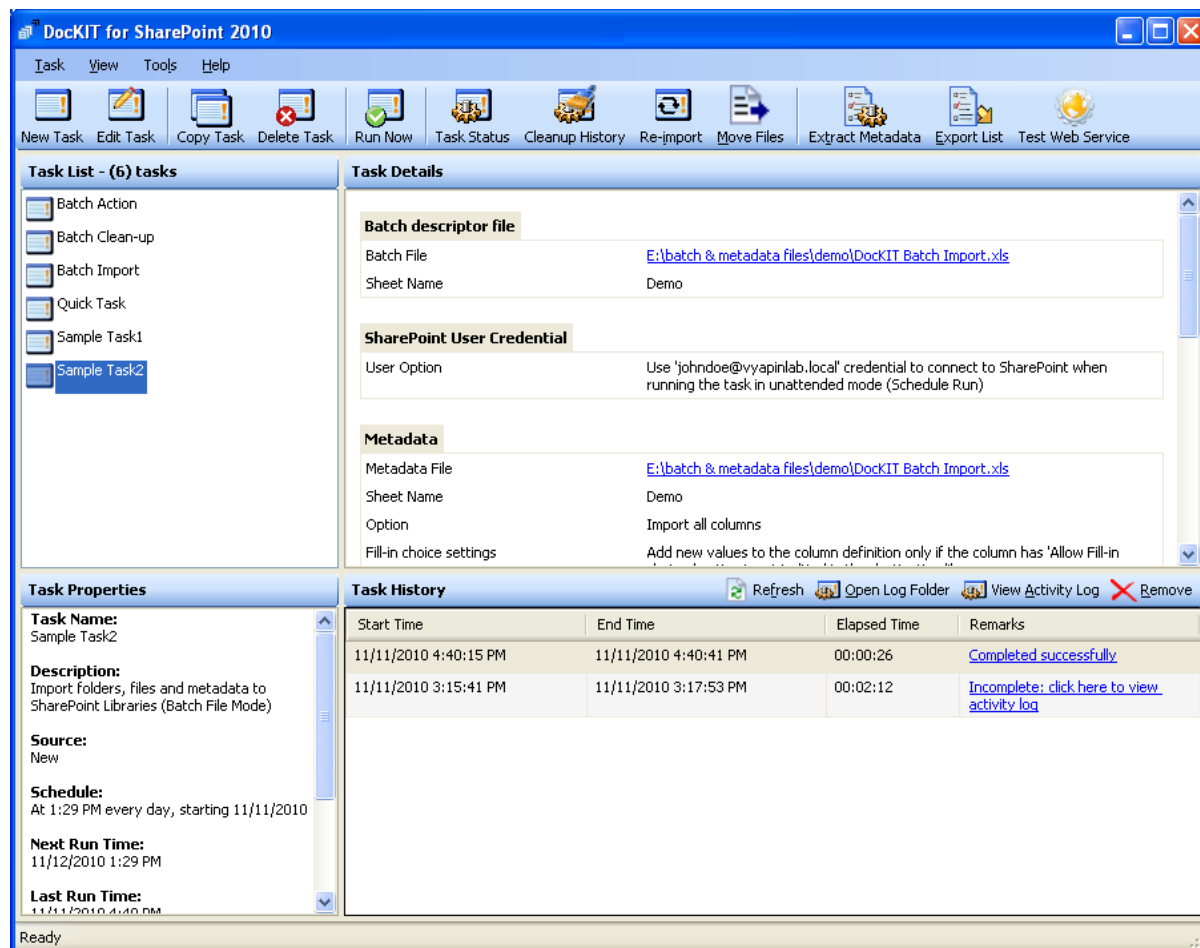
---

- **Task Manager**
- **Change Application Data folder location**
- **Create new task**
- **Edit an existing task**
- **Copy an existing task**
- **Delete an existing task**
- **Run a task**
- **Run a task from command line**
- **Task Status**
- **Task History**
- **Import folders, files and metadata to SharePoint Libraries (Explorer Mode)**
- **Import folders, files and metadata to SharePoint Libraries (Batch File Mode)**
- **Import metadata to the documents in SharePoint Libraries**
- **Manage list items (including metadata) in all SharePoint Lists (Explorer Mode)**
- **Import metadata to all SharePoint Lists (Batch File Mode)**

## CHAPTER-3- DockIT Features

### 3.1 Task Manager

DockIT creates import tasks for import process setup to migrate documents and metadata from file system to SharePoint. DockIT Task Manager in the main application window will help you manage DockIT import tasks and their corresponding task history. DockIT Task Manager provides menu and tools to work with the tasks easily.



DockIT Task Manager contains a standard menu bar and toolbar along with four panes to manage DockIT import task effectively:

- 1) Task List pane
- 2) Task Properties pane
- 3) Task Details pane
- 4) Task History pane

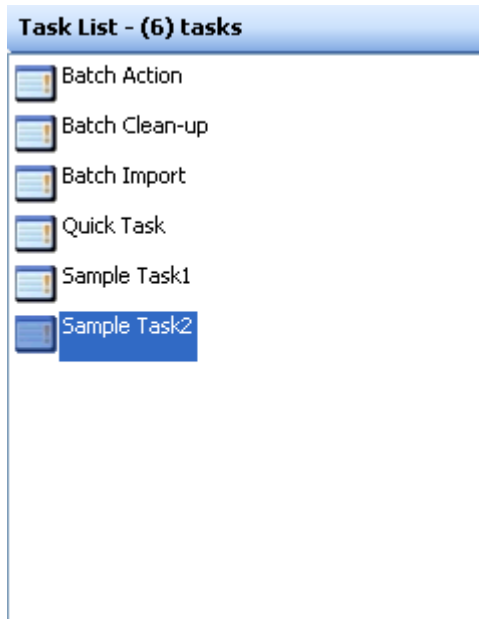
#### Task List:

Task List pane contains all import 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



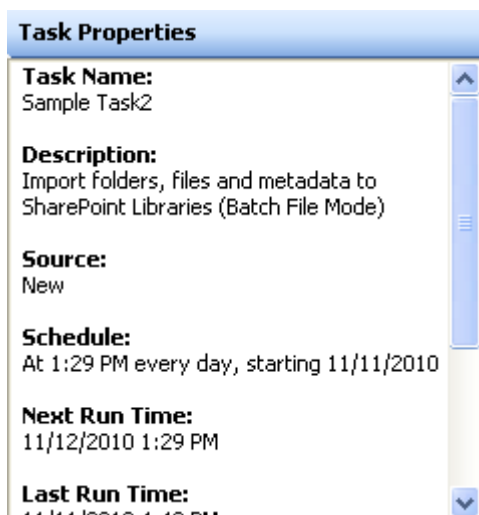
## CHAPTER-3- DockIT Features

selected task in the Task List pane. The remaining panes will change their content based on the selected task. Total task count will be displayed at the top of the banner.



### Task Properties:

Task Properties pane displays the information about the currently selected task in Task List pane. It provides information about Task Name, Task Type, Created On and Last Modified On. If the currently selected task is setup to run using a Windows Scheduled Task (setup to run at a scheduled time), then the Task Properties adds additional information about schedule task such as Run As and Last Run status etc.



### Task Details:

Task Details pane displays the task settings about currently selected task in Task List pane.

## CHAPTER-3- DockIT Features

**Task Details**

**Batch descriptor file**

Batch File	<a href="#">E:\batch &amp; metadata files\demo\DockIT Batch Import.xls</a>
Sheet Name	Demo

**SharePoint User Credential**

User Option	Use 'johndoe@vyapinlab.local' credential to connect to SharePoint when running the task in unattended mode (Schedule Run)
-------------	---

**Metadata**

Metadata File	<a href="#">E:\batch &amp; metadata files\demo\DockIT Batch Import.xls</a>
Sheet Name	Demo
Option	Import all columns
Fill-in choice settings	Add new values to the column definition only if the column has 'Allow Fill-in

### Task History:

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

**Task History** Refresh Open Log Folder View Activity Log Remove

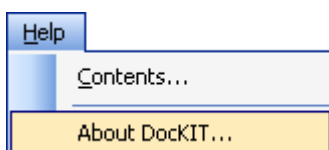
Start Time	End Time	Elapsed Time	Remarks
11/11/2010 4:40:15 PM	11/11/2010 4:40:41 PM	00:00:26	<a href="#">Completed successfully</a>
11/11/2010 3:15:41 PM	11/11/2010 3:17:53 PM	00:02:12	<a href="#">Incomplete: click here to view activity log</a>

### 3.2 Change Application Data folder location

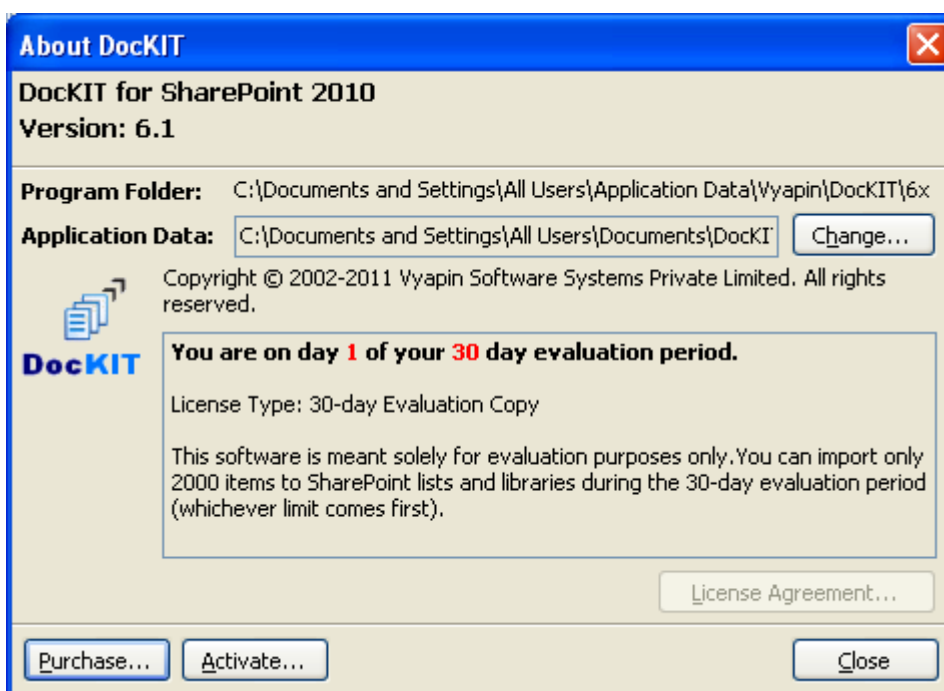
---

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

- 1) Select **About DockKIT** from **Help** menu



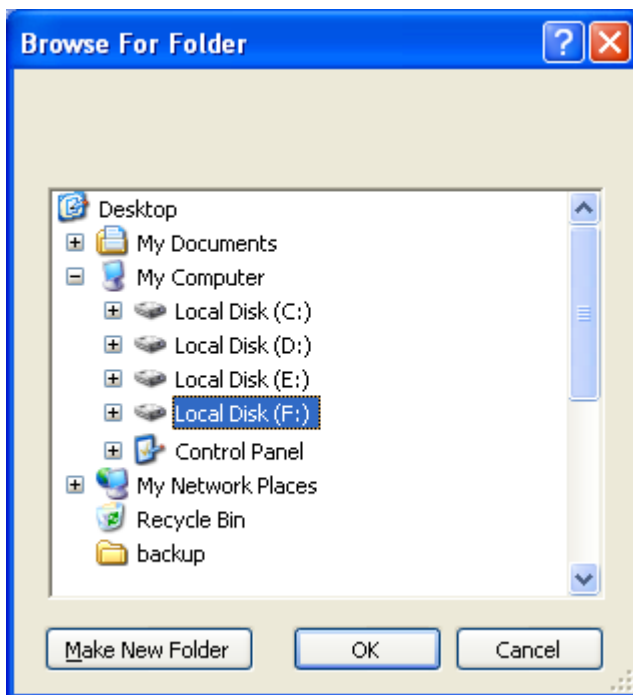
- 2) The **About DockKIT** dialog appears as shown below:



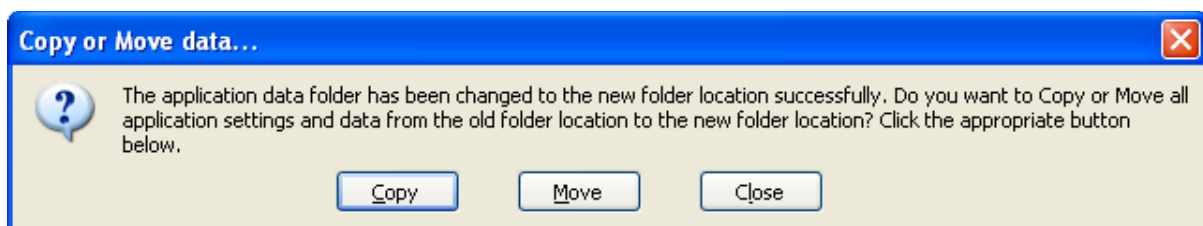
- 3) Click **Change...** button to change **Application Data** folder location of DockKIT application.

## CHAPTER-3- DockIT Features

The '**Browse For Folder**' location dialog will appear as shown below:



- 4) Select a desired folder location and Click **OK**. The folder location can be local drives or mapped network drives.
- 5) DockIT provides an option to copy or move the existing DockIT application settings (DockIT migration task settings, task histories, file renaming rules, activity logs, error logs etc.) to the new location once you change the Application Data Folder. Once you specify the new Application Data folder location, DockIT will prompt you to copy or move existing DockIT application settings to the new location as shown below:



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

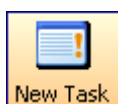
### 3.3 Create New Task

---

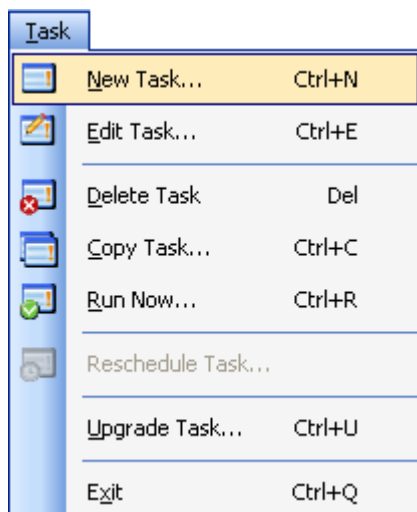
You can create a task to migrate data, documents and, their associated metadata properties from network file shares, file servers and local hard drives to SharePoint 2010 and SharePoint 2007. DockIT facilitates importing files and data into SharePoint libraries and lists using the following task options:

- A. Import folders, files and metadata to SharePoint libraries (Explorer Mode):** Import folders and files along with metadata (external metadata file and file properties) from file system to SharePoint library based on the folders/files manually added by the user using the DockIT user interface.
- B. Import folders, files and metadata to SharePoint libraries (Batch File Mode):** Import folders and files along with metadata (external metadata file and file properties) from file system to SharePoint library based on the entries in the batch descriptor file. DockIT processes the files in the order in which they appear in the batch descriptor file.
- C. Manage list items (including metadata) in all SharePoint Lists (Explorer Mode):** Update the list items or clean-up (delete) list items in a SharePoint list using DockIT Explorer view.
- D. Import metadata to all SharePoint Lists (Batch File Mode):** Import contents (metadata) stored in a file (from external applications) to all SharePoint lists based on the sequential entries in the batch descriptor file. You can create; update and clean-up (delete) list items and its metadata using this task option.

- 1) Click **New Task** from DockIT main screen.



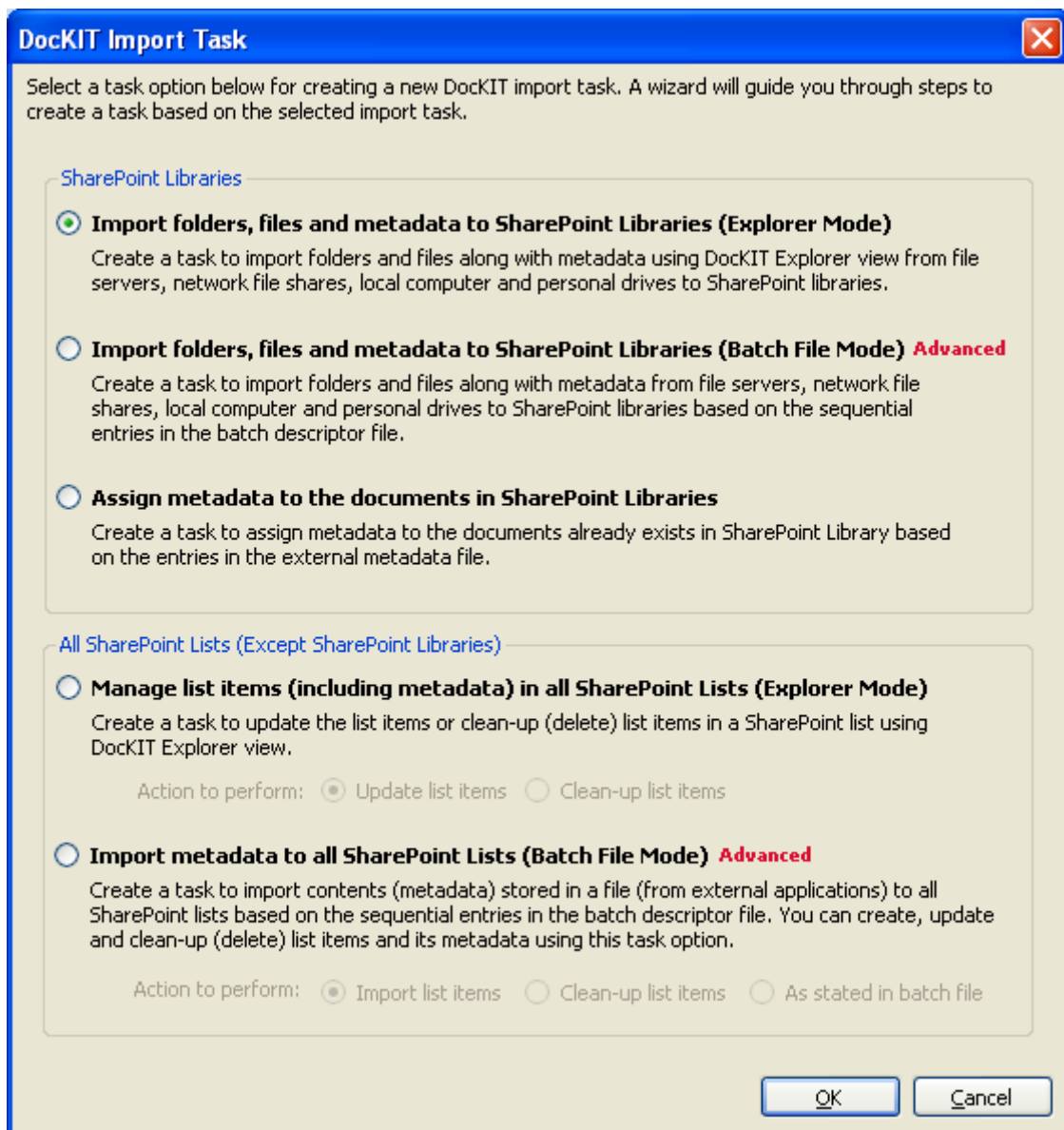
Or Select **New Task** from **Task** menu



## CHAPTER-3- DockIT Features

Or Press **Ctrl + N**

- 2) Select a task type in **New Task** dialog and click **OK**.



- a) Create a task to import folders, files and metadata to SharePoint libraries (Explorer Mode)
- b) Create a task to import folders, files and metadata to SharePoint libraries (Batch File Mode)
- c) Create a task to import metadata to Documents in SharePoint libraries
- d) Create a task to manage list items (including metadata) in all SharePoint Lists (Explorer Mode)
- e) Create a task to import metadata to all SharePoint Lists (Batch File Mode)

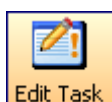
### 3.4 Edit an existing Task

---

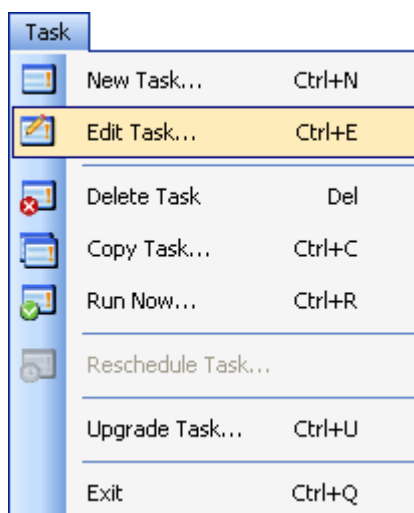
#### Edit Task

To edit an existing task:

- 1) Select a task in the **Task List** pane.
- 2) Click **Edit Task** from DockIT main screen.



Or Select **Edit Task** from **Task** menu



Or Press **Ctrl + E**

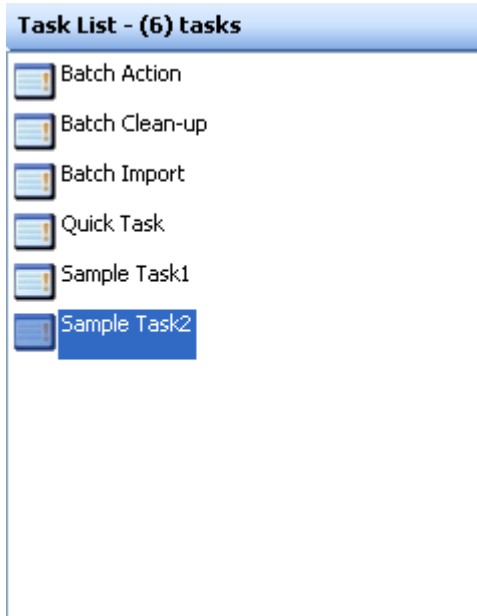
- 3) **DockIT Task Wizard** will load the selected task settings and appears as seen in Create New Task wizard. However, some of the options may be disabled when editing a task.
  - a) Edit a task to import folders, files and metadata to SharePoint libraries (Explorer Mode)
  - b) Edit a task to import folders, files and metadata to SharePoint libraries (Batch File Mode)
  - c) Edit a task to import metadata to SharePoint libraries
  - d) Edit a task to manage list items (including metadata) in all SharePoint Lists (Explorer Mode)
  - e) Edit a task to import metadata to all SharePoint Lists (Batch File Mode)

### 3.5 Delete an existing task

---

To delete a DockKIT import task:

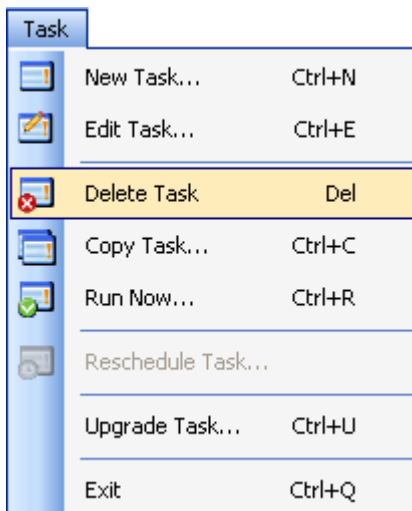
- 1) Select a task from **Task List** pane.



- 2) Click **Delete Task** from DockKIT main screen.



Or Select **Delete Task** from **Task** menu

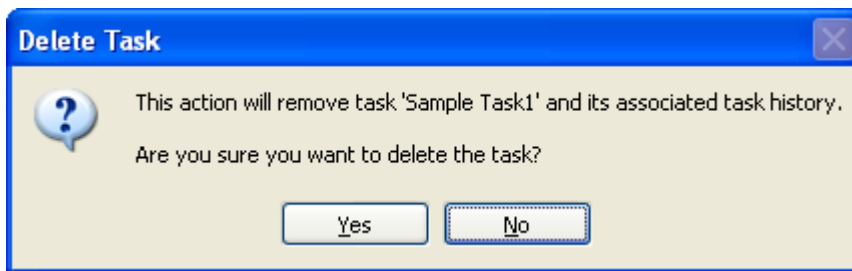


Or Press **Del** key



## CHAPTER-3- DockIT Features

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



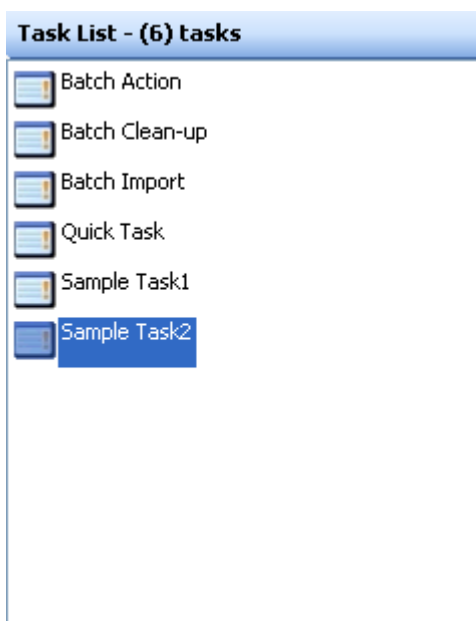
**NOTE:** Deleting a task will permanently delete the selected task and its task history items.

### 3.6 Run a Task

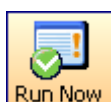
---

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

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

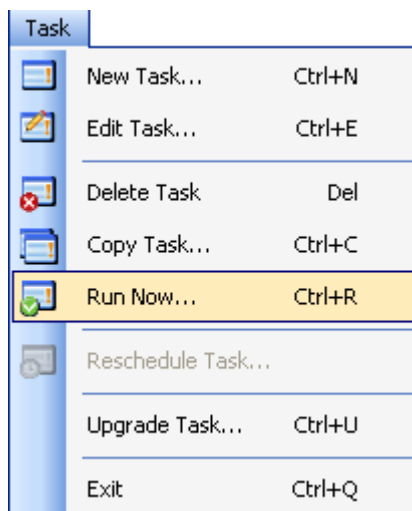


- 2) Click **Run Now** from DockIT main screen.



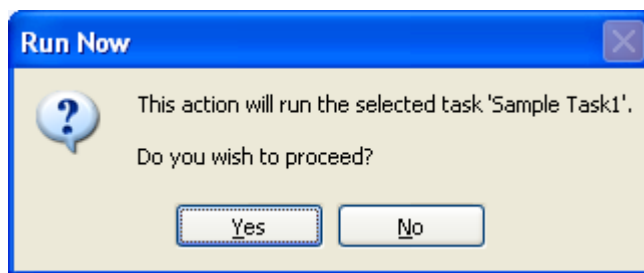
## CHAPTER-3- DockIT Features

Or Select **Run Now** from **Task** menu

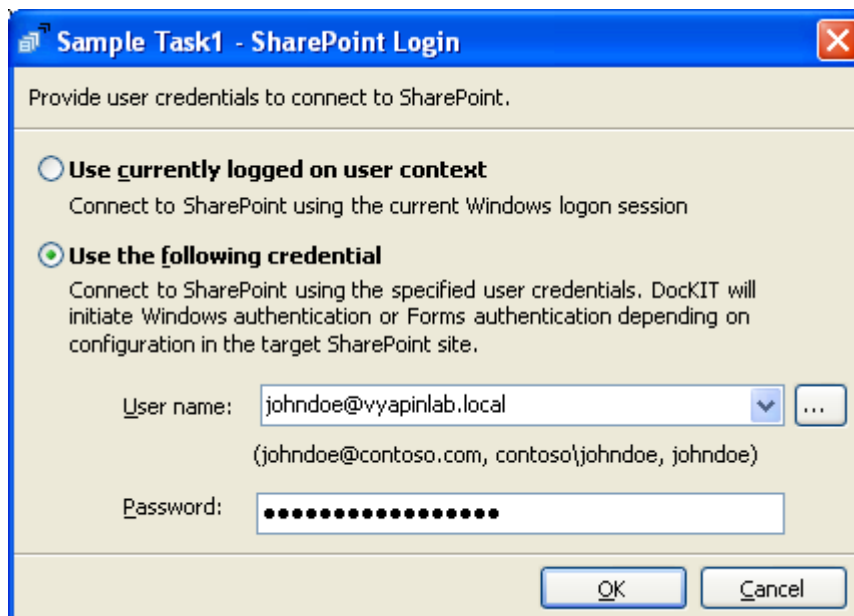


Or Press **Ctrl + R** key

3) Click **Yes** in **Run Now** confirmation message box shown below:

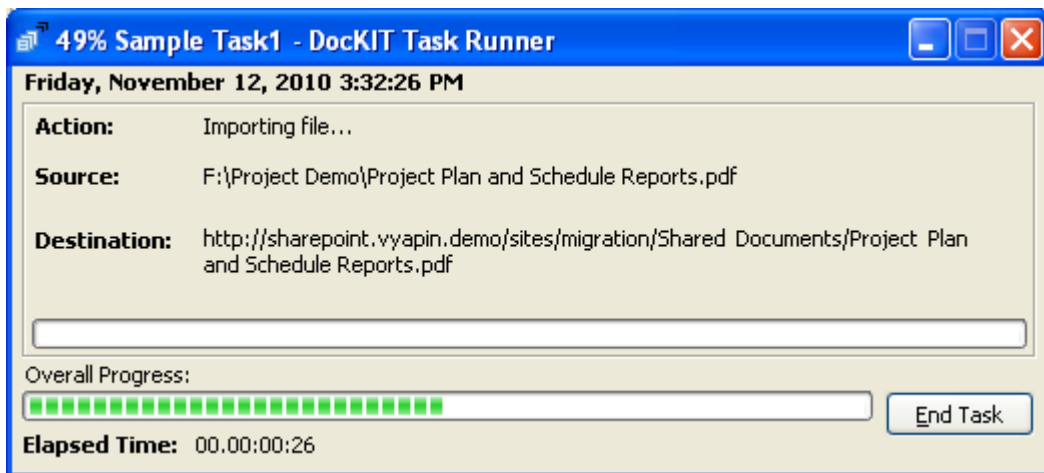


4) The **Credential Dialog** will appear as shown below. The given credential will be used to connect to the SharePoint site.



## CHAPTER-3- DocKIT Features

- 5) The current process of task will be reported in a new dialog as shown below:



- 6) 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.

### 3.7 Run a task from command line

---

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

To run a DockIT import task from command line:

#### 1) Usage:

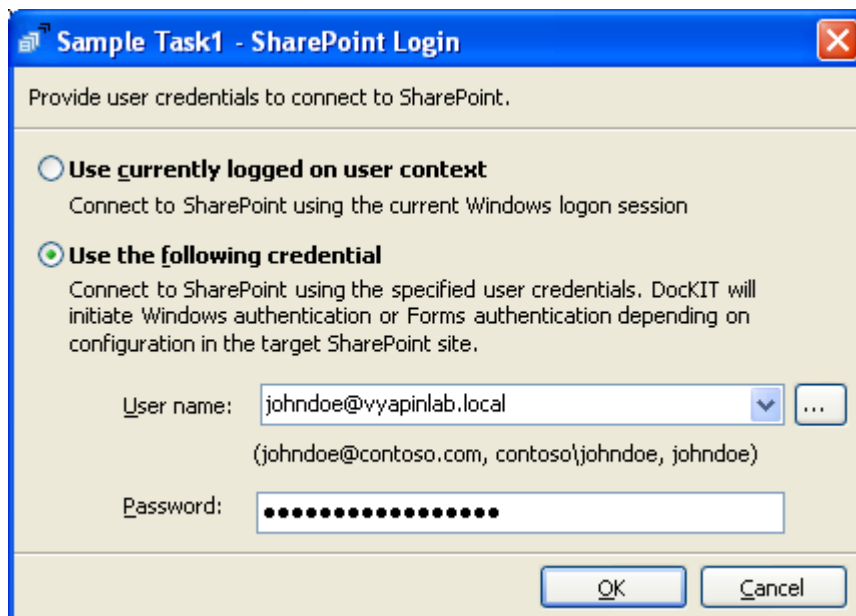
```
DocKITTaskRunner <task name> [/profile:<user name>] [/u:<user name>]  
[/p:password] [/noprompt]
```

Where,

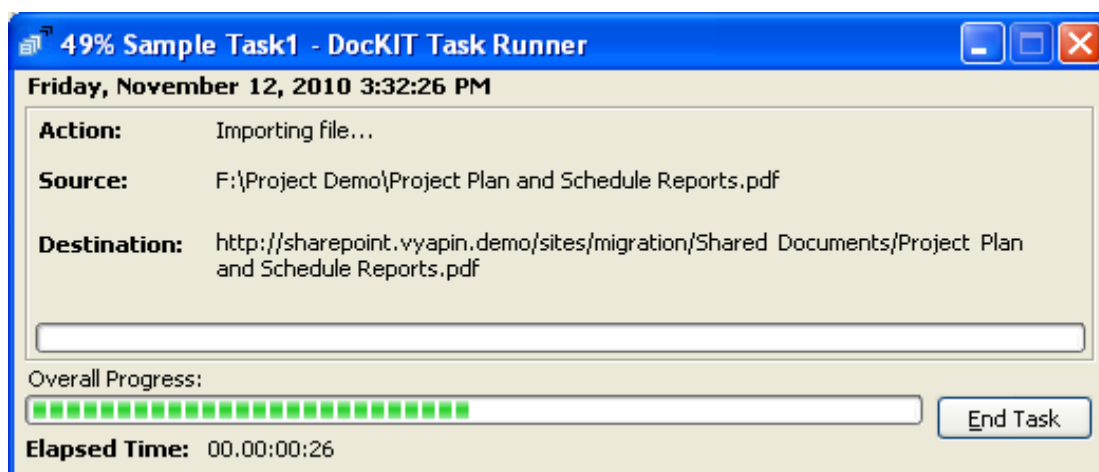
DockITTaskRunner	Name of the DockIT Task Runner application. Specify absolute path where the DockITTaskRunner located. For example: C:\Program Files\DockIT6x\DockITTaskRunner
task name	Name of the DockIT Task to be run from DOS command prompt. Enclose the task name in double quotes. For example: "Sample Task1"
/profile	Denotes profile name stored in the current user context using DockIT's Profile Manager, in which DockIT task must be run. Enclose the user name in double quotes. For example: "/profile:contoso\johndoe"
/u	Denotes user name context in which DockIT task must be run in the <i>domain\user name or user name@domain name or user name</i> format. Enclose the user name in double quotes. For example: "/u:VOYAGER\Administrator" "/u:contoso\johndoe" "/u:johndoe@contoso.com" "/u:johndoe"
/p	Denotes the password for the user name specified in /u parameter. Enclose the password in double quotes For example: "/p:2ab45fb"
/noprompt	This optional flag suppresses DockIT's login dialog prompt to enter user credentials to connect to SharePoint

## CHAPTER-3- DockIT Features

- 2) If **/noprompt** flag is not used, then the **Credential Dialog** will appear as shown below. The given credential will be used to connect to SharePoint.



- 3) The import task will be reported in a new dialog as shown below:



- 4) Once the import task is complete, click **Refresh** button available in Task History pane in DockIT main application. A new entry will be added in **Task History** section, where you can view the import activity performed when the task ran last.

### Examples of invoking an import task from the command prompt:

```
C:\ProgramFiles\DockIT6x>DockITTaskRunner"mytask1"
```

```
"/u:voyager\administrator" "/p:2az" /noprompt
```

```
C:\Program Files\DockIT6x> DockITTaskRunner "Sample Task1"
```

```
"/u:voyager\adminuser" "/p:2az$%&" /noprompt
```

```
C:\Program Files\DockIT6x> DockITTaskRunner "Sample Task1"
```

```
"/profile:voyager\adminuser" /noprompt
```

```
D:\>"C:\Program Files\DockIT6x\DockITTaskRunner" "Sample Task1 (Re-import)" "/u:voyager\adminuser" "/p:2az$%&" /noprompt
```

## CHAPTER-3- DockIT Features

### DOS batch file examples:

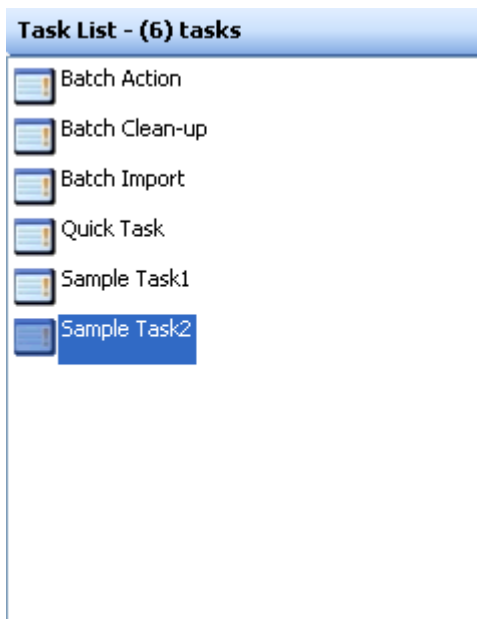
- To execute DockIT task one by one from a batch file:  
"C:\Program Files\DockIT6x\DockITTaskRunner" "Sample Task1"  
"/u:voyager\adminuser" "/p:2az\$%&" /noprompt  
"C:\Program Files\DockIT6x\DockITTaskRunner" "Sample Task2"  
"/profile:voyager\testuser" /noprompt
- To execute multiple DockIT tasks simultaneously:  
start "cmd" "C:\Program Files\DockIT6x\DockITTaskRunner" "Sample Task1"  
"/u:voyager\user1" "/p:ctest1" /noprompt  
start "cmd" "C:\Program Files\DockIT6x\DockITTaskRunner" "Sample Task2"  
"/profile:voyager\user2" /noprompt

### 3.8 Copy an existing task

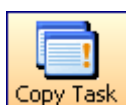
---

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

- 1) Select a task from the **Task List** pane.

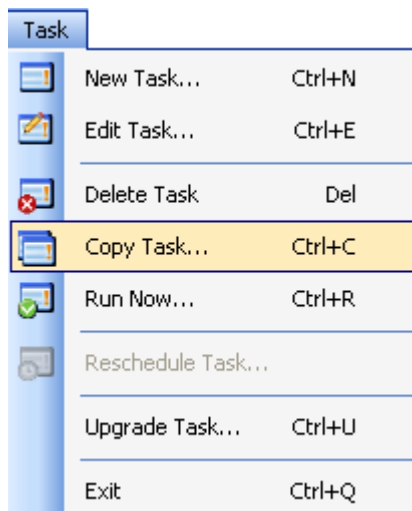


- 2) Click **Copy Task** from DockIT main screen.

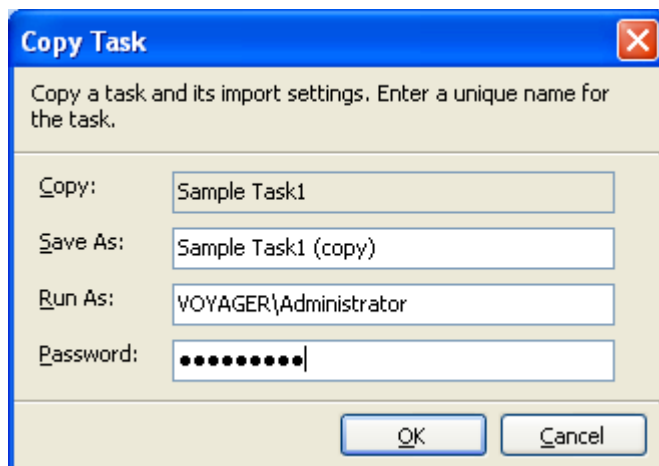


## CHAPTER-3- DockIT Features

Or Select **Copy Task** from **Task** menu



- 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.



### 3.9 Create Windows Task

---

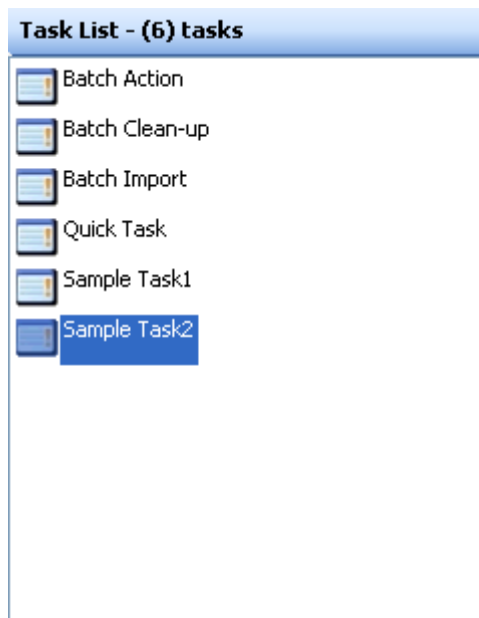
#### Reschedule Task

Use this tool to create a Windows 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** pane

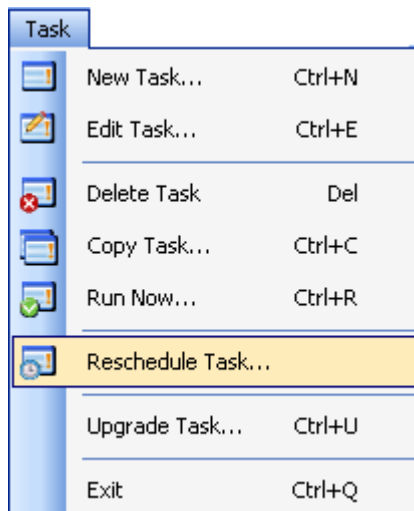


**2)** If DockIT has enough information about the required Windows Schedule Task, the **Reschedule Task** option will be enabled.

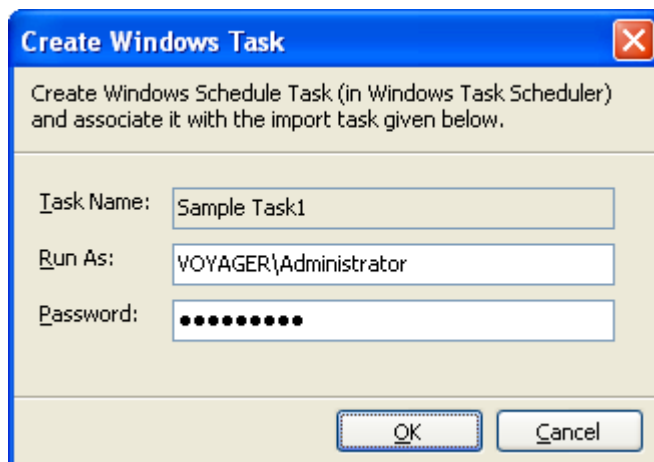
Select **Reschedule Task** from **Task** menu



## CHAPTER-3- DockIT Features



- 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.



### 3.10 DockKIT Tools

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- **Test DockKIT webservice**
- **Metadata Extractor**
- **List Export**
- **Cleanup History**
- **Move Files**
- **View Activity Log**
- **Remove a task history item**

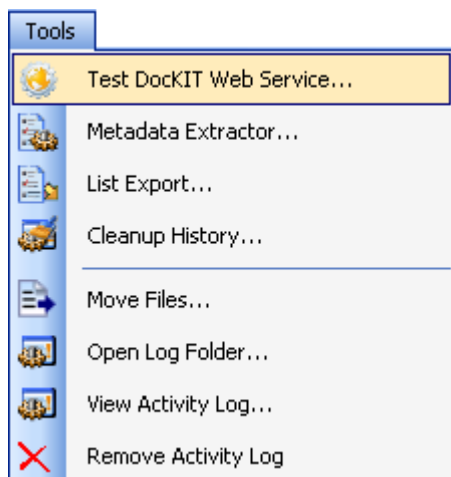
### 3.11 Test DockKIT Web Service Existence

---

DockKIT Web Service component is a server-side component of DockKIT software. This component must be installed on SharePoint 2007 / SharePoint 2010 servers only. You must install DockKIT Web Service component package in the SharePoint server, if you would like to perform the following in SharePoint:

- propagate Created Date, Last Modified Date, Created By and, Modified By field values
- assign Content Approval Status & Comments
- assign Target Audiences (Global Audience group or Security/Distribution group)
- update Business data / External data fields
- update Managed Metadata fields
- create Document Sets

**1) Select **Test DockKIT Web Service** from **Tools** menu as shown below:**



## CHAPTER-3- DockIT Features

2) The **Test DockIT Web Service** dialog appears as shown below:

**Test DockIT Web Service**

DockIT Web Service component is an optional server-side component of DockIT software, to be installed on SharePoint server to propagate the Created Date, Last Modified Date, Created By, Modified By, Content Approval Status & Comments and Target Audiences (Global Audience group or Security/Distribution group) fields to SharePoint.

You can check the existence of DockIT Web Service component in the destination SharePoint server using this tool by specifying a SharePoint site URL and a credential to connect.

URL:

**Use currently logged on user context to connect to SharePoint**  
Connect to SharePoint using the current Windows logon session

**Use the following credential to connect to SharePoint**  
Connect to SharePoint using the specified user credentials. DockIT will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.

User name:  ...  
(johndoe@contoso.com, contoso\johndoe, johndoe)

Password:

3) Specify a valid SharePoint URL in the URL textbox to verify **DockIT Web Service** existence in the SharePoint Server.

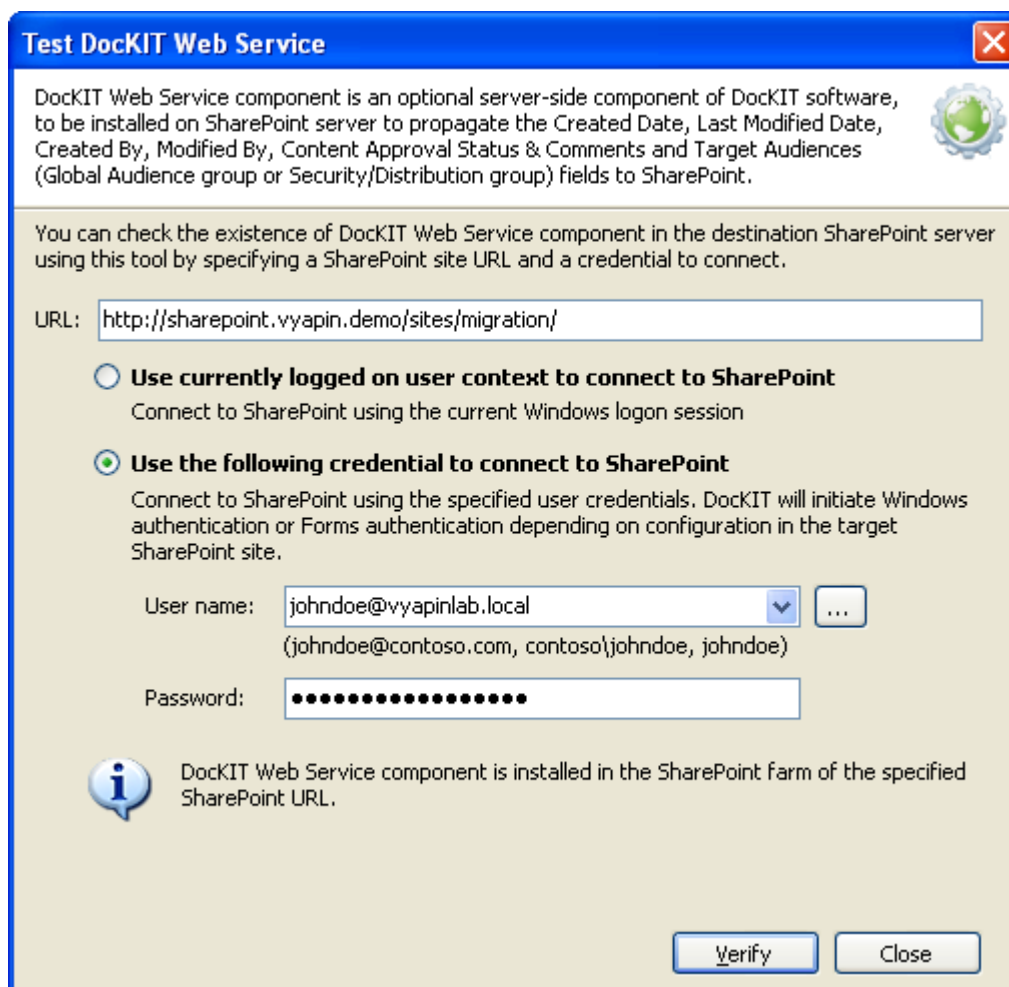
4) Specify the users' credentials to connect to SharePoint URL specified above using the options given below.

**a) Use currently logged on user context to connect to SharePoint -** Connect to SharePoint URL using the current windows logon session.




**b) Use the following credential to connect to SharePoint -** 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 Web Service** component in the destination SharePoint Server. When clicking this button, DockIT connects to the specified SharePoint server and checks the availability of **DockIT Web Service** component. DockIT will display the Web Service status as shown below:

## CHAPTER-3- DockIT Features



You can verify whether **DockIT Web Service** is installed in the destination SharePoint Server using the icon representation displayed in the top-right corner of **Test DockIT Web Service** dialog as described in the table below:

	This icon implies that <b>DockIT Web Service</b> component is installed in the destination SharePoint farm.
	This icon implies that there is a discrepancy in <b>DockIT Web Service</b> version. Uninstall the existing <b>DockIT Web Service</b> component installed on all front-end web servers or application servers in the target SharePoint farm and re-install the version of <b>DockIT Web Service</b> component that corresponds with DockIT client application version (bundled with client application).
	This icon implies that <b>DockIT Web Service</b> component is not installed in the SharePoint farm of the specified SharePoint URL. Install <b>DockIT Web Service</b> component on all front-end web servers or application servers in the target SharePoint farm using the appropriate <b>DockIT Web Service</b> setup bundled with DockIT client application.

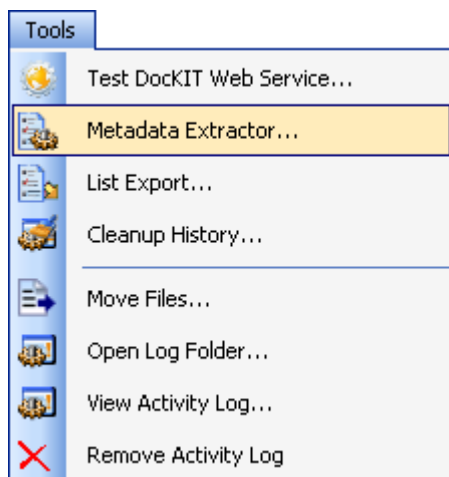
### 3.12 Metadata Extractor

---

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.

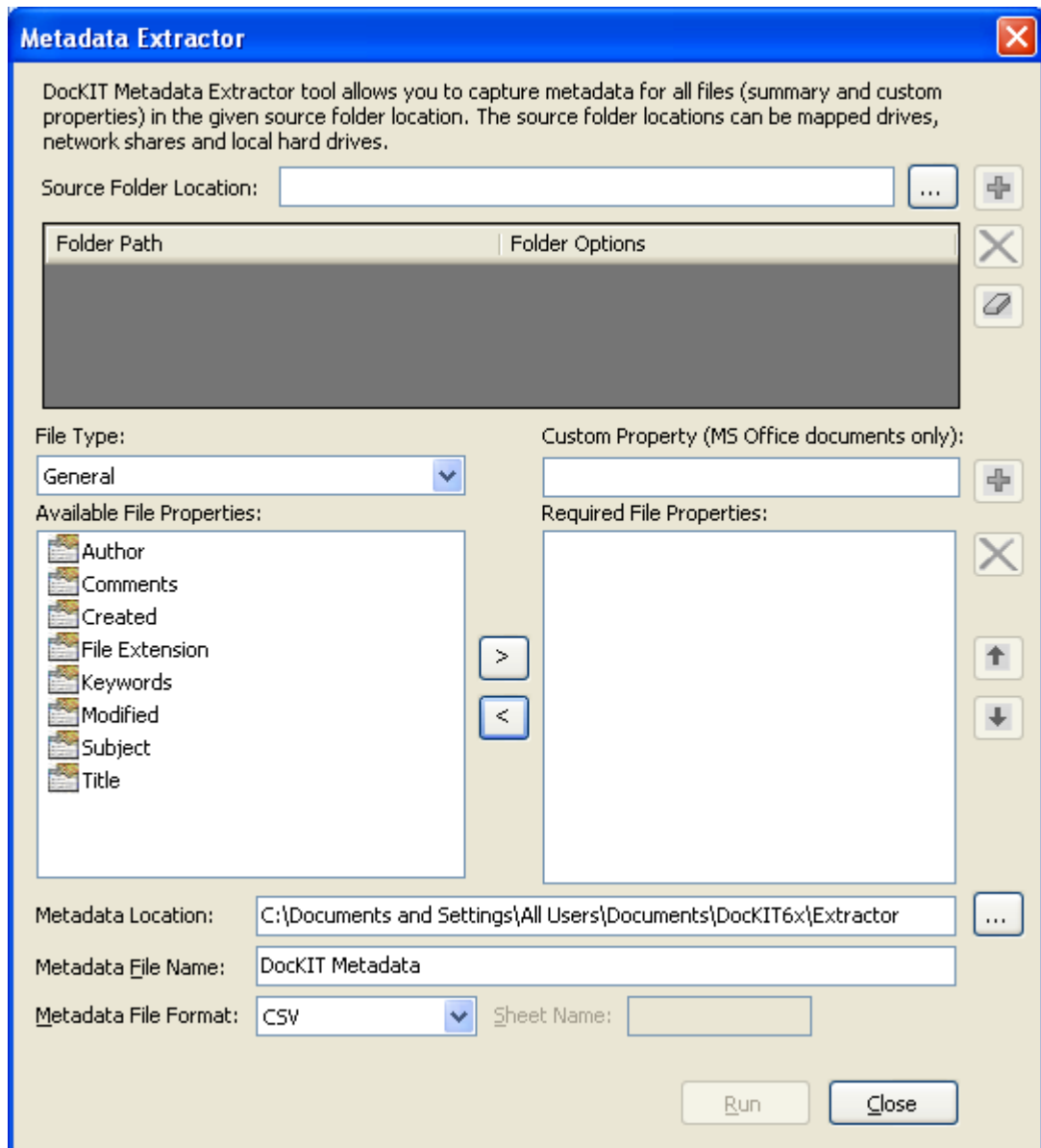
DockIT Metadata Extractor allows you to extract file properties that are specific to the file extension. For example, DockIT provides almost 30+ properties for PDF file format alone. DockIT enumerates folders and sub-folders and generates metadata for all the files available underneath them.

- 1) Select **Metadata Extractor** from **Tools** menu.



- 2) The **Metadata Extractor** dialog appears as shown below:

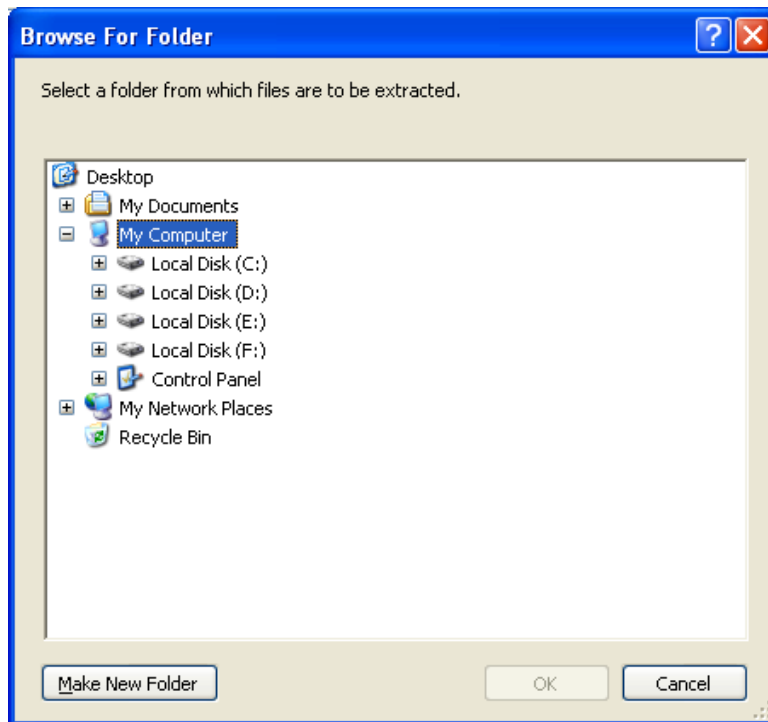
## CHAPTER-3- DockIT Features



- 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.

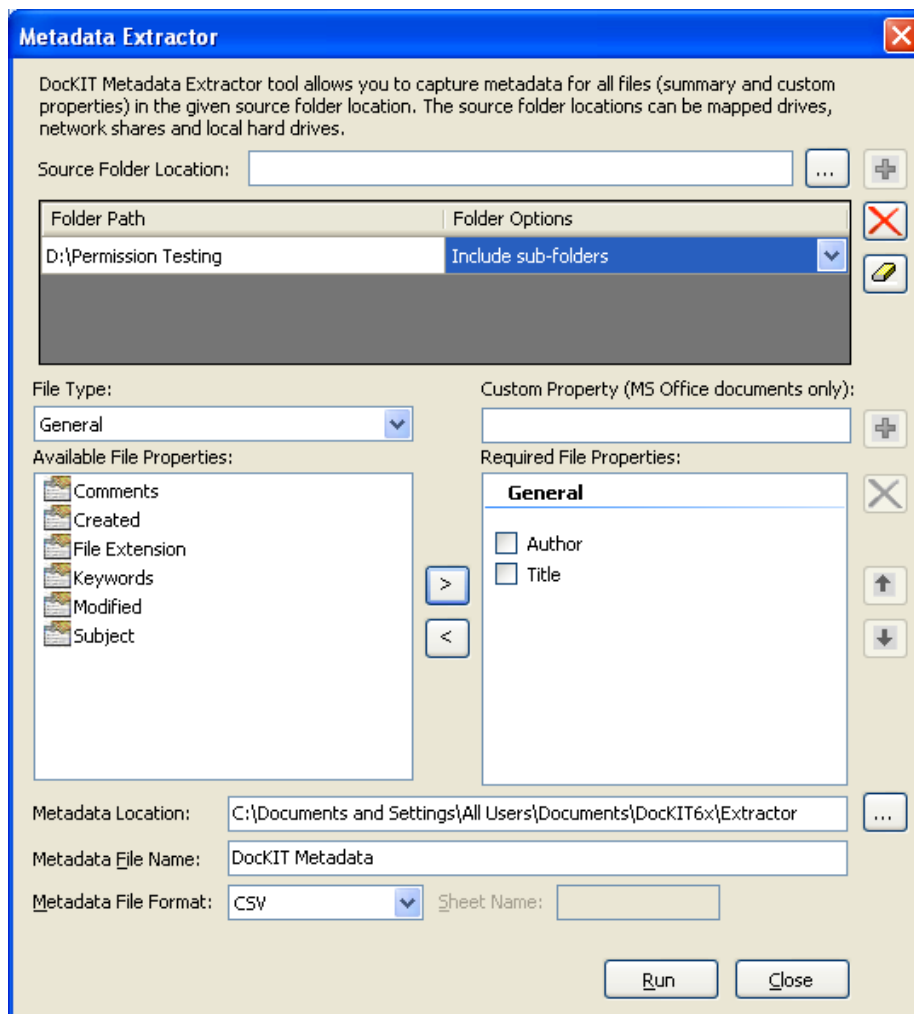
The **Browse for Folder** dialog will be shown as below:

## CHAPTER-3- DockIT Features



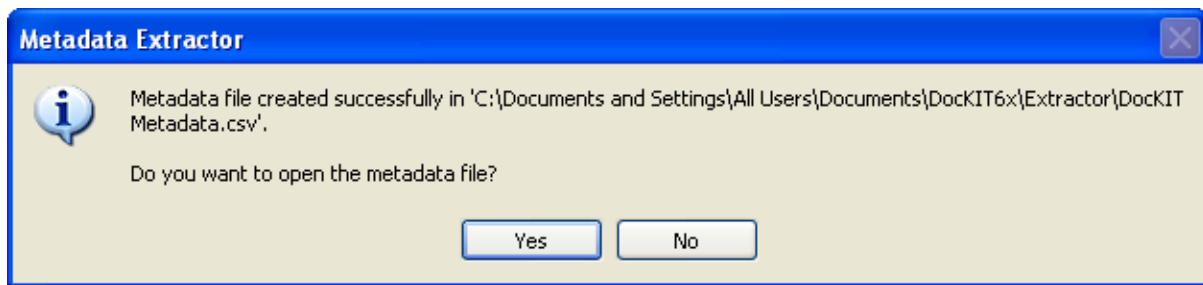
Upon selecting required source folder, *click **OK*** to add it for extraction.

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



## CHAPTER-3- DockIT Features

- 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:

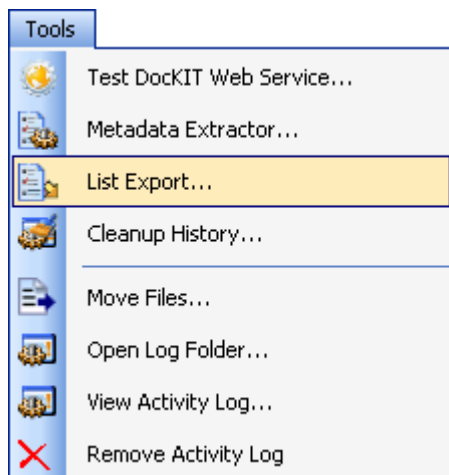


### 3.13 List Export

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The DockIT List Export tool helps you generate the list items' URL for a given SharePoint List with their specified column value and exports the results in .CSV file format.

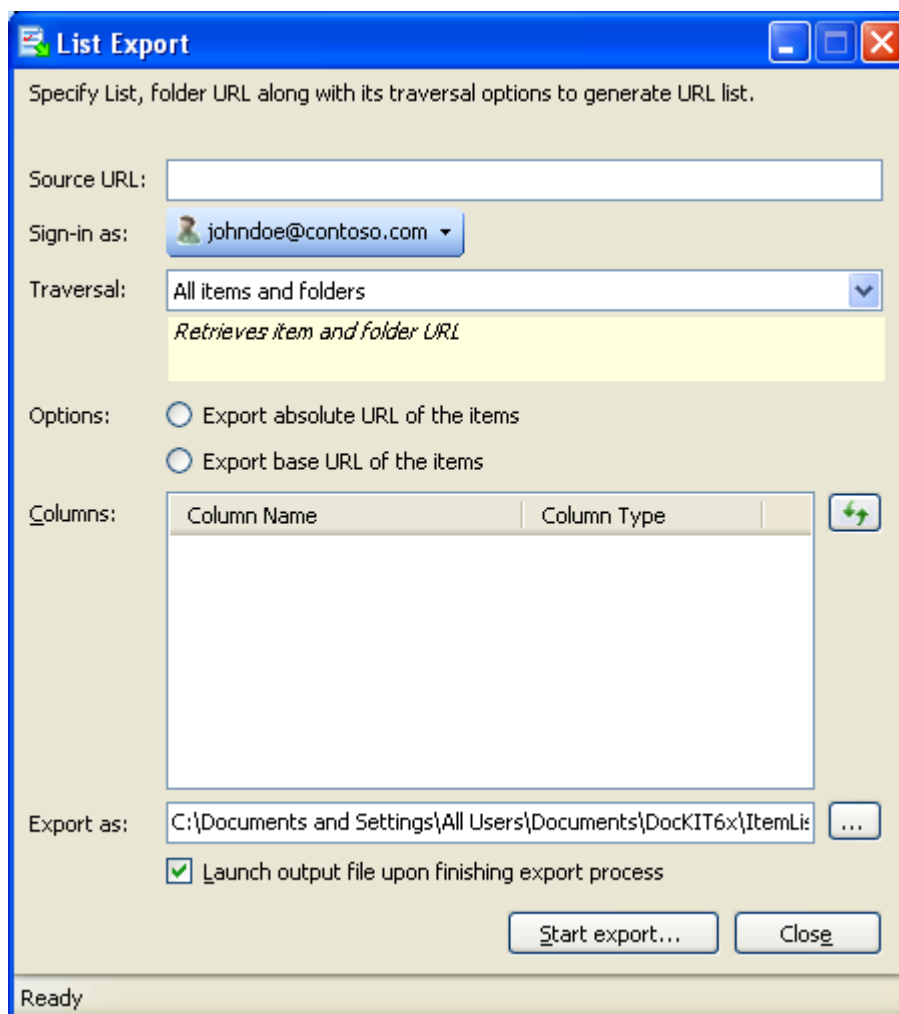
- 1) Select **List Export** from **Tools** menu.



- 2) The **List Export** dialog appears as shown below:

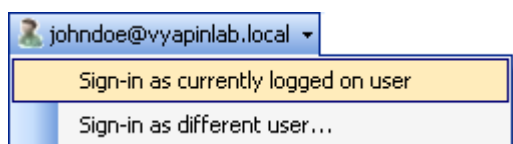


## CHAPTER-3- DockIT Features



Specify a valid SharePoint List URL in the **Source URL** textbox. You can specify a SharePoint library / list / folder Location in the textbox. For Example: <http://sharepoint.local/demo/lists/sports>

- 3) Click **Sign-in** as drop down menu to specify the user credential as shown below: Specify the users' credentials to connect to the SharePoint URL using the options given below:

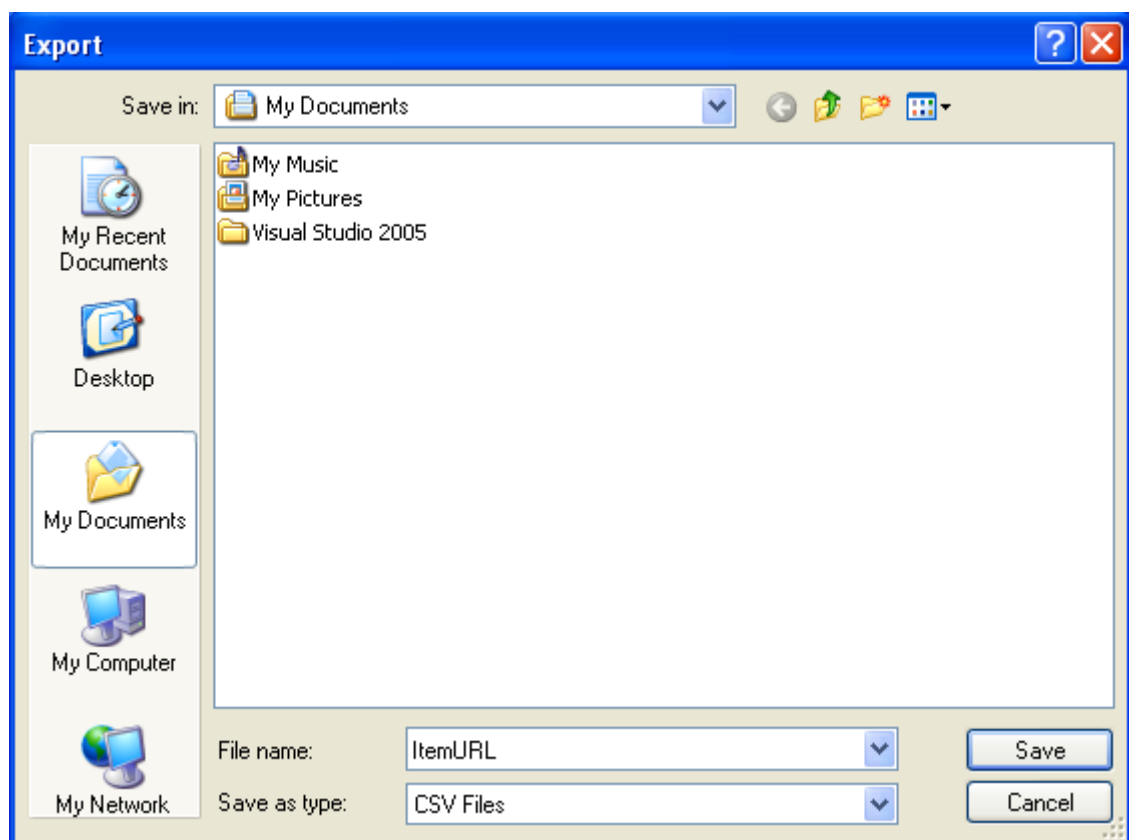


- a) **Sign-in as currently logged on user** - Connect to SharePoint URL using the currently logged on user context
- b) **Sign-in as different user** - Connect to the SharePoint URL using a different user context. Enter the user name in any ONE of the following formats: **<DOMAINNAME>\<USERNAME>**, **UserName@DomainName**, **UserName** and its corresponding password. DockIT will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.

## CHAPTER-3- DockIT Features

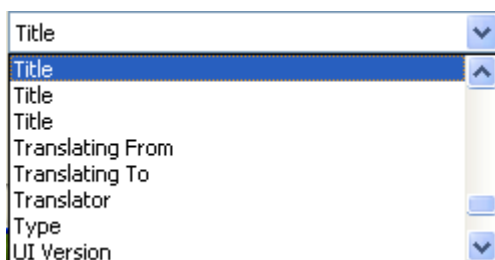
- 4) Traversal Options:** Select any one of the list traversal options as given below:
- a) All items and folders** - Generate the URL list for all items and folders in the specified location.
  - b) All items only** - Generate the URL list for all items only, but not folders.
  - c) All folders only** - Generate the URL list for all folders, but not items.
  - d) Items in current level** - Generate URL for all items and folders in the current level.
- 5) Export as:** Specify valid export path in export as textbox.

Click (...) button to specify the export file name. An Export dialog appears as shown below:



- 6) Export Options:** Select any one of the following options to generate the URL for the list items:
- a) Export absolute URL of the items** - Generate the absolute URL of the items with specified column value.
  - b) Export base URL of the items** - Generate URL of the items parent URL with specified column value.
- 7) Column Options:** Select multiple columns from the list. The value of the column will be exported along with the list item URL.

## CHAPTER-3- DocKIT Features

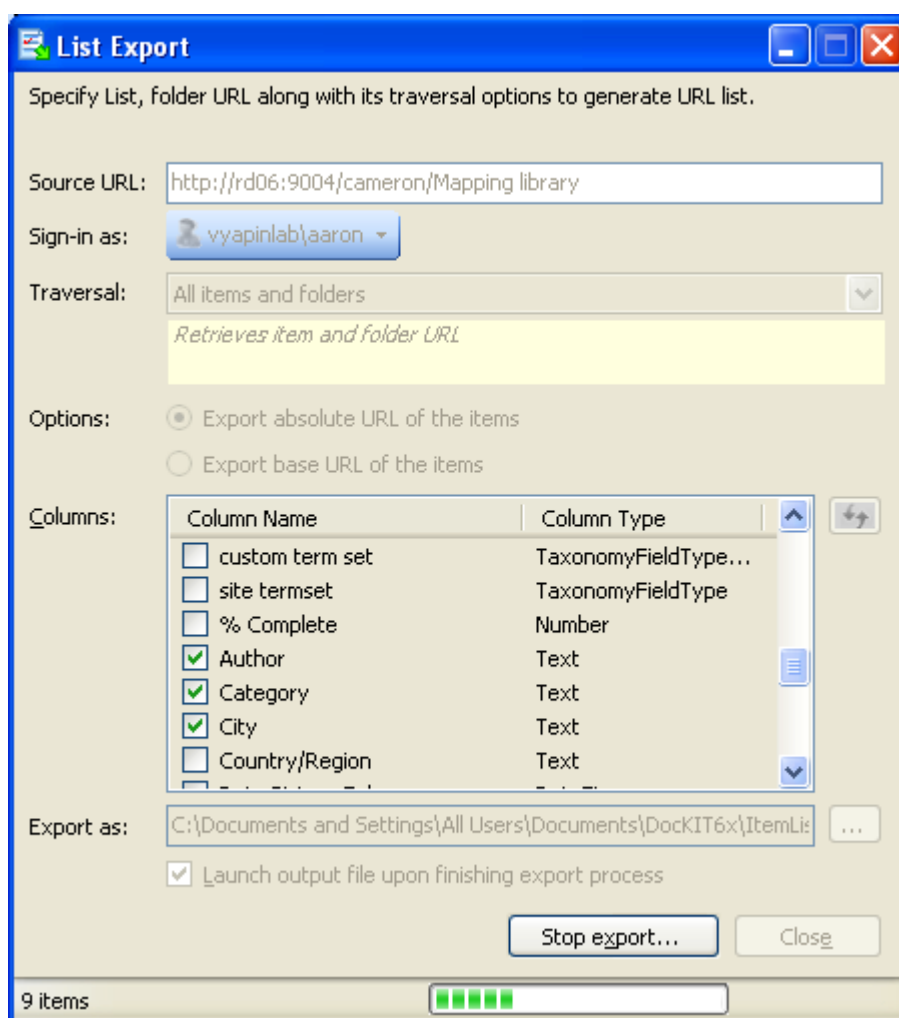


To Refresh the column names, click the Refresh button.

**8) Launch Options:** By selecting the option '**Launch output file upon finishing export process**', the output file will be launched automatically after completing the export process.

**9) Click Start Export...** button to start the export process.

**10) After clicking Start Export...** button, a dialog appears as shown below:



If you want to stop export click **Stop export...** button.

**11) Sample entries generated using this tool:**

*For Absolute URL with Title Column*

"Destination Path", "Title", "DocumentType", "PolicyNumber"

## CHAPTER-3- DockIT Features

"http://sharepoint.vyapin.demo/sites/migration/lists/countries/1\_.000","United States of America","Word","123A"

"http://sharepoint.vyapin.demo/sites/migration/lists/countries/2\_.000","Australia",  
,"Excel Document","234B"

*For Base URL with Title Column*

"Destination Path", "Title", "DocumentType", "PolicyNumber"

"http://sharepoint.vyapin.demo/sites/migration/lists/countries","United States of America", "Word", "123A"

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

**12)** Click **Close** button to close the List Export dialog.

### 3.14 Cleanup history

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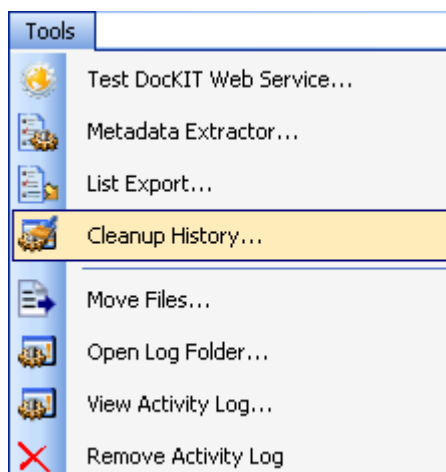
DockIT maintain the task history of each task run in the application task history folder e.g., <Application Data Folder>\DockIT6x\TaskHistory\<taskname>\<timestamp>. Over a period of time, the task history folder grows in size. We recommend cleaning up the task history periodically to control the disk space usage. To cleanup task history, perform the following steps given below:

**1)** Click **Cleanup History** from DockIT Task Manager.

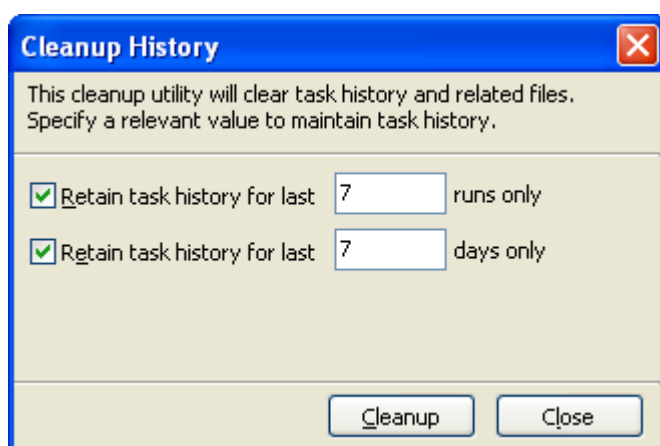


Or Select **Cleanup History** from **Tools** menu

## CHAPTER-3- DockKIT Features



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.

### 3.15 Move Files

---

#### Moving Source Files To Target Location

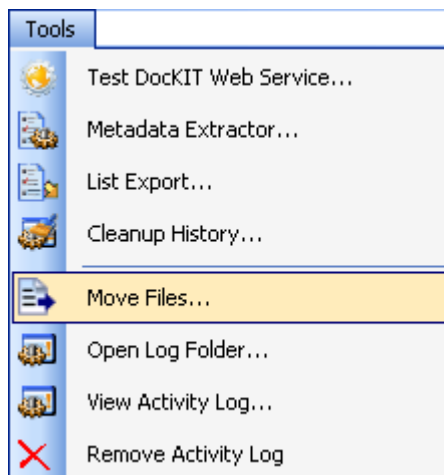
The 'Move Files' tool will help you to move the already imported source files and folders to the specified location. You can filter the files to be moved to the target location by specifying appropriate file options available in the tool.

1) Click **Move Files** from DockKIT main screen

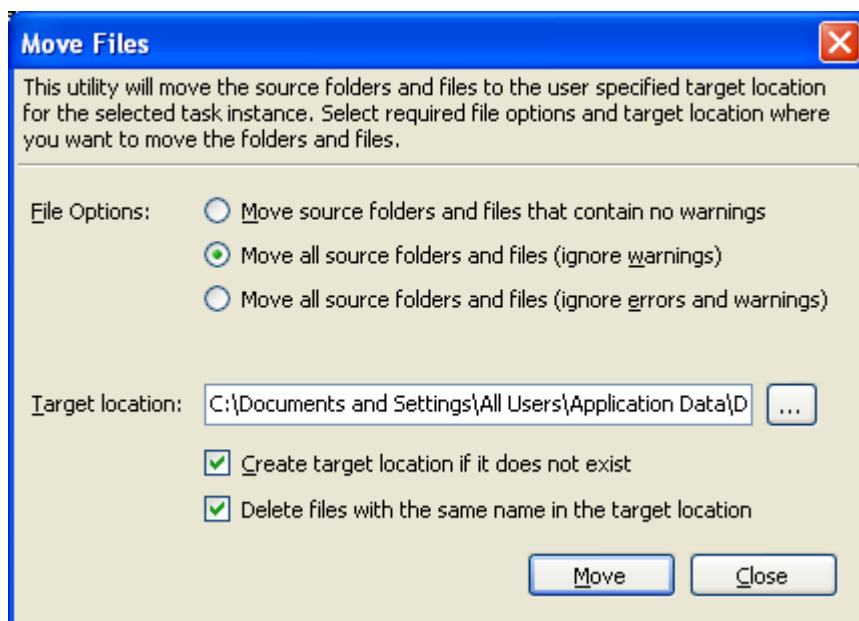


Or Select **Move Files** from **Tools** menu

## CHAPTER-3- DockIT Features



2) The **Move Files** dialog appears as shown below:



3) Select **File Options** given below:

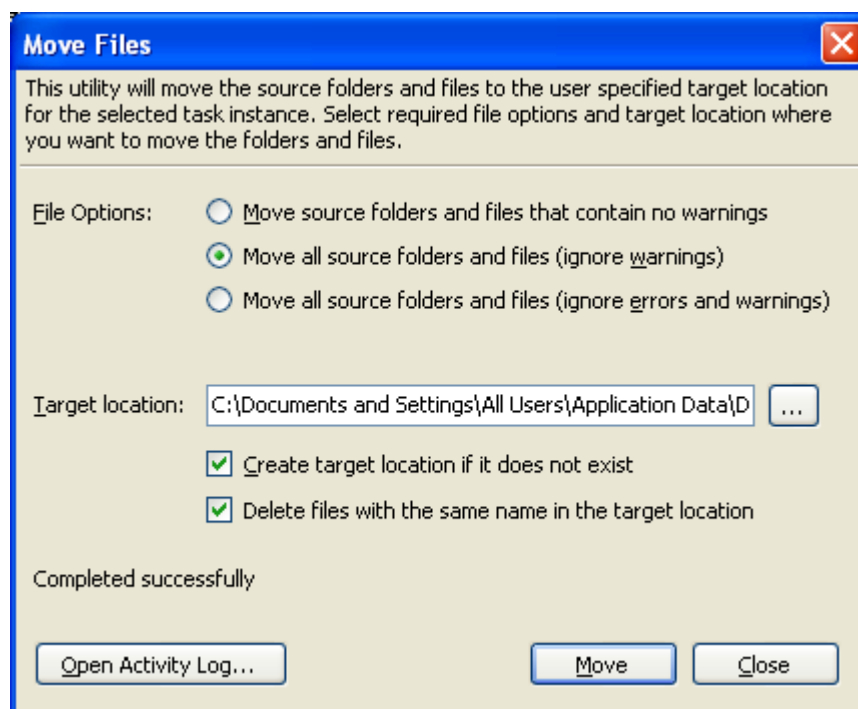
- a) **Move source folders and files that contain no warnings** - Move source folders and files that were imported without any warnings.
- b) **Move all source folders and files (ignore warnings)** - Move source folders and files that were imported, but warnings may be reported in the 'File Errors' tab of the Activity Log Viewer dialog.
- c) **Move all source folders and files (ignore errors and warnings)** - Move all source folders and files that were used to import. This option will move all the files regardless of their errors and warnings caused while importing into SharePoint.

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

## CHAPTER-3- DockIT Features

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

- 5) **Create target location if it does not exist** - Automatically creates the folder structure if unavailable in the target location and proceeds with the file move process.
- 6) **Delete files with the same name in the target location** - Overwrite files if the file with the same name already exists in the target location during the move process. By default, this option will be unselected, so as to ignore the file move if a file with the same name exists in the target location.
- 7) Click **Move** button to commence the move process.



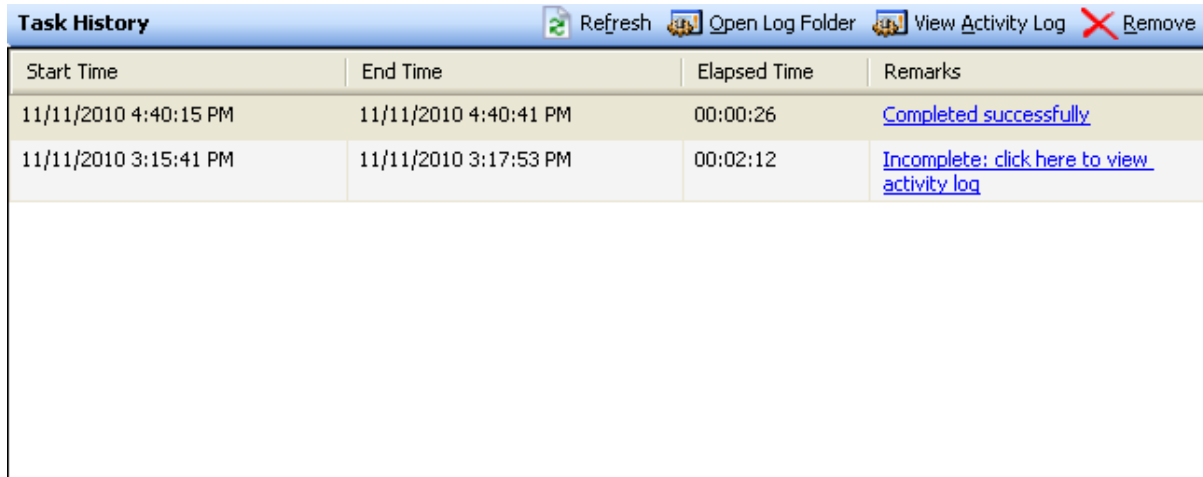
Once the move process is complete, click **Open Activity Log** to view the activity log file.

## CHAPTER-3- DockIT Features

### 3.16 View Activity Log

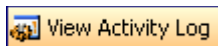
To view activity log associated with a task history item:

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

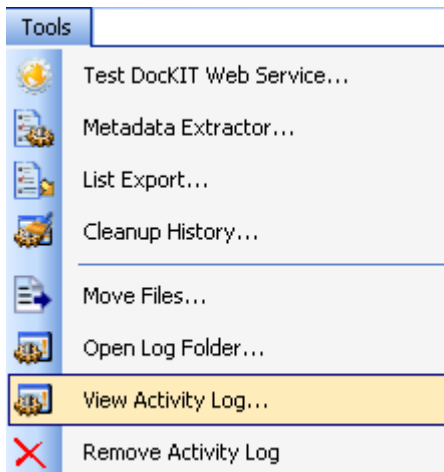


Start Time	End Time	Elapsed Time	Remarks
11/11/2010 4:40:15 PM	11/11/2010 4:40:41 PM	00:00:26	<a href="#">Completed successfully</a>
11/11/2010 3:15:41 PM	11/11/2010 3:17:53 PM	00:02:12	<a href="#">Incomplete: click here to view activity log</a>

- 2) Click **View Activity Log** from DockIT main screen.



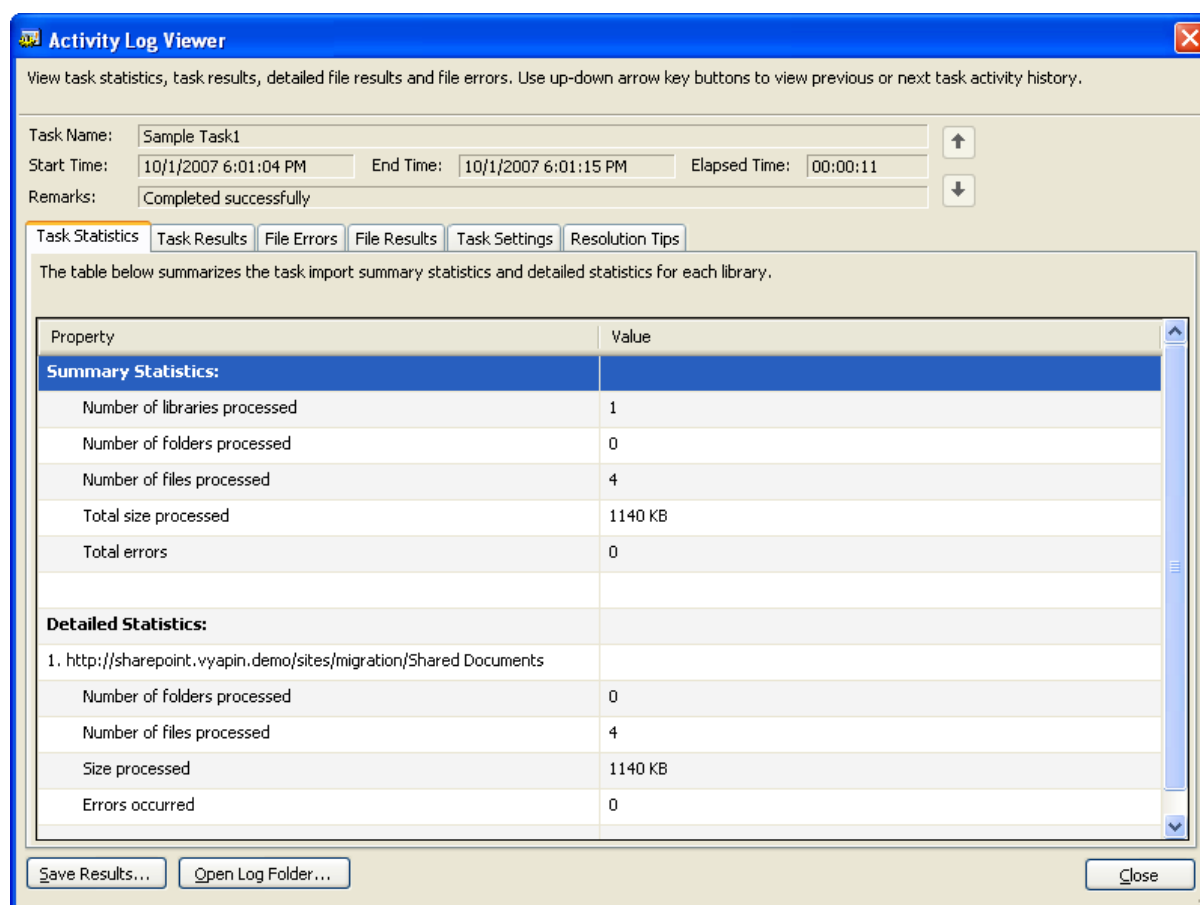
Or Select **View Activity Log** from **Tools** menu



- 3) The **Activity Log Viewer** dialog appears as shown below:



## CHAPTER-3- DockIT Features



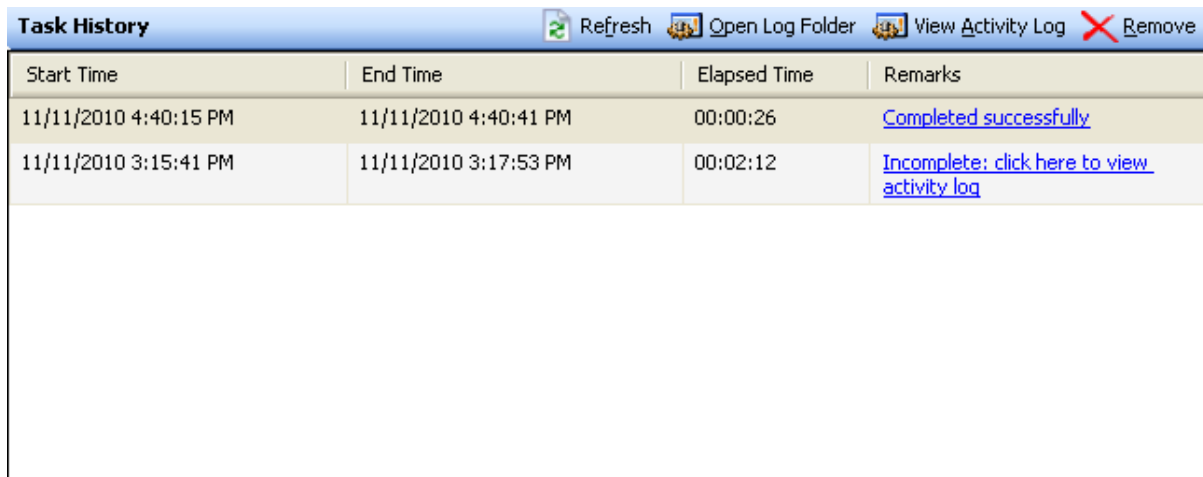
- 4) The activity log of a task is classified into four different categories (seen under separate tabs):
  - a) **Task Statistics:** Displays a brief summary of the import process.
  - b) **Task Results:** Displays the task level detailed report of the import process.
  - c) **File Errors:** Displays detailed report of errors that occurred during import.
  - d) **File Results:** Displays detailed log of all items processed in the import task.
  - e) **Task settings:** Displays settings specified for the task at the time of import.
- 5) Click **Save Results** button to save the task results in Microsoft Excel format. Each tab in Activity LogViewer dialog is stored as a separate worksheet in MS-Excel.
- 6) Click **Open Log Folder** button to open the folder that contains the activity log of the currently displayed task history item.

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

### 3.17 Remove a Task History Item

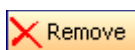
To remove a task history item:

- 1) Select item from **Task History** pane.

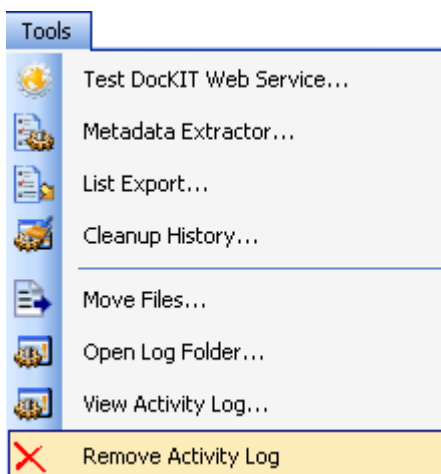


Start Time	End Time	Elapsed Time	Remarks
11/11/2010 4:40:15 PM	11/11/2010 4:40:41 PM	00:00:26	<a href="#">Completed successfully</a>
11/11/2010 3:15:41 PM	11/11/2010 3:17:53 PM	00:02:12	<a href="#">Incomplete: click here to view activity log</a>

- 2) Click **Remove** from DockIT main screen.



Or Select **Remove Activity Log** from **Tools** menu



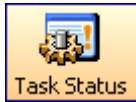
This will remove the currently selected activity log entry and log folders & files associated with the task history item. To maintain task history items, see Cleanup history and Task Status.

## CHAPTER-3- DockIT Features

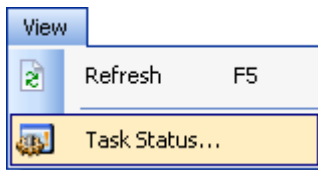
### 3.18 Task Status

To view and manage task status of a selected task:

- 1) Click **Task Status** from DockIT main screen.



Or Select **Task Status** from **Tools** menu



- 2) The **Task Status** dialog appears as shown below:

A screenshot of the "Task Status" dialog box. The title bar says "Task Status". Below the title bar, it says "View task status for specified number of days." There is a "Show status for" field with "7" and "days" selected, followed by a "Go" button. To the right are buttons for "Refresh", "Open Log Folder", "View Activity Log", "Remove", and "Remove All". The main area contains a table with 5 columns: "Task Name", "Start Time", "End Time", "Elapsed Time", and "Remarks". The table has 13 rows of data. At the bottom left, it says "13 row(s)". At the bottom right, there is a "Show at startup" checkbox and a "Close" button.

Task Name	Start Time	End Time	Elapsed Time	Remarks
Sample Task1	11/12/2010 3:32:26 PM	11/12/2010 3:33:18 PM	00:00:51	Completed successfully
Batch Action	11/12/2010 2:33:00 PM	11/12/2010 2:33:04 PM	00:00:04	Incomplete: click here to view activity log
Batch Import	11/12/2010 2:29:00 PM	11/12/2010 2:29:04 PM	00:00:04	Incomplete: click here to view activity log
Batch Clean-up	11/12/2010 2:26:00 PM	11/12/2010 2:26:16 PM	00:00:15	Incomplete: click here to view activity log
Sample Task2	11/12/2010 1:29:00 PM	11/12/2010 1:29:15 PM	00:00:15	Terminated: canceled by user
Sample Task2	11/11/2010 9:00:07 PM	11/11/2010 9:00:51 PM	00:00:44	Incomplete: click here to view activity log
Sample Task2	11/11/2010 8:51:00 PM	11/11/2010 8:51:51 PM	00:00:50	Completed successfully
Sample Task2	11/11/2010 8:45:54 PM	11/11/2010 8:46:52 PM	00:00:57	Completed successfully
Sample Task2	11/11/2010 5:31:15 PM	11/11/2010 5:32:12 PM	00:00:57	Completed successfully
Sample Task2	11/11/2010 5:06:43 PM	11/11/2010 5:07:36 PM	00:00:53	Completed successfully
Sample Task2	11/11/2010 4:40:15 PM	11/11/2010 4:40:41 PM	00:00:26	Completed successfully
Sample Task2	11/11/2010 3:15:41 PM	11/11/2010 3:17:53 PM	00:02:12	Incomplete: click here to view activity log
Sample Task1	11/11/2010 12:47:59 PM	11/11/2010 12:48:17 PM	00:00:17	Terminated: canceled by user

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

## CHAPTER-3- DockKIT Features

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

### 3.19 Task History

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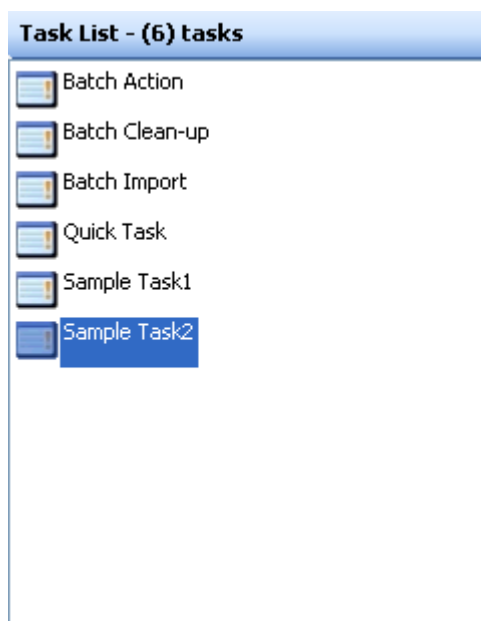
When an import task is run in DockKIT, the task import information is maintained in the 'Task History' folder. The task history information can be seen at right-bottom of DockKIT application's main window.

Task History			
Start Time	End Time	Elapsed Time	Remarks
11/11/2010 4:40:15 PM	11/11/2010 4:40:41 PM	00:00:26	<a href="#">Completed successfully</a>
11/11/2010 3:15:41 PM	11/11/2010 3:17:53 PM	00:02:12	<a href="#">Incomplete: click here to view activity log</a>

To view task history of a particular task:

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

## CHAPTER-3- DockIT Features



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

Task History			
Start Time	End Time	Elapsed Time	Remarks
11/11/2010 4:40:15 PM	11/11/2010 4:40:41 PM	00:00:26	<a href="#">Completed successfully</a>
11/11/2010 3:15:41 PM	11/11/2010 3:17:53 PM	00:02:12	<a href="#">Incomplete: click here to view activity log</a>

### 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

## CHAPTER-3- DockIT Features

	version. This message is applicable for evaluation / trial version only.
Terminated: cancelled by user	Import process was cancelled by the user.
Terminated abnormally	The import process was abnormally terminated / killed.
Failed: the following error occurred while creating activity log	The import process could not be initiated as there were issues in creating the activity log files and initiating the import process.

The following operations can be performed on Task history items:

- **View activity log**
- **Remove a task history item**
- **Manage task status**
- **Cleanup history**

## **4 Import folders, files and metadata to SharePoint Libraries (Explorer Mode)**

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- **Create Task**
- **Edit Task**
- **Copy Task**
- **Delete Task**
- **Run Task**
- **Re-import Task**

## Chapter-4–Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

### 4.1 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.

- 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 **'Path'**. '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 Path field will not be carried forward as a metadata field into SharePoint.
- 4) 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.xls".
- 5) 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.xls). If you use shares to import file, ensure the 'Path' field has the corresponding UNC path (e.g., \\Machine\_Name\Share\_Name\Sample File1.xls).
- 6) For CSV and TXT formats, all field names and their corresponding metadata values should be enclosed within double quotes (" ") e.g., "John Doe". When



## Chapter-4–Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

using accented characters such as [á é í ó] in folder / file names, the CSV / TXT metadata file must be in UNICODE encoded format.

- 7) For Microsoft Excel file formats (XLS / XLSX), do not enclose the field names and their corresponding metadata values within double quotes.
- 8) Ensure date values are in 'Date Only' or 'Date And Time' format.
- 9) 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.
- 10) 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.
- 11) 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 /BCS column value in the format: *<filter name>:<value>*. For example: *"Company Name:NorthWind*
- 12) 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.

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

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

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

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

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

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

	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. DockKIT 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. DockKIT 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"	"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 ';'. DockKIT 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"

## Chapter-4–Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

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 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 Web Service component to be installed in the destination SharePoint server (MOSS / Microsoft SharePoint Server 2010).	"All site users; Admins; Viewers; Administrators; SPUsers; Contributors; Designers"
Publishing Schedule Start Date (Applicable only for Collaboration Portal / Publishing Portal Site)	Date or Date & Time can be given in this field. DockIT provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2010 10:50 AM" "1/25/2009"
Publishing Schedule End Date (Applicable only for Collaboration Portal / Publishing Portal Site)	Date or Date & Time can be given in this field. DockIT provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2009 10:50 AM" "1/25/2010"
Publishing Image (Applicable only for Collaboration Portal / Publishing Portal Site)	The http URL of any picture can be given to this field. Relative URL also can be given to this field.	"http://sharepoint/Pictures/chart.bmp" "Pictures/chart.bmp" <img src='/sites/collaboration portal/PublishingImages/News ArticleImage.jpg' />
Publishing Hyperlink (Applicable	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"

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

only for Collaboration Portal / Publishing Portal Site)		"<a href='/sites/collaboration portal/PublishingImages/News ArticleImage.jpg'> NewsArticleImage.jpg</a>"
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 <b>sample text</b>
Business Data (BDC) / External Data (BCS) (Applicable only for SharePoint Enterprise Edition)	<p>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.</p> <p>DockIT also automatically fills-up the column values associated with the BDC / BCS column during import. In order to assign the values to the BDC / BCS column, DockIT Web Service component must be installed in the destination SharePoint server (MOSS / Microsoft SharePoint Server 2010).</p>	<p>"Company Name:Vyapin"          "ID:1000"          "Product Name:DockIT for SharePoint"</p> <p>If the filter name contains colon (:) in its name, use the following syntax:</p> <p>"FILTER:Product:Product ID,QUERY:DockIT"          "FILTER:ID:Name,QUERY:1000AX"</p>
Managed Metadata (Single Value)	<p>Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values.</p> <p>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</p>	<p>"Continent North America Country United States States Alaska"</p> <p>"Alaska"</p>

**Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)**

	<p>' '.</p> <p>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.</p> <p>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.</p> <p>In order to assign the values to the Managed Metadata column, DocKIT Web Service component must be installed in the destination SharePoint server (Microsoft SharePoint Server 2010).</p>	
<p>Managed Metadata (Multiple Values)</p>	<p>Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'.</p> <p>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 ' '.</p> <p>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.</p> <p>If you specify the term label in the</p>	<p>"Continent North America Country United States States Washington;Continent North America Country United States California;Continent North America Country United States Alaska"</p> <p>"Washington;California;Alaska"</p>

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

	<p>metadata file, DocKIT will search the specified term value and assign the first matching term value for the corresponding managed metadata column.</p> <p>In order to assign the values to the Managed Metadata column, DocKIT Web Service component must be installed in the destination SharePoint server (Microsoft SharePoint Server 2010).</p>	
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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;</u> <u>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 ';#'. <i>* - 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.</i>	";#Windows Live;;#Mail;#"	<u>Windows Live;;#Mail</u>

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

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;</u> <u>Mesh; Windows Azure;</u> <u>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 ';#'. <i>* - 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.</i>	";#Windows Live;;#Mail;#Windows Photo Gallery;#"	<u>Windows Live;#Mail;</u> <u>Windows Photo Gallery</u>

### 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.xls","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"

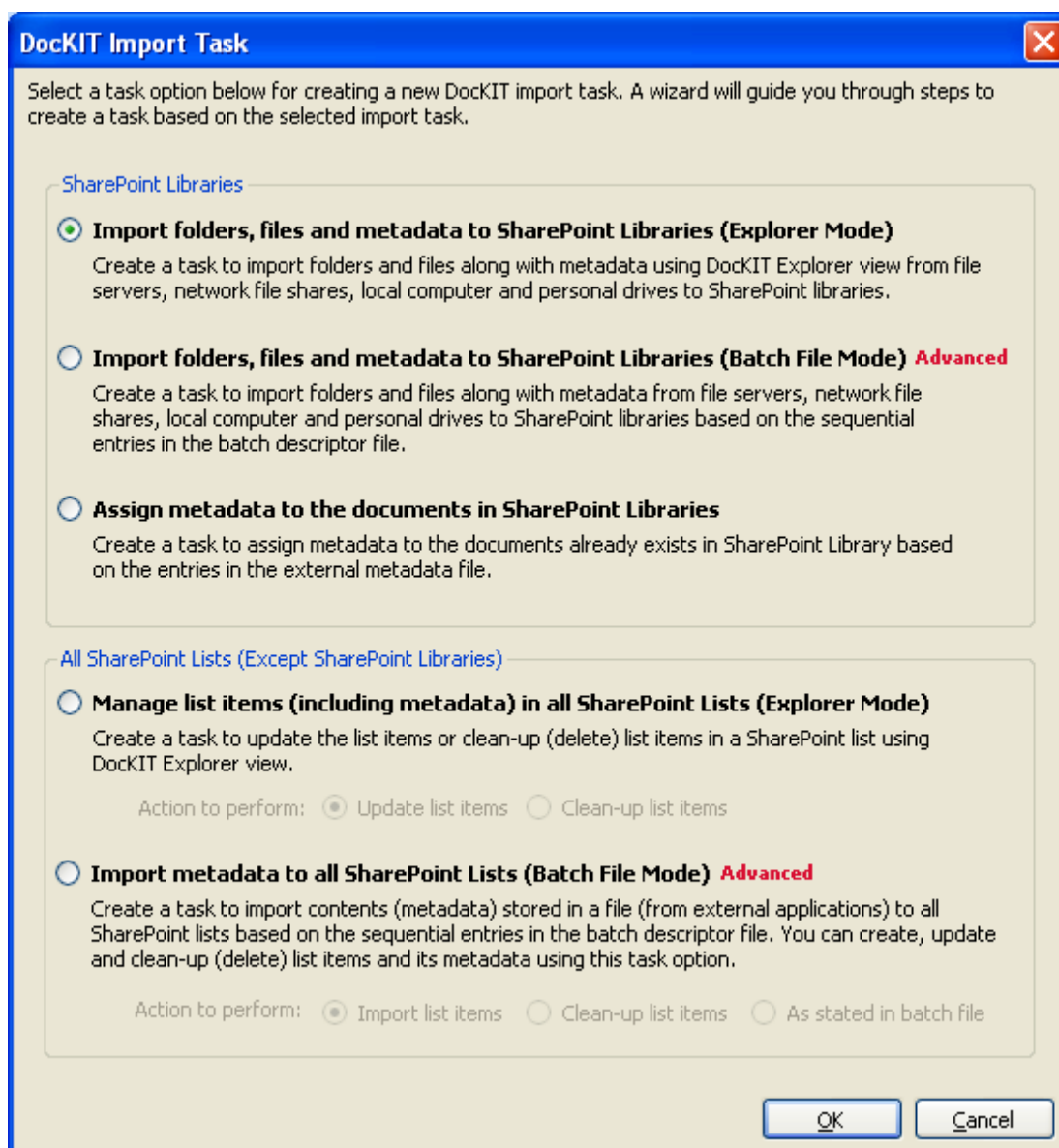


## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

### 4.2 Create Task

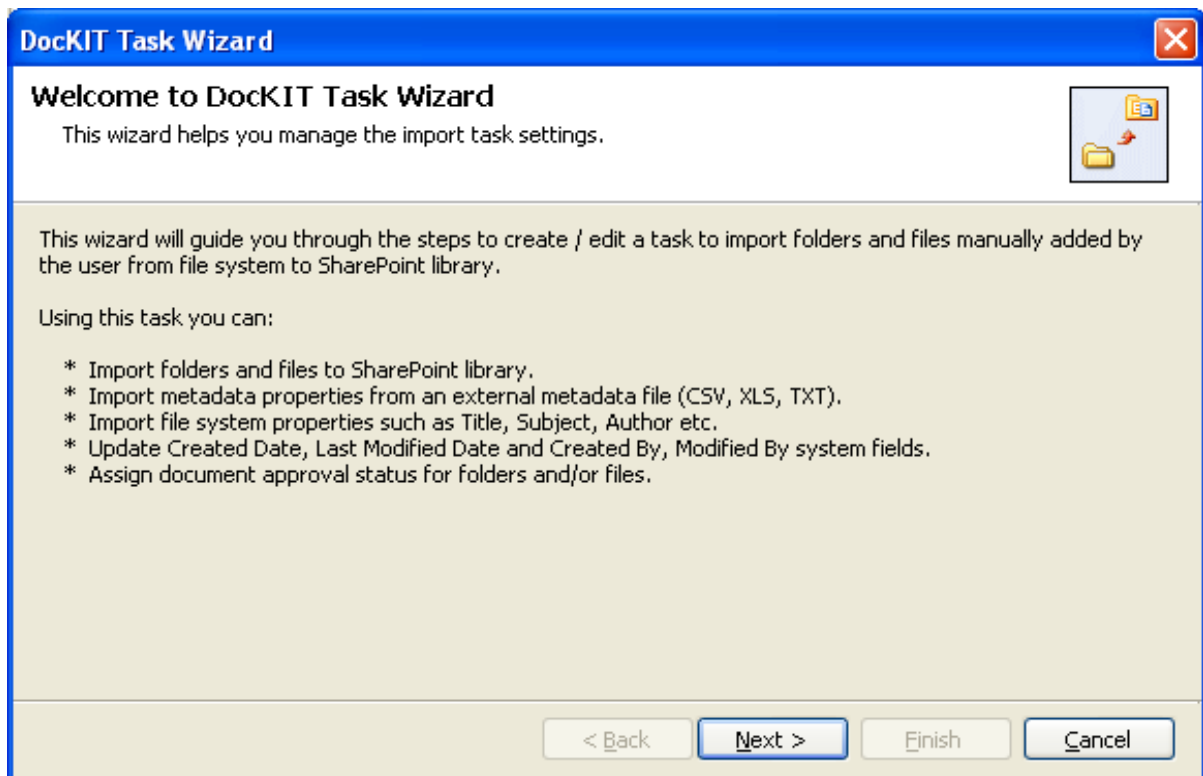
To create a task to import folders and files along with metadata from File System to SharePoint Library:

- 1) Select **Import folders, files and metadata to SharePoint Libraries (Explorer Mode)** option in **DocKIT Import Task** dialog as shown below and click **OK**.



## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

2) The **DockIT Task Wizard** appears as shown below:



3) Click **Next** button

4) Specify the *SharePoint Destination Location*

5) *Select Items to Import*

6) Specify *Metadata Options*

7) Specify Mapping Templates

8) *Specify Permission Options*

9) Specify File Settings

10) Specify Import Conditions

11) Specify Task Settings

12) Specify Pre-migration Validation

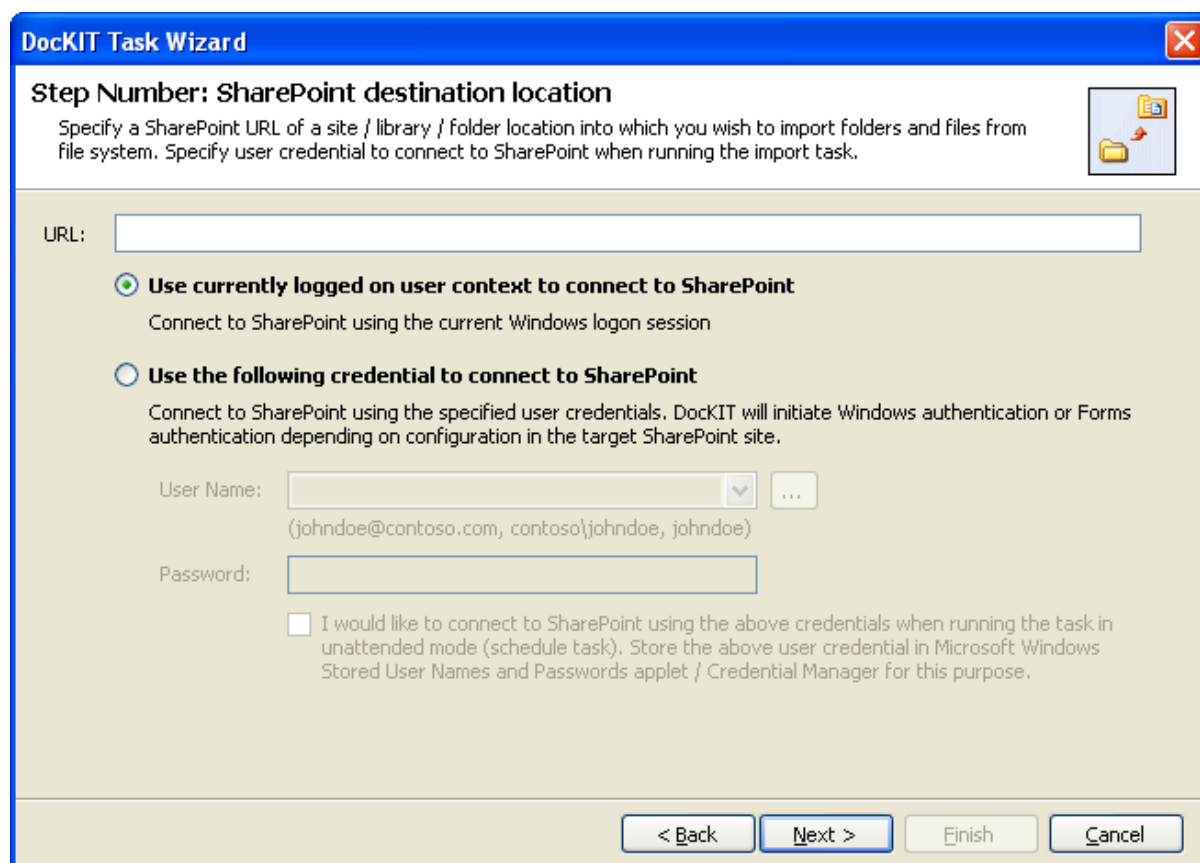
13) Click **Finish** button to create a task, or click **Back** button to change any task settings.

## Chapter-4–Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

### 4.3 Step 1: SharePoint destination location

To specify a SharePoint URL of a site / library / folder location into which you wish to import folders and files from the file system, perform the steps given below:

- 1) The **SharePoint destination location** step appears as shown below:



The screenshot shows a Windows-style dialog box titled "DocKIT Task Wizard". The main heading is "Step Number: SharePoint destination location". Below the heading is a descriptive text: "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." To the right of this text is a small icon of a folder with a document and a red arrow pointing to it. Below the text is a large text input field labeled "URL:". Underneath the URL field are two radio button options. The first option is selected and is labeled "Use currently logged on user context to connect to SharePoint", with a subtext "Connect to SharePoint using the current Windows logon session". The second option is labeled "Use the following credential to connect to SharePoint", with a subtext "Connect to SharePoint using the specified user credentials. DocKIT will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site." Below these options are two input fields: "User Name:" with a dropdown arrow and a "..." button, and "Password:". Below the password field is a checkbox with the text "I would like to connect to SharePoint using the above credentials when running the task in unattended mode (schedule task). Store the above user credential in Microsoft Windows Stored User Names and Passwords applet / Credential Manager for this purpose." At the bottom of the dialog are four buttons: "< Back", "Next >", "Finish", and "Cancel".

- 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 users' credentials to connect to the SharePoint URL using the options given below.
  - a) **Use currently logged on user context to connect to SharePoint** - Connect to SharePoint URL using the currently logged on user context
  - b) **Use the following credential to connect to SharePoint** - Connect to the SharePoint URL using a different user context. 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.

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

- 4) I would like to connect to SharePoint using the above credentials when running the task in unattended mode (schedule task). Store the above user credential in Microsoft Windows Stored User Names and Passwords applet / Credential Manager for this purpose - In scheduled import process, DockIT allows the user to enter different user credentials to connect to SharePoint and to create a scheduled import 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 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 import task.

- 5) Click ... button to create new user profile.

**DocKIT Task Wizard**

**Step Number: 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.

URL:

**Use currently logged on user context to connect to SharePoint**  
Connect to SharePoint using the current Windows logon session

**Use the following credential to connect to SharePoint**  
Connect to SharePoint using the specified user credentials. DockIT will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.

User Name:  ...  
(johndoe@contoso.com, contoso\johndoe, johndoe)

Password:

I would like to connect to SharePoint using the above credentials when running the task in unattended mode (schedule task). Store the above user credential in Microsoft Windows Stored User Names and Passwords applet / Credential Manager for this purpose.

< Back   Next >   Finish   Cancel

- 6) Click **Next** to proceed.

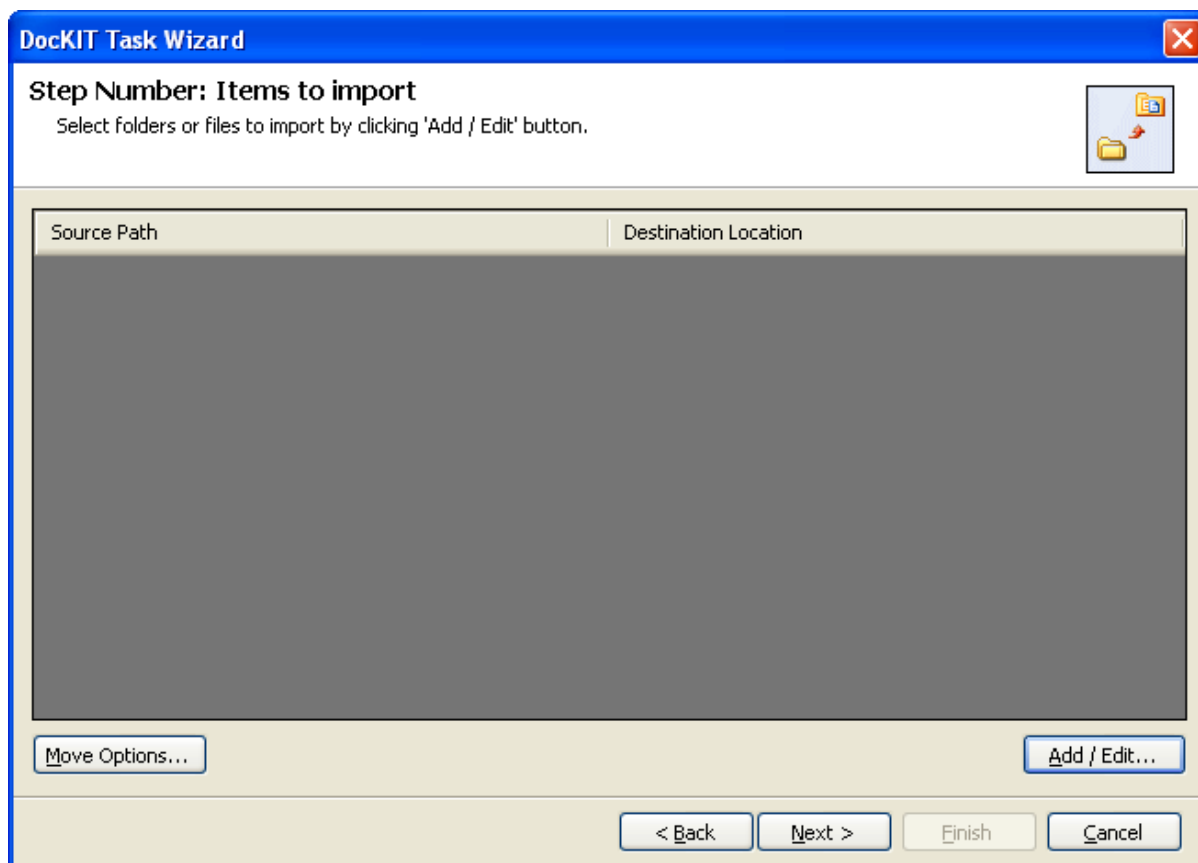
## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

### 4.4 Step 2: Items to Import

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

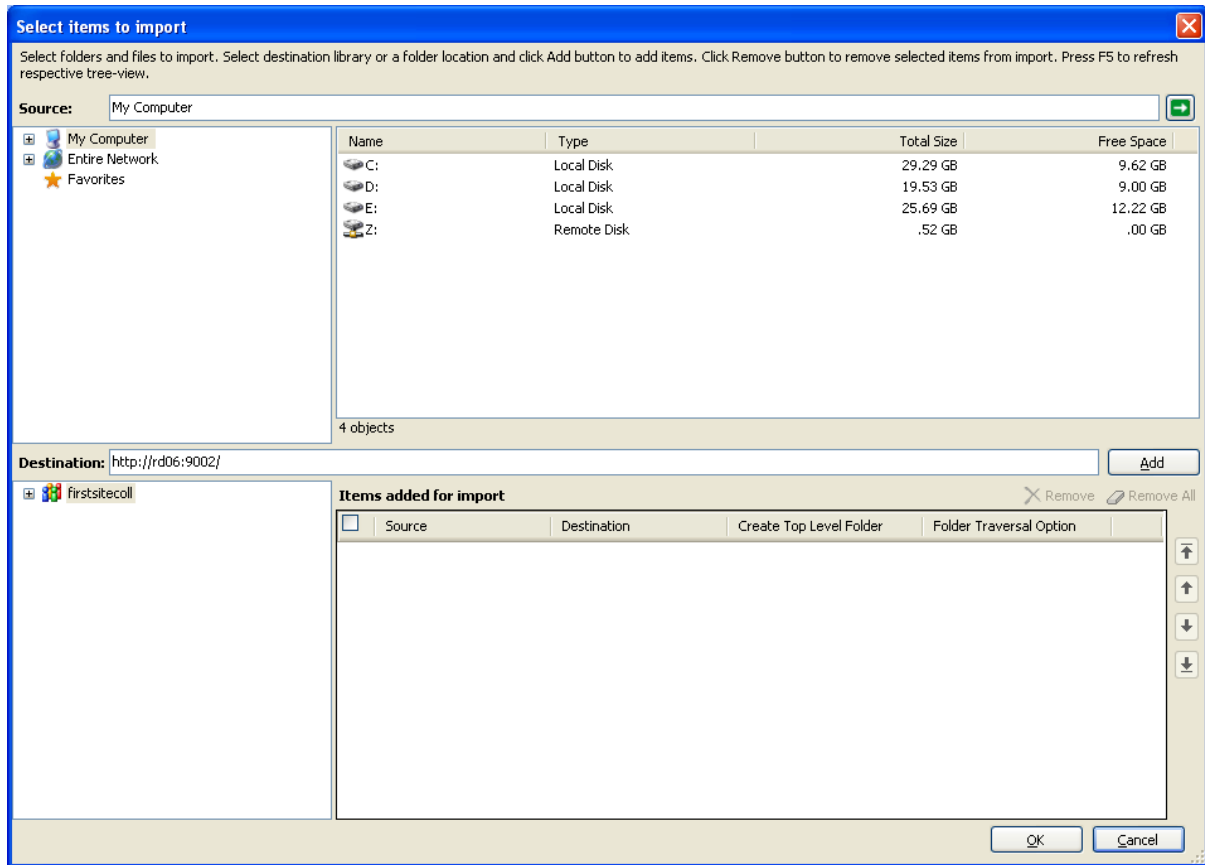
- 1) The **Items to Import** step appears as shown below:



- 2) Click **Add / Edit** button to add and remove the folders and files for import.

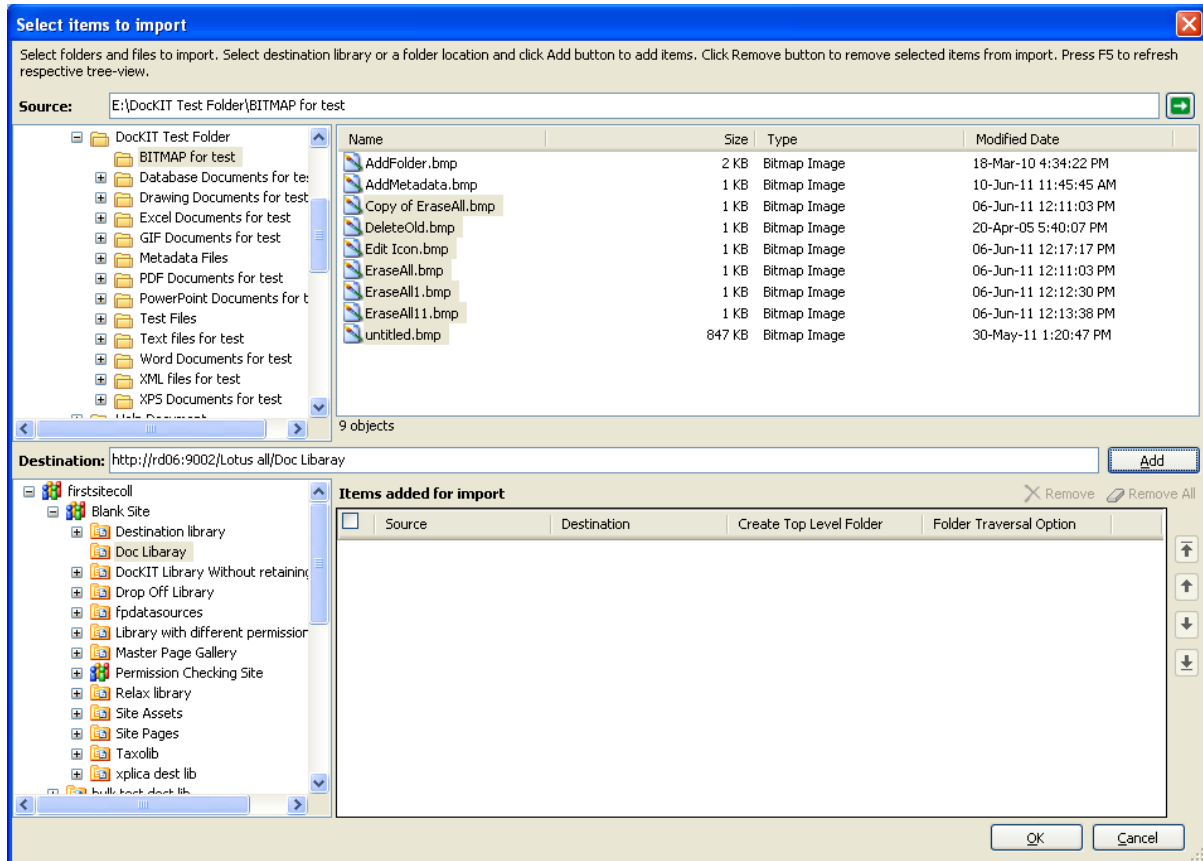
## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

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



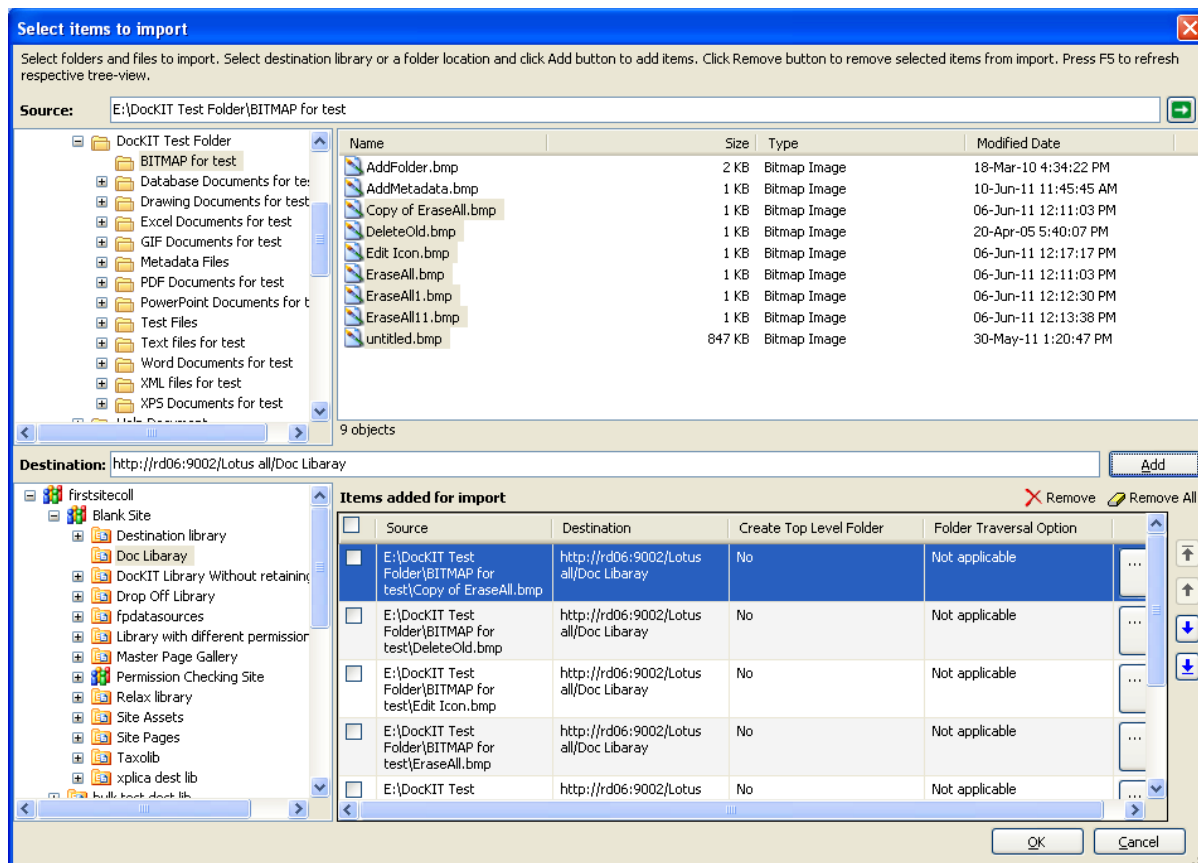
## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

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



## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

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



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

**Importing file versions:** You may use this order sequence feature site 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



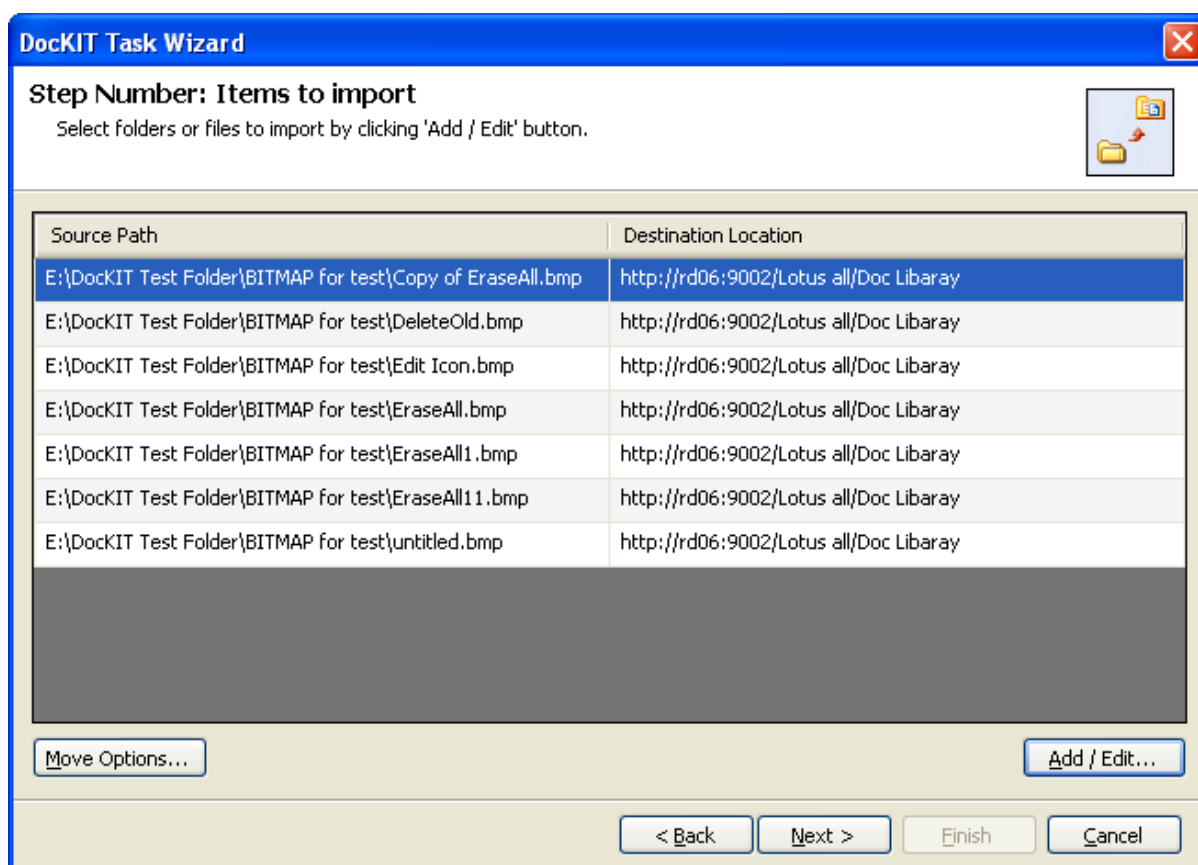
## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

grid to order them. DockIT will automatically process the added folders / files in the order in which it appears in the grid. Specify the appropriate settings in the File Settings wizard step to handle file versions correctly.

- 7) If you need to import different versions of files that are suffixed with its version number as - D:\Document Store\Sample\_v1.txt, D:\Document Store\Sample\_v2.txt, D:\Document Store\Sample\_v3.txt etc., click Importing Document Versions... for step by step guide to import them as a single file with versions.
- 8) To make the import process easier for users, DockIT provides an ability to specify the contents to import from the source folder structure. To specify the folder settings to use in the destination SharePoint library and the necessary files to import, perform the steps as given below:

Use  button to edit the folder traversal option for folders that are added in **Items added for import grid view.**

A Folder Traversal dialog appears as shown below:



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

## **Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)**

Select any of the following folder options given below to specify the contents to be imported from the source folders in file system:

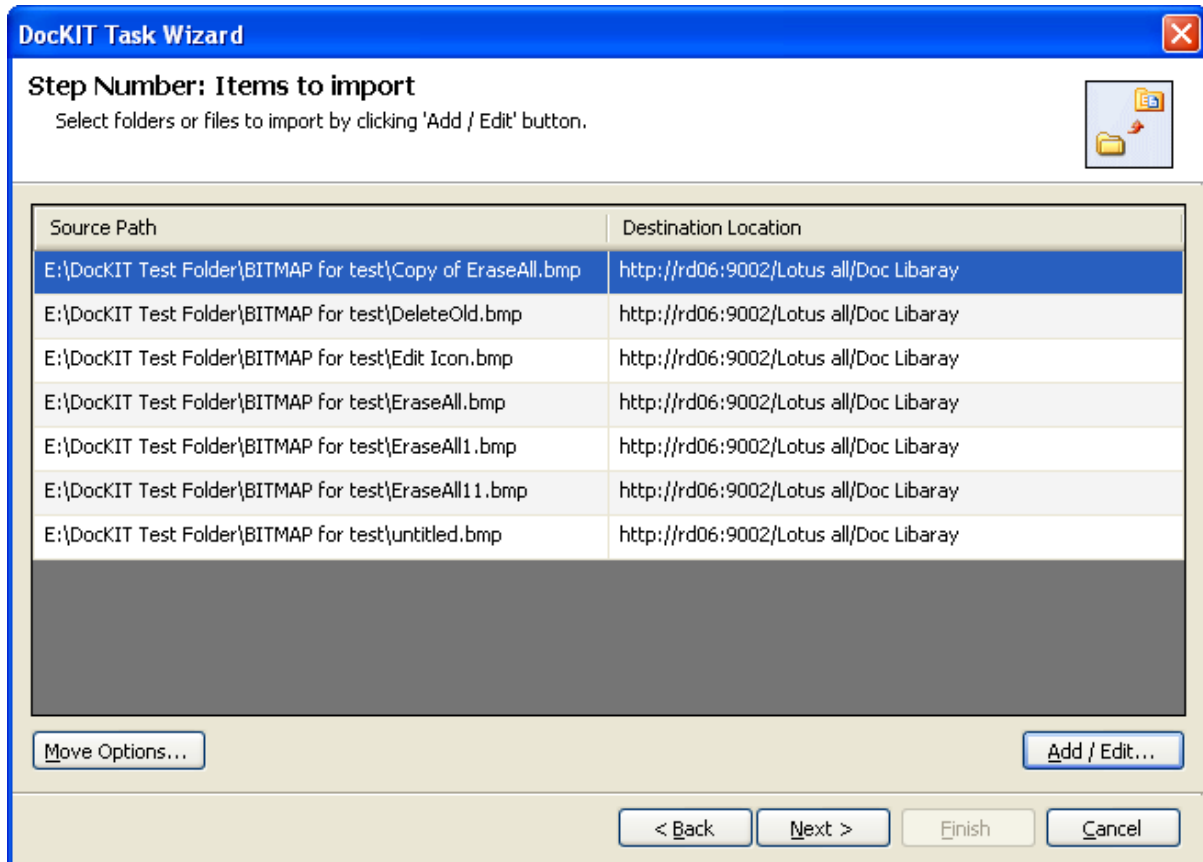
- a) Import files and retain source sub-folder structure** - This option imports folders and files exactly as they are in source file system. The source folder structure in the file system will be retained in the destination location.
- b) Import all files including sub-folders, but ignore sub-folder structure** - This option imports files only and ignore its source folder structure in the file system. Note: Specify the appropriate options in **File Settings** step to handle situations where same filenames may be available for more than one file in different source folder hierarchy (sub-folders).
- c) Import files in the top-level folders only** - This option imports files available in the top-level folders only. DocKIT will not traverse the sub-folders within the top level folders.
- d) Import sub-folder structure only and ignore all files** - This option creates the sub-folder structure in the destination location and ignores all files that are available within the added folder and sub-folders.
- e) Do not import any contents** - This option does not import any contents (sub-folders and files) from the source folder added for import. This option will be useful when you want to create the top-level folder only and ignore all its contents.

**NOTE:** Folder Traversal option is not applicable for file.

- 9)** Click **OK** button to proceed or click **Cancel** to discard the changes.

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

**10) Items to import** steps contains the folders and files added for import as shown below:



**11)** In order to move the source folders and files to the specified location after completing import process, click **Move Options...**

**12)** Click **Next** to Proceed.

## Chapter-4–Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

### 4.5 Step 3: Metadata Options

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

- 1) The **Metadata Options** step appears as shown below:

The screenshot shows a software window titled "DocKIT Task Wizard - test permission task". The current step is "Step Number: Metadata Options", with the instruction "Specify mapping template to update document properties in SharePoint." The interface includes several input fields and controls:

- Metadata File:** A section header above the input fields.
- File Name:** A text input field with a browse button (...).
- Sheet Name:** A dropdown menu with a browse button (...), a "View..." button, and a "Clear" button.
- Date format:** A dropdown menu currently set to "<Use default>".
- Time format:** A dropdown menu currently set to "<No Time>".
- Allow Fill-in settings (Applicable for Choice, Managed Metadata datatypes only):** Three radio button options:
  - Do not add new values to the column definition
  - Add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library
  - Add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination library
- Fail-safe Settings:** A checkbox labeled "Import a document to SharePoint even if it contains any errors or warnings in the metadata. Enabling this option may result in documents having partial or incomplete metadata in the destination library." which is currently unchecked.
- Navigation:** Buttons for "< Back", "Next >", "Finish", and "Cancel" at the bottom.

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

## **Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)**

- 6) Select the **Fill-in choice settings** as below,
- a) **Do not add new values to the column definition** - When selecting this option, DockIT does not create or add new values to the column definition (For example: Choice field definition, Managed Metadata field definition).
  - b) **Add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library** - When selecting this option, DockIT will create or add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library.
  - c) **Add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination library** - When selecting this option, DockIT will create or add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination library.

### **7) Fail-safe Settings:**

**Migrate a document to SharePoint even if it contains any errors or warnings in the metadata. Enabling this option may result in documents having partial or incomplete metadata in the destination library:**

If the specified document metadata contains any errors or warnings, DockIT will migrate the document to the SharePoint library, even when there is partial or incomplete metadata associated with the document.


When you deselect this option, if the specified metadata contains any errors or warnings, DockIT does not migrate the document to the destination SharePoint library thereby skipping them. The errors or warnings typically identified by Pre-migration Validation tool will be used to determine if a document can be imported to a SharePoint library.

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

**DocKIT Task Wizard - test permission task**

**Step Number: Metadata Options**  
Specify mapping template to update document properties in SharePoint.

**Metadata File:**

File Name: C:\Documents and Settings\All Users\Documents\DocKIT6x - Permissions\DocKI ... 

Sheet Name:  ...

Date format: <Use default> Time format: <No Time>

**Allow Fill-in settings (Applicable for Choice, Managed Metadata datatypes only):**

- Do not add new values to the column definition
- Add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library
- Add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination library

**Fail-safe Settings**

Import a document to SharePoint even if it contains any errors or warnings in the metadata. Enabling this option may result in documents having partial or incomplete metadata in the destination library.

< Back  Finish

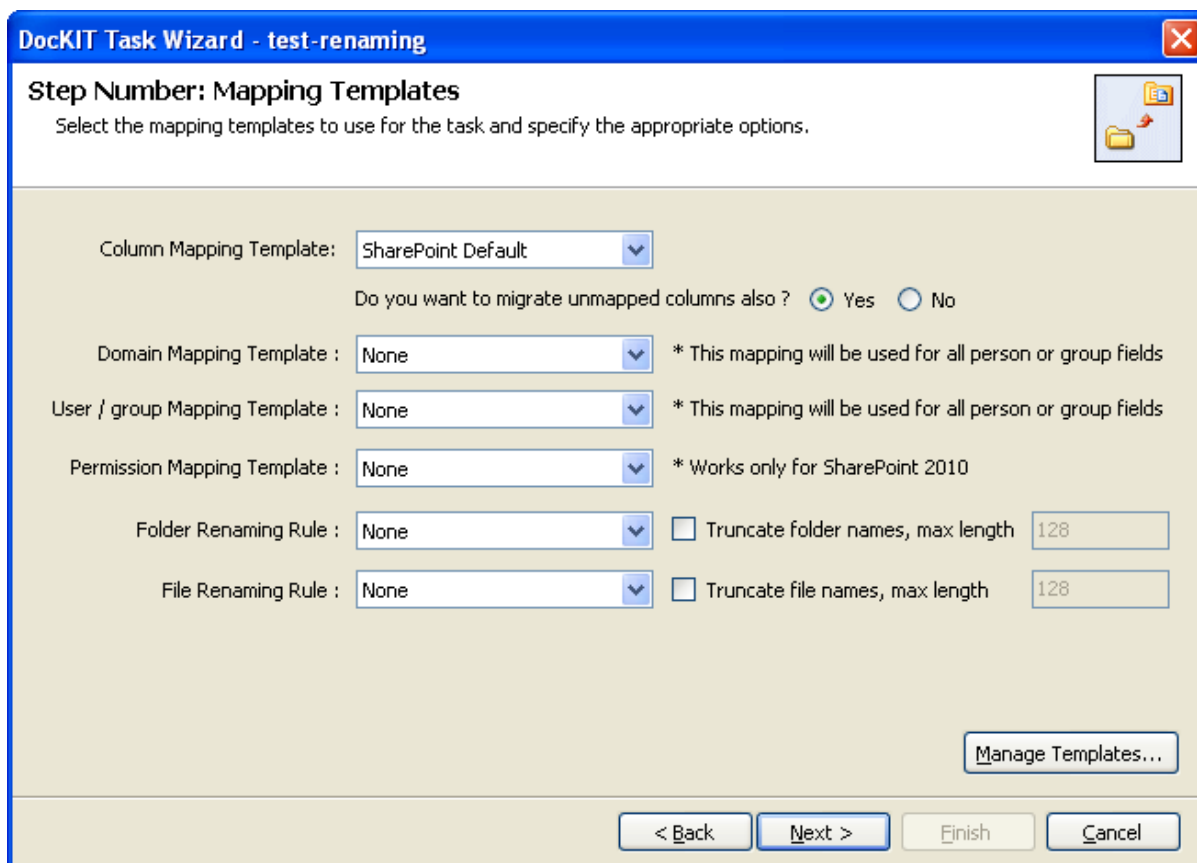
Click **Next** to Proceed.

### 4.6 Step4: Mapping Templates

#### Mapping Templates

To specify the mapping templates to use for the task:

- 1) The Mapping Templates step appears as shown below:



**DocKIT Task Wizard - test-renaming**

**Step Number: Mapping Templates**  
Select the mapping templates to use for the task and specify the appropriate options.

Column Mapping Template:    
Do you want to migrate unmapped columns also ?  Yes  No

Domain Mapping Template :   \* This mapping will be used for all person or group fields

User / group Mapping Template :   \* This mapping will be used for all person or group fields

Permission Mapping Template :   \* Works only for SharePoint 2010

Folder Renaming Rule :    Truncate folder names, max length

File Renaming Rule :    Truncate file names, max length

- 2) Column Mapping Template :

Select any one column mapping template to use from the list of available template(s).

Default Templates

- a) **SharePoint Default** - Values for the destination SharePoint columns configured in this template, will be assigned as per SharePoint defaults.
- b) **DocKIT Default** - Values for the destination SharePoint columns configured in this template, will be assigned as per the setting defined in DocKIT default mapping template.

## Chapter-4–Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

**Do you want to migrate unmapped columns also? - This option helps you to migrate additional unmapped columns available in the metadata file along with the columns that are mapped in the mapping template to use.**

If this option is enabled and if external metadata file has some columns that are not mapped to destination column(s), DockIT will migrate those unmapped columns to the target SharePoint library.

If this option is disabled, DockIT will migrate only the columns defined in the mapping template and not the unmapped columns to the target SharePoint library.

### **3) Domain Mapping Template :**

Select any one domain mapping template to use from the list of available template(s).

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

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

### **4) User / Group Mapping Template :**

Select any one user / group mapping template to use from the list of available template(s)

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

### **5) Permission Mapping Template :**

Select any permission mapping template to use from the list of available template(s)

None represents the default permission mapping template.

**NOTE:** This mapping works only for SharePoint 2010.

### **6) Folder Renaming Rule :**

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

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.



## Chapter-4–Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

**NOTE:** DocKIT 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.

### 7) File Renaming Rule :

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

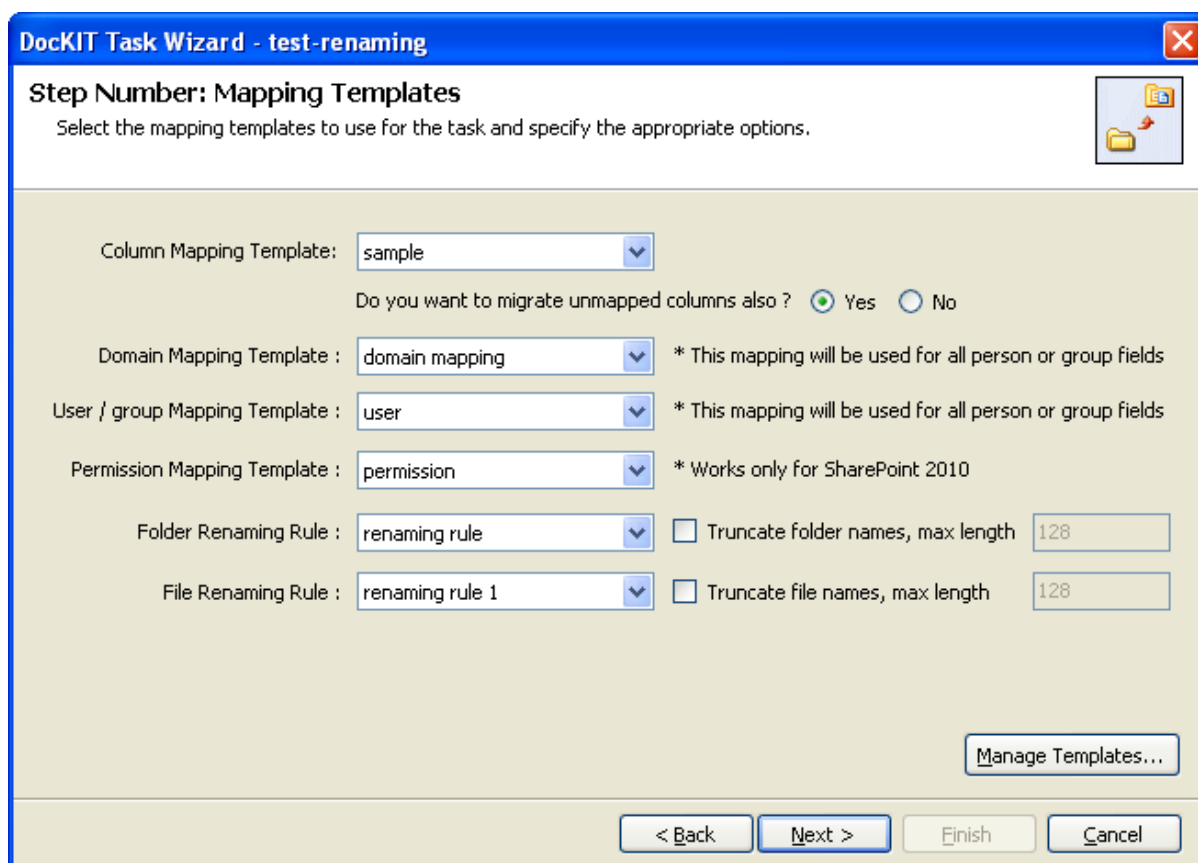
Truncate file names:

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** 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.

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



The screenshot shows the 'DocKIT Task Wizard - test-renaming' window. The title bar is blue with a close button. The main area has a light beige background. At the top, it says 'Step Number: Mapping Templates' and 'Select the mapping templates to use for the task and specify the appropriate options.' Below this are several rows of settings:

- Column Mapping Template: sample (dropdown)
- Do you want to migrate unmapped columns also?  Yes  No
- Domain Mapping Template: domain mapping (dropdown) \* This mapping will be used for all person or group fields
- User / group Mapping Template: user (dropdown) \* This mapping will be used for all person or group fields
- Permission Mapping Template: permission (dropdown) \* Works only for SharePoint 2010
- Folder Renaming Rule: renaming rule (dropdown)  Truncate folder names, max length 128
- File Renaming Rule: renaming rule 1 (dropdown)  Truncate file names, max length 128

At the bottom right is a 'Manage Templates...' button. At the very bottom are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

Click **Next** to Proceed.

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

### 4.7 Step 5: Permission Options

#### Permission Options

To specify the permission options to assign roles and permission levels for the imported items in SharePoint:

- 1) The **Permission Options** step appears as shown below:

DocKIT Task Wizard - test permission task

Step Number: Permission Options (Works only for SharePoint 2010)  
Specify the appropriate permission options

Do not migrate NTFS / Share permissions

Assign NTFS / Share permissions to the corresponding items in SharePoint

As in source

If the source folder that is migrated to SharePoint is a shared folder, assign:  NTFS  Share permissions

Connect to shared folder as:  ...

Consolidate NTFS permissions and assign to the top-level folder only

Do you want to add users and groups to the target site collection, if they are unavailable?  Yes  No

If permissions are already defined in the target folder / document, then

Skip permission assignment

Merge new and existing permissions

Replace existing permissions with new permissions

< Back Next > Finish Cancel

**NOTE:** This step is enabled only if a valid permission mapping template is selected under the list of permission mapping templates in mapping templates step.

- 2) Select any one of the following options given below:
  - a) **Do not migrate NTFS / Share permissions** - Skips the NTFS / Share permissions from migration.
  - b) **Assign NTFS / Share permissions to the corresponding items in SharePoint** - Assigns NTFS / Share permissions to the corresponding items in SharePoint based on the domain, user / group and permission mapping template specified in the Mapping Templates step.

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

- i. **As in source** - DockIT assigns permissions for the respective imported file / folder based on the permission mapping template. DockIT does have the option to migrate share permissions of the imported folder (if it is a share folder) by selecting Share Permissions as a 'If the source folder migrated to SharePoint is a share folder, assign' option underneath.
  - ii. **Consolidate NTFS permissions and assign to the top-level folder only**
    - If the item added for import is a folder, DockIT enumerates the sub - folders / files under the added folder, collects a unique list of users & permissions and assigns to the imported folder as per the mapping settings.
- 3) Do you want to add users and groups to the target site collection, if they are unavailable?
  - a) **Yes** - DockIT grants permission for the users / groups in imported items by adding the user / group with Limited Access permissions in the site collection.
  - b) **No** - DockIT does not add the user / group in the site collection and hence does not grant permission for the users / groups in imported items.
- 4) If the file / folder already exists and permissions are defined for it, DockIT provides the following options for this case
  - a) **Skip permission assignment** - DockIT skips the permission assignment if the permissions are already defined in the target folder / file
  - b) **Merge new and existing permissions** - DockIT merges the new permissions with the existing permissions defined for the folder / file.
  - c) **Replace existing permissions with new permissions** - DockIT removes the existing permissions defined for the folder / file in target and assigns new permissions

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

**DocKIT Task Wizard - test permission task**

**Step Number: Permission Options (Works only for SharePoint 2010)**  
Specify the appropriate permission options

Do not migrate NTFS / Share permissions

Assign NTFS / Share permissions to the corresponding items in SharePoint

As in source

If the source folder that is migrated to SharePoint is a shared folder, assign:  NTFS  Share permissions

Connect to shared folder as:

Consolidate NTFS permissions and assign to the top-level folder only

Do you want to add users and groups to the target site collection, if they are unavailable?  Yes  No

If permissions are already defined in the target folder / document, then

Skip permission assignment

Merge new and existing permissions

Replace existing permissions with new permissions

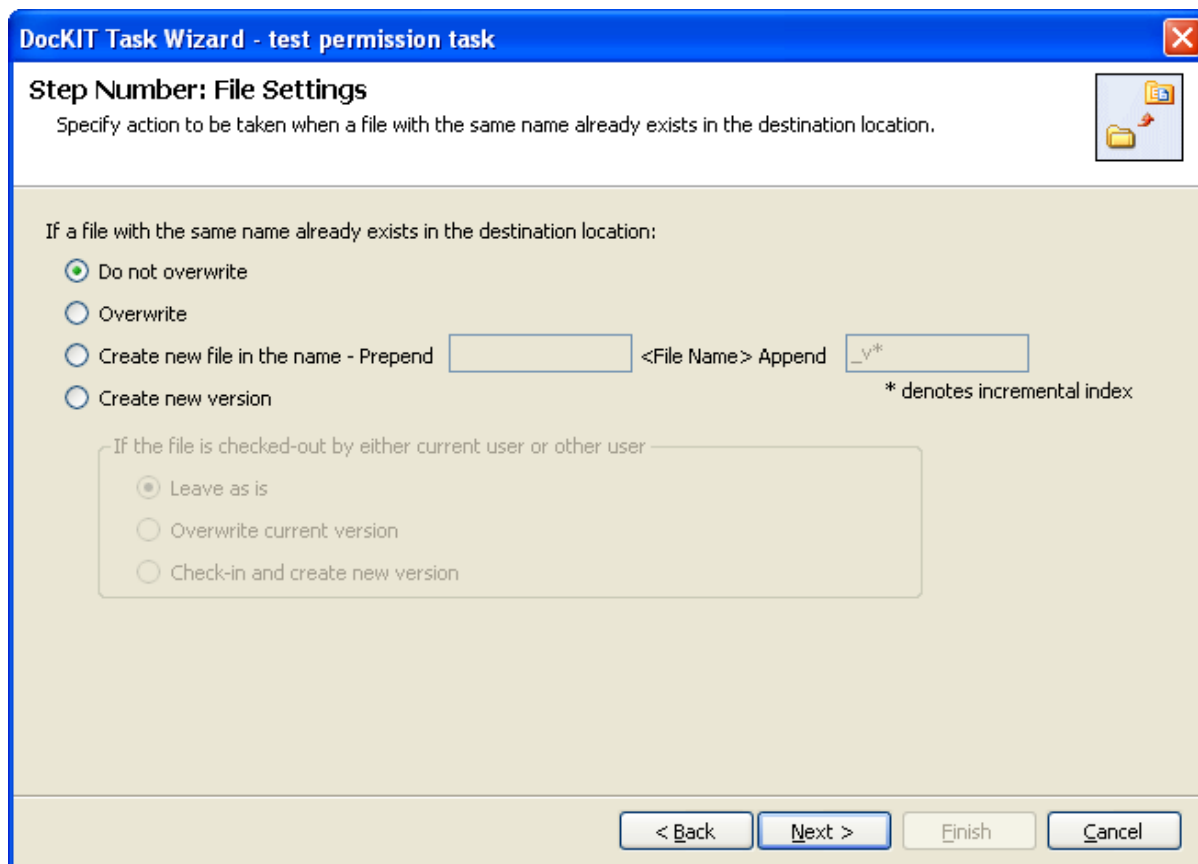
Click **Next** to Proceed.

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

### 4.8 Step 6: File Settings

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

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

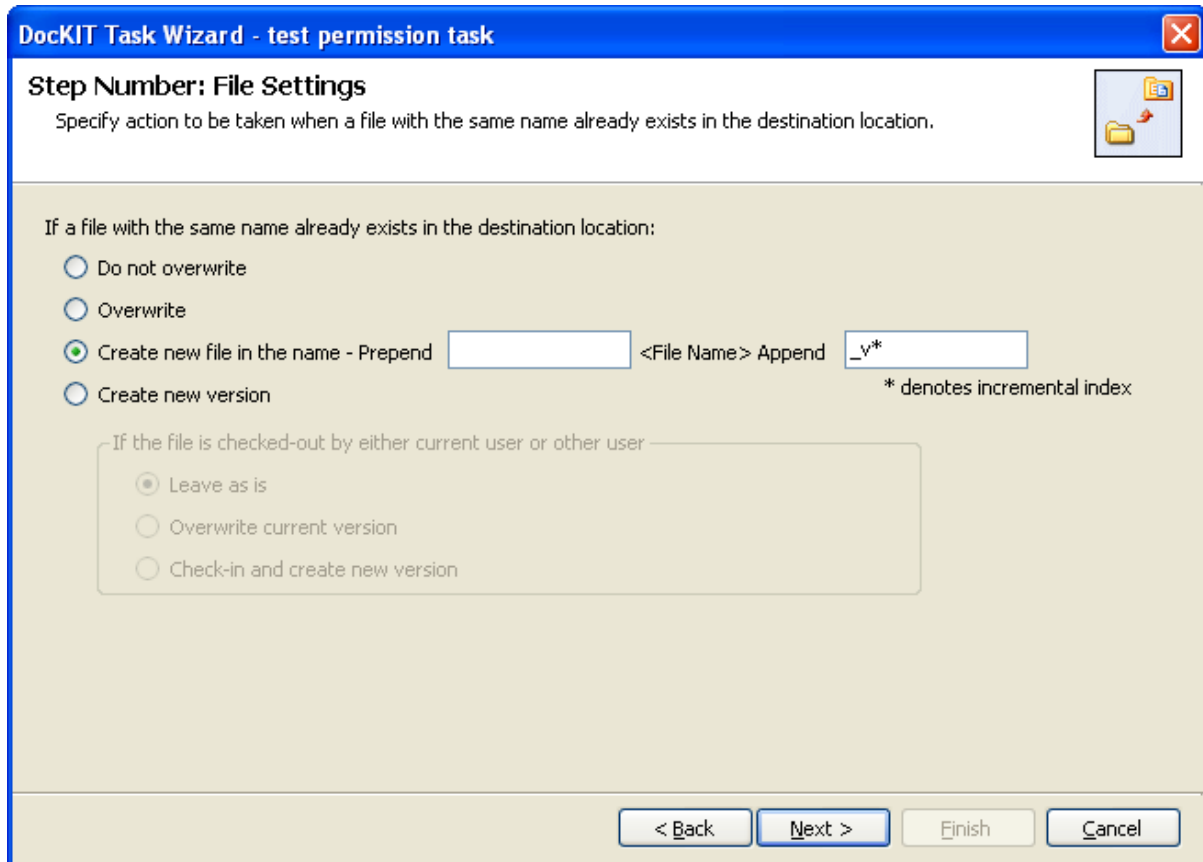


2) Select any one of the following options given below:

- a) **Do not overwrite** - Skips the file without overwriting.
- b) **Overwrite file** - Deletes the file from the destination location (along with its version history) and imports the source file.
- c) **Create as new file** - Creates a new file by appending and prepending the user defined characters with the source file name and imports the newly created file. Note: \* is the reserved character and denotes incremental index.
- d) **Create new version** - Adds the source file as new version at the destination location. Select any one of the following options to instruct DockIT what to do if the destination file is checked-out by either current user or another user:
  - i. **Leave as is** - Skip the file.
  - ii. **Overwrite current version** - Undo Checkout the file and add the source file as new version.

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

- iii. **Check-in file & create new version** - Check-in the file and add the source file as a new version.



**DocKIT Task Wizard - test permission task**

**Step Number: File Settings**

Specify action to be taken when a file with the same name already exists in the destination location.

If a file with the same name already exists in the destination location:

- Do not overwrite
- Overwrite
- Create new file in the name - Prepend  <File Name> Append  **\_v\***
- Create new version

\* denotes incremental index

If the file is checked-out by either current user or other user

- Leave as is
- Overwrite current version
- Check-in and create new version

< Back   Next >   Finish   Cancel

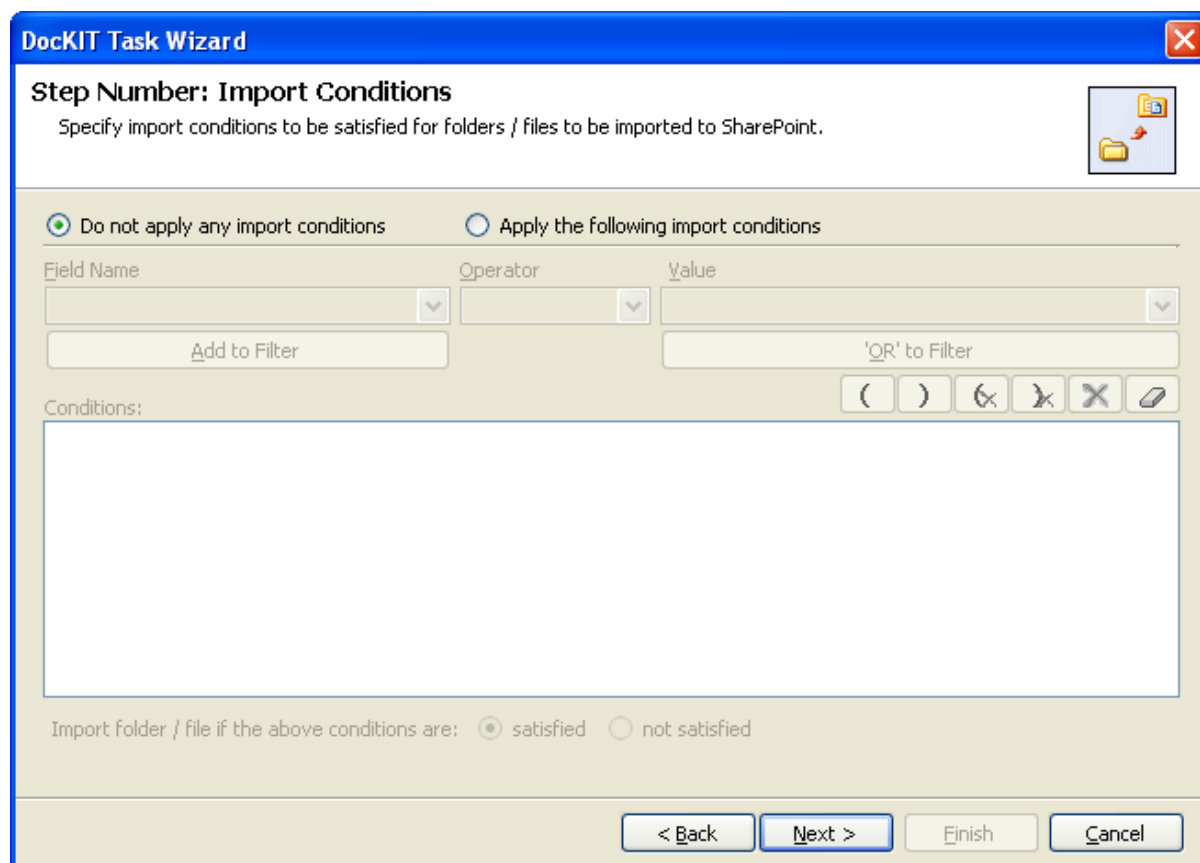
Click **Next** to Proceed.

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

### 4.9 Step 7: Import Conditions

DocKIT imports folders and files along with metadata to SharePoint library based on certain import conditions. Import conditions 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).

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



The screenshot shows the 'DocKIT Task Wizard' window at the 'Step Number: Import Conditions' stage. The window title is 'DocKIT Task Wizard' and it has a close button (X) in the top right corner. The main heading is 'Step Number: Import Conditions' with a sub-instruction: 'Specify import conditions to be satisfied for folders / files to be imported to SharePoint.' There is a folder icon in the top right corner of the main area. Below the instruction, there are two radio buttons: 'Do not apply any import conditions' (which is selected) and 'Apply the following import conditions'. Underneath, there is a table-like structure for defining conditions with columns for 'Field Name', 'Operator', and 'Value'. Each column has a dropdown menu. Below these columns are two buttons: 'Add to Filter' and ''OR' to Filter'. To the right of the 'Conditions:' label is a set of icons for logical operations: parentheses '(', ')', 'AND', 'OR', 'XOR', and a delete icon. Below the icons is a large empty text area for defining conditions. At the bottom of the main area, there is a label 'Import folder / file if the above conditions are:' followed by two radio buttons: 'satisfied' (selected) and 'not satisfied'. At the very bottom of the window, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

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

- a) **Do not apply any import conditions** - No import conditions will be used to filter folders / files
- b) **Apply the following import conditions** - The import conditions specified will be used to filter folders / files taken for import into SharePoint

3) The wizard step appears as shown below:

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

**DocKIT Task Wizard**

**Step Number: Import Conditions**  
Specify import conditions to be satisfied for folders / files to be imported to SharePoint.

Do not apply any import conditions     Apply the following import conditions

Field Name	Operator	Value
Modified Date (File Property)	>	23-Dec-11

'AND' to Filter      'OR' to Filter

Conditions:

```
[(Created Date (File Property)) > #23-Dec-11#  
AND [Modified Date (File Property)] > #23-Dec-11#  
OR [Modified Date (File Property)] > #23-Dec-11#
```

Import folder / file if the above conditions are:  satisfied     not satisfied

< Back    Next >    Finish    Cancel

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

- 4) Apart from relational operators, DocKIT allows you to construct flexible and generic import conditions by using the Changed operator for periodic document imports. It will be available for use for the fields - Created Date (File Property) and Modified Date (File Property) only. The following are the available values for this operator.

**Today, Yesterday, This Week, This Month, Last Week, Last Month, Since Last Import in DocKIT, Since Last Update in SharePoint, Last 7 days and Last 14 days.**

- 5) DocKIT can import the folders / files that satisfy the import conditions or import the folders / files that do not satisfy the import conditions specified in the step above. Use the appropriate action to follow using the options given below:
  - a) **Import folder / file if the above conditions are satisfied** - Folders / Files that satisfy the condition will be marked for import.



## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

- b) Import folder / file if the above conditions are not satisfied** - Folders / Files that do not satisfy the condition will be marked for import.

**DocKIT Task Wizard - sample**

**Step Number: Import Conditions**  
Specify import conditions to be satisfied for folders / files to be imported to SharePoint.

Do not apply any import conditions     Apply the following import conditions

Field Name	Operator	Value
Modified Date (File Property)	>	23-Dec-11

'AND' to Filter      'OR' to Filter

Conditions:

```
[(Created Date (File Property)) > #23-Dec-11#  
AND [Modified Date (File Property)] > #23-Dec-11#]  
OR [Modified Date (File Property)] > #23-Dec-11#
```

Import folder / file if the above conditions are:  satisfied     not satisfied

< Back    Next >    Finish    Cancel

Click **Next** to Proceed.

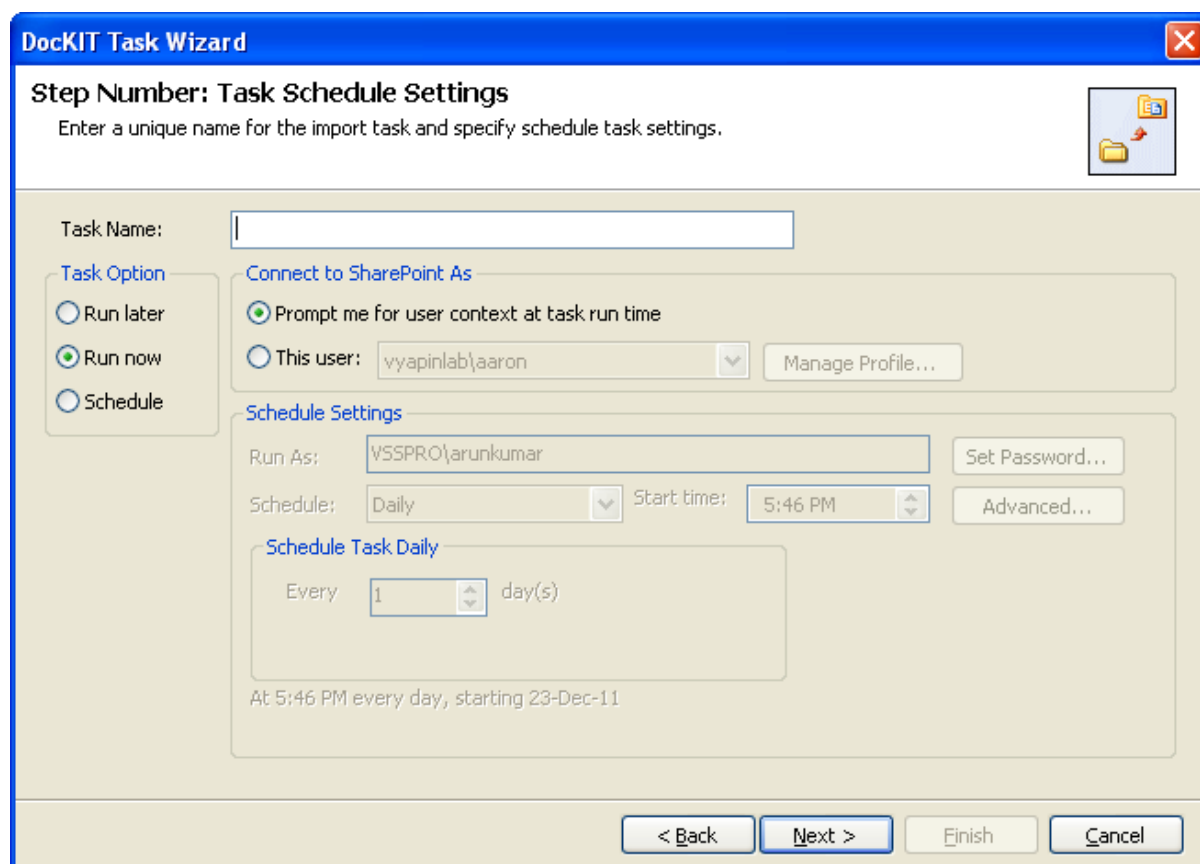
## Chapter-4–Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

### 4.10 Step 8: Task Schedule Settings

#### Task Settings

To specify the task name and schedule settings:

- 1) The **Task Settings** step appears as shown below



The screenshot shows the 'DocKIT Task Wizard' window at the 'Task Schedule Settings' step. The window title is 'DocKIT Task Wizard' and the step title is 'Step Number: Task Schedule Settings'. Below the title bar, there is a subtitle: 'Enter a unique name for the import task and specify schedule task settings.' and a folder icon with a red arrow.

The main area contains the following fields and options:

- Task Name:** A text input field.
- Task Option:** Three radio buttons: 'Run later', 'Run now' (selected), and 'Schedule'.
- Connect to SharePoint As:** A section with two radio buttons: 'Prompt me for user context at task run time' (selected) and 'This user:'. The 'This user:' option has a dropdown menu showing 'vyapinlab\aaroon' and a 'Manage Profile...' button.
- Schedule Settings:** A section with a 'Run As:' dropdown menu showing 'VSSPRO\arunkumar' and a 'Set Password...' button. Below it, a 'Schedule:' dropdown menu is set to 'Daily' and a 'Start time:' dropdown menu is set to '5:46 PM', with an 'Advanced...' button to the right.
- Schedule Task Daily:** A section with 'Every' followed by a dropdown menu set to '1' and 'day(s)'. Below this, it says 'At 5:46 PM every day, starting 23-Dec-11'.

At the bottom of the window, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

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

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

- a) **Prompt me for user context at task run time** - DocKIT will prompt for the user context to use to connect destination SharePoint at the time of DocKIT task run.
- b) **This user <user name>** - DocKIT will use stored profile context to connect destination SharePoint.

The screenshot shows the 'DocKIT Task Wizard' window, specifically the 'Step Number: Task Schedule Settings' dialog. The window title is 'DocKIT Task Wizard' and it has a close button (X) in the top right corner. Below the title bar, the text reads 'Step Number: Task Schedule Settings' and 'Enter a unique name for the import task and specify schedule task settings.' There is a small icon of a folder with a red arrow pointing to it in the top right corner of the dialog area.

The main content area is divided into several sections:

- Task Name:** A text box containing 'sample task'.
- Task Option:** A vertical list of three radio buttons: 'Run later', 'Run now' (which is selected), and 'Schedule'.
- Connect to SharePoint As:** A section with two radio buttons: 'Prompt me for user context at task run time' (selected) and 'This user:'. The 'This user:' option has a dropdown menu showing 'vyapinlab\aaroon' and a 'Manage Profile...' button.
- Schedule Settings:** A section with a 'Run As:' text box containing 'VSSPRO\arunkumar' and a 'Set Password...' button. Below it, a 'Schedule:' dropdown menu is set to 'Daily', and a 'Start time:' dropdown menu is set to '5:46 PM', with an 'Advanced...' button to its right.
- Schedule Task Daily:** A section with a text box containing 'Every 1 day(s)', where '1' is in a small dropdown menu.
- Summary:** A line of text at the bottom of the schedule section that reads 'At 5:46 PM every day, starting 23-Dec-11'.

At the bottom of the dialog, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

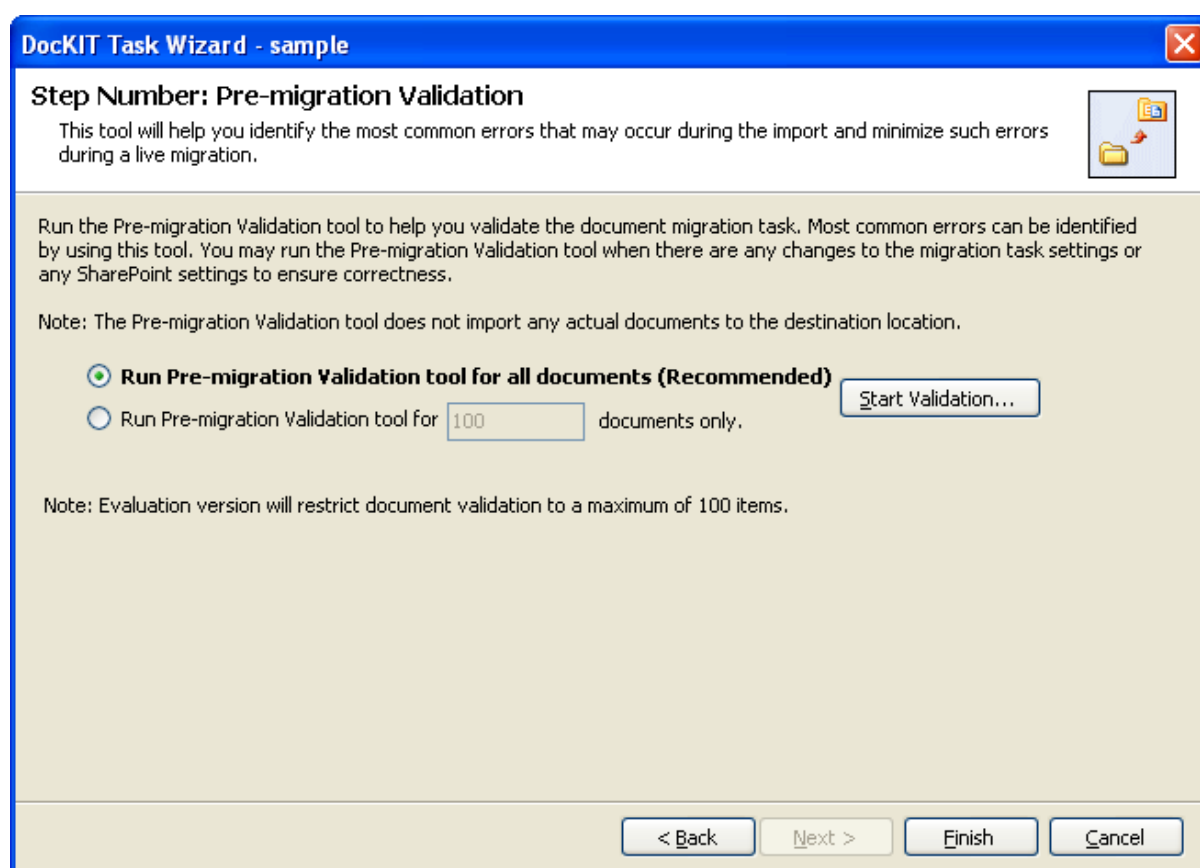
- 5) Click **Finish** button to create the task.

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

### 4.11 Step 9: Pre-migration Validation

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

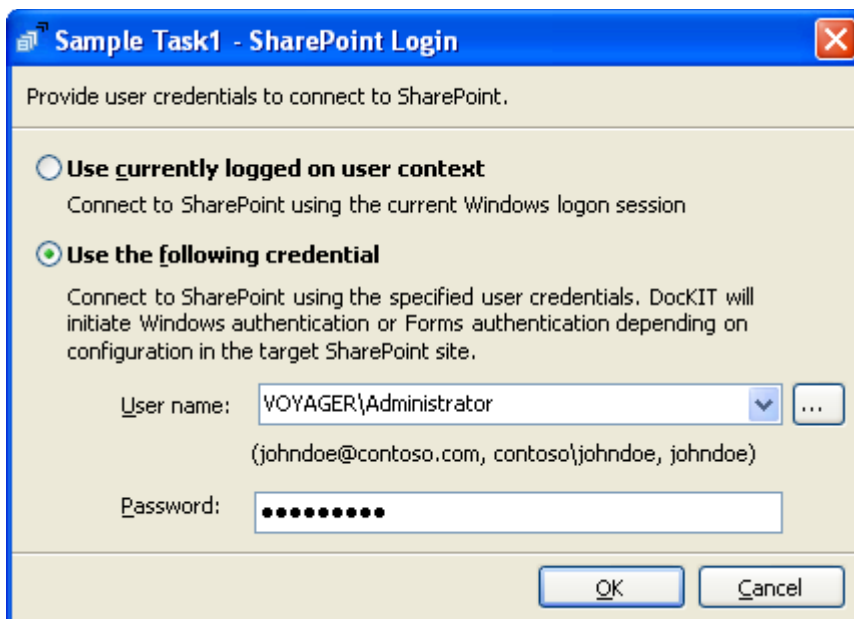
- 1) The **Pre-migration Validation** step in the DockIT Task Wizard appears as shown below:



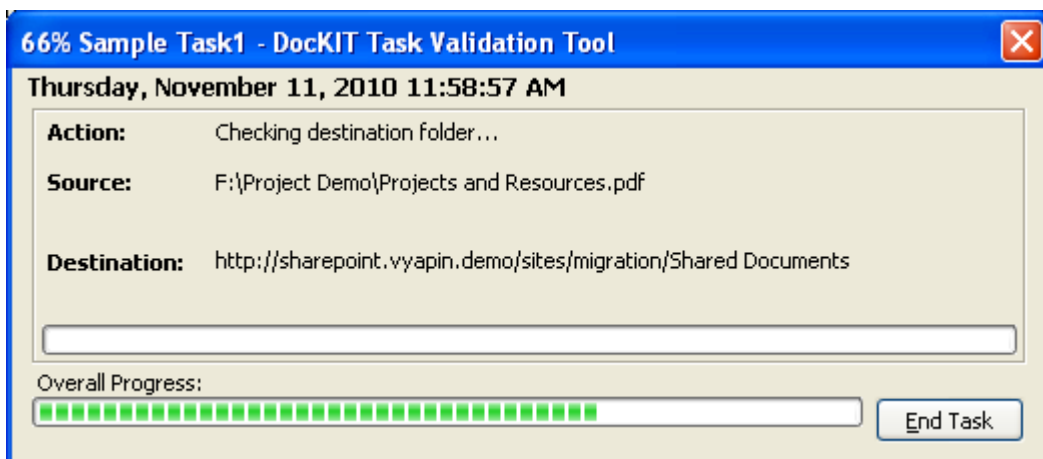
- 2) Select any of the following options below to specify the number of files to invoke and run the Pre-migration Validation tool:
  - a) **Run Pre-migration Validation tool for all documents (Recommended)** - This option runs the Pre-migration Validation tool for all folders and files specified in the import task wizard.
  - b) **Run Pre-migration Validation tool for <n> documents only** - This option runs the Pre-migration Validation tool for the specified number of files in the text box.

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

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

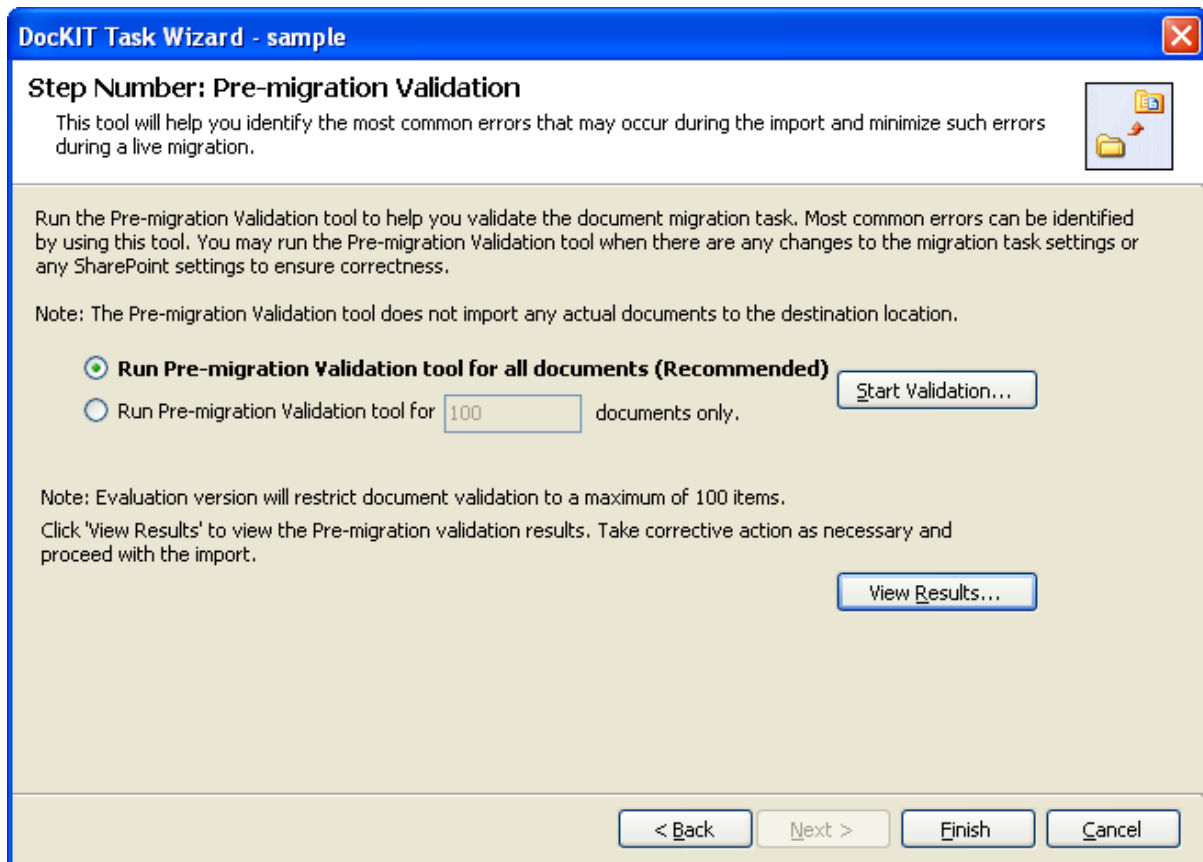


- 5) You will notice a task progress bar in a new window as shown below:



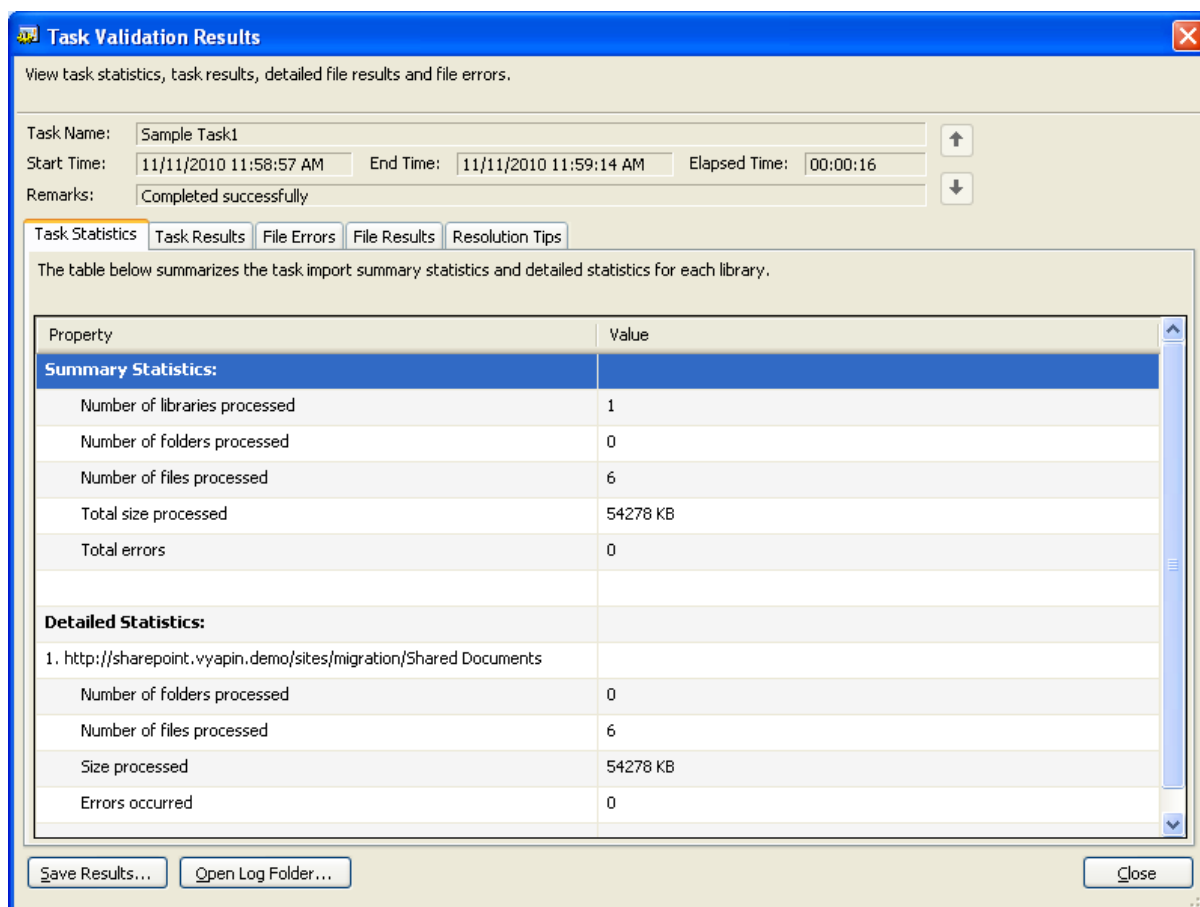
## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

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



## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

7) The **Task Validation Results** dialog will appear as shown below:



8) The validation test results are summarized under four separate tabs:

- a) **Task Statistics:** Summarizes the task import summary statistics and detailed statistics for each destination library.
- b) **Task Results:** Summarizes the task level check (specifically, import task settings) results from the task validation tool.
- c) **File Results:** Summarizes the task validation tool results after verification of each folder / file added for import.
- d) **File Errors:** Summarizes the items for which an error has occurred.

9) Click **Save Results** button to save the task validation results in Microsoft Excel format. Each tab in Task Validation Results is stored as a separate worksheet in MS-Excel.

10) Click **Open Log Folder** button to open the folder that contains the activity log of the task validation results.

## **Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)**

### **Limitations:**

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

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



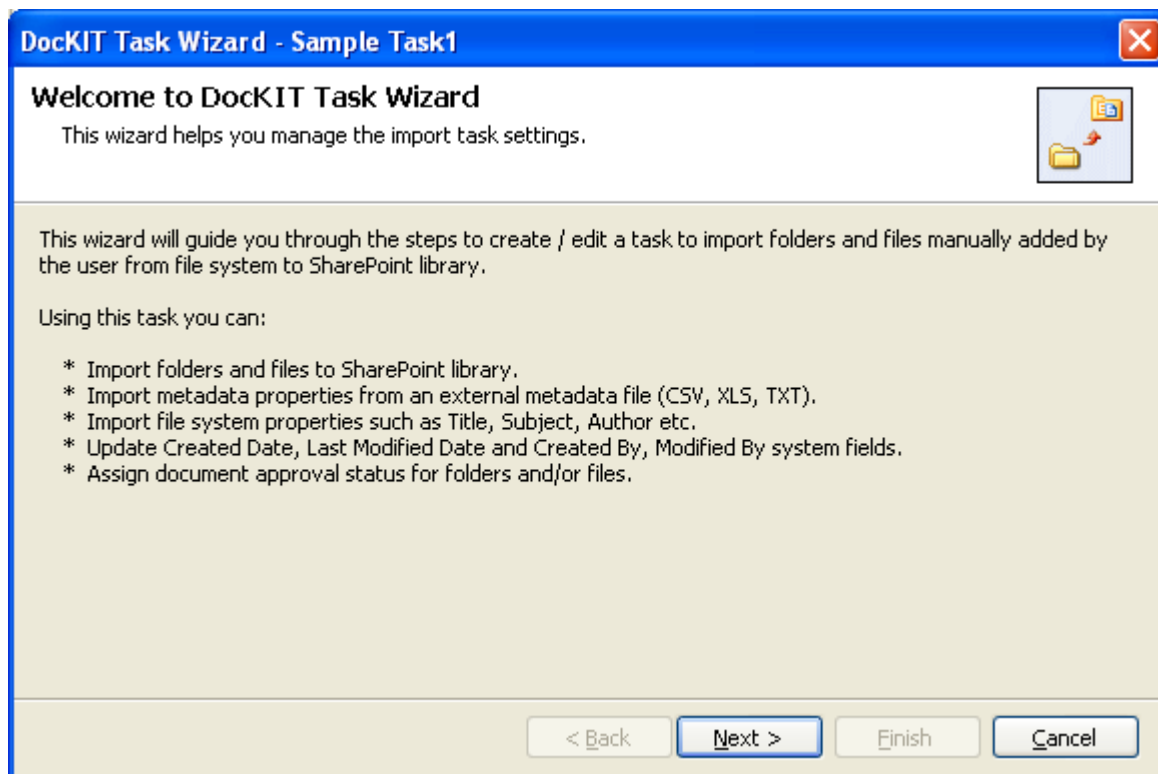
## Chapter-4–Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

### 4.12 Edit Task

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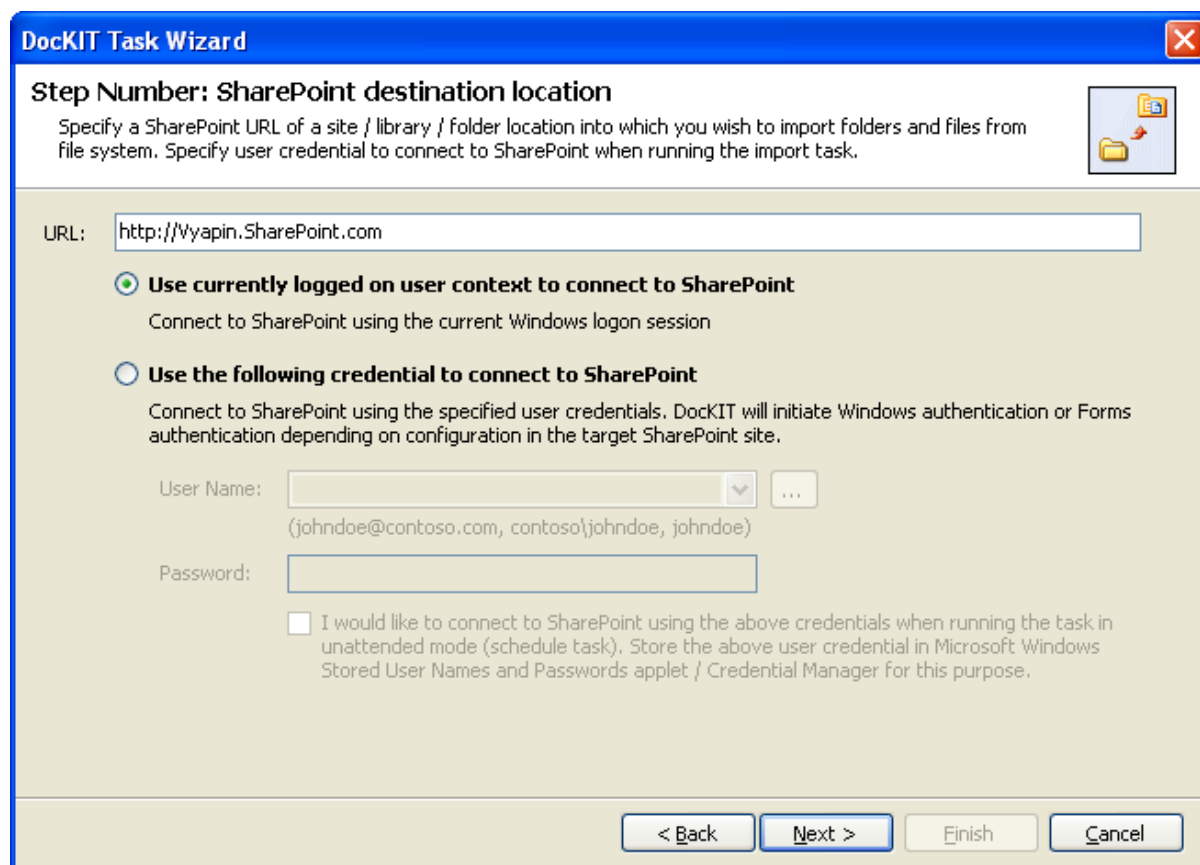
Edit task is similar to creating a task, except that a few settings cannot be altered as stated below.

- 1) The **DockIT Task Wizard** appears as shown below:



- 2) Click **Next** button.
- 3) In *SharePoint destination location*, DockIT Task Wizard allows you to edit the user credentials settings to connect to SharePoint. SharePoint **URL** cannot be altered.

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)



The screenshot shows the 'DocKIT Task Wizard' dialog box. The title bar is blue with the text 'DocKIT Task Wizard' and a close button. The main area has a light beige background. At the top, it says 'Step Number: SharePoint destination location' followed by instructions: '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.' There is a small icon of a folder with a document and an arrow. Below this, there is a text box for 'URL:' containing 'http://Vyapin.SharePoint.com'. Two radio buttons are present: the first is selected and labeled 'Use currently logged on user context to connect to SharePoint' with the subtext 'Connect to SharePoint using the current Windows logon session'. The second is unselected and labeled 'Use the following credential to connect to SharePoint' with the subtext 'Connect to SharePoint using the specified user credentials. DocKIT will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.' Below the second radio button, there are fields for 'User Name:' (with a dropdown menu and a button) and 'Password:'. A checkbox is also present with the text: 'I would like to connect to SharePoint using the above credentials when running the task in unattended mode (schedule task). Store the above user credential in Microsoft Windows Stored User Names and Passwords applet / Credential Manager for this purpose.' At the bottom, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

**4)** Add folders and files as *Items to import*

**5)** Specify *Mapping Options*

**6)** Specify *Mapping Templates*

**7)** Specify *Permission Options*

**8)** Specify *File Settings*

**9)** Specify *Import Conditions*

**10)** In *Task Settings* edit mode, DocKIT Task Wizard the task name cannot be altered.

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

**DocKIT Task Wizard - sample**

**Step Number: Task Schedule Settings**  
Enter a unique name for the import task and specify schedule task settings.

Task Name:

Task Option

- Run later
- Run now
- Schedule

Connect to SharePoint As

- Prompt me for user context at task run time
- This user:

Schedule Settings

Run As:  

Schedule:  Start time:  

Schedule Task Daily

Every  day(s)

At 6:16 PM every day, starting 23-Dec-11

< Back   Next >   Finish   Cancel

**11)** Specify *Pre-migration Validation*

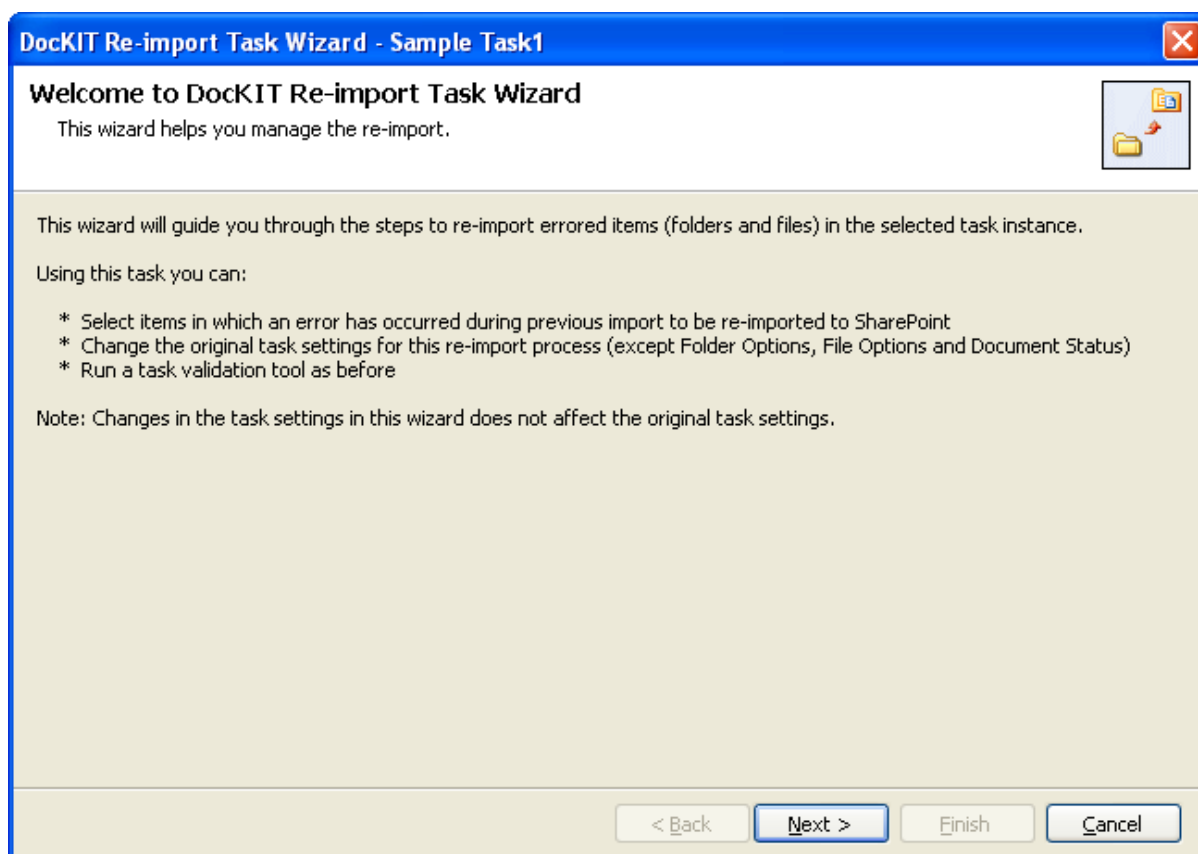
**12)** Click **Finish** button to save the task settings, or click **Back** button to go to the previous step.

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

### 4.13 Re-import Task

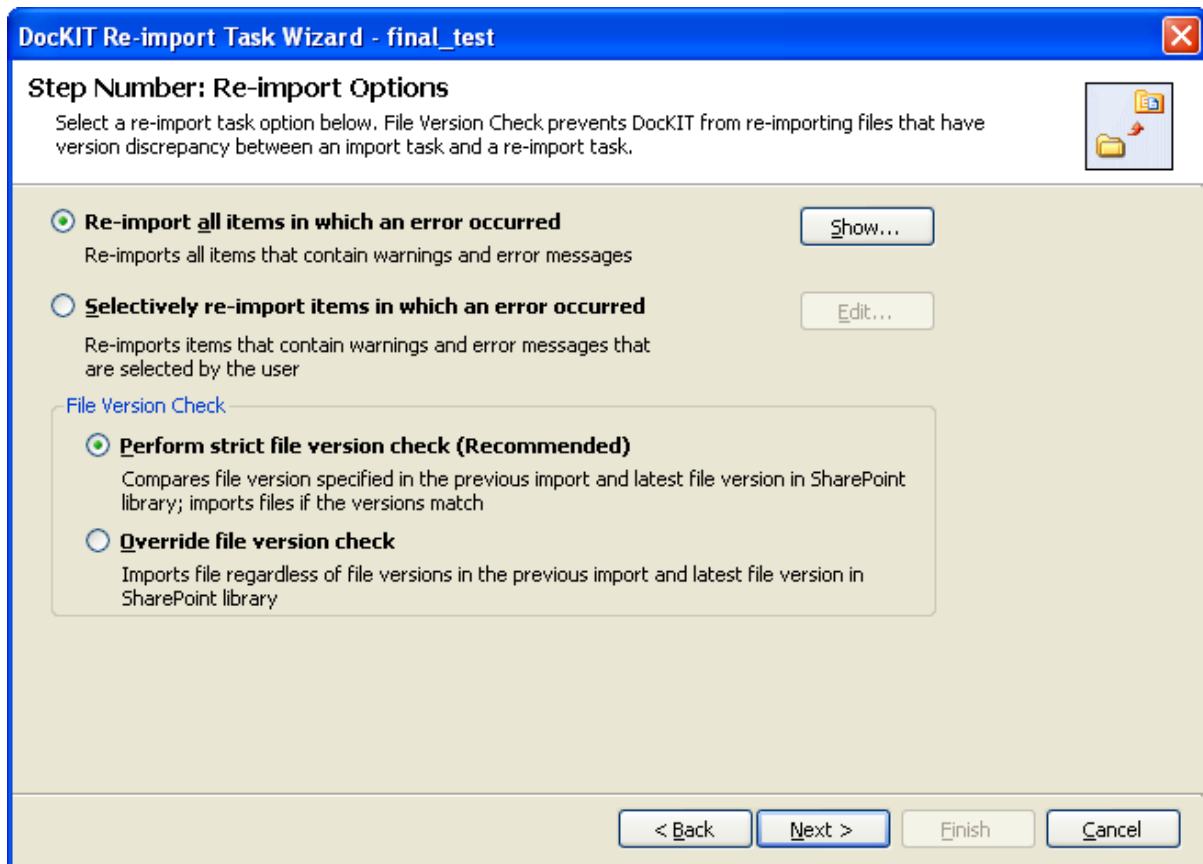
The Re-import Task tool will help you re-import folders / files that had errors in them. Re-import Task is similar to a new task, except that you can import only folders / files that resulted in errors or folders / files that did not migrate to the destination library during the import process. You can change the original task settings in a re-import task, except Folder Options, File Options and Document Status settings that were defined in the original task.

- 1) The **DockIT Re-import Task Wizard** appears as shown below. Click **Next** button to proceed.



## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

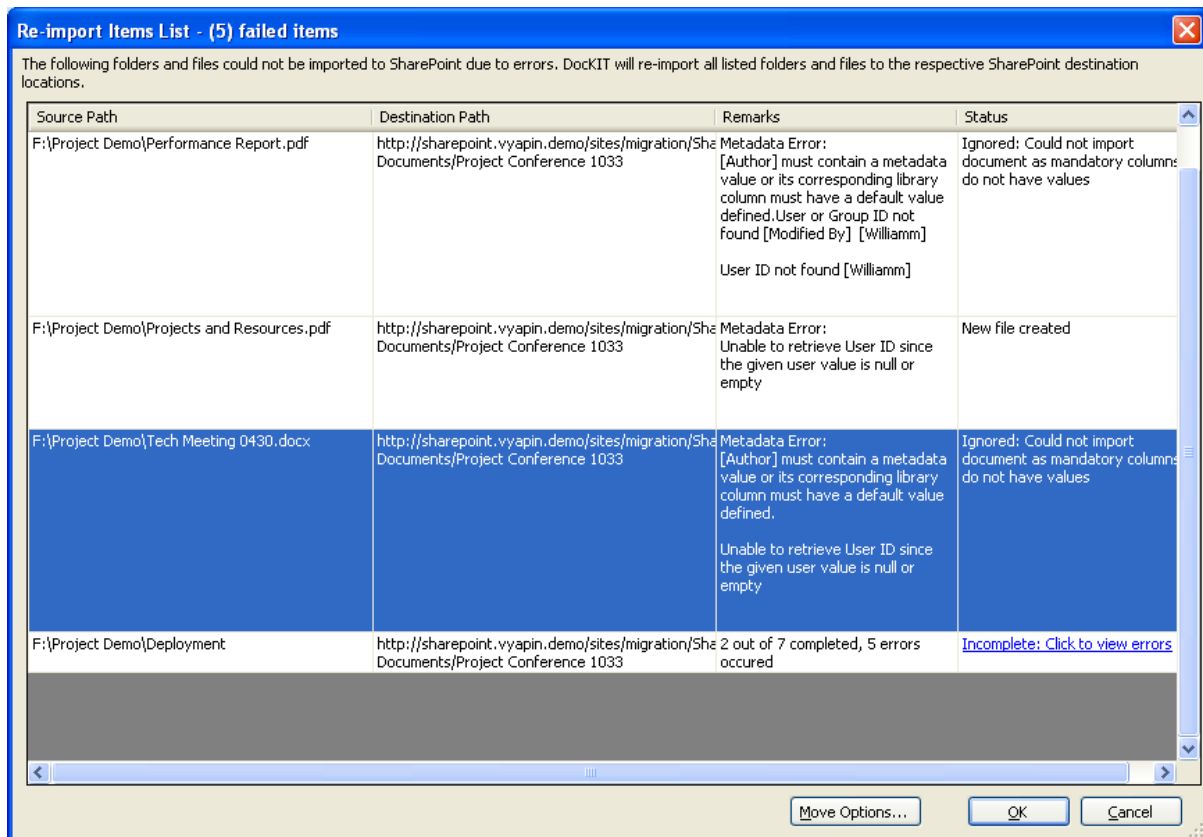
2) **Re-import Options** step appears as shown below:



a) **Re-import all items in which an error occurred** - Re-imports all folder / file items that contain warnings & errors and the folder / file items that were not migrated to the destination library. Click **Show...** button to view items to be re-imported.

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

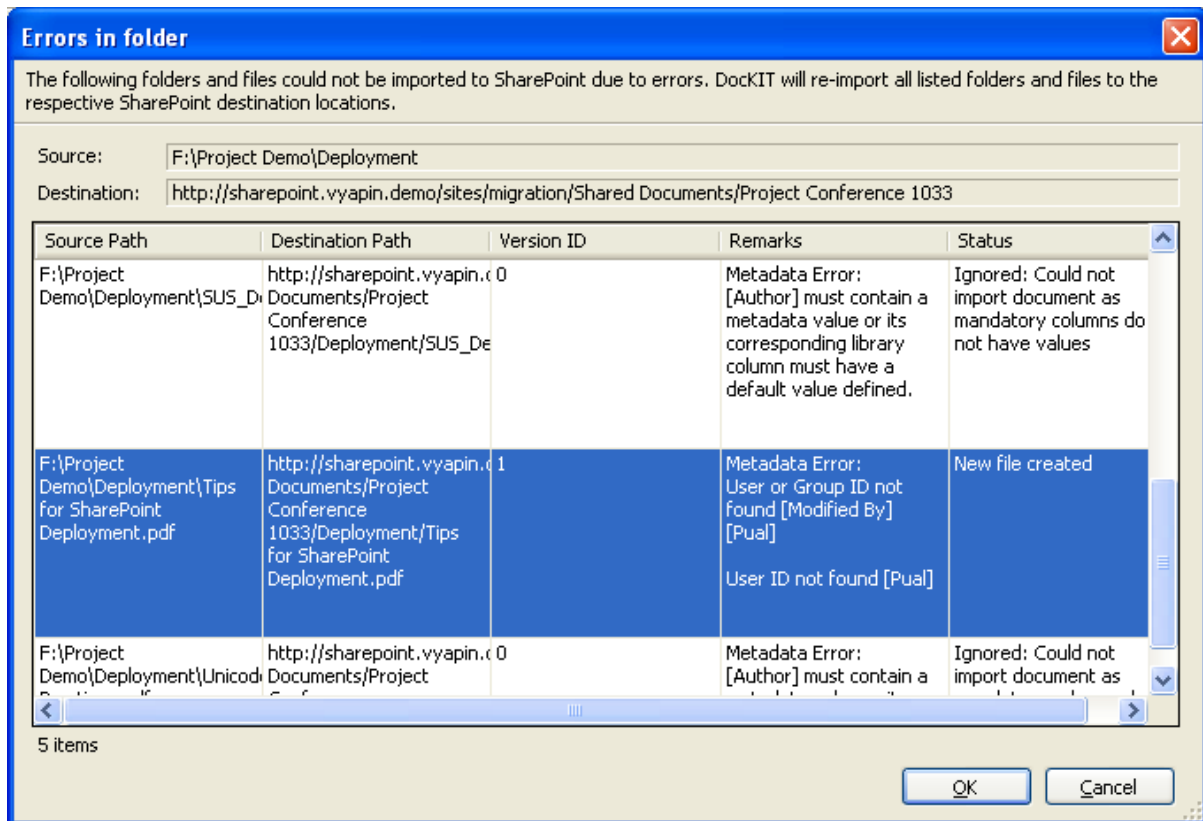
The **Re-import Items List** dialog appears as shown below:



Click the hyperlink available in the respective folder entries to view the items to be re-imported from the selected folder.

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

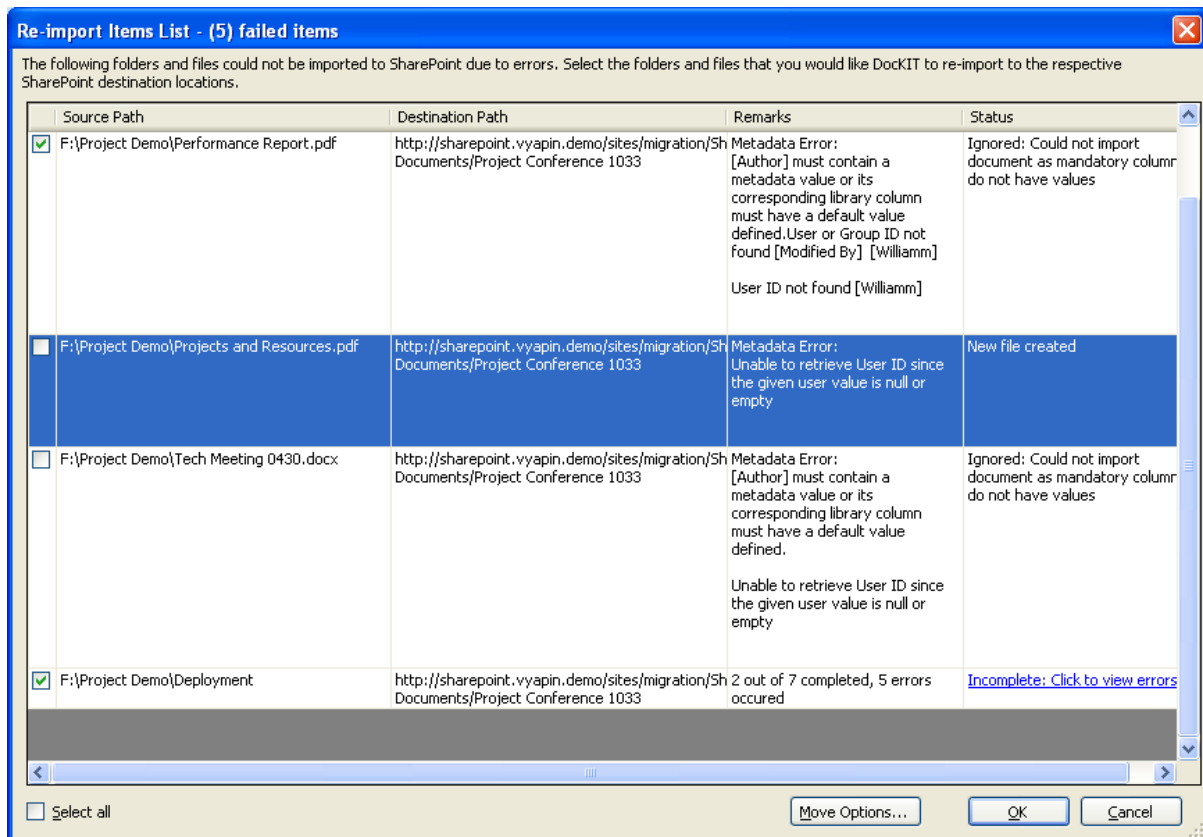
The 'Errors in folder' dialog appears as shown below:



- b) Selectively re-import items in which an error occurred** - Re-imports items that contain warnings and error messages that are selected by the user. Click Edit... button to select the required items to be re-imported by this task.

## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

The 'Re-import Items List' dialog appears as shown below:

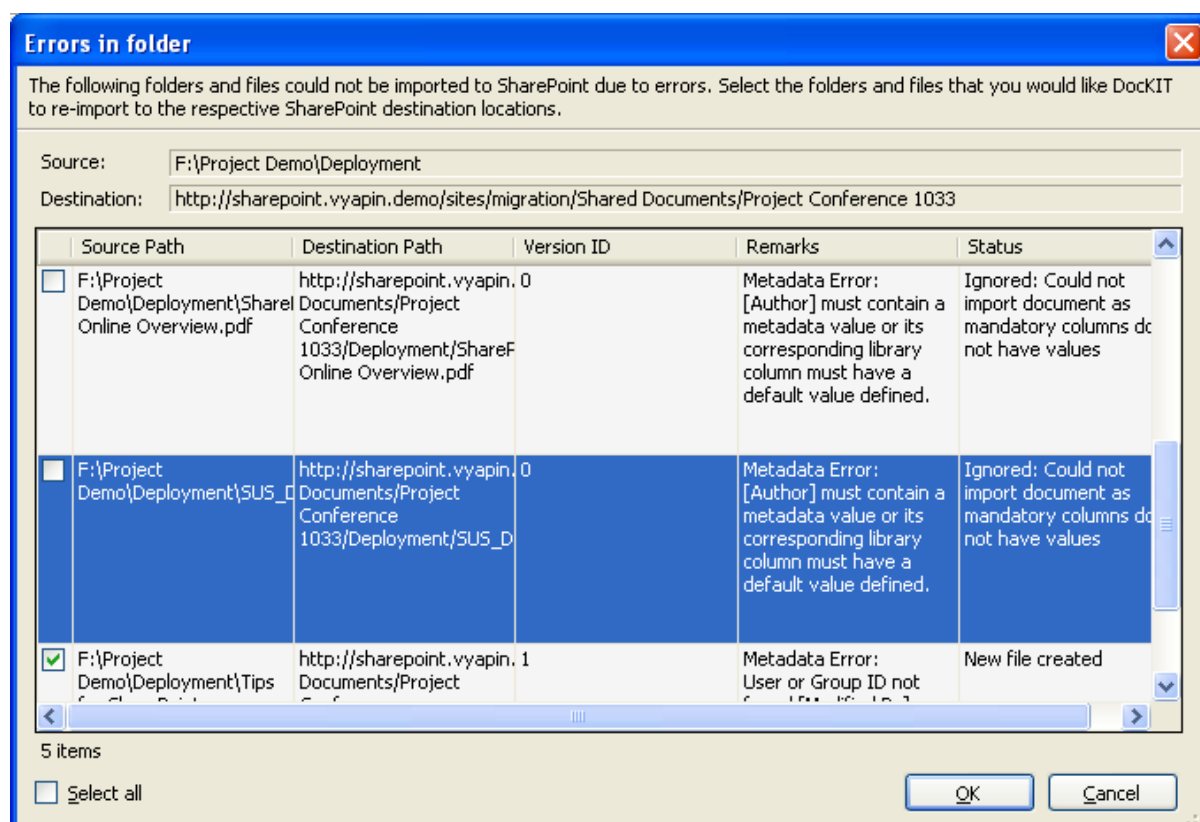


Click the hyperlink available in the respective folder entries to view the items to be re-imported from the selected folder.



## Chapter-4-Import folders, files & metadata to SharePoint Libraries (Explorer Mode)

The 'Errors in folder' dialog appears as shown below:



**4) File Version Check** prevents DockIT from re-importing files that have newer version of files in a SharePoint library, in the elapsed time between an import task and a re-import task. Select a **File Version Check** setting from any one of the following options given below:

**a) Perform strict file version check (Recommended)** - Compares file version specified in the previous import and latest file version in SharePoint library; imports files if the versions match and ignores files whose file version's do not match at the time of re-import. For example, let's assume that DockIT attempted to import file (say, "Test Document.doc") as version (say, 1.6) in the import task and it failed for some reason. The file version check will ensure that the re-import task is importing ("Test Document.doc") as version 1.6 again, in order to avoid importing files when a newer version of the file may have been added by another user. This check is performed by comparing the last version that DockIT tried to import and the current file version in the SharePoint library, at the time of re-import.

**b) Override files version check** - Imports file regardless of file version in the previous import and latest file version in SharePoint library. The file version is completely ignored.

**5)** Follow the same steps in Create Task wizard for the remaining steps. Please note that the original task settings in Folder Options, File Settings and Document Status cannot be altered.

## **5 Import folders, files and metadata to SharePoint Libraries (Batch File Mode)**

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- **Create Task**
  
- **Edit Task**
  
- **Copy Task**
  
- **Delete Task**
  
- **Run Task**
  
- **Re-import Task**

## Chapter-5–Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

### 5.1 Batch File Structure

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

- 1) The first row of the batch file should contain the Field Names as headers.
- 2) The first field should be named as '**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 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 Path and Destination Path field will not be carried forward as a metadata field into SharePoint.
- 4) The first column of all the rows should contain the source path of the file e.g., "C:\My Projects\Sales Brochures.doc" (or) \\FileServer\My Documents\Sales Templates.xls
- 5) 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 batch file. If you use local / mapped drives to import files, ensure the 'Path' field has the corresponding local / mapped drive path (e.g., M:\My Document\Sample File.xls). If you use shares to import file, ensure the 'Path' field has the corresponding UNC path (e.g., \\Machine\_Name\Share\_Name\Sample File.xls).
- 6) The second column of all the rows should contain the destination path of the file e.g., http://sharepoint/technical documents/folder1. In this case the destination

## Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

path should be either SharePoint Library URL or sub-folder URL of SharePoint Library.

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

Path	Destination Path	New Folder
M:\My Document\Sample File.xls	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.xls' will be imported into the new destination location 'http://sharepoint/technical documents/folder1/folder2/folder3'.

- 8) 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.dummy	http://vyapin/project documents/folder1	Sample Test.doc	http://www.google.com	Link to a document	John Doe
M:\file1.dummy	http://vyapin/project documents/folder1/su b1	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.

- 9) The **New Folder** and **Link Name** fields will not be carried forward as a metadata field into SharePoint.

## **Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)**

### **Sample format of a CSV / TEXT batch file:**

*NOTE: Refer Point #2 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.xls","http://sharepoint/libone2","FolderA/FolderAA/FolderAAA"

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

## **5.2 Metadata File Structure**

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Please Click the Link Below to read about the Metadata File Structure:-

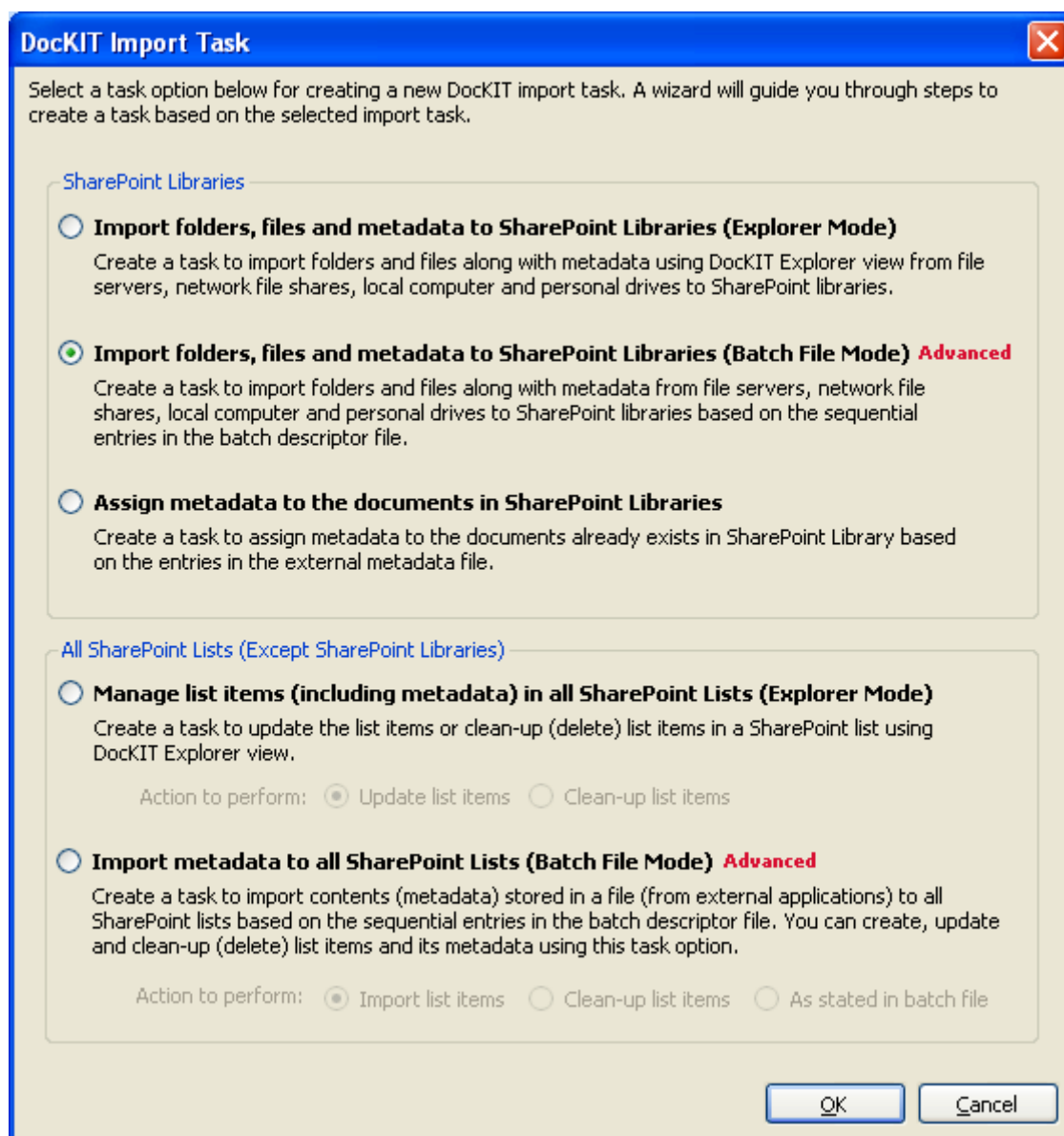
[Metadata File Structure](#)

## Chapter-5–Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

### 5.3 Create Task

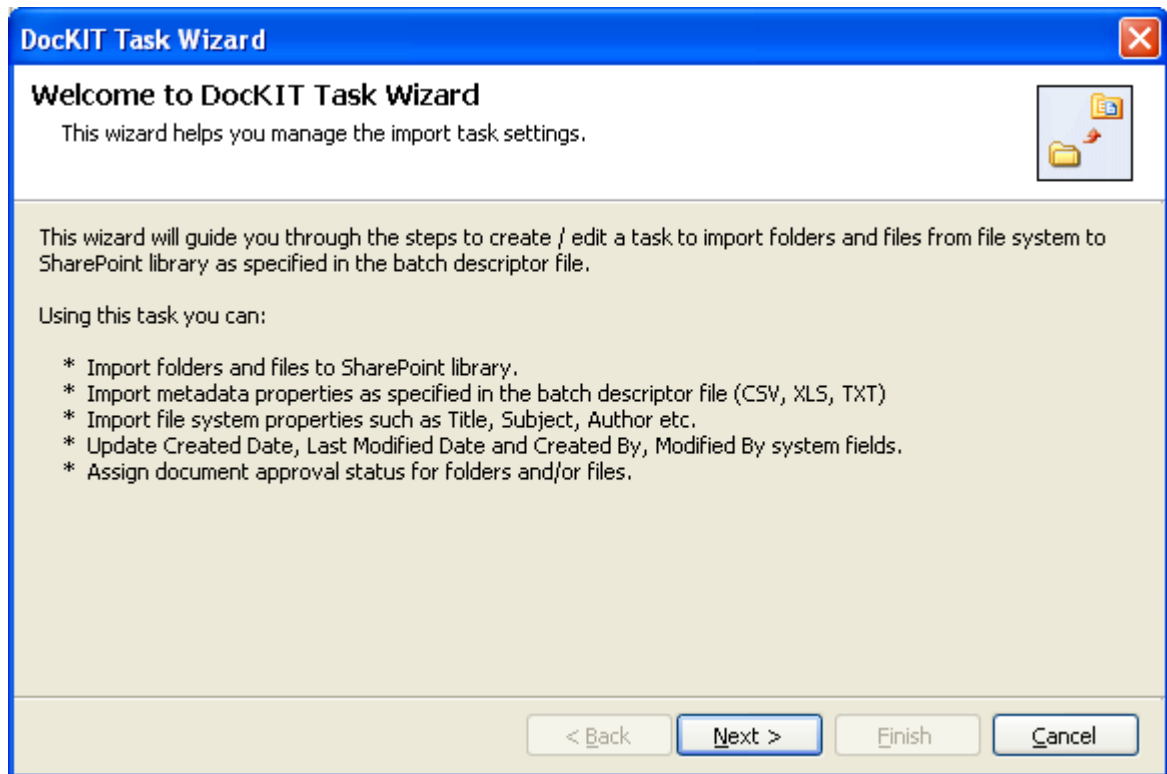
Create a task to import folders and files along with metadata from file system to SharePoint Library based on the entries in the descriptor file. DockIT will process the files in the order in which they appear in the batch descriptor file.

- 1) Select **Import folders, files and metadata to SharePoint Libraries (Batch File Mode)** option in **DockIT Import Task** dialog as shown below and click **OK**.



## Chapter-5–Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

### 2) The DocKIT Task Wizard appears



3) Click **Next button**

4) Specify **Batch File Options**

5) Specify **Metadata Options**

6) Specify **Rename folders and files**

7) Specify **Folder Options**

8) Specify **File Settings**

9) Specify **Import Conditions**

10) Specify **Task Settings**

11) Specify **Pre-migration Validation**

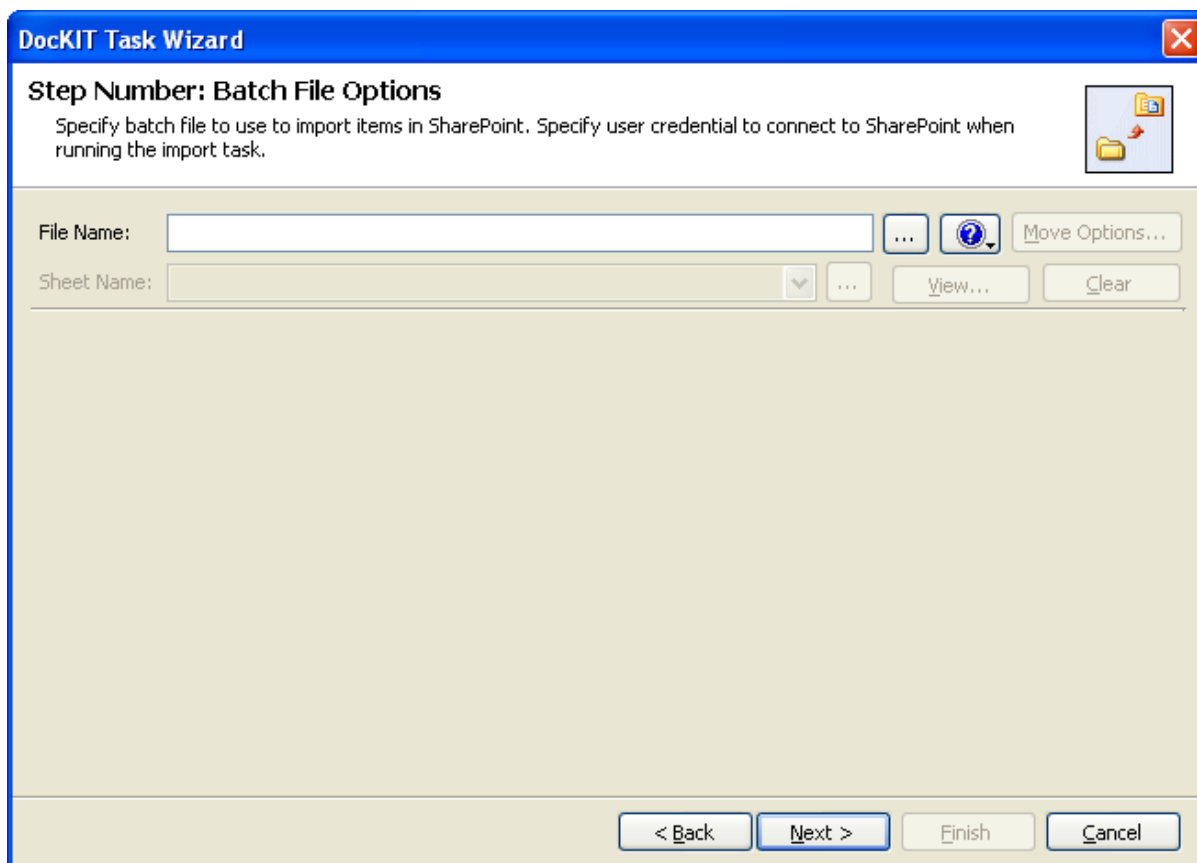
12) Click **Finish** button to create the task, or click **Back** button to change the any task settings.

## Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

### 5.4 Step-1 Batch File Options

In the batch file, to specify the documents to import into the SharePoint Library:

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



**DocKIT Task Wizard**

**Step Number: Batch File Options**

Specify batch file to use to import items in SharePoint. Specify user credential to connect to SharePoint when running the import task.

File Name:  ... ? Move Options...

Sheet Name:  ... View... Clear

< Back Next > Finish Cancel

- 2) **Click (...)** button to specify the batch file. The batch file can be any one of the following file formats - Comma delimited (CSV), Microsoft Excel (XLS) or Text file (TXT).
- 3) **Click (?)** drop down button if you want to see a sample batch descriptor file (such as, Comma delimited (CSV) file, Excel (XLS) file) to know what are the mandatory columns, how to give values for these columns and how it should be formatted in a batch descriptor file.
- 4) Specify the users credentials to connect to SharePoint using the options given below to run the import task in unattended mode / scheduled run,
  - a) **Use currently logged on user context to connect to SharePoint** - Connect to SharePoint URL using the currently logged on user context
  - b) **Use the following credential to connect to SharePoint** - Connect to the SharePoint URL using a different user context. Enter the user name in any



## Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

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.

In scheduled import process, *DocKIT* allows the user to enter different user credentials to connect to SharePoint and to create a scheduled import 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. Hence, you will not be allowed to change the scheduled 'Run As' user context for the import task.

**DocKIT Task Wizard**

**Step Number: Batch File Options**

Specify batch file to use to import items in SharePoint. Specify user credential to connect to SharePoint when running the import task.

File Name: C:\Documents and Settings\arunkumar\Desktop\SampleBatchDescriptor.csv

Sheet Name:

< Back   Next >   Finish   Cancel

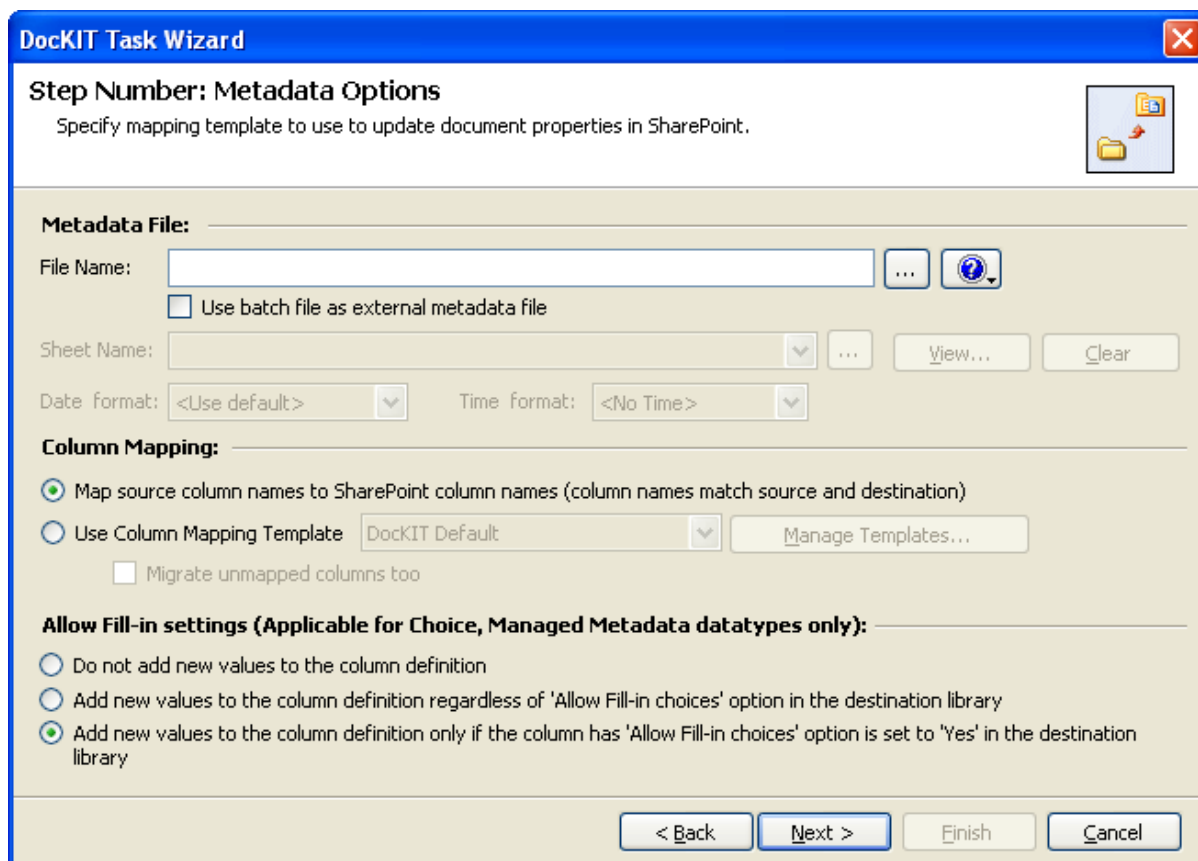
Click **Next** to Proceed.

## Chapter-5–Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

### 5.5 Step 2: Metadata Options

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

- 1) The **Metadata Options** step appears as shown below:



The screenshot shows the 'DocKIT Task Wizard' window at the 'Step Number: Metadata Options' stage. The window title is 'DocKIT Task Wizard' and it has a close button (X) in the top right corner. The main heading is 'Step Number: Metadata Options' with a sub-instruction: 'Specify mapping template to use to update document properties in SharePoint.' There is a small icon of a folder and a document with a red arrow pointing to it.

**Metadata File:**

File Name: [Text Box] [Browse Button (...)] [Help Button (?)]

Use batch file as external metadata file

Sheet Name: [Text Box] [Dropdown Arrow] [Browse Button (...)] [View... Button] [Clear Button]

Date format: [<Use default> Dropdown] Time format: [<No Time> Dropdown]

**Column Mapping:**

Map source column names to SharePoint column names (column names match source and destination)

Use Column Mapping Template [DockIT Default Dropdown] [Manage Templates... Button]

Migrate unmapped columns too

**Allow Fill-in settings (Applicable for Choice, Managed Metadata datatypes only):**

Do not add new values to the column definition

Add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library

Add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination library

Navigation buttons at the bottom: < Back, Next >, Finish, Cancel

- 2) **Use batch file as external metadata file** option enables you to provide the same batch file given in the previous step as external metadata file, in order to lookup the metadata values for files and folders being imported into SharePoint. In other words, if you have the a single batch descriptor file containing metadata for the respective files being imported, you can provide the same batch file to use as the external metadata file by selecting **Use batch file as external metadata file option**. It will be selected by default if you are creating a new import task. Therefore, you can have the metadata values either in the same batch file (single file) or in the separate file (batch file and external metadata file) to update to the respective SharePoint columns of the imported files and/or folders. If you have separate metadata file for the import task, click (...) button to specify the required metadata file.

## Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

- 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 (XLS) or Text file (TXT).
- 4) The external metadata file will automatically be extracted once the file name is specified. If you are using a Microsoft Excel based metadata file, then select the sheet name to use from the drop-down.
- 5) Click (?) drop down button if you want to see a sample external metadata file (such as, Comma delimited (CSV) file, Excel (XLS) file) to know how the columns should be arranged in an external metadata file.
- 6) Specify the **Metadata columns to import** by choosing one of the options given below:
  - a) **Do not import metadata values** - No columns will be imported
  - b) **Import all columns** - All columns available in the metadata file at the time of task run will be imported
  - c) **Import selected columns only** - Selected columns only will be imported
  - d) **Ignore selected columns** - All columns will be imported, except the selected columns
- 7) **Select** the required columns from the metadata file to be updated in SharePoint based on the selected option in step 4.
- 8) Select the **Fill-in choice settings** as below,
  - a) **Do not add new values to the column definition** - When selecting this option, DockIT does not create or add new values to the column definition (For example: Choice field definition, Managed Metadata field definition).
  - b) **Add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library** - When selecting this option, DockIT will create or add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library.
  - c) **Add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination library** - When selecting this option, DockIT will create or add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination library.
- 9) Specify the **Date and Time format** for the date fields in the metadata file. If the column selected to import contains date and time values, specify the date mask to parse the date values. The default value is the current system settings.

## Chapter-5–Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

**DocKIT Task Wizard** [Close]

**Step Number: Metadata Options** [Help]

Specify mapping template to use to update document properties in SharePoint.

---

**Metadata File:**

File Name: C:\Documents and Settings\arunkumar\Desktop\SampleBatchDescriptor.csv [Browse] [Refresh]

Use batch file as external metadata file

Sheet Name: [Dropdown] [More] [View...] [Clear]

Date format: <Use default> [Dropdown] Time format: <No Time> [Dropdown]

---

**Column Mapping:**

Map source column names to SharePoint column names (column names match source and destination)

Use Column Mapping Template **sample** [Dropdown] [Manage Templates...] [Validate...]

Migrate unmapped columns too

---

**Allow Fill-in settings (Applicable for Choice, Managed Metadata datatypes only):**

Do not add new values to the column definition

Add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library

Add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination library

[< Back] [Next >] [Finish] [Cancel]

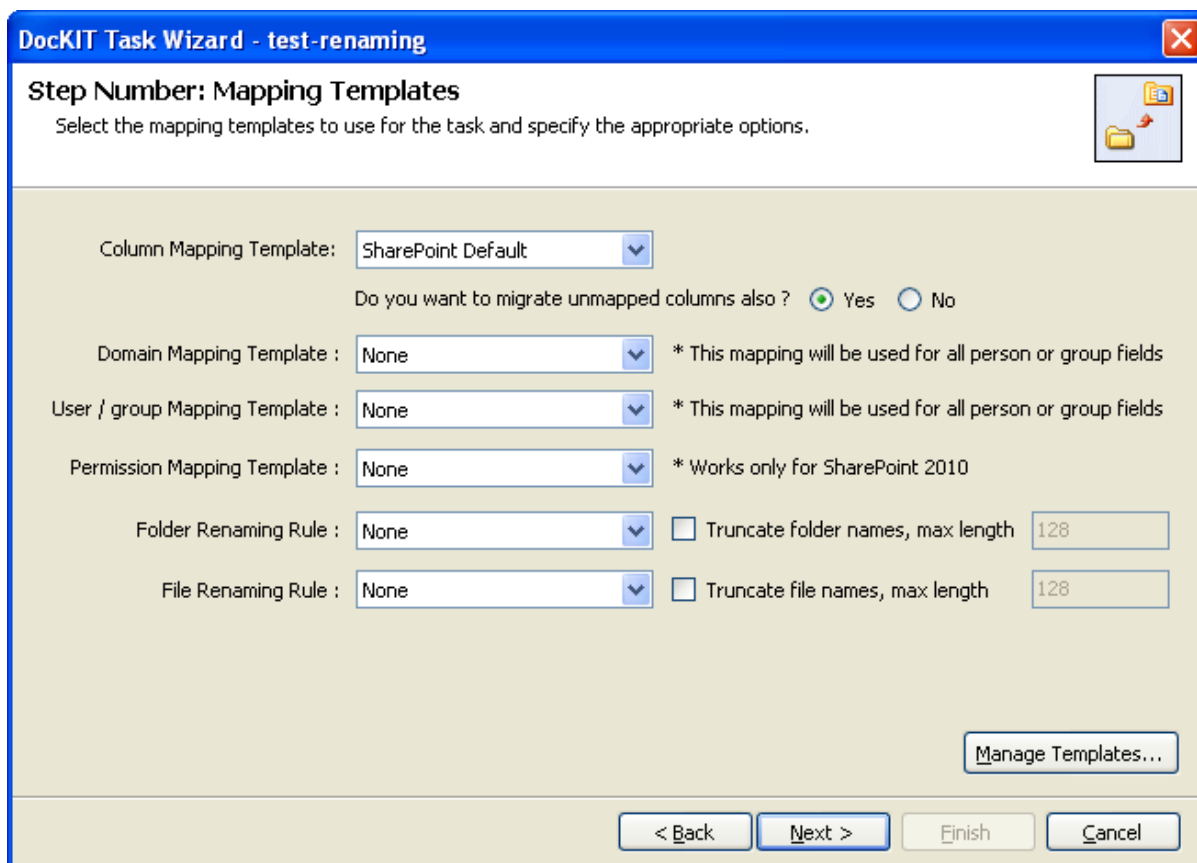
Click **Next** to Proceed.

## Chapter-5–Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

### 5.6 Step 3: Mapping Templates

To specify the mapping templates to use for the task:

- 1) The **Mapping Templates** step appears as shown below:



**DocKIT Task Wizard - test-renaming**

**Step Number: Mapping Templates**  
Select the mapping templates to use for the task and specify the appropriate options.

Column Mapping Template : SharePoint Default

Do you want to migrate unmapped columns also ?  Yes  No

Domain Mapping Template : None \* This mapping will be used for all person or group fields

User / group Mapping Template : None \* This mapping will be used for all person or group fields

Permission Mapping Template : None \* Works only for SharePoint 2010

Folder Renaming Rule : None  Truncate folder names, max length 128

File Renaming Rule : None  Truncate file names, max length 128

Manage Templates...

< Back Next > Finish Cancel

#### 2) Column Mapping Template :

Select any one column mapping template to use from the list of available template(s).

Default Templates

**a) SharePoint Default** - All columns values available in the metadata file at the time of task run will be imported to its corresponding columns in SharePoint

**b) DocKIT Default** - Values assigned to the destination SharePoint columns depending upon the DocKIT default mapping template.

**Do you want to Migrate unmapped columns also ? - Enabling this option helps to import the all unmapped columns available in the metadata file along with the columns that are mapped to the destination column in the mapping template to use:**

## **Chapter-5–Import folders, files and metadata to SharePoint Libraries (Batch File Mode)**

If external metadata file have some columns that are not mapped to the destination column, DockIT will migrate the unmapped columns to the SharePoint library.

When you deselect this option, DockIT does not migrate the unmapped columns to the destination SharePoint library. It migrate the columns depending up on the mapping template.

### **3) Domain Mapping Template :**

Select any one domain mapping template to use from the list of available template(s).

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

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

### **4) User / Group Mapping Template :**

Select any one user / group mapping template to use from the list of available template(s)

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

### **5) Permission Mapping Template :**

Select any permission mapping template to use from the list of available template(s)

None represents the default permission mapping template.

**NOTE:** This mapping works only for SharePoint 2010.

### **6) Folder Renaming Rule :**

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

#### **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 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.

## Chapter-5–Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

### 7) File Renaming Rule :

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

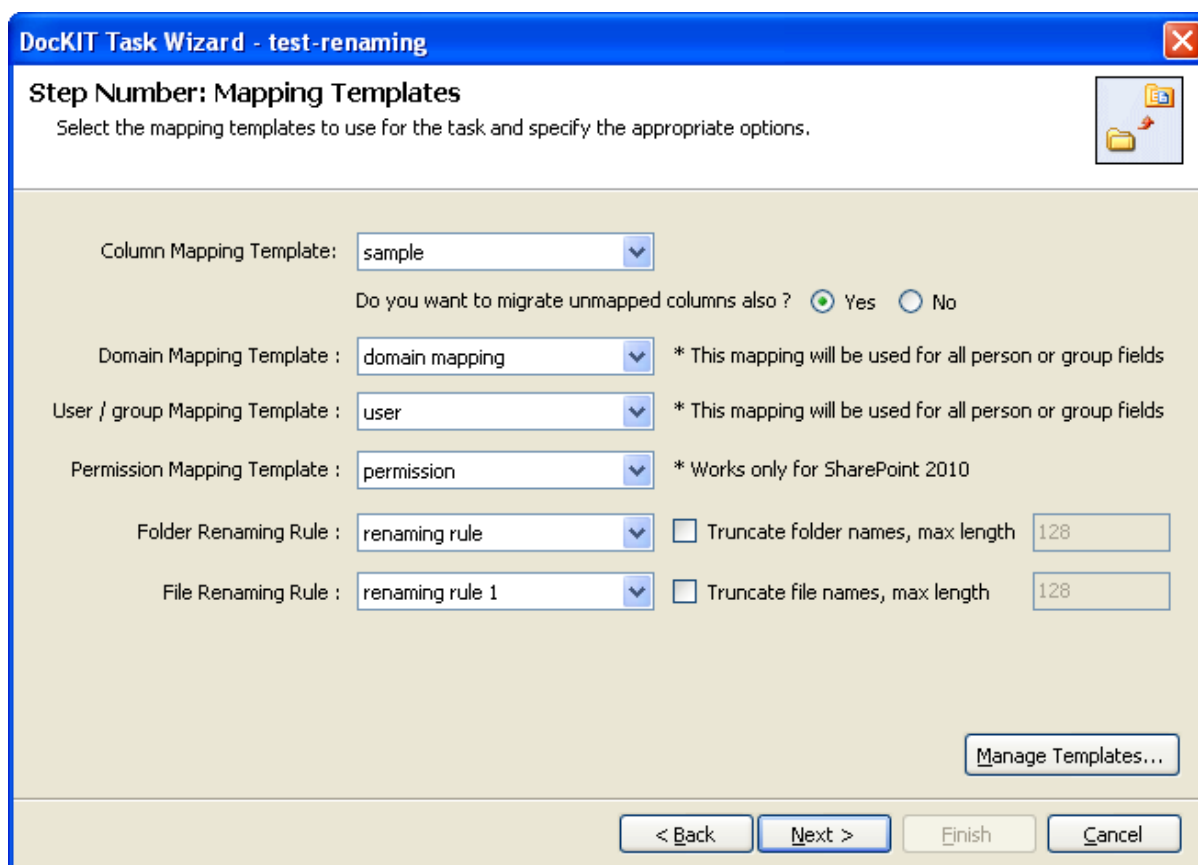
#### Truncate file names:

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 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.

8) Click (**Manage Template...**) button if you want to customize the available template(s) or create a new template.



The screenshot shows the 'DocKIT Task Wizard - test-renaming' dialog box, specifically the 'Step Number: Mapping Templates' screen. The dialog has a blue title bar and a close button (X) in the top right corner. Below the title bar, the text reads 'Step Number: Mapping Templates' and 'Select the mapping templates to use for the task and specify the appropriate options.' There is a small icon of a folder with a document and a red arrow pointing to it.

The main area of the dialog contains several configuration options:

- Column Mapping Template:** A dropdown menu with 'sample' selected.
- Do you want to migrate unmapped columns also ?** Radio buttons for 'Yes' (selected) and 'No'.
- Domain Mapping Template :** A dropdown menu with 'domain mapping' selected. A note next to it says '\* This mapping will be used for all person or group fields'.
- User / group Mapping Template :** A dropdown menu with 'user' selected. A note next to it says '\* This mapping will be used for all person or group fields'.
- Permission Mapping Template :** A dropdown menu with 'permission' selected. A note next to it says '\* Works only for SharePoint 2010'.
- Folder Renaming Rule :** A dropdown menu with 'renaming rule' selected. To its right is a checkbox 'Truncate folder names, max length' which is unchecked, followed by a text input field containing '128'.
- File Renaming Rule :** A dropdown menu with 'renaming rule 1' selected. To its right is a checkbox 'Truncate file names, max length' which is unchecked, followed by a text input field containing '128'.

At the bottom right of the main area, there is a button labeled 'Manage Templates...'. At the very bottom of the dialog, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

Click **Next** to Proceed.

## Chapter-5–Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

### 5.7 Step: 4: Permission Options

To specify the permission options to assign roles and permission levels for the imported items in SharePoint:

1) The **Permission Options** step appears as shown below:

DocKIT Task Wizard - test permission task

Step Number: Permission Options (Works only for SharePoint 2010)  
Specify the appropriate permission options

Do not migrate NTFS / Share permissions

Assign NTFS / Share permissions to the corresponding items in SharePoint

As in source

If the source folder that is migrated to SharePoint is a shared folder, assign:  NTFS  Share permissions

Connect to shared folder as: Currently logged on user

Consolidate NTFS permissions and assign to the top-level folder only

Do you want to add users and groups to the target site collection, if they are unavailable?  Yes  No

If permissions are already defined in the target folder / document, then

Skip permission assignment

Merge new and existing permissions

Replace existing permissions with new permissions

< Back Next > Finish Cancel

**NOTE:** This step is enabled only if a valid permission mapping template is selected under the list of permission mapping templates in mapping templates step.

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

a) **Do not migrate NTFS / Share permissions** - Skips the NTFS / Share permissions from migration.

b) **Assign NTFS / Share permissions to the corresponding items in SharePoint** - Assigns NTFS / Share permissions to the corresponding items in SharePoint based on the domain, user / group and permission mapping template specified in the Mapping Templates step.

i. **As in source** - DockKIT assigns permissions for the respective imported file / folder based on the permission mapping template. DockKIT does have the option to migrate share permissions of the imported folder (if it is a share folder) by selecting Share Permissions as a 'If the source





## Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

**DocKIT Task Wizard - test permission task**

**Step Number: Permission Options (Works only for SharePoint 2010)**  
Specify the appropriate permission options

Do not migrate NTFS / Share permissions

Assign NTFS / Share permissions to the corresponding items in SharePoint

As in source

If the source folder that is migrated to SharePoint is a shared folder, assign:  NTFS  Share permissions

Connect to shared folder as:

Consolidate NTFS permissions and assign to the top-level folder only

Do you want to add users and groups to the target site collection, if they are unavailable?  Yes  No

If permissions are already defined in the target folder / document, then

Skip permission assignment

Merge new and existing permissions

Replace existing permissions with new permissions

< Back   Next >   Finish   Cancel

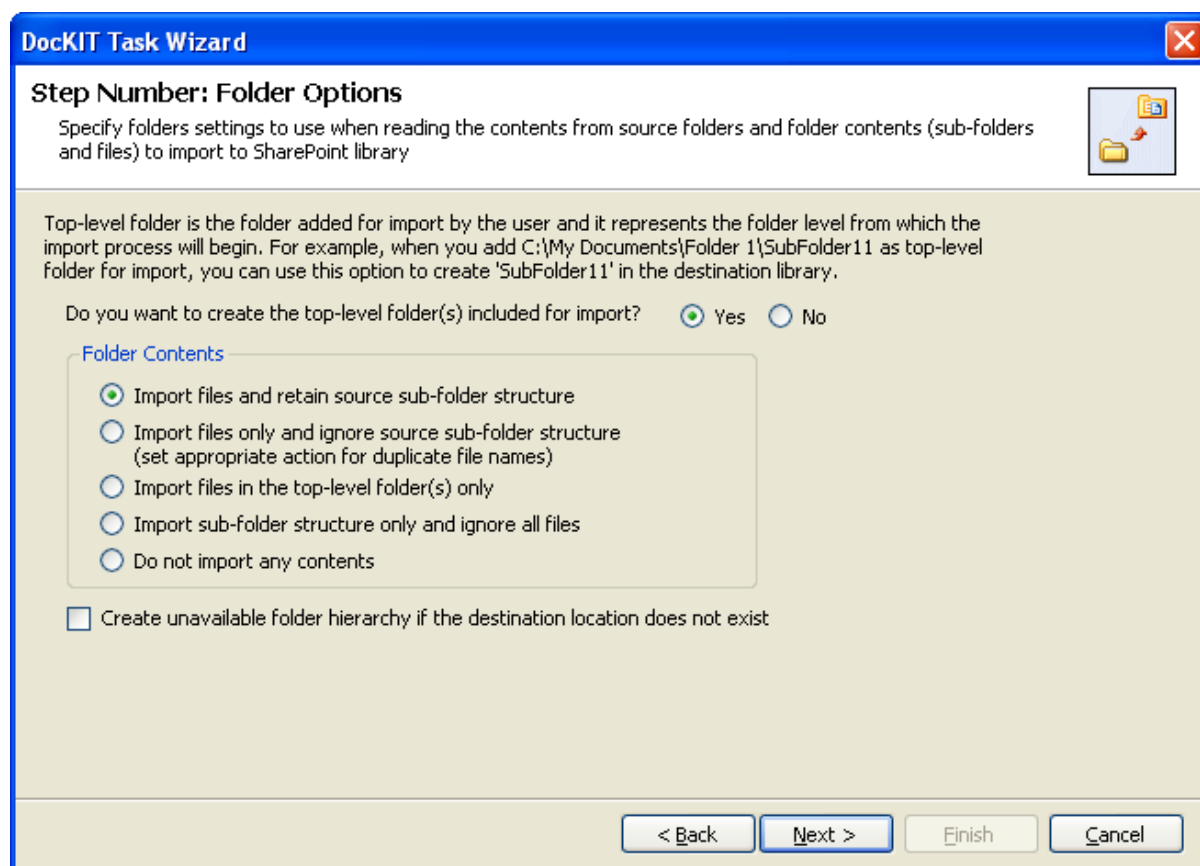
Click **Next** to Proceed.

## Chapter-5–Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

### 5.8 Step 5: Folder Options

To make the import process easier for users, DockIT provides an ability to specify the contents to import from the source folder structure. To specify the folder settings to use in the destination SharePoint library and the necessary files to import, perform the steps as given below:

1) The **Folder Options** step appears as shown below:



The screenshot shows the 'DockIT Task Wizard' window at the 'Step Number: Folder Options' stage. The window title is 'DockIT Task Wizard' and it has a close button (X) in the top right corner. The main heading is 'Step Number: Folder Options' with a sub-heading 'Specify folders settings to use when reading the contents from source folders and folder contents (sub-folders and files) to import to SharePoint library'. There is a folder icon with a red arrow pointing to it. Below this, a text box explains: 'Top-level folder is the folder added for import by the user and it represents the folder level from which the import process will begin. For example, when you add C:\My Documents\Folder 1\SubFolder11 as top-level folder for import, you can use this option to create 'SubFolder11' in the destination library.' Below the text box, there is a question: 'Do you want to create the top-level folder(s) included for import?' with two radio buttons: 'Yes' (selected) and 'No'. Below this, there is a section titled 'Folder Contents' with five radio button options: 'Import files and retain source sub-folder structure' (selected), 'Import files only and ignore source sub-folder structure (set appropriate action for duplicate file names)', 'Import files in the top-level folder(s) only', 'Import sub-folder structure only and ignore all files', and 'Do not import any contents'. At the bottom of the 'Folder Contents' section, there is a checkbox labeled 'Create unavailable folder hierarchy if the destination location does not exist'. At the bottom of the window, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

2) 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).

3) Select any of the following folder options given below to specify the contents to be imported from the source folders in file system:

a) **Import files and retain source sub-folder structure** - This option imports folders and files exactly as they are in source file system. The source folder structure in the file system will be retained in the destination location.

## Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

### **b) Import all files including sub-folders, but ignore sub-folder structure -**

This option imports files only and ignore its source folder structure in the file system. Note: Specify the appropriate options in File Settings step to handle situations where same filenames may be available for more than one file in different source folder hierarchy (sub-folders).

### **c) Import files in the top-level folders only -** This option imports files available in the top-level folders only. DockIT will not traverse the sub-folders within the top level folders.

### **d) Import sub-folder structure only and ignore all files -** This option creates the sub-folder structure in the destination location and ignores all files that are available within the added folder and sub-folders.

### **e) Do not import any contents -** This option does not import any contents (sub-folders and files) from the source folder added for import. This option will be useful when you want to create the top-level folder only and ignore all its contents.

## **4) DockIT expects the destination folder to be exists in the SharePoint. If the destination folder is not available in the destination location, DockIT fails to import the file to the specified folder in SharePoint. You can override this behaviour by selecting the option **Create unavailable folder hierarchy if the destination location does not exist.****

In this case, DockIT will automatically create the unavailable folder hierarchy (folder and sub-folders) in destination SharePoint during import process. After creating them, it will commence the import to the required folder in SharePoint. By using this option, you can simply avoid the error message 'Unable to locate destination folder with the specified URL' reported in Activity Log Viewer, since DockIT will take care creating unavailable folder structure in destination location.

**NOTE:** DockIT does not create library if it is unavailable in the SharePoint. In other words, DockIT creates unavailable folders alone in the existing library.

## **5) Click *Next* to Proceed.**

## Chapter-5–Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

### 5.9 Step 6: File Settings

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

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

**Step Number: File Settings**  
Specify action to be taken when a file with the same name already exists in the destination location.

If a file with the same name already exists in the destination location:

- Do not overwrite
- Overwrite
- Create new file in the name - Prepend [ ] <File Name> Append [ ]
- Create new version

\* denotes incremental index

If the file is checked-out by either current user or other user

- Leave as is
- Overwrite current version
- Check-in and create new version

< Back   Next >   Finish   Cancel

2) Select any one of the following options:

- a) **Do not overwrite** - Skips the file without overwriting.
- b) **Overwrite file** - Delete the file from the destination location (along with its version history) and imports the source file.
- c) **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 an other user:
  - i. **Leave as is** - Skip the file.
  - ii. **Overwrite current version** - Undo Checkout the file and add the source file as new version.
  - iii. **Check-in & create new version** - Check-in the file and add the source file as a new version.

## Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

**DocKIT Task Wizard - test permission task**

**Step Number: File Settings**

Specify action to be taken when a file with the same name already exists in the destination location.

If a file with the same name already exists in the destination location:

- Do not overwrite
- Overwrite
- Create new file in the name - Prepend  <File Name> Append  \* denotes incremental index
- Create new version

If the file is checked-out by either current user or other user

- Leave as is
- Overwrite current version
- Check-in and create new version

< Back   Next >   Finish   Cancel

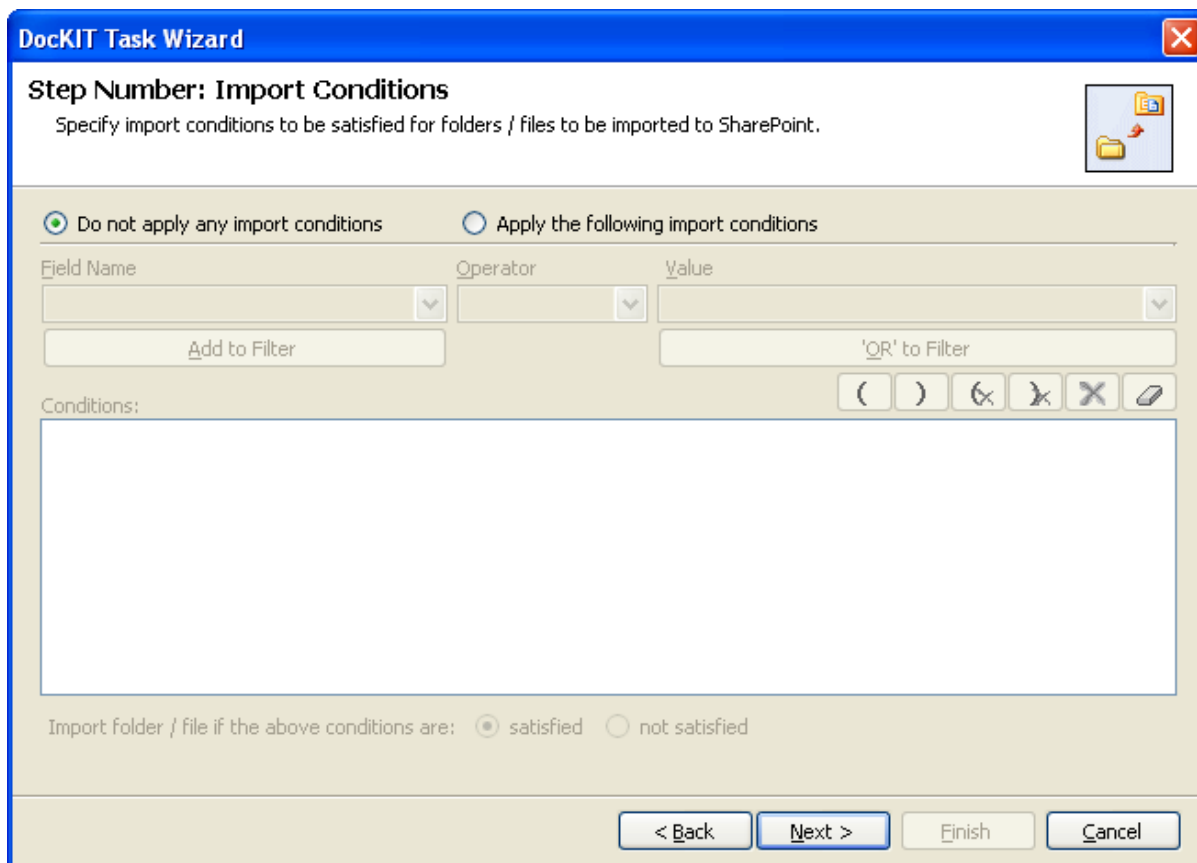
Click **Next** to Proceed.

## Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

### 5.10 Step 7: Import Conditions

DocKIT imports folders and files along with metadata to SharePoint library based on certain import conditions. Import conditions 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).

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



The screenshot shows the 'DocKIT Task Wizard' window at the 'Step Number: Import Conditions' stage. The window title is 'DocKIT Task Wizard' and it has a close button (X) in the top right corner. The main heading is 'Step Number: Import Conditions' with a sub-instruction: 'Specify import conditions to be satisfied for folders / files to be imported to SharePoint.' There is a folder icon with a red arrow pointing to it in the top right corner of the main area.

There are two radio buttons for selection: 'Do not apply any import conditions' (which is selected) and 'Apply the following import conditions'. Below these are three input fields: 'Field Name', 'Operator', and 'Value', each with a dropdown arrow. Below the 'Field Name' field is an 'Add to Filter' button. Below the 'Value' field is a button labeled ''OR' to Filter'. To the right of the 'Value' field are several icons: a left parenthesis '(', a right parenthesis ')', a double-headed arrow, a right-pointing arrow, a left-pointing arrow, and an eraser icon.

Below the icons is a large empty text area labeled 'Conditions:'. At the bottom of the main area, there is a label 'Import folder / file if the above conditions are:' followed by two radio buttons: 'satisfied' (selected) and 'not satisfied'.

At the bottom of the window are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

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

- a) **Do not apply any import conditions** - No import conditions will be used to filter folders / files
- b) **Apply the following import conditions** - The import conditions specified will be used to filter folders / files taken for import into SharePoint

## Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

3) The wizard step appears as shown below:

DocKIT Task Wizard

Step Number: Import Conditions

Specify import conditions to be satisfied for folders / files to be imported to SharePoint.

Do not apply any import conditions  Apply the following import conditions

Field Name	Operator	Value
Modified Date (File Property)	>	23-Dec-11

'AND' to Filter 'OR' to Filter

Conditions:

```
([Created Date (File Property)] > #23-Dec-11#  
AND [Modified Date (File Property)] > #23-Dec-11#)  
OR [Modified Date (File Property)] > #23-Dec-11#
```

Import folder / file if the above conditions are:  satisfied  not satisfied

< Back Next > Finish Cancel

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

4) Apart from relational operators, DockIT allows you to construct flexible and generic import conditions by using the **Changed** operator for periodic document imports. It will be available for use for the fields - Created Date (File Property) and Modified Date (File Property) only. The following are the available values for this operator.

**Today, Yesterday, This Week, This Month, Last Week, Last Month, Since Last Import in DockIT, Since Last Update in SharePoint, Last 7 days and Last 14 days.**

5) DockIT can import the folders / files that **satisfy** the import conditions or import the folders / files that **do not satisfy** the import conditions specified in the step above. Use the appropriate action to follow using the options given below:

**a) Import folder / file if the above conditions are satisfied** - Folders / Files that satisfy the condition will be marked for import.



## Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

- b) Import folder / file if the above conditions are not satisfied** - Folders / Files that do not satisfy the condition will be marked for import.

**DocKIT Task Wizard - sample**

**Step Number: Import Conditions**  
Specify import conditions to be satisfied for folders / files to be imported to SharePoint.

Do not apply any import conditions     Apply the following import conditions

Field Name	Operator	Value
Modified Date (File Property)	>	23-Dec-11

'AND' to Filter      'OR' to Filter

Conditions:

- [(Created Date (File Property)) > #23-Dec-11#
- AND [Modified Date (File Property)] > #23-Dec-11#
- OR [Modified Date (File Property)] > #23-Dec-11#

Import folder / file if the above conditions are:  satisfied     not satisfied

< Back    Next >    Finish    Cancel

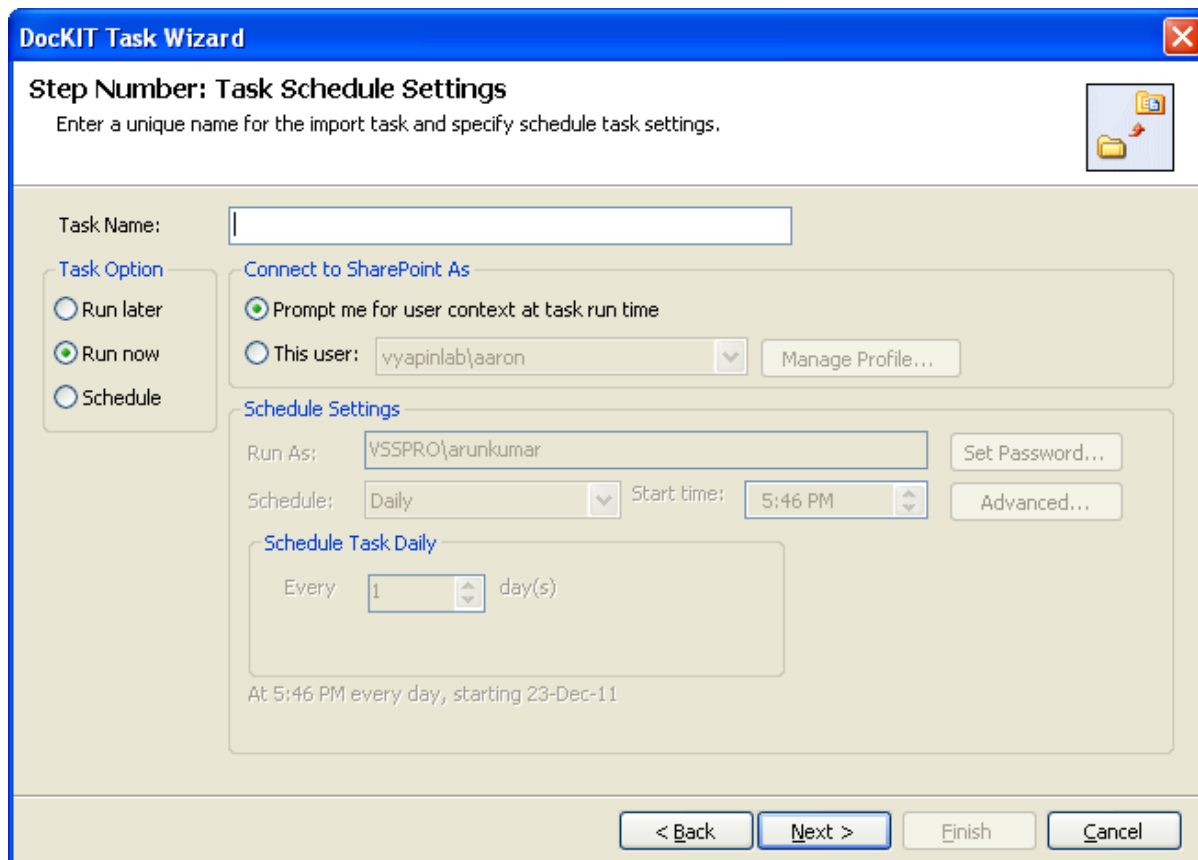
Click **Next** to Proceed.

### 5.11 Step 8: Task Schedule Settings

#### Task Settings

To specify the task name and schedule settings:

- 1) The **Task Settings** step appears as shown below



The screenshot shows the 'DocKIT Task Wizard' window at the 'Step Number: Task Schedule Settings' stage. The window title is 'DocKIT Task Wizard' and it has a close button (X) in the top right corner. Below the title bar, the text reads 'Step Number: Task Schedule Settings' and 'Enter a unique name for the import task and specify schedule task settings.' There is a small icon of a folder with a document and a red arrow pointing to it.

The main area of the dialog is divided into several sections:

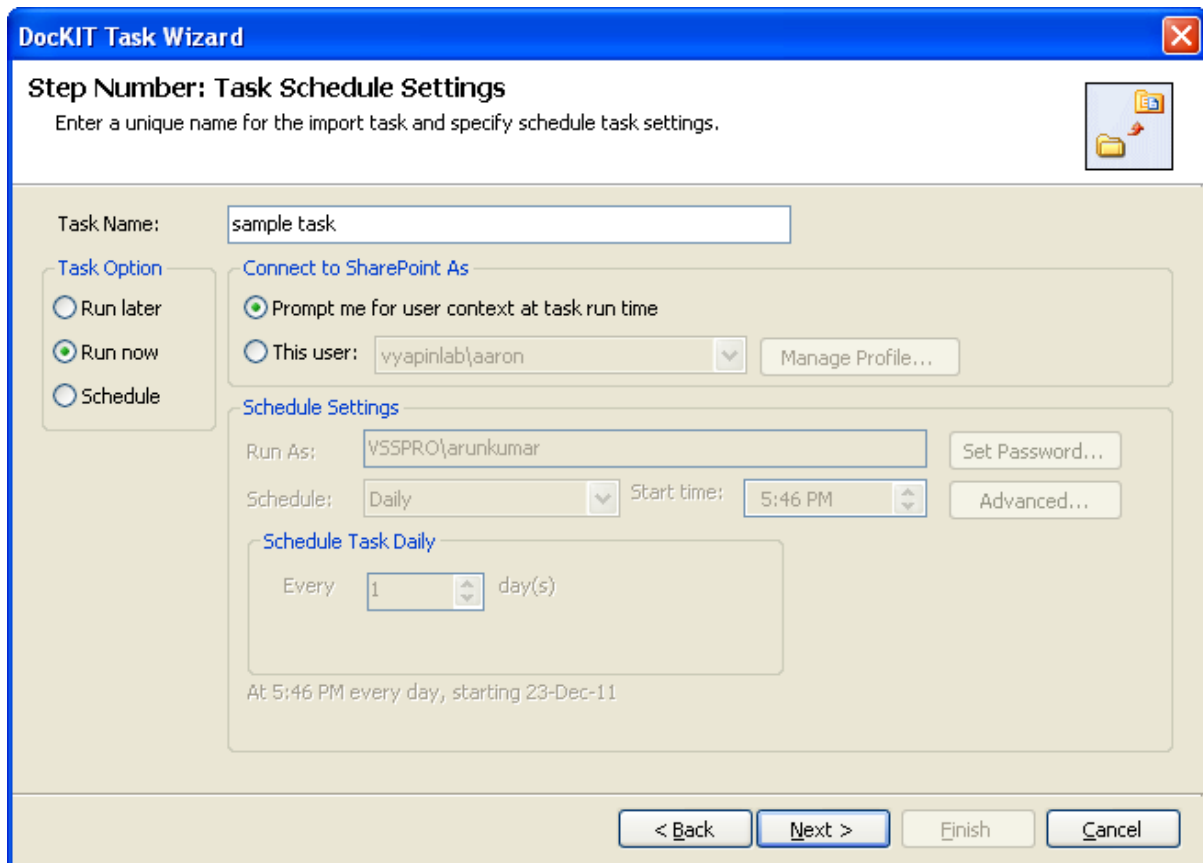
- Task Name:** A text input field is currently empty.
- Task Option:** A vertical list of three radio buttons: 'Run later', 'Run now' (which is selected), and 'Schedule'.
- Connect to SharePoint As:** A section with a blue header. It contains a radio button for 'Prompt me for user context at task run time' (which is selected) and another for 'This user:'. The 'This user:' dropdown is set to 'vyapinlab\aaroon' and has a 'Manage Profile...' button next to it.
- Schedule Settings:** A section with a blue header. It contains a 'Run As:' dropdown set to 'WSSPRO\arunkumar' with a 'Set Password...' button. Below it, the 'Schedule:' dropdown is set to 'Daily' and the 'Start time:' dropdown is set to '5:46 PM', with an 'Advanced...' button to the right.
- Schedule Task Daily:** A section with a blue header. It contains a text box 'Every' followed by a dropdown set to '1' and the text 'day(s)'. Below this, it says 'At 5:46 PM every day, starting 23-Dec-11'.

At the bottom of the dialog, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

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

## Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

- a) **Prompt me for user context at task run time** - DockIT will prompt for the user context to use to connect destination SharePoint at the time of DockIT task run.
- b) **This user <user name>** - DockIT will use stored profile context to connect destination SharePoint.



The screenshot shows the 'DockIT Task Wizard' window, specifically the 'Step Number: Task Schedule Settings' dialog. The window title is 'DockIT Task Wizard' and it has a close button in the top right corner. The main heading is 'Step Number: Task Schedule Settings' with a sub-instruction: 'Enter a unique name for the import task and specify schedule task settings.' There is a folder icon in the top right corner of the dialog area.

The dialog contains the following fields and options:

- Task Name:** A text box containing 'sample task'.
- Task Option:** A vertical list of radio buttons:
  - Run later
  - Run now
  - Schedule
- Connect to SharePoint As:** A section with two radio buttons:
  - Prompt me for user context at task run time
  - This user:
- Schedule Settings:** A section with:
  - Run As:**    - Schedule:**   **Start time:**
  - Schedule Task Daily:** A box containing 'Every  day(s)'. Below this box, it says 'At 5:46 PM every day, starting 23-Dec-11'.

At the bottom of the dialog, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

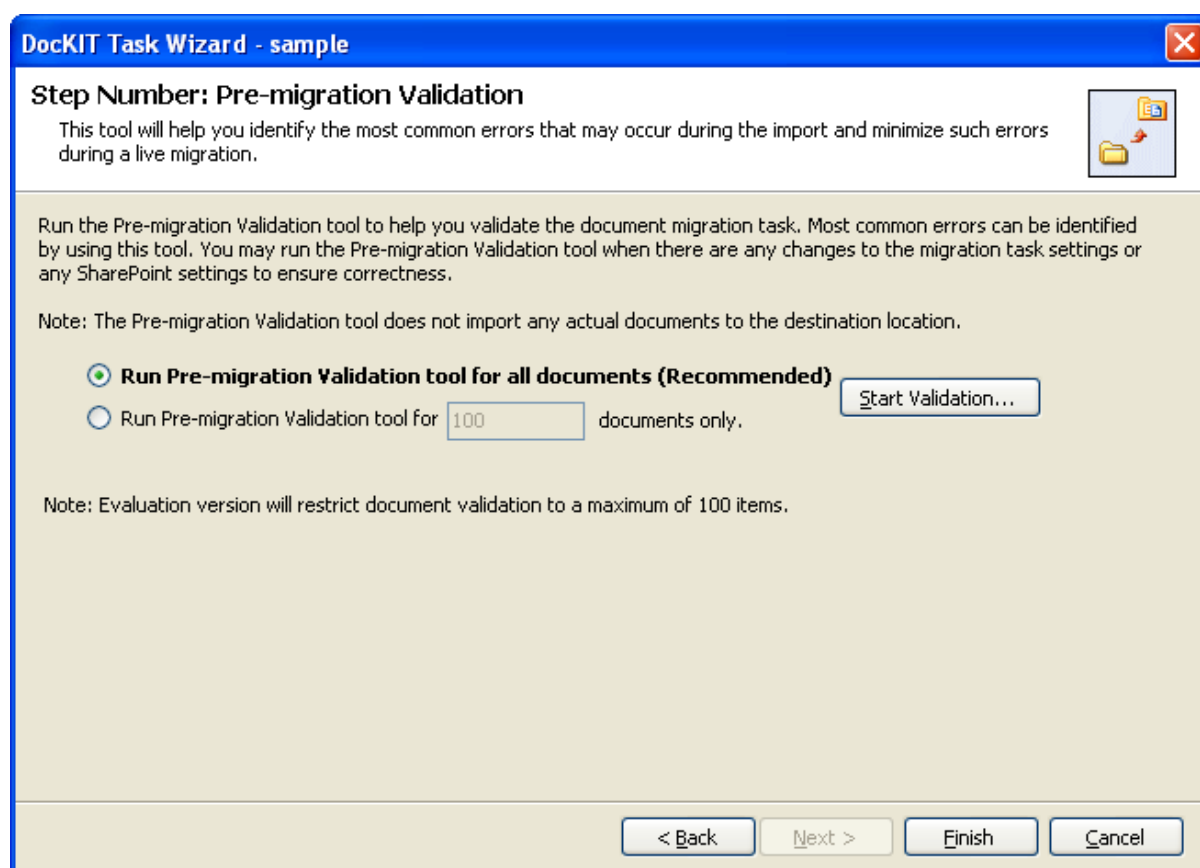
Click **Finish** button to create the task.

## Chapter-5–Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

### 5.12 Step 9: Pre-migration Validation

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

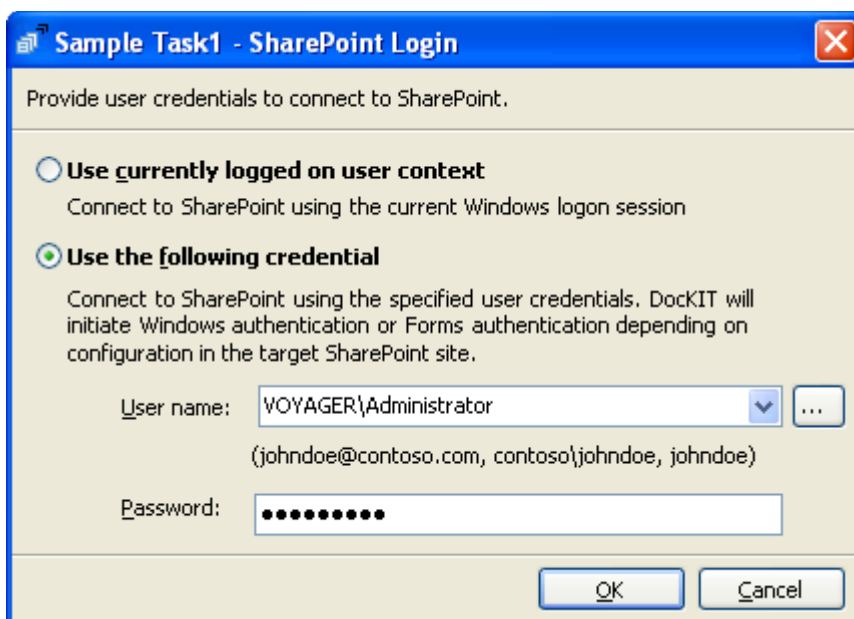
- 1) The **Pre-migration Validation** step in the DockIT Task Wizard appears as shown below:



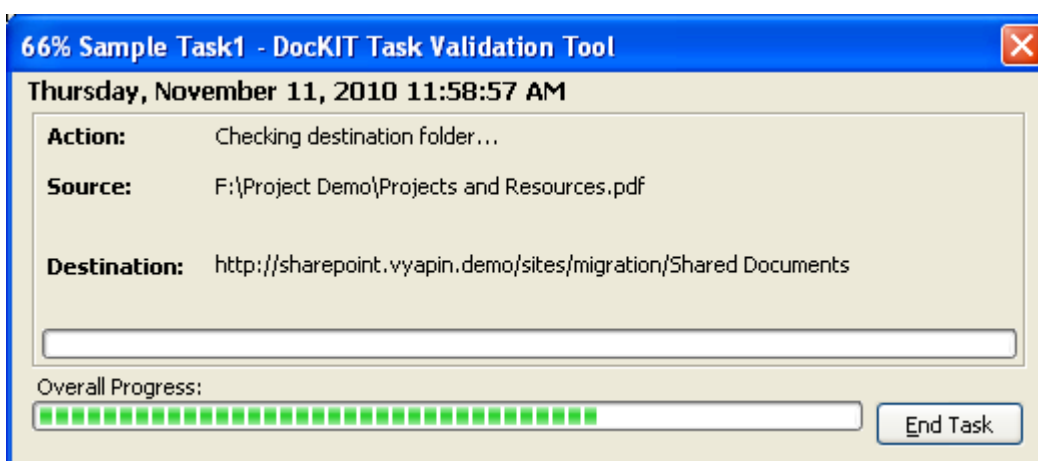
- 2) Select any of the following options below to specify the number of files to invoke and run the Pre-migration Validation tool:
  - a) **Run Pre-migration Validation tool for all documents (Recommended)** - This option runs the Pre-migration Validation tool for all folders and files specified in the import task wizard.
  - b) **Run Pre-migration Validation tool for <n> documents only** - This option runs the Pre-migration Validation tool for the specified number of files in the text box.

## Chapter-5–Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

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

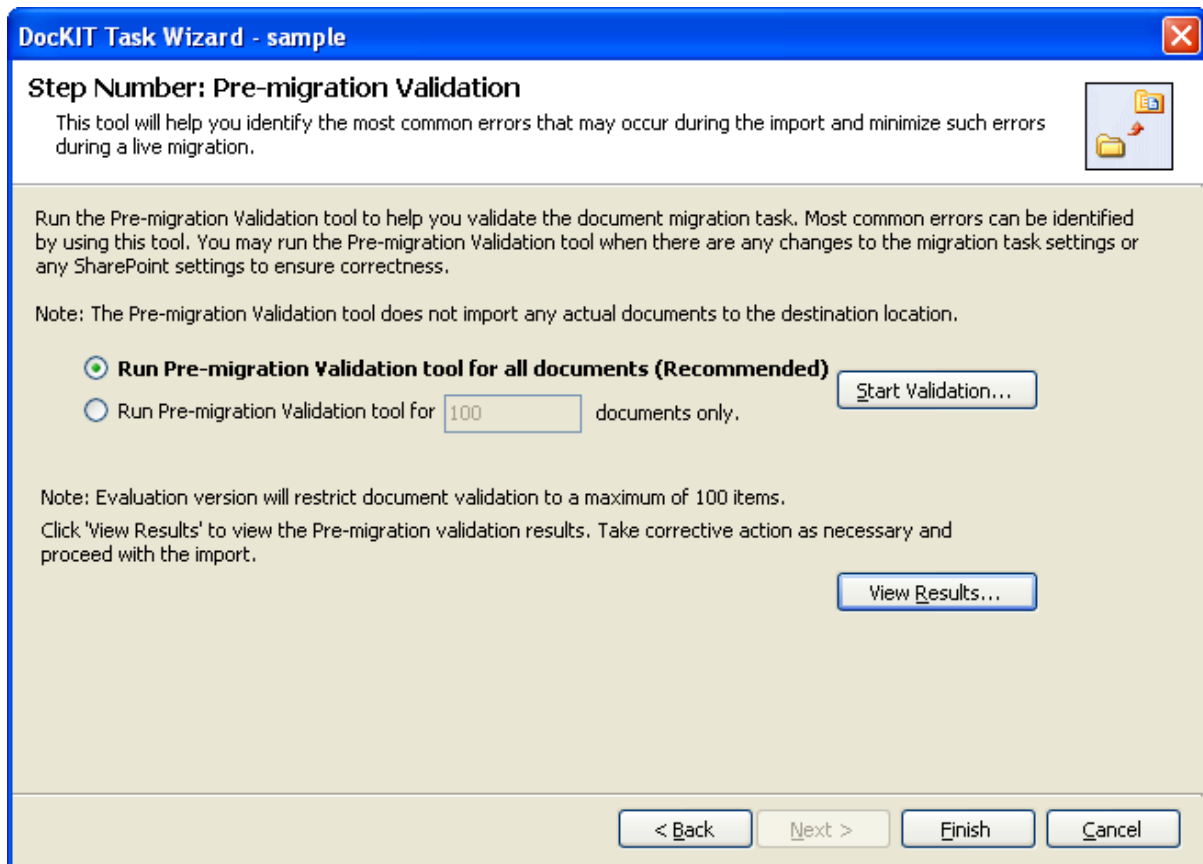


- 5) You will notice a task progress bar in a new window as shown below.

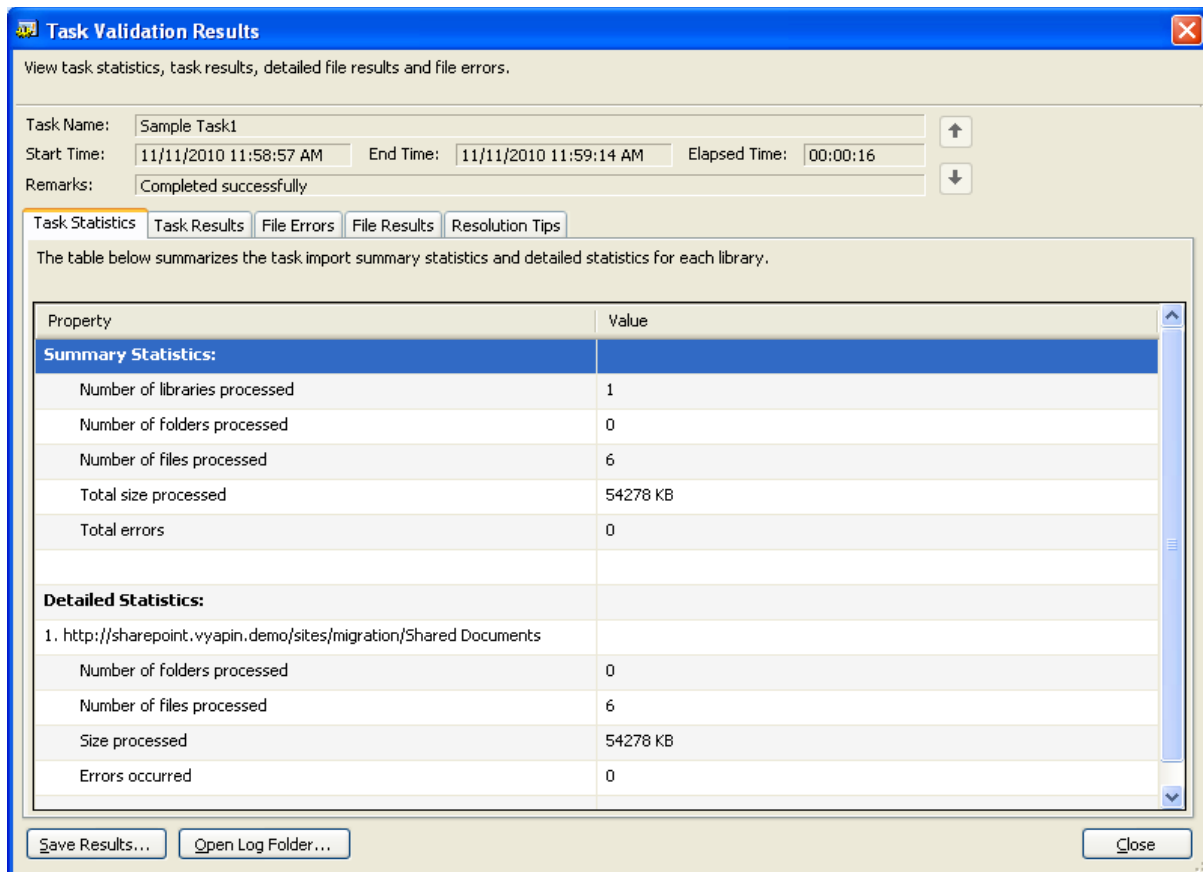


- 6) Once the Pre-migration validation is complete, **View Results** button will be enabled (as shown below). Click **View Results** button to view the Pre-migration validation test results.

## Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)



7) The **Task Validation Results** dialog will appear as shown below:



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- 8) The validation test results are summarized under four separate tabs:
  - a) **Task Statistics:** Summarizes the task import summary statistics and detailed statistics for each destination library.
  - b) **Task Results:** Summarizes the task level check (specifically, import task settings) results from the task validation tool.
  - c) **File Results:** Summarizes the task validation tool results after verification of each folder / file added for import.
  - d) **File Errors:** Summarizes the items for which an error has occurred.
- 9) Click **Save Results** button to save the task validation results in Microsoft Excel format. Each tab in Task Validation Results is stored as a separate worksheet in MS-Excel.
- 10) Click **Open Log Folder** button to open the folder that contains the activity log of the task validation results.

### Limitations:

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

- i. Blocked file extensions are not checked in the Pre-migration validation as this SharePoint error message is reported only at the time of a live import to SharePoint.
- ii. It is sufficient for the given user credential to have read permissions in the destination library for the Pre-migration validation tool to execute. The Pre-migration validation tool does not check for other permissions that may be required for the import task to run successfully.
- iii. File level security permissions are not checked in the Pre-migration validation.
- iv. The Pre-migration validation tool does not verify if the give user credentials can perform check-in / cancel check-out operations on an existing document.
- v. The final document status requested in the task settings is not verified in the Pre-migration validation process.
- vi. Document import may fail due to automatic propagation of file properties during a live transfer to SharePoint and the Pre-migration validation does not have the ability to trap such related errors.

## Chapter-5–Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

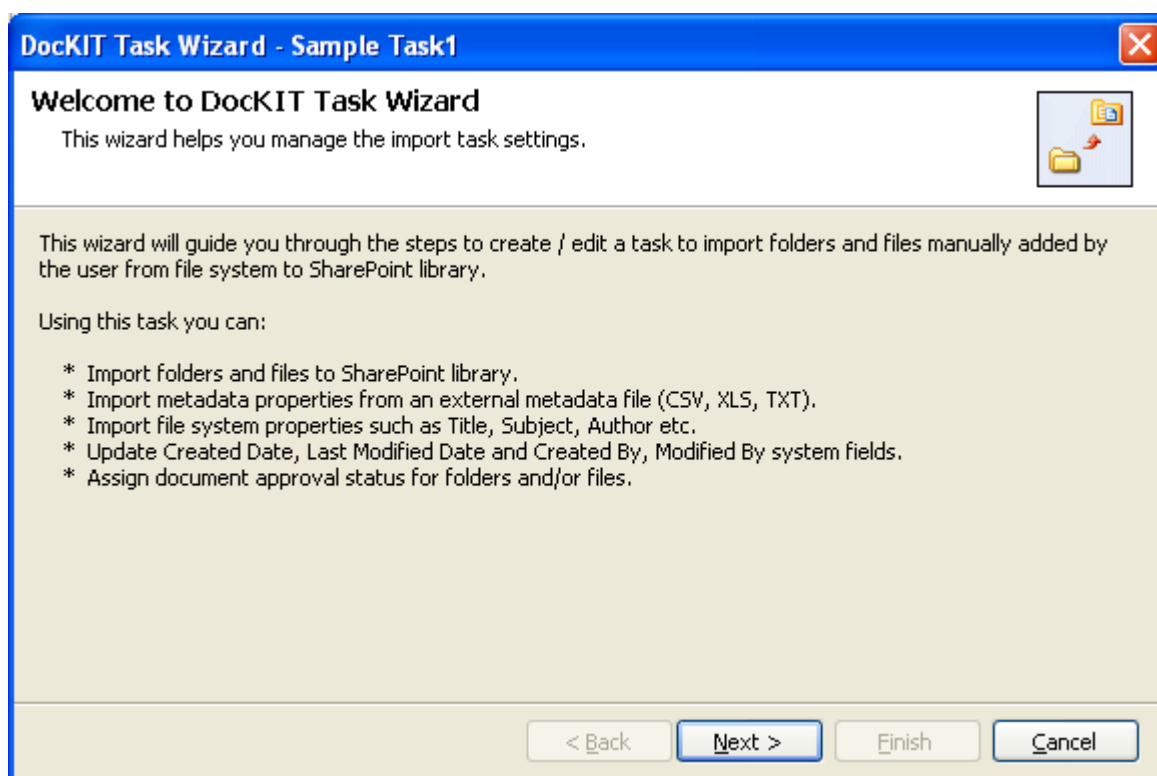
- vii.** When a particular folder location does not exist in the destination location and is expected to be created as a new folder using the batch descriptor line item entry, the Pre-migration validation tool may report any sub-folder under the new folder to be a non-existent folder location. You can safely ignore this error message.
- viii.** List validation rules are not checked in the Pre-migration validation as this SharePoint validation error message is reported only at the time of live import to SharePoint.

### 5.13 Edit Task

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Edit task is similar to creating a task, except that a few settings cannot be altered as stated below.

- 1) The **DocKIT Task Wizard** appears



- 2) Click **Next** button
- 3) Specify **Batch File Options**
- 4) Specify **Metadata Options**
- 5) Specify **Mapping Templates**
- 6) Specify **Permission Options**



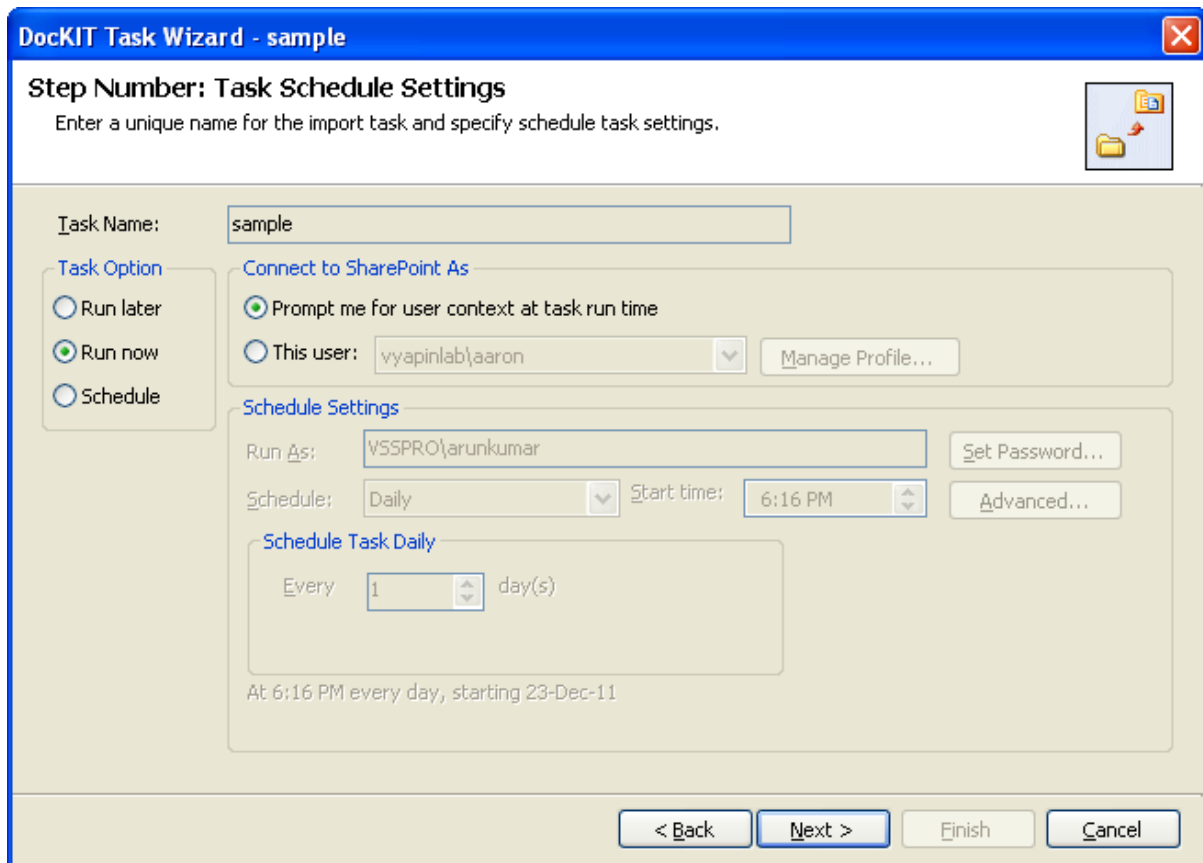
## Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

7) Specify **Folder Options**

8) Specify **File Settings**

9) Specify **Import Conditions**

10) In **Task Settings** edit mode, DockIT Task Wizard the task name cannot be altered.



The screenshot shows the 'DockIT Task Wizard - sample' window at the 'Step Number: Task Schedule Settings' stage. The window title bar includes a close button (X). Below the title bar, the text reads 'Enter a unique name for the import task and specify schedule task settings.' A folder icon is visible in the top right corner.

The main content area is divided into several sections:

- Task Name:** A text box containing 'sample'.
- Task Option:** A vertical list of radio buttons: 'Run later', 'Run now' (selected), and 'Schedule'.
- Connect to SharePoint As:** A section with two radio buttons: 'Prompt me for user context at task run time' (selected) and 'This user:'. The 'This user:' option is currently set to 'vyapinlab\aaroon' with a dropdown arrow and a 'Manage Profile...' button.
- Schedule Settings:** A section with a 'Run As:' text box containing 'VSSPRO\arunkumar' and a 'Set Password...' button. Below it, a 'Schedule:' dropdown is set to 'Daily' and a 'Start time:' dropdown is set to '6:16 PM', with an 'Advanced...' button to the right.
- Schedule Task Daily:** A section with a text box 'Every 1 day(s)' where '1' is in a dropdown.
- Summary:** A line of text at the bottom of the schedule section: 'At 6:16 PM every day, starting 23-Dec-11'.

At the bottom of the window, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

11) Specify **Pre-migration Validation**

12) Click **Finish** button to save the task settings, or click **Back** button to go back to a previous step.

## Chapter-5–Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

### 5.14 Re-import Task

The Re-import Task tool will help you re-import folders / files that had errors in them. Re-import Task is similar to a new task, except that you can import only folders / files that resulted in errors or folders / files that did not migrate to the destination library during the import process. You can change the original task settings in a re-import task, except Folder Options, File Options and Document Status settings that were defined in the original task.

- 1) The **DocKIT Re-import Task Wizard** appears as shown below. Click **Next** button to proceed.



## Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

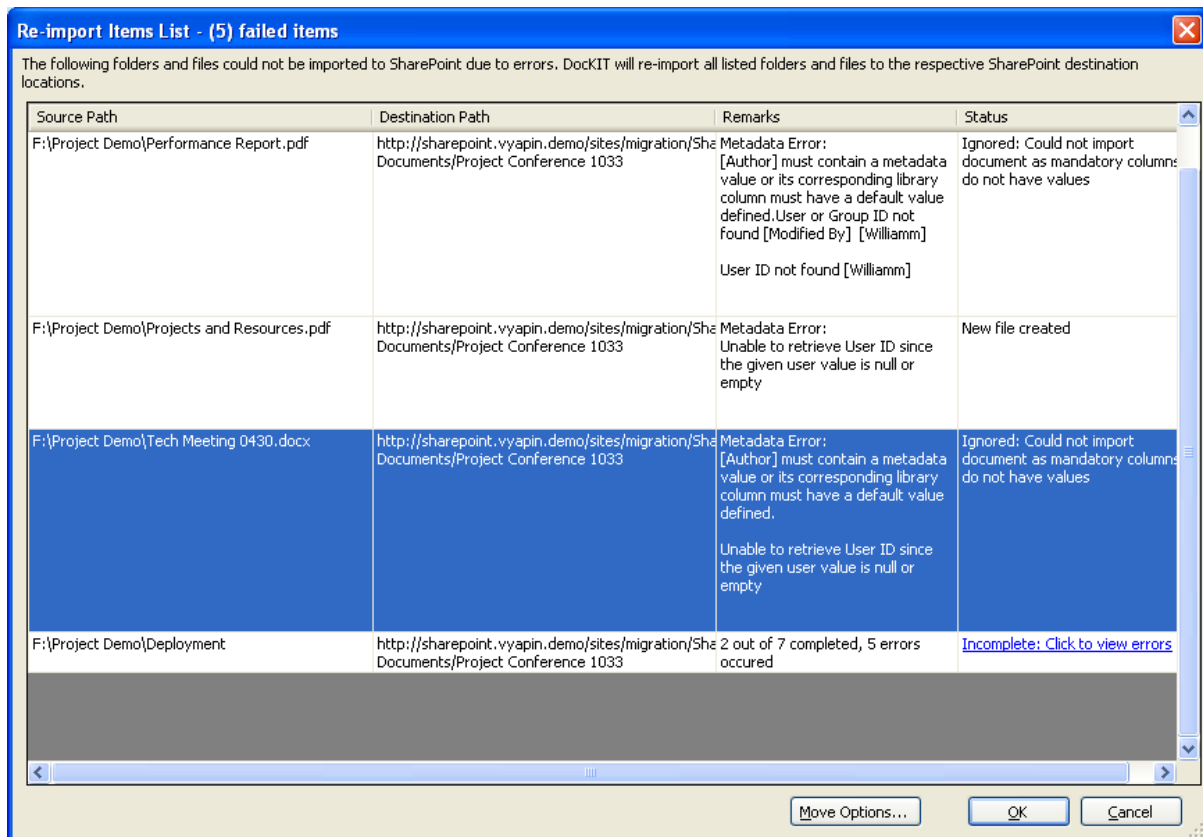
2) **Re-import Options** step appears as shown below:



**Re-import all items in which an error occurred** - Re-imports all folder / file items that contain warnings & errors and the folder / file items that were not migrated to the destination library. Click **Show...** button to view items to be re-imported.

## Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

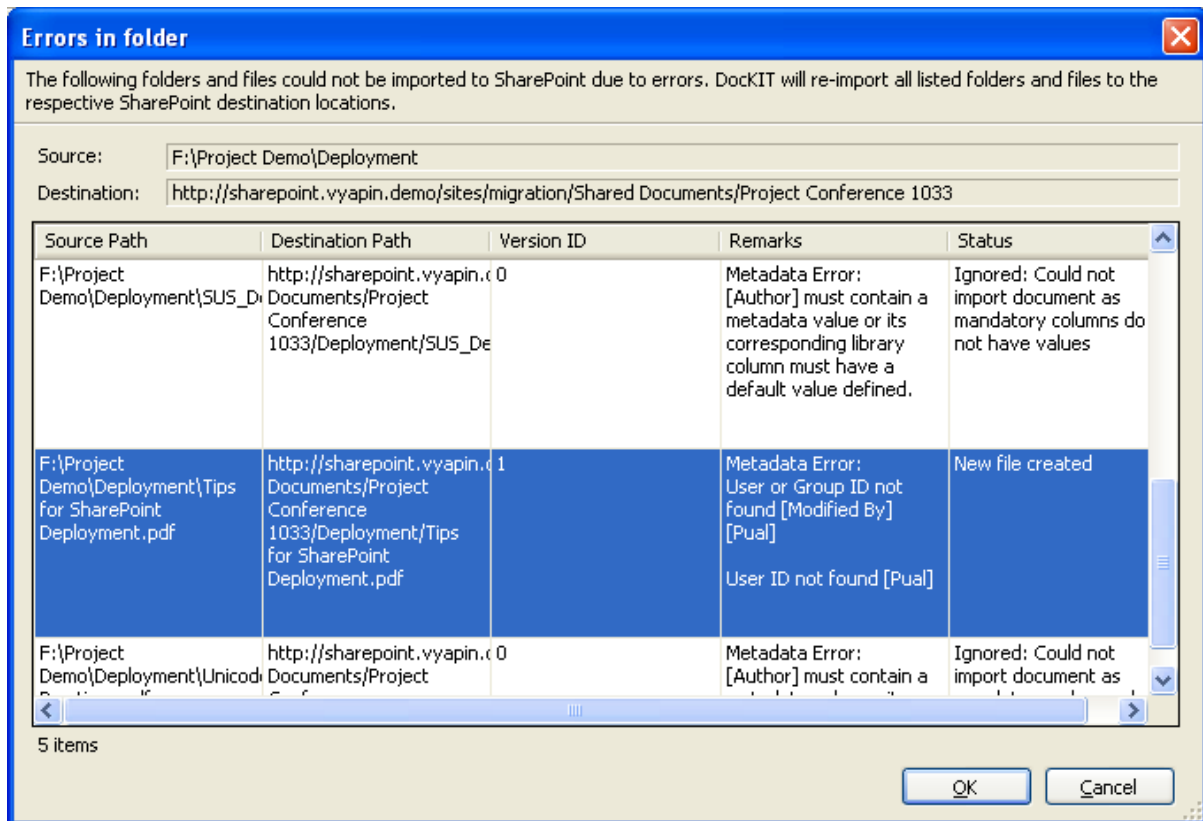
The **Re-import Items List** dialog appears as shown below:



Click the hyperlink available in the respective folder entries to view the items to be re-imported from the selected folder.

## Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

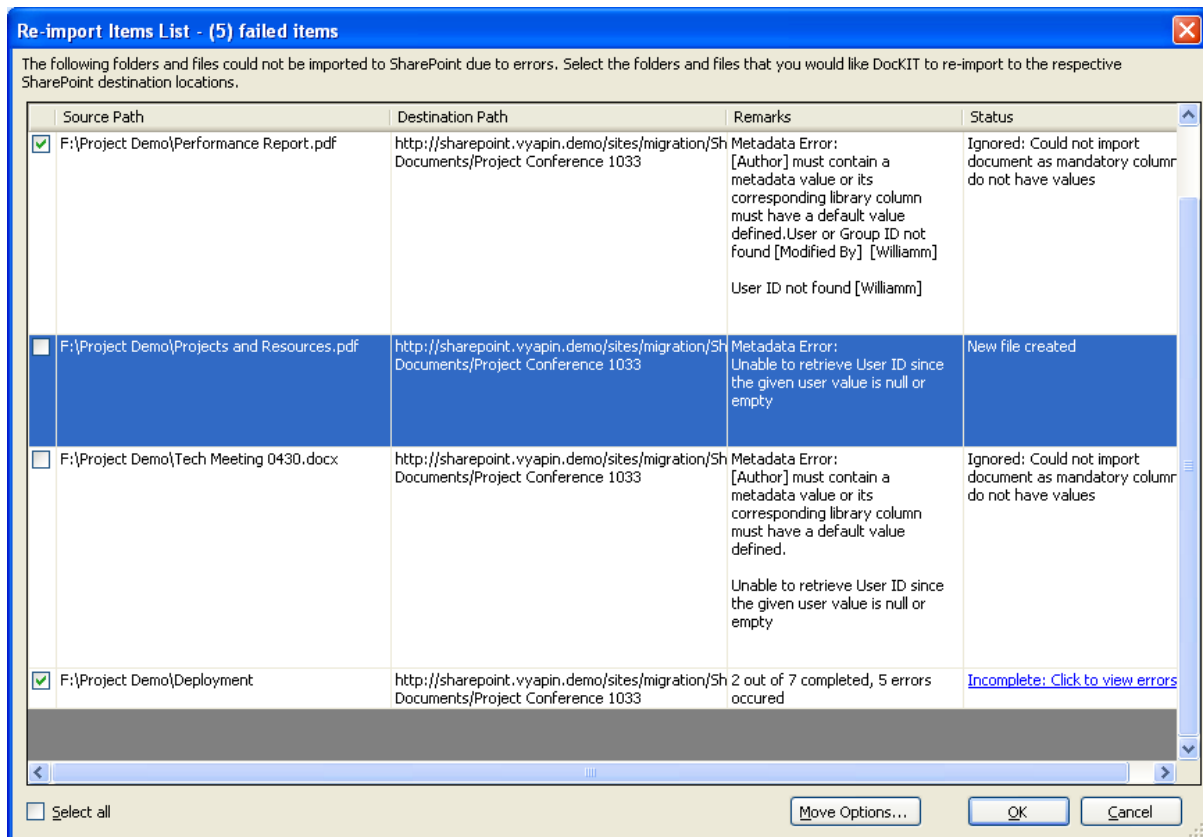
The '**Errors in folder**' dialog appears as shown below:



**Selectively re-import items in which an error occurred** - Re-imports items that contain warnings & errors that are manually selected by the user. Click **Edit...** button to select the required items to be re-imported during this import task.

## Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

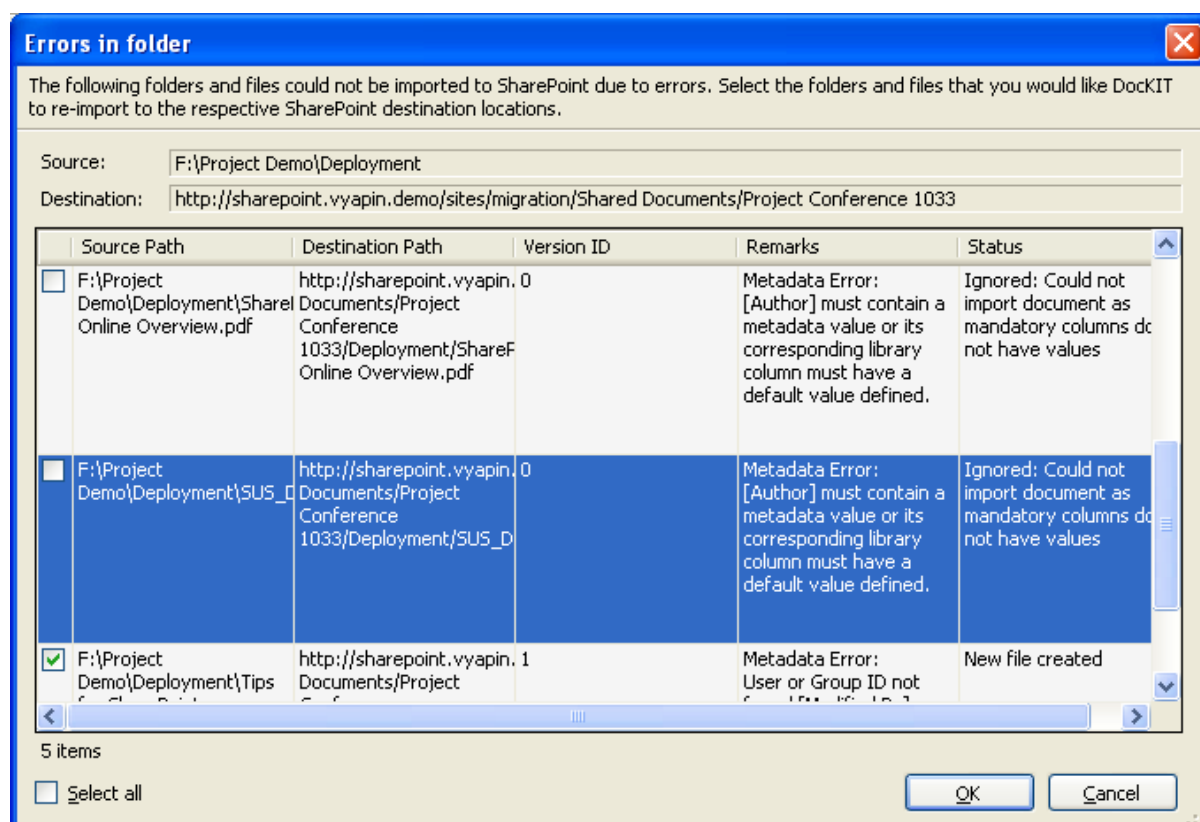
The **Re-import Items List** dialog appears as shown below:



Click the hyperlink available in the respective folder entries to view the items to be re-imported from the selected folder.

## Chapter-5-Import folders, files and metadata to SharePoint Libraries (Batch File Mode)

The 'Errors in folder' dialog appears as shown below:



4) File Version Check prevents DockKIT from re-importing files that have newer version of files in a SharePoint library, in the elapsed time between an import task and a re-import task. Select a **File Version Check setting** from any one of the following options given below:

a) **Perform strict file version check (Recommended)** - Compares file version specified in the previous import and latest file version in SharePoint library; imports files if the versions match and ignores files whose file version's do not match at the time of re-import. For example, let's assume that DockKIT attempted to import file (say, "Test Document.doc") as version (say, 1.6) in the import task and it failed for some reason. The file version check will ensure that the re-import task is importing ("Test Document.doc") as version 1.6 again, in order to avoid importing files when a newer version of the file may have been added by another user. This check is performed by comparing the last version that DockKIT tried to import and the current file version in the SharePoint library, at the time of re-import.

b) **Override files version check** - Imports file regardless of file version in the previous import and latest file version in SharePoint library. The file version is completely ignored.

5) Follow the same steps in Create Task wizard for the remaining steps. Please note that the original task settings in Folder Options, File Settings and Document Status cannot be altered.

## 6 Assign Metadata to the documents in SharePoint Libraries

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- **Create Task**
- **Edit Task**
- **Copy Task**
- **Delete Task**
- **Run Task**
- **Re-import Task**

### 6.1 Create Metadata File

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Please click the link below to read about 'How to Create Metadata File'?

[Create Metadata File](#)

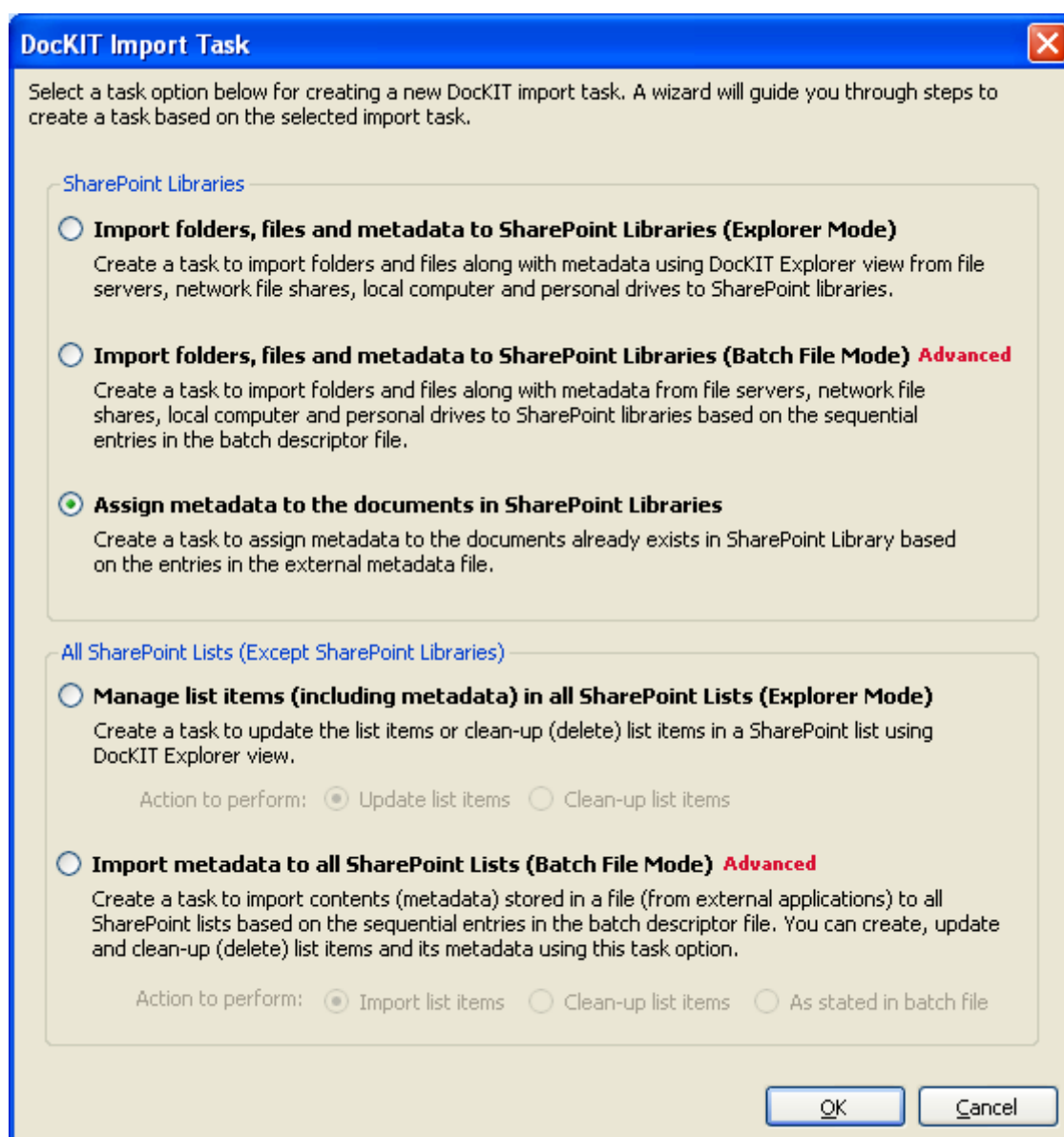


## Chapter-6- Assign Metadata to the documents in SharePoint

### 6.2 Create Task

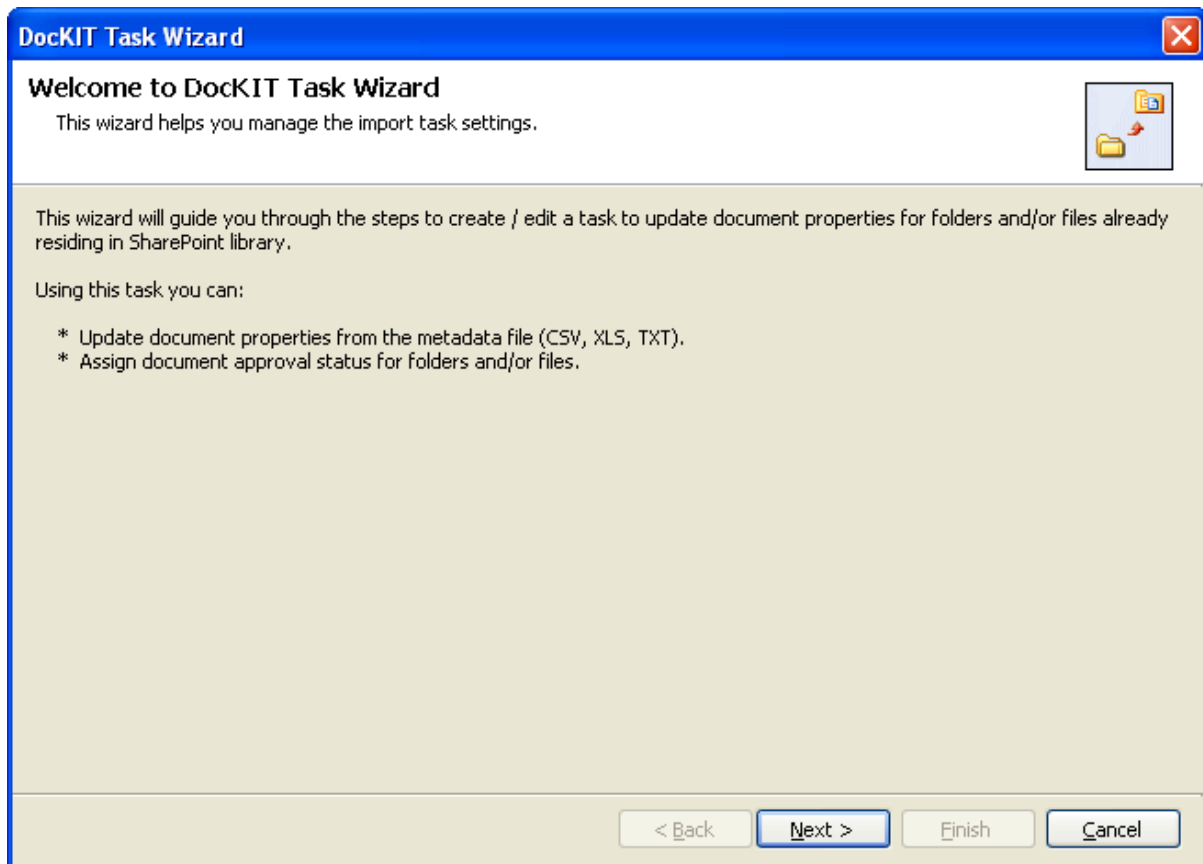
To create a task to update document properties to documents already residing in SharePoint library using the values specified in the metadata file:

- 1) Select **Assign metadata to documents in SharePoint Libraries** option in **New Document Import Task** dialog as shown below and click **OK**.



## Chapter-6- Assign Metadata to the documents in SharePoint

### 2) The DocKIT Task Wizard appears



3) Click **Next** button

4) Specify the **SharePoint User Credential**

5) Specify the **Metadata Options**

6) Specify the **Mapping Templates**

7) Specify the **File Settings**

8) Specify the **Import Conditions**

9) Specify **Task Settings**

10) Specify **Pre-migration Validation**

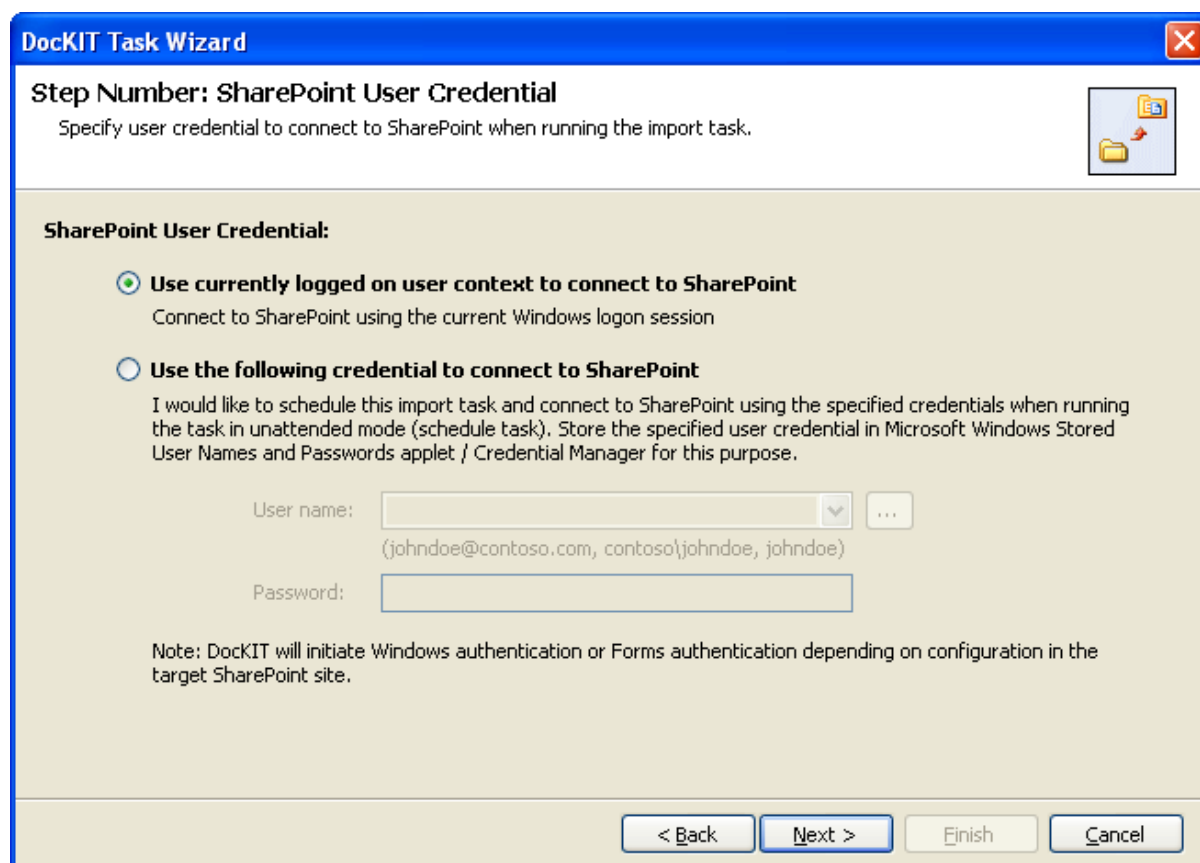
11) Click **Finish** button to create the task, or click **Back** button to change the any task settings.

## Chapter-6- Assign Metadata to the documents in SharePoint

### 6.3 SharePoint User Credential

Specify the user credential to connect to SharePoint when running the import task in unattended mode (schedule task),

1) The **SharePoint User Credential** step appears as shown below:



The screenshot shows the 'DocKIT Task Wizard' dialog box. The title bar reads 'DocKIT Task Wizard'. The main heading is 'Step Number: SharePoint User Credential'. Below the heading, it says 'Specify user credential to connect to SharePoint when running the import task.' There is a small icon of a folder with a document and a red arrow pointing to it. The main content area is titled 'SharePoint User Credential:' and contains two radio button options. The first option is selected and is 'Use currently logged on user context to connect to SharePoint', with the subtext 'Connect to SharePoint using the current Windows logon session'. The second option is 'Use the following credential to connect to SharePoint', with the subtext 'I would like to schedule this import task and connect to SharePoint using the specified credentials when running the task in unattended mode (schedule task). Store the specified user credential in Microsoft Windows Stored User Names and Passwords applet / Credential Manager for this purpose.' Below the second option, there are two input fields: 'User name:' with a dropdown menu and a '...' button, and 'Password:' with a text box. The 'User name' dropdown shows '(johndoe@contoso.com, contoso\johndoe, johndoe)'. At the bottom of the dialog, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

2) Specify the **user credentials** to connect to the SharePoint using the options given below.

a) **Use currently logged on user context to connect to SharePoint -**

Connect to SharePoint URL using the currently logged on user context

b) **Use the following credential to connect to SharePoint -** Connect to the

SharePoint URL using a different user context. 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.

## Chapter-6- Assign Metadata to the documents in SharePoint

In scheduled import process, DockKIT allows the user to enter different user credentials to connect to SharePoint and to create a scheduled import task (unattended mode).

By default, DockKIT 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.

DockKIT 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. Hence, you will not be allowed to change the scheduled 'Run As' user context for the import task.

3) . Click ... button to create *new user* profile.

**DockKIT Task Wizard**

**Step Number: SharePoint User Credential**  
Specify user credential to connect to SharePoint when running the import task.

**SharePoint User Credential:**

**Use currently logged on user context to connect to SharePoint**  
Connect to SharePoint using the current Windows logon session

**Use the following credential to connect to SharePoint**  
I would like to schedule this import task and connect to SharePoint using the specified credentials when running the task in unattended mode (schedule task). Store the specified user credential in Microsoft Windows Stored User Names and Passwords applet / Credential Manager for this purpose. ?

User name: johndoe@contoso.com ...  
(johndoe@contoso.com, contoso\johndoe, johndoe)

Password: .....

Note: DockKIT will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.

< Back   Next >   Finish   Cancel

4) Click **Next** to Proceed.

## Chapter-6- Assign Metadata to the documents in SharePoint

### 6.4 Metadata Options

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

- 1) The **Metadata Options** step appears as shown below

The screenshot shows a software window titled "DocKIT Task Wizard - test - 3". The main heading is "Step Number: Metadata Options" with a subtitle "Specify mapping template to update document properties in SharePoint." The interface includes a "Metadata File:" section with a "File Name:" text box, a browse button "...", a help icon "?", a "Sheet Name:" dropdown menu, a "View..." button, and a "Clear" button. Below this are "Date format:" and "Time format:" dropdown menus. A section titled "Allow Fill-in settings (Applicable for Choice, Managed Metadata datatypes only):" contains three radio button options. The first is "Do not add new values to the column definition". The second is "Add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library". The third, which is selected, is "Add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination library". A "Fail-safe Settings" section has a checkbox "Update a document in SharePoint even if it contains any errors or warnings in the metadata. Enabling this option may result in documents having partial or incomplete metadata in the destination library." At the bottom are buttons for "< Back", "Next >", "Finish", and "Cancel".

- 2) 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 (XLS) or Text file (TXT).
- 3) The external metadata file will automatically be extracted once the file name is specified. If you are using a Microsoft Excel based metadata file, then select the sheet name to use from the drop-down.
- 4) Click (?) drop down button if you want to see a sample external metadata file (such as, Comma delimited (CSV) file, Excel (XLS) file) to know how the columns should be arranged in an external metadata file.
- 5) Specify the **Date and Time format** for the date fields in the metadata file. If the columns selected to import contain date and time values, specify the date mask to parse the date values. The default value is the current system settings.
- 6) Select the **Fill-in choice settings** as below:

## Chapter-6- Assign Metadata to the documents in SharePoint

- a) **Do not add new values to the column definition** - When selecting this option, DockIT does not create or add new values to the column definition (For example: Choice field definition, Managed Metadata field definition).
- b) **Add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library** - When selecting this option, DockIT will create or add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library.
- c) **Add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination library** - When selecting this option, DockIT will create or add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination library.

### 7) Fail-safe Settings:

Migrate a document to SharePoint even if it contains any errors or warnings in the metadata. Enabling this option may result in documents having partial or incomplete metadata in the destination library: By selecting this option, If the specified metadata contains any errors or warnings, DockIT will update the documents having partial or incomplete metadata in destination SharePoint library.

By unselecting this option, if the specified metadata contains any errors or warnings, DockIT doesn't update the documents available in destination SharePoint library, it thereby skips the item.

## Chapter-6- Assign Metadata to the documents in SharePoint

The screenshot shows a Windows-style dialog box titled "DocKIT Task Wizard - test permission task". The main heading is "Step Number: Metadata Options" with a sub-instruction: "Specify mapping template to update document properties in SharePoint." The dialog is divided into several sections:

- Metadata File:** This section contains a "File Name:" field with a text box containing "C:\Documents and Settings\All Users\Documents\DocKIT6x - Permissions\DocKI" and a browse button "...". To the right is a help icon. Below this is a "Sheet Name:" field with a dropdown arrow and a browse button "...". To the right are "View..." and "Clear" buttons.
- Date and Time formats:** Two dropdown menus are present: "Date format:" set to "<Use default>" and "Time format:" set to "<No Time>".
- Allow Fill-in settings (Applicable for Choice, Managed Metadata datatypes only):** This section has three radio button options:
  - Do not add new values to the column definition
  - Add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library
  - Add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination library
- Fail-safe Settings:** A section with a checked checkbox and the text: "Import a document to SharePoint even if it contains any errors or warnings in the metadata. Enabling this option may result in documents having partial or incomplete metadata in the destination library."

At the bottom of the dialog are four buttons: "< Back", "Next >", "Finish", and "Cancel".

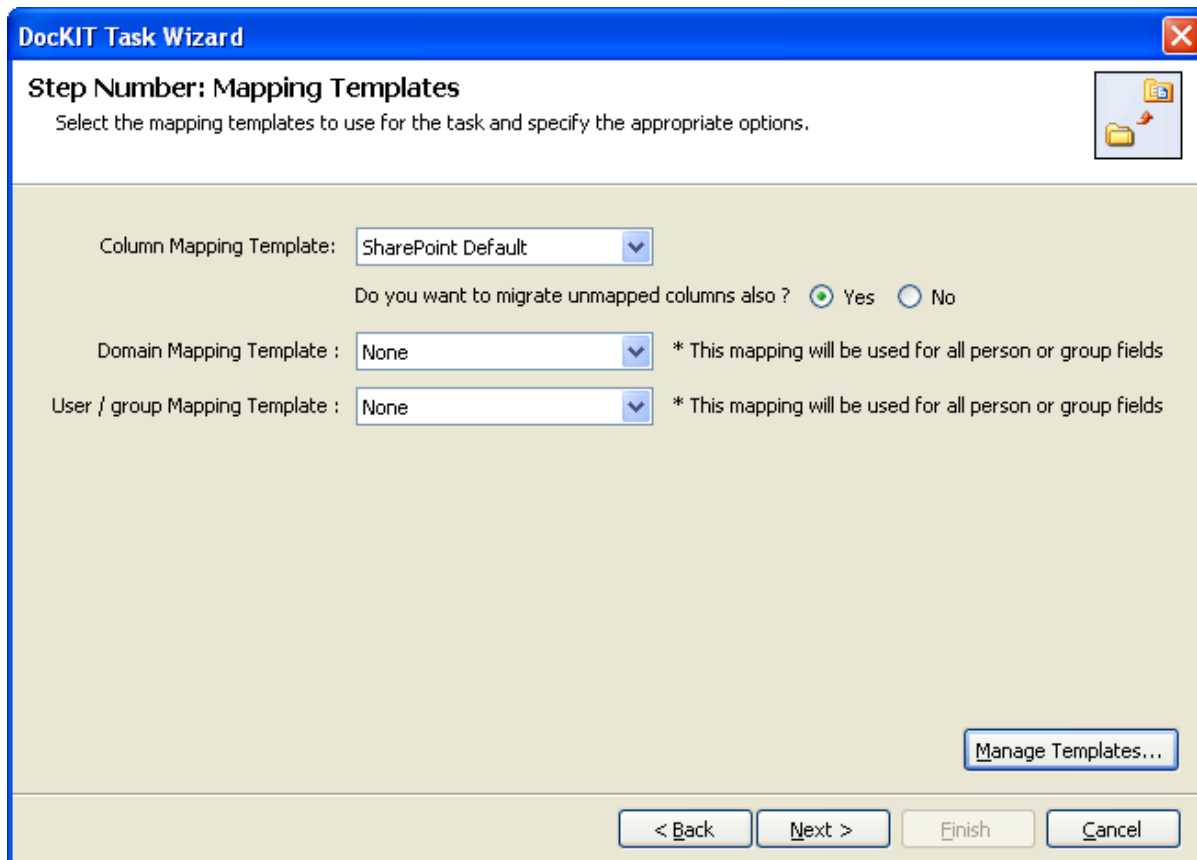
9) Click **Next** to Proceed.

## Chapter-6- Assign Metadata to the documents in SharePoint

### 6.5 Mapping Templates

To specify the mapping templates to use for the task:

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



The screenshot shows the 'DocKIT Task Wizard' window at the 'Step Number: Mapping Templates' stage. The window title is 'DocKIT Task Wizard' and it has a close button (X) in the top right corner. The main heading is 'Step Number: Mapping Templates' with a sub-instruction: 'Select the mapping templates to use for the task and specify the appropriate options.' There is a small icon of a folder with a document and an arrow in the top right corner of the main area.

The form contains the following fields and options:

- Column Mapping Template:** A dropdown menu currently set to 'SharePoint Default'.
- Do you want to migrate unmapped columns also ?** Radio buttons for 'Yes' (selected) and 'No'.
- Domain Mapping Template :** A dropdown menu currently set to 'None'. A note next to it says '\* This mapping will be used for all person or group fields'.
- User / group Mapping Template :** A dropdown menu currently set to 'None'. A note next to it says '\* This mapping will be used for all person or group fields'.

At the bottom right of the main area is a button labeled 'Manage Templates...'. At the bottom of the window are four navigation buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

2) **Column Mapping Template :**

Select any one column mapping template to use from the list of available template(s).

Default Templates

- a) **SharePoint Default** - All columns values available in the metadata file at the time of task run will be imported to its corresponding columns in SharePoint
- b) **DocKIT Default** - Values assigned to the destination SharePoint columns depending upon the DocKIT default mapping template.

**Do you want to migrate unmapped columns also? - Enabling this option helps to import the all unmapped columns available in the metadata file along with the columns that are mapped to the destination column in the mapping template to use:**



## Chapter-6- Assign Metadata to the documents in SharePoint

If external metadata file have some columns that are not mapped to the destination column, DockIT will migrate the unmapped columns to the SharePoint library.

When you deselect this option, DockIT does not migrate the unmapped columns to the destination SharePoint library. It migrate the columns depending up on the mapping template.

### 3) Domain Mapping Template :

Select any one domain mapping template to use from the list of available template(s)

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

### 4) User / Group Mapping Template :

Select any one user / group mapping template to use from the list of available template(s)

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

### 5) Click (Manage Template...)

**DocKIT Task Wizard**

**Step Number: Mapping Templates**

Select the mapping templates to use for the task and specify the appropriate options.

Column Mapping Template: System users template

Do you want to migrate unmapped columns also ?  Yes  No

Domain Mapping Template : domain mapping \* This mapping will be used for all person or group fields

User / group Mapping Template : user \* This mapping will be used for all person or group fields

Manage Templates...

< Back Next > Finish Cancel

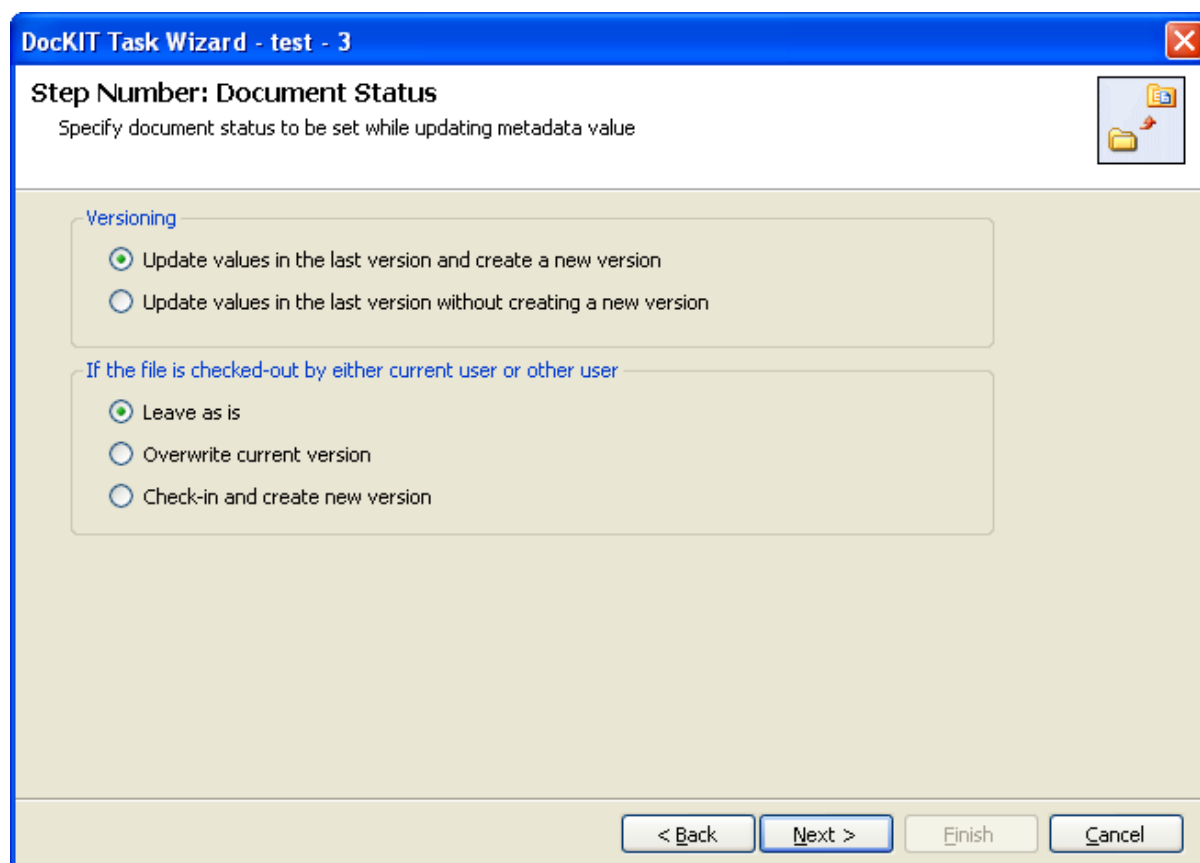
## Chapter-6- Assign Metadata to the documents in SharePoint

### 6.6 File Settings

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

- 1) The **File Settings** step appears as shown below



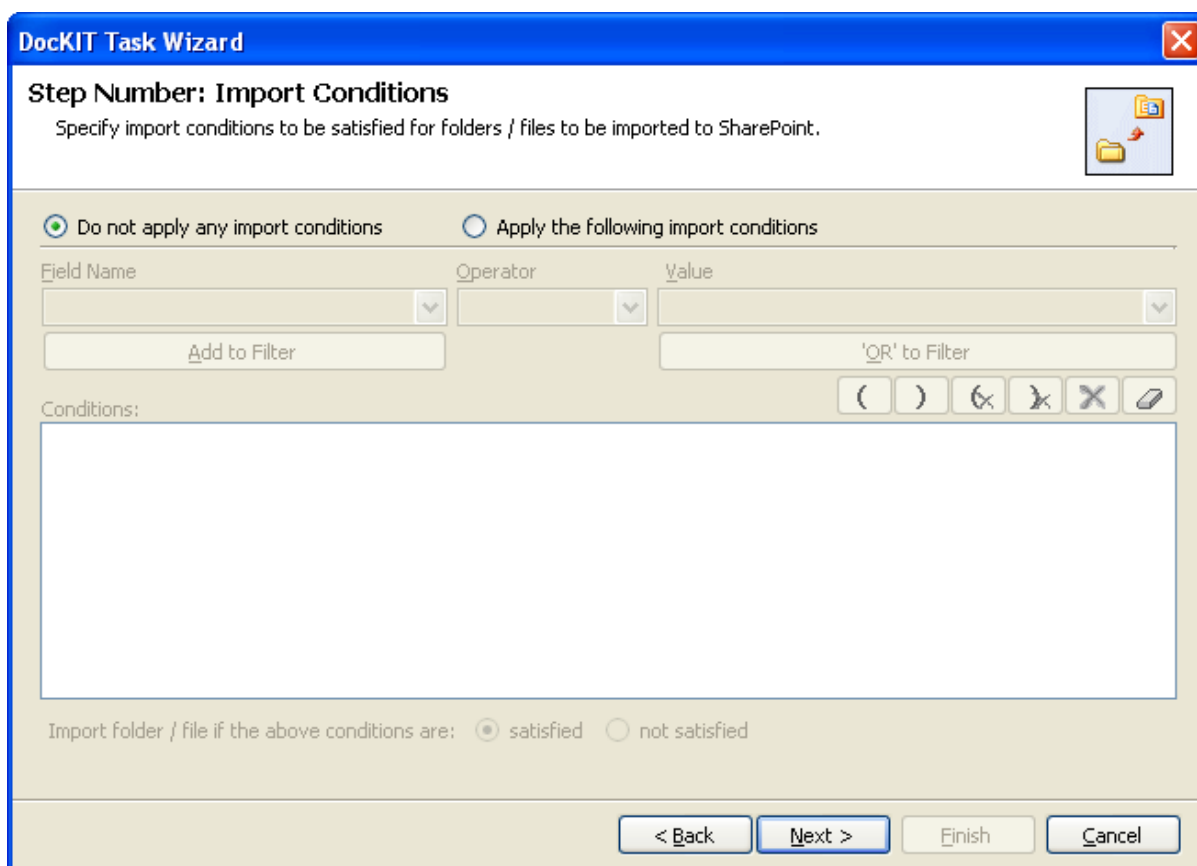
- 2) Select any one of the following Options:
  - a) **Leave as is** - Skip the file.
  - b) **Overwrite current version** - Undo Checkout the file and add the source file as new version.
  - c) **Check-in file & create new version** - Check-in the file and add the source file as a new version.
- 3)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

## Chapter-6- Assign Metadata to the documents in SharePoint

### 6.7 Import Conditions

DocKIT imports folders and files along with metadata to SharePoint library based on certain import conditions. Import conditions can be created using metadata columns and values (from external metadata file).

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



The screenshot shows the 'DocKIT Task Wizard' window at the 'Step Number: Import Conditions' stage. The window title is 'DocKIT Task Wizard' and it has a close button in the top right corner. The main heading is 'Step Number: Import Conditions' with a sub-instruction: 'Specify import conditions to be satisfied for folders / files to be imported to SharePoint.' There is a folder and document icon in the top right. Below the instruction, there are two radio buttons: 'Do not apply any import conditions' (which is selected) and 'Apply the following import conditions'. Under the 'Apply the following import conditions' section, there is a table with three columns: 'Field Name', 'Operator', and 'Value'. Each column has a dropdown menu. Below the table, there is an 'Add to Filter' button and an 'OR' to Filter button. To the right of the 'OR' button are several icons: a left parenthesis, a right parenthesis, a double slash, a double asterisk, a double X, and an eraser. Below these is a large empty text area labeled 'Conditions:'. At the bottom of the conditions area, there is a label 'Import folder / file if the above conditions are:' followed by two radio buttons: 'satisfied' (selected) and 'not satisfied'. At the very bottom of the window, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

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

- a) **Do not apply any import conditions** - No import conditions will be used to filter folders / files
- b) **Apply the following import conditions** - The import conditions specified will be used to filter folders / files taken for import into SharePoint

3) The wizard step appears as shown below

## Chapter-6- Assign Metadata to the documents in SharePoint

**Step Number: Import Conditions**  
Specify import conditions to be satisfied for folders / files to be imported to SharePoint.

Do not apply any import conditions     Apply the following import conditions

Field Name	Operator	Value
Modified Date (File Property)	>	23-Dec-11

'AND' to Filter      'OR' to Filter

Conditions:

```
([Created Date (File Property)] > #23-Dec-11#  
AND [Modified Date (File Property)] > #23-Dec-11#)  
OR [Modified Date (File Property)] > #23-Dec-11#
```

Import folder / file if the above conditions are:  satisfied     not satisfied

< Back    Next >    Finish    Cancel

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

- 4) DockIT can import the folders / files that **satisfy** the import conditions or import the folders / files that **do not satisfy** the import conditions specified in the step above. Use the appropriate action to follow using the options given below:
  - a) **Update folder / file if the above conditions are satisfied** - Folders / Files that satisfy the condition will be marked for metadata update.
  - b) **Update folder / file if the above conditions are not satisfied** - Folders / Files that do not satisfy the condition will be marked for metadata update.

## Chapter-6- Assign Metadata to the documents in SharePoint

**DocKIT Task Wizard - sample**

**Step Number: Import Conditions**  
Specify import conditions to be satisfied for folders / files to be imported to SharePoint.

Do not apply any import conditions     Apply the following import conditions

Field Name	Operator	Value
Modified Date (File Property)	>	23-Dec-11

Conditions:

```
[(Created Date (File Property)) > #23-Dec-11#  
AND [Modified Date (File Property)] > #23-Dec-11#  
OR [Modified Date (File Property)] > #23-Dec-11#
```

Import folder / file if the above conditions are:  satisfied     not satisfied

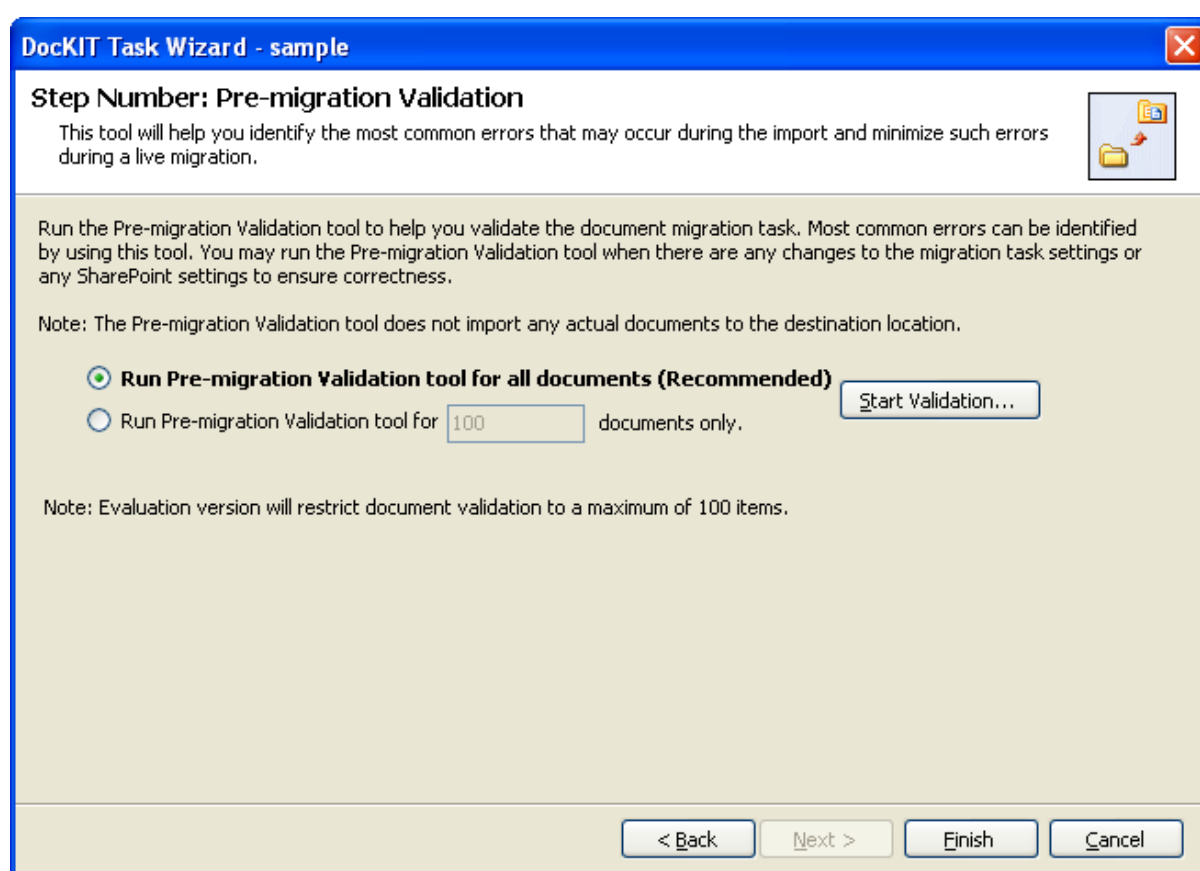
5) Click **Next** to Proceed.

### 6.8 Task Validation

#### Pre-migration Validation

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

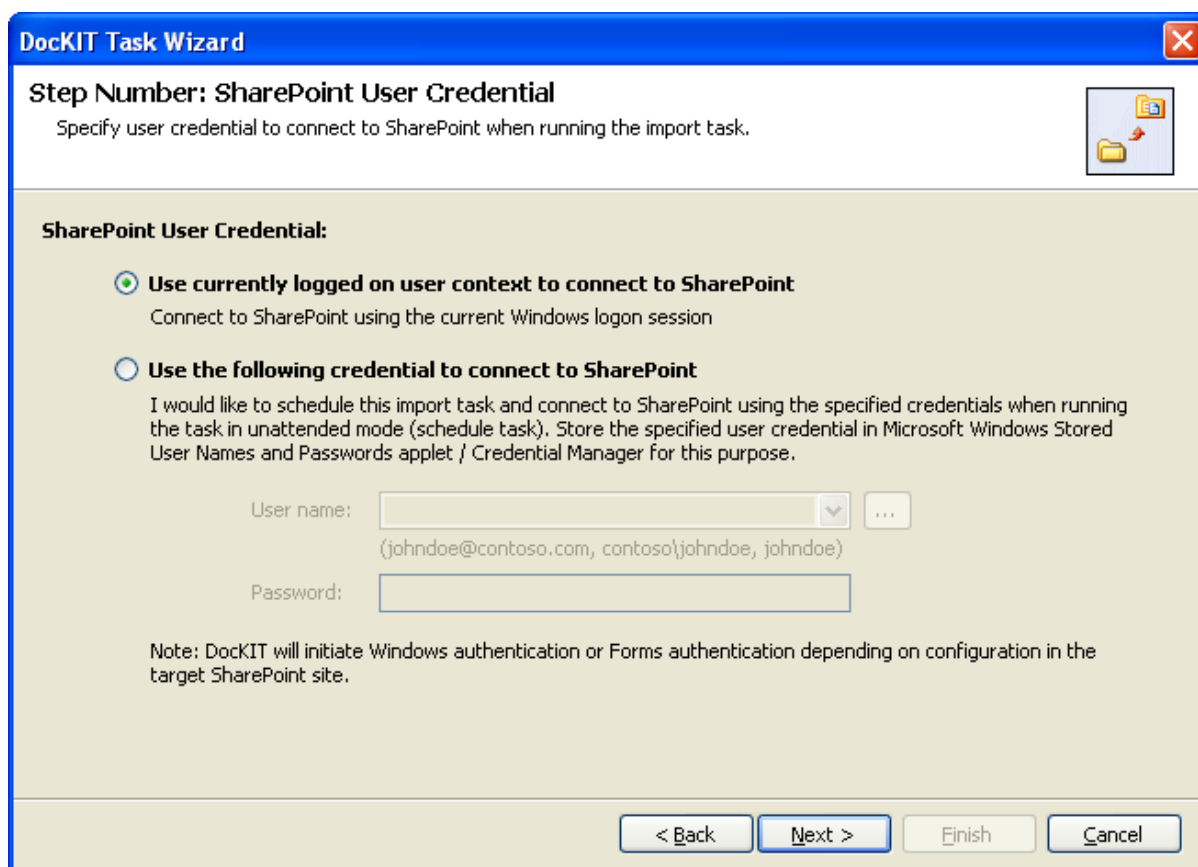
- 1) The **Pre-migration Validation** step in the DockIT Task Wizard appears as shown below:



- 2) Select any of the following options below to specify the number of files to invoke and run the Pre-migration Validation tool:
  - a) **Run Pre-migration Validation tool for all documents (Recommended)** - This option runs the Pre-migration Validation tool for all folders and files specified in the import task wizard.
  - b) **Run Pre-migration Validation tool for <n> documents only** - This option runs the Pre-migration Validation tool for the specified number of files in the text box.

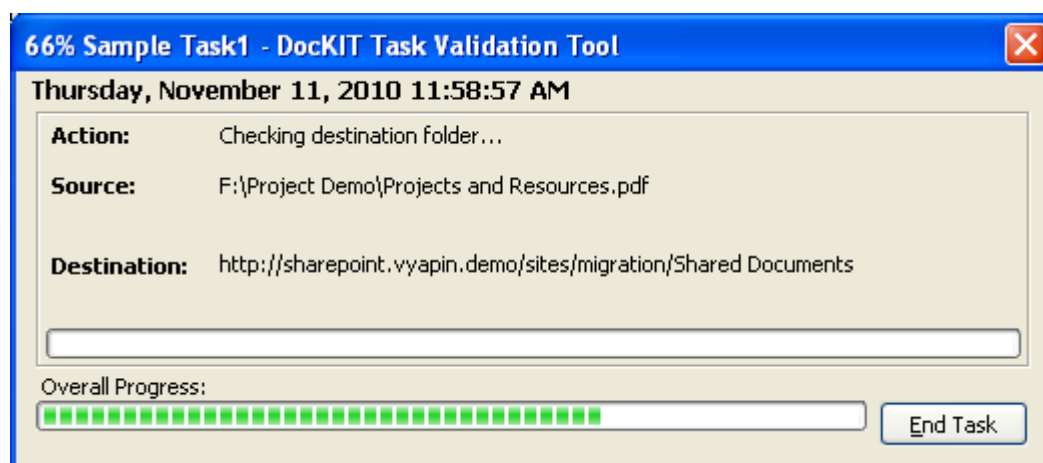
## Chapter-6- Assign Metadata to the documents in SharePoint

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



The screenshot shows a Windows dialog box titled "DocKIT Task Wizard" with a close button in the top right corner. The main heading is "Step Number: SharePoint User Credential" and the instruction below it says "Specify user credential to connect to SharePoint when running the import task." There is a small icon of a folder with a document and an arrow pointing to it. Below this, the section "SharePoint User Credential:" contains two radio button options. The first option, "Use currently logged on user context to connect to SharePoint", is selected. The second option, "Use the following credential to connect to SharePoint", includes a descriptive note: "I would like to schedule this import task and connect to SharePoint using the specified credentials when running the task in unattended mode (schedule task). Store the specified user credential in Microsoft Windows Stored User Names and Passwords applet / Credential Manager for this purpose." Below the second option are two input fields: "User name:" with a dropdown menu and a "..." button, and "Password:" with a text box. The user name dropdown shows "(johndoe@contoso.com, contoso\johndoe, johndoe)". At the bottom of the dialog, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

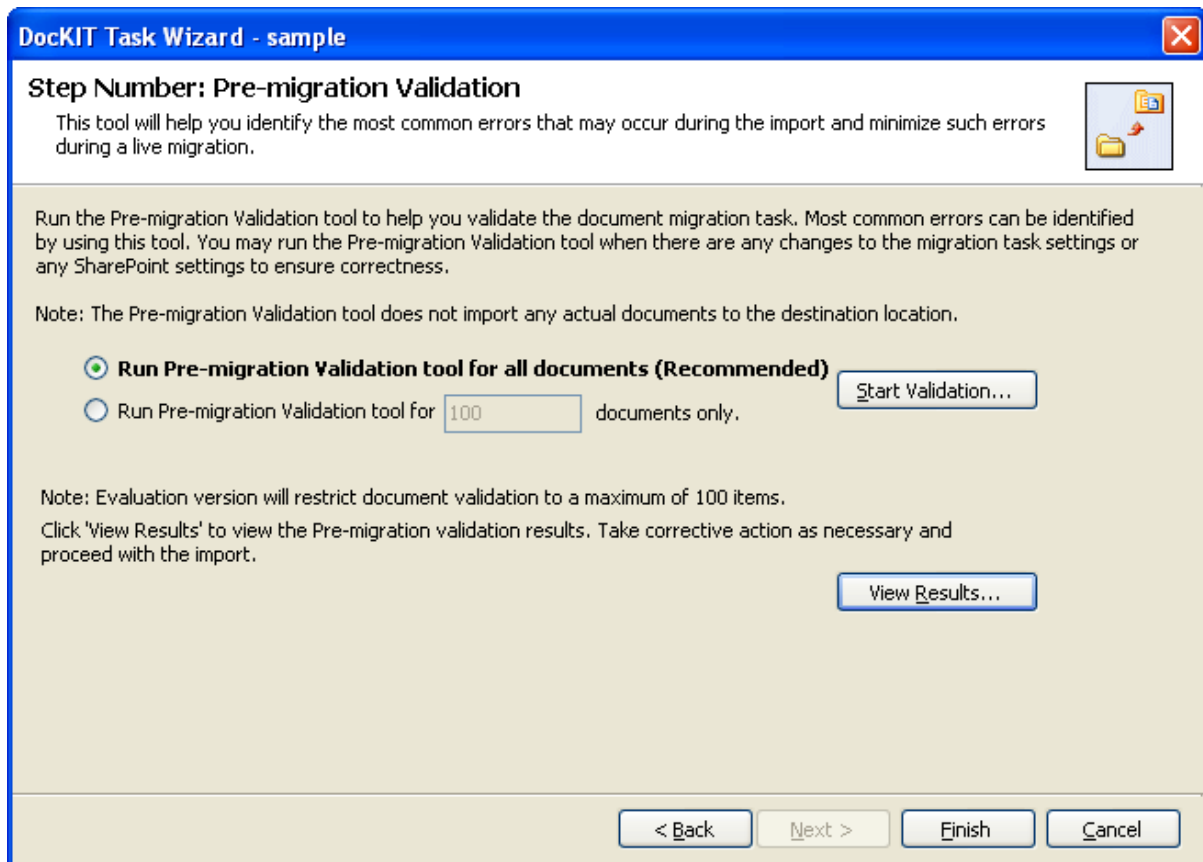
- 5) You will notice a task progress bar in a new window as shown below.



The screenshot shows a progress window titled "66% Sample Task1 - DocKIT Task Validation Tool" with a close button in the top right corner. The window displays the date and time: "Thursday, November 11, 2010 11:58:57 AM". Below this, there is a table with three rows: "Action: Checking destination folder...", "Source: F:\Project Demo\Projects and Resources.pdf", and "Destination: http://sharepoint.vyapin.demo/sites/migration/Shared Documents". Underneath the table is a progress bar that is approximately 66% full. At the bottom left, it says "Overall Progress:" followed by another progress bar. At the bottom right, there is an "End Task" button.

## Chapter-6- Assign Metadata to the documents in SharePoint

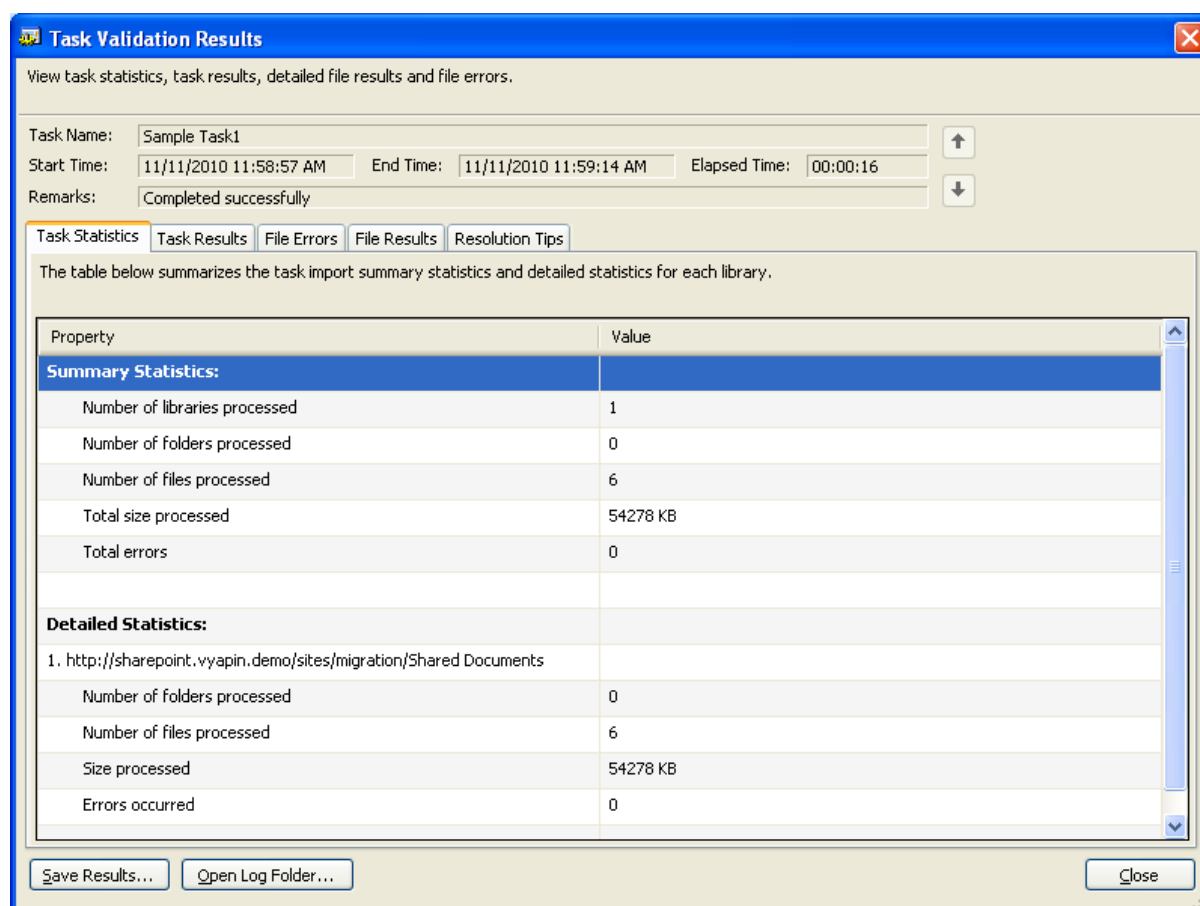
- 6) Once the Pre-migration validation is complete, **View Results** button will be enabled (as shown below). Click **View Results** button to view the Pre-migration validation test results.





## Chapter-6- Assign Metadata to the documents in SharePoint

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



8) The validation test results are summarized under four separate tabs:

- a) **Task Statistics:** Summarizes the task import summary statistics and detailed statistics for each destination library.
- b) **Task Results:** Summarizes the task level check (specifically, import task settings) results from the task validation tool.
- c) **File Results:** Summarizes the task validation tool results after verification of each folder / file added for import.
- d) **File Errors:** Summarizes the items for which an error has occurred.

9) Click **Save Results** button to save the task validation results in Microsoft Excel format. Each tab in Task Validation Results is stored as a separate worksheet in MS-Excel.

10) Click **Open Log Folder** button to open the folder that contains the activity log of the task validation results.

### Limitations:

The Pre-migration validation check and the actual import results may vary in certain circumstances. The Pre-migration Validation Tool does not perform a few checks as the checks may either slowdown the validation process or a few errors

## Chapter-6- Assign Metadata to the documents in SharePoint

will occur only when performing an actual live transfer. Please note the following additional information about the Pre-migration Validation tool:

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

### 6.9 Task Settings

To specify the task name and schedule settings:

- 1) The **Task Settings** step appears as shown below

**DocKIT Task Wizard**

**Step Number: File Settings**  
Specify action to be taken when a file with the same name already exists in the destination location.

If a file with the same name already exists in the destination location:

- Do not overwrite
- Overwrite
- Create new file in the name - Prepend [ ] <File Name> Append [ ]
- Create new version \* denotes incremental index

If the file is in checked-out by either current user or other user

- Leave as is
- Overwrite current version
- Check-in and create new version

**Fail-safe Settings**

- Import a document to SharePoint even if it contains any errors or warnings in the metadata. Enabling this option may result in documents having partial or incomplete metadata in the destination library.

< Back   Next >   Finish   Cancel

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

## Chapter-6- Assign Metadata to the documents in SharePoint

The screenshot shows the 'DocKIT Task Wizard' window, specifically the 'Task Schedule Settings' step. The window title is 'DocKIT Task Wizard' and it has a close button (X) in the top right corner. Below the title bar, the text reads 'Step Number: Task Schedule Settings' and 'Enter a unique name for the import task and specify schedule task settings.' There is a small icon of a folder with a document and an arrow in the top right corner.

The main area contains the following fields and options:

- Task Name:** A text box containing 'sample task'.
- Task Option:** A group box containing three radio buttons: 'Run later', 'Run now' (which is selected), and 'Schedule'.
- Connect to SharePoint As:** A group box containing:
  - A radio button for 'Prompt me for user context at task run time' (which is selected).
  - A radio button for 'This user:' with a dropdown menu showing 'vyapinlab\aaron' and a 'Manage Profile...' button.
- Schedule Settings:** A group box containing:
  - 'Run As:' with a text box containing 'VSSPRO\arunkumar' and a 'Set Password...' button.
  - 'Schedule:' with a dropdown menu set to 'Daily' and a 'Start time:' dropdown set to '5:46 PM', with an 'Advanced...' button.
  - 'Schedule Task Daily' section with 'Every' followed by a spinner box set to '1' and 'day(s)'. Below this, it says 'At 5:46 PM every day, starting 23-Dec-11'.

At the bottom of the window, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

4) Click **Finish** button to create the task.

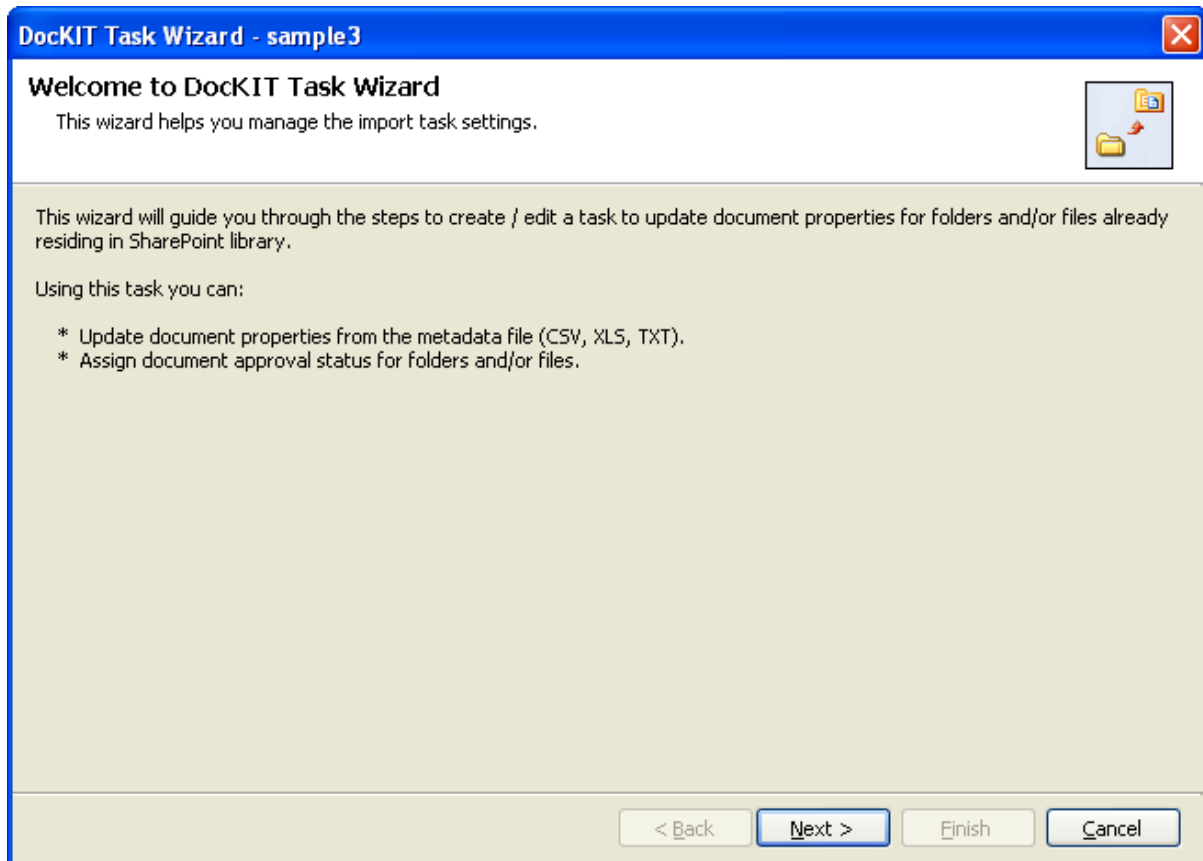
## Chapter-6- Assign Metadata to the documents in SharePoint

### 6.10 Edit Task

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Edit task is similar to creating a task, except that a few settings cannot be altered as stated below.

- 1) The **DockIT Task Wizard** appears



- 2) Click **Next** button
- 3) Specify the **Metadata Options**
- 4) Specify **the Mapping Templates**
- 5) Specify the **File Settings**
- 6) Specify the **Import Conditions**
- 7) In **Task Settings** edit mode, DockIT Task Wizard the task name cannot be altered.

## Chapter-6- Assign Metadata to the documents in SharePoint

The screenshot shows the 'DocKIT Task Wizard - sample' window. The title bar includes a close button. The main content area is titled 'Step Number: Task Schedule Settings' and contains the instruction: 'Enter a unique name for the import task and specify schedule task settings.' Below this, there is a 'Task Name' field with the value 'sample'. A 'Task Option' section on the left has three radio buttons: 'Run later', 'Run now' (which is selected), and 'Schedule'. The 'Run now' option is expanded to show 'Connect to SharePoint As' settings, including 'Prompt me for user context at task run time' (selected) and 'This user:' set to 'vyapinlab\aaaron'. Below this is the 'Schedule Settings' section, which includes 'Run As:' set to 'vyapinlab\aaaron', 'Schedule:' set to 'Daily', and 'Start time:' set to '6:16 PM'. A 'Schedule Task Daily' section shows 'Every 1 day(s)'. At the bottom of the window are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

### 8) Specify **Pre-migration Validation**

9) Click **Finish** button to save the task settings, or click **Back** button to back to a previous step.

## 6.11 Re-import Task

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Please click the link below to read about Re-import Task:

[Re-import Task](#)

## **7 Manage list items (including metadata) in all SharePoint Lists (Explorer Mode)**

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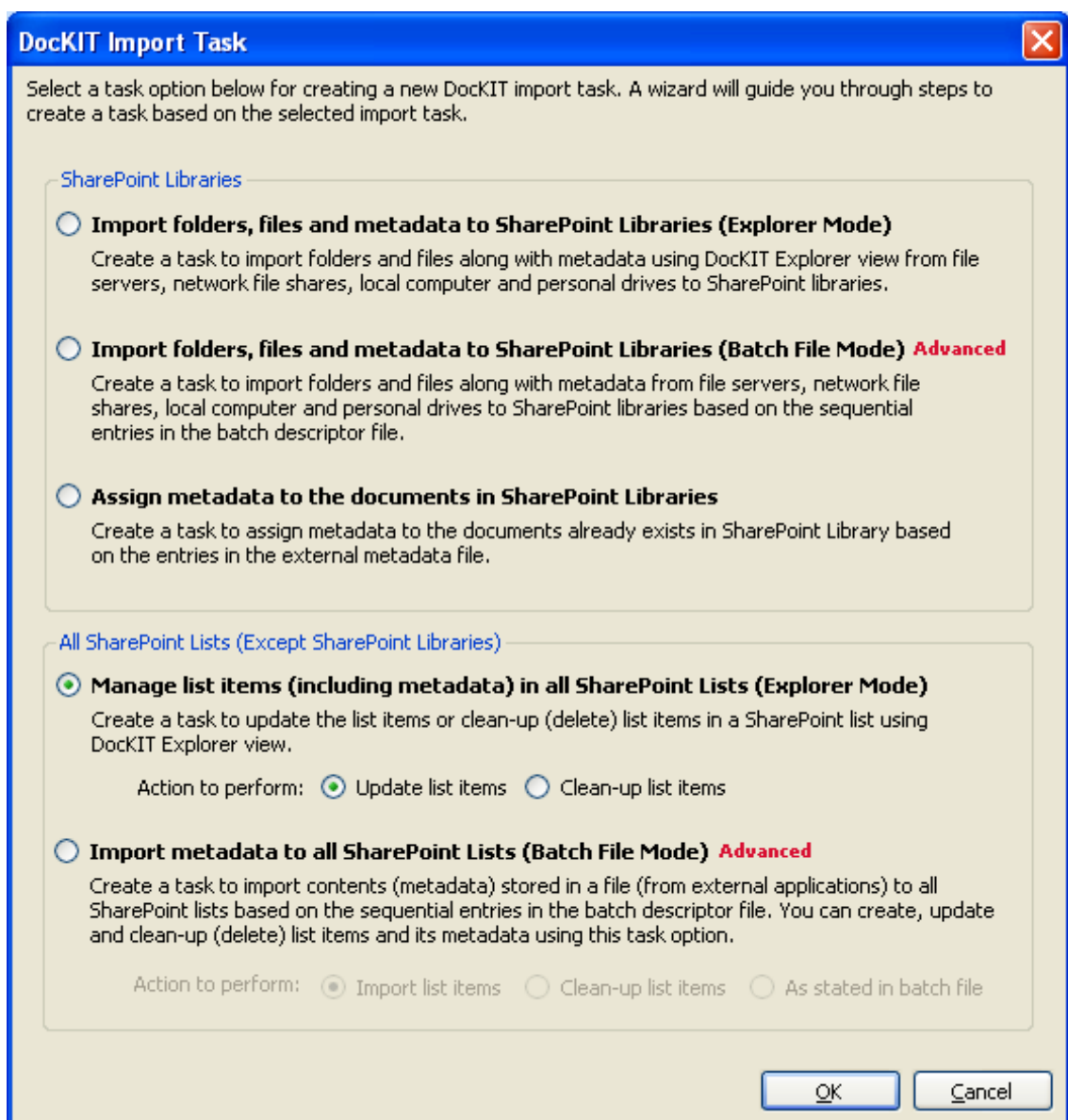
- **Create a task to import list items**
  
- **Create a task to clean-up list items**
  
- **Edit Task**
  
- **Copy Task**
  
- **Delete Task**
  
- **Run Task**

### 7.1 Update list items

#### Update list items (Explorer Mode)

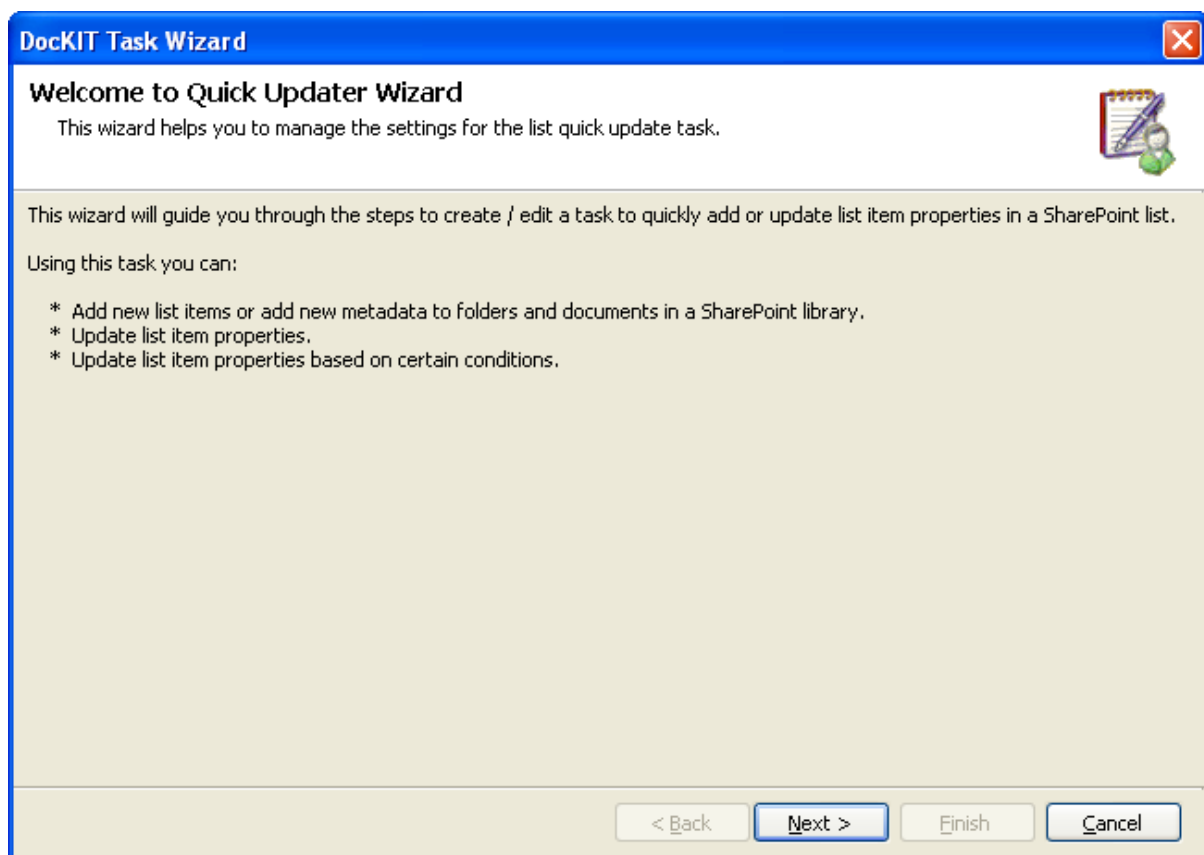
To create a task to import list items in SharePoint list using DockIT Explorer Mode option:

- 1) Select **Manage list items (including metadata) in all SharePoint Lists (Explorer Mode)** option in **DockIT Import Task dialog** as shown below. Ensure the action to perform is **Update list items** and click **OK** to proceed.





2) The **DocKIT Task Wizard** appears as shown below



3) Click **Next** button

4) Specify the **SharePoint list location**

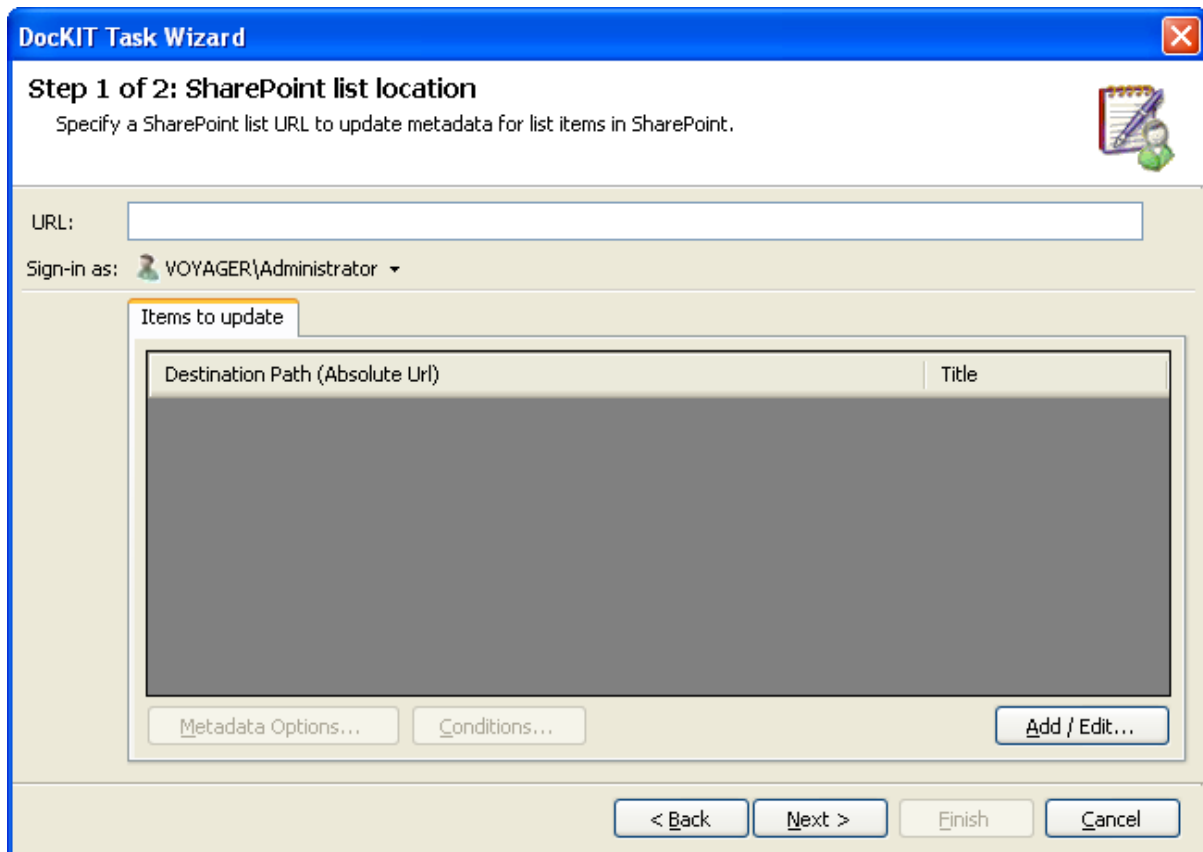
5) Specify **Task Settings**

6) Click **Finish** button to create the task, or click **Back** button to change the task settings.

### 7.2 SharePoint list location

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

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

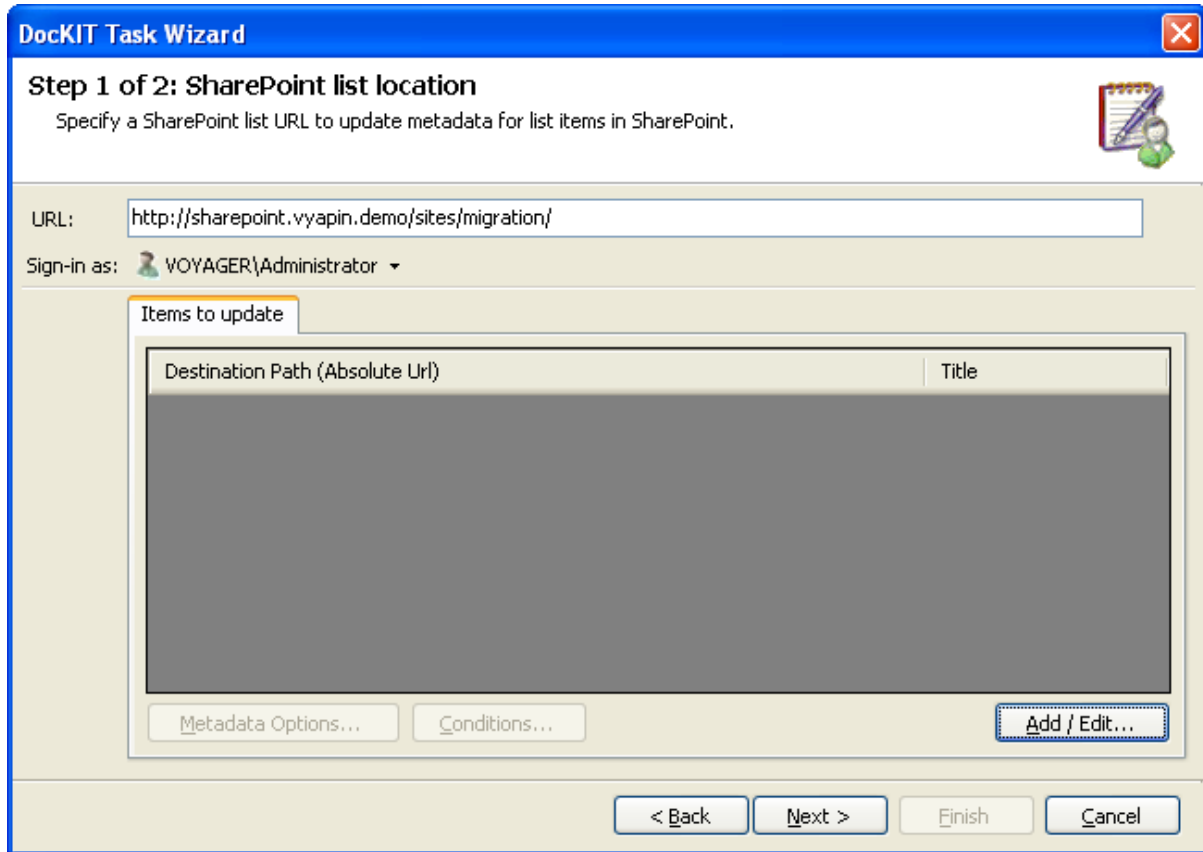


The screenshot shows the 'DocKIT Task Wizard' window, specifically 'Step 1 of 2: SharePoint list location'. The window title is 'DocKIT Task Wizard' and it has a close button (X) in the top right corner. The main heading is 'Step 1 of 2: SharePoint list location' with a sub-instruction: 'Specify a SharePoint list URL to update metadata for list items in SharePoint.' There is a small icon of a notepad and pencil in the top right. Below the instruction, there is a 'URL:' label followed by an empty text input field. Underneath that is a 'Sign-in as:' label with a user icon and the text 'VOYAGER\Administrator' and a dropdown arrow. The main area is titled 'Items to update' and contains a table with two columns: 'Destination Path (Absolute Url)' and 'Title'. The table body is currently empty. At the bottom of the table area are three buttons: 'Metadata Options...', 'Conditions...', and 'Add / Edit...'. At the very bottom of the wizard are four navigation buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

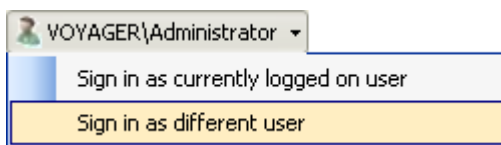
Destination Path (Absolute Url)	Title
---------------------------------	-------

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

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

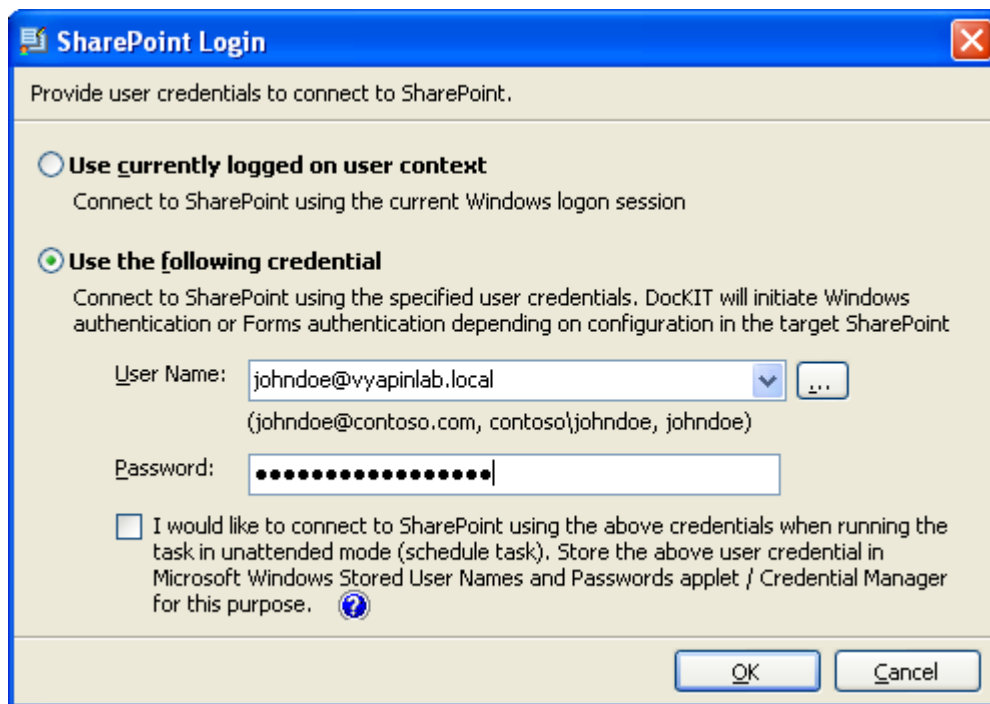


- 3) Click the Sign-in as drop down menu to specify the user credential as shown below:



- a) **Sign in as currently logged on user** - Connect to SharePoint URL using the currently logged on user context
- b) **Sign in as different user** - Connect to the SharePoint URL using a different user context.

On selecting *sign in as currently logged on user*, **Credential Dialog** will appear as shown below.



Specify the users' credentials to connect to the SharePoint URL specified in step 2 using one of the options given below:

- a) **Use currently logged on user context** - Connect to SharePoint URL using the currently logged on user context
- b) **Use the following credential** - 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.

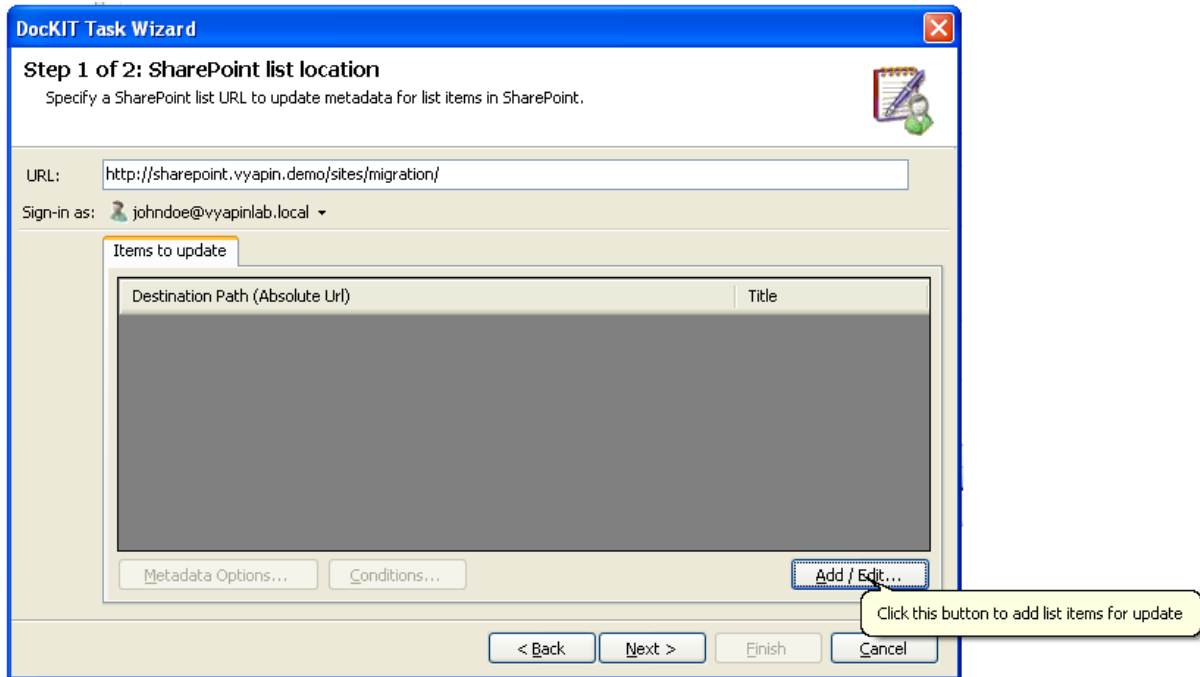
**I would like to connect to SharePoint using the above credentials when running the task in unattended mode (schedule task). Store the above user credential in Microsoft Windows Stored User Names and Passwords applet for this purpose** - In scheduled Update process, DockIT allows the user to enter different user credentials to connect to SharePoint and to create a scheduled export 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.

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

DockKIT will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords 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.

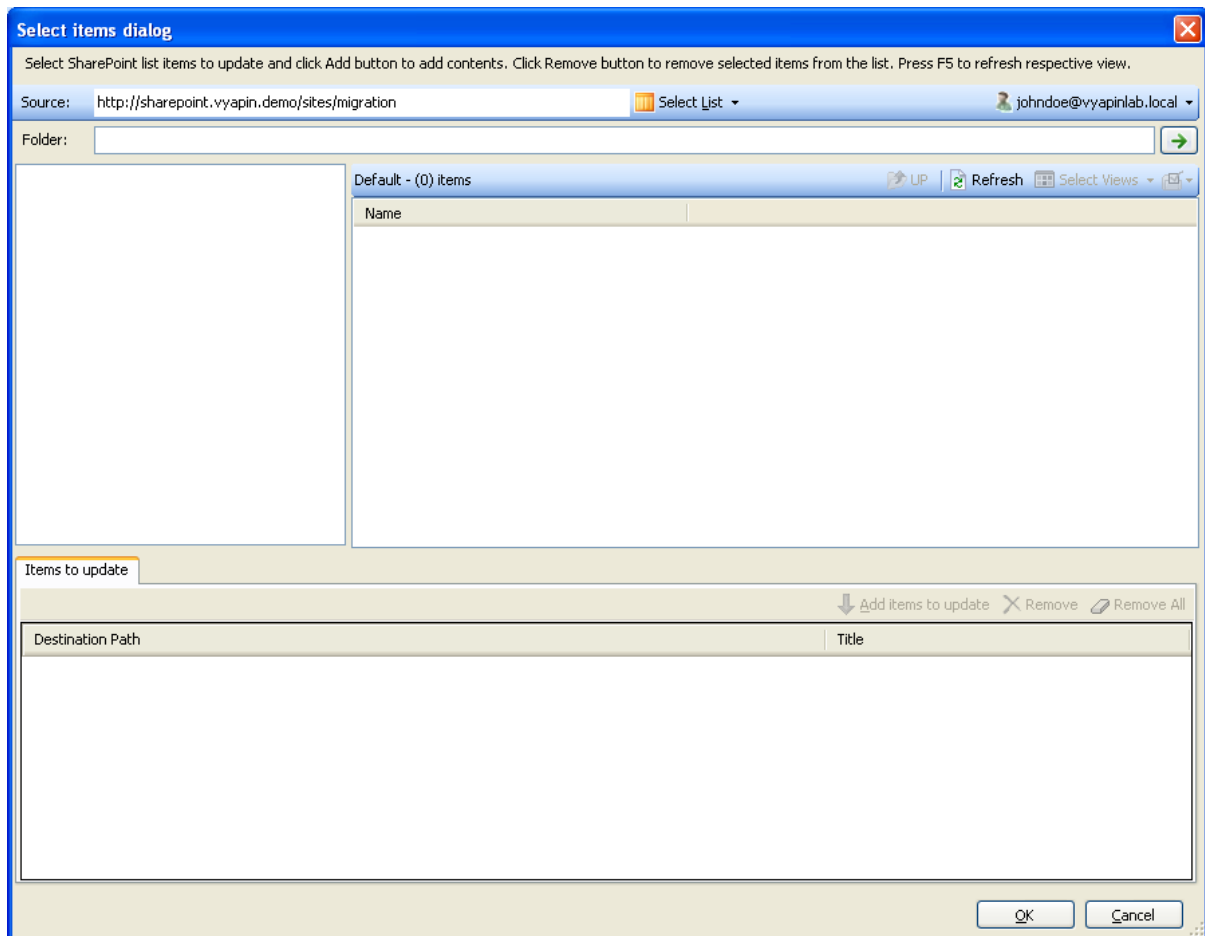
Click **OK** to proceed.



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

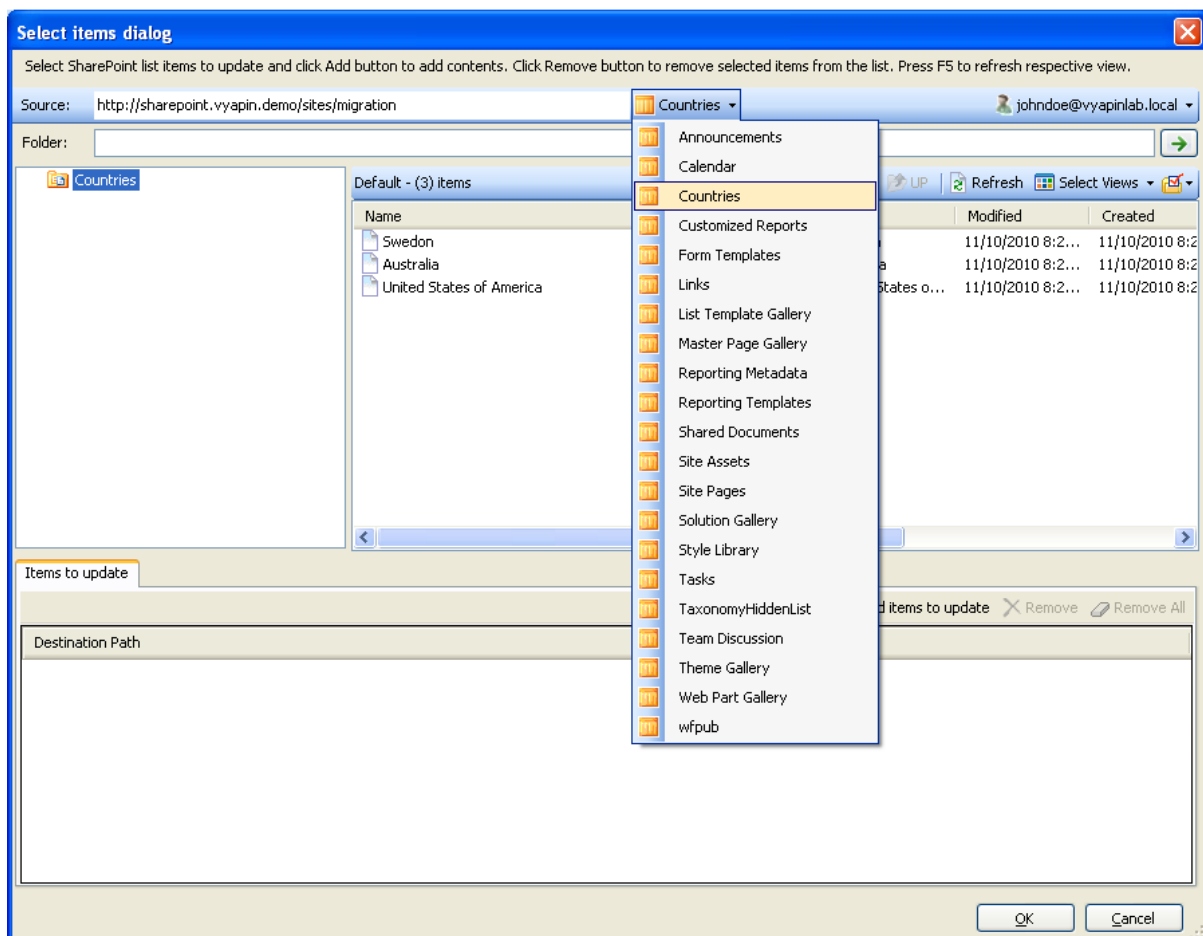
## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)


5) The **Select items dialog** appears as shown below:



## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

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

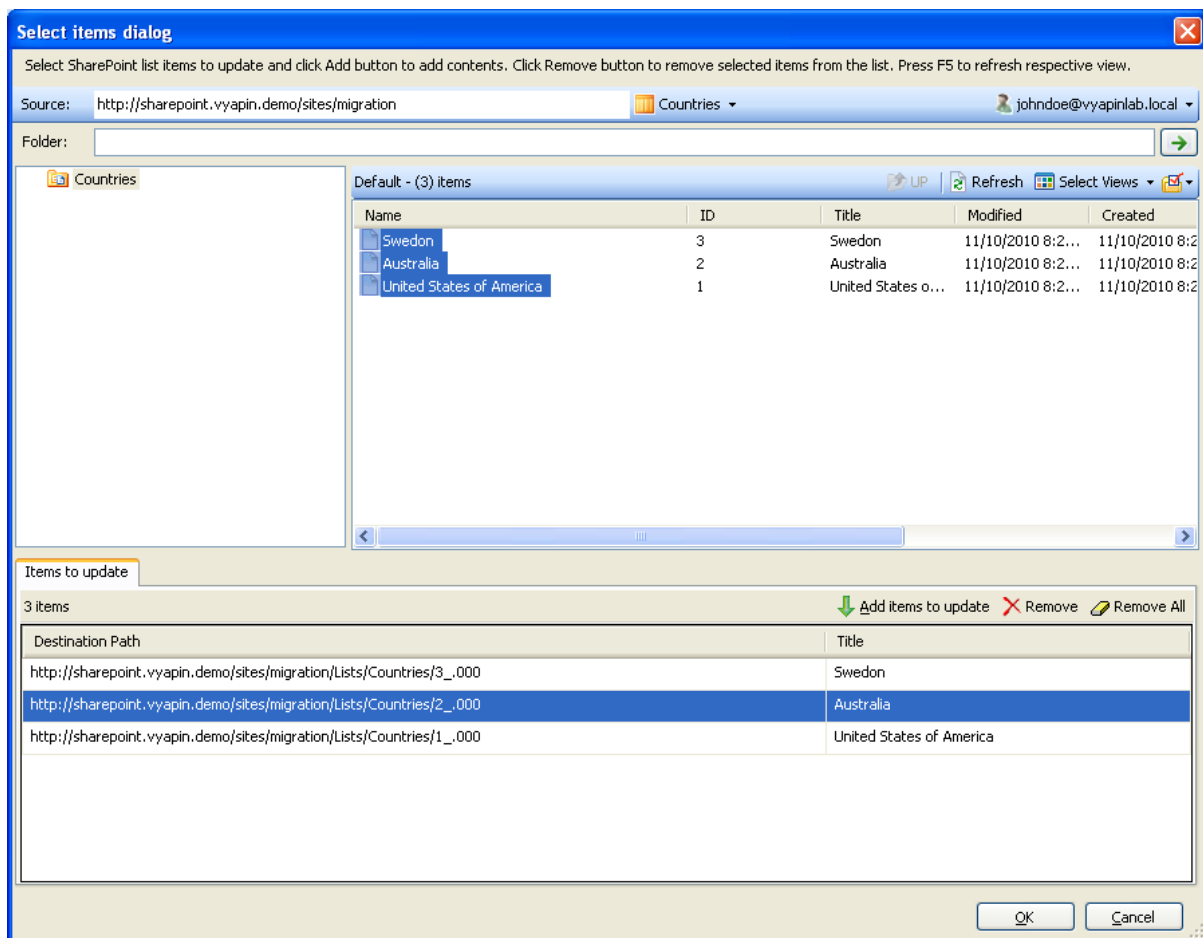


8) **Select items dialog** contains a textbox (top), tree-view (top-left) and a list-view (top-right), which provides explorer like view to select folder / item to update or delete. The **Folder** textbox allows you to directly browse the specified folder location in the connected SharePoint list. You must specify the folder's relative path and Click  button to mount the specified folder as a root item in the explorer view. This option will be very useful if the connected list contains large number of folders and sub-folders.

9) Browse items in the explorer view and select required items from the list view (top right pane). You can add the selected items to either update or delete process. Select an appropriate tab and click '**Add items**' button to add the selected items to the respective process. Please note that you cannot add the same list items to both update and delete process in the same task.

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

The items added for update will appear as shown below:

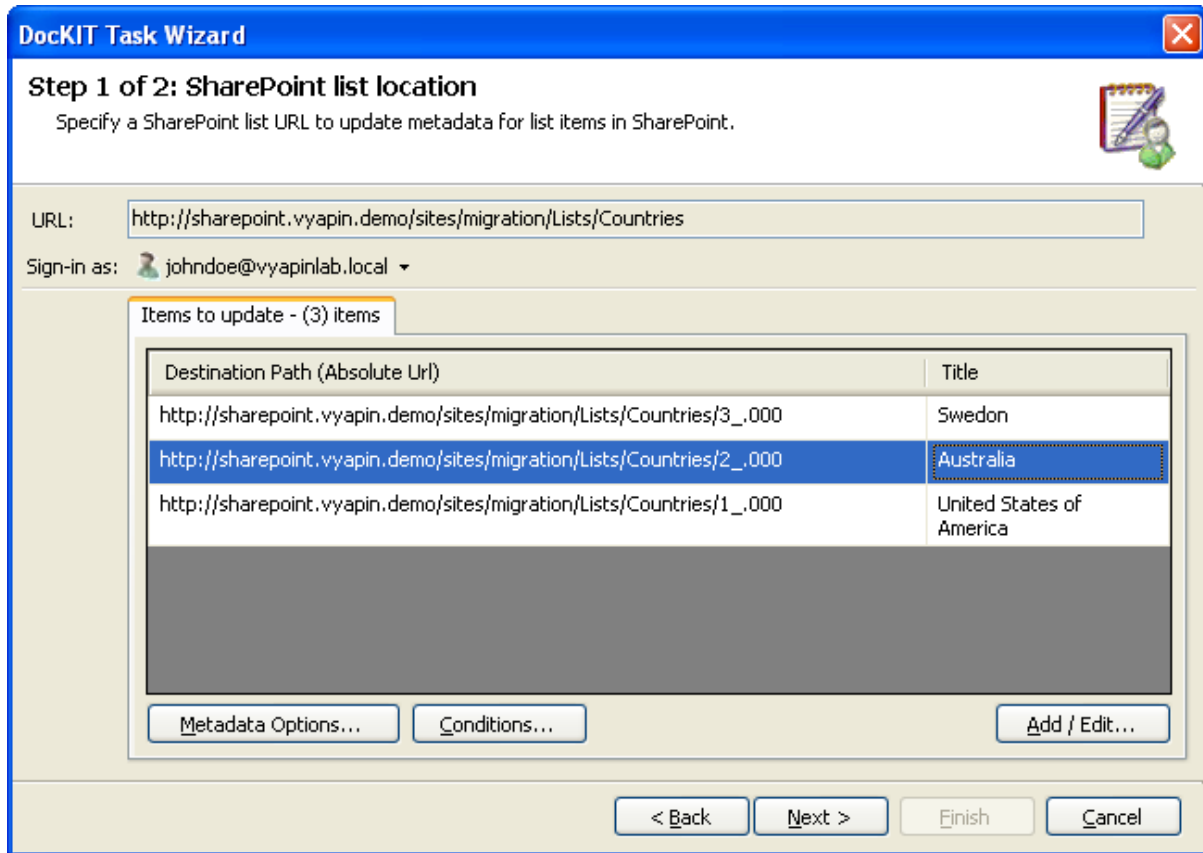


- 10) Click the Sign-in as drop down menu at the top-right corner of **Select Items Dialog** to sign in as different user and browse the list items by specifying the user credential as specified in the *Step 3*.
- 11) Click **OK** button to proceed or click **Cancel** to discard the changes.



## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

**12) SharePoint list location** steps contains the folders and list items added for update or delete as shown below:



**13)** Click **Metadata Options...** button to specify the metadata values to update in the SharePoint list.

**14)** Click **Conditions...** button to define the conditions to use when updating list items in a SharePoint list.

**15)** Click **Next** to proceed.

### 7.3 Task Schedule Settings

#### Task Settings

To specify the task name and schedule settings for the quick import task:

- 1) The **Task Schedule Settings** step appears as shown below:

**Task Name:**

**Task Option**

Run later

Run now

Schedule

**Connect to SharePoint As**

Prompt me for user context at task run time

This user:

< Back   Next >   Finish   Cancel

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

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

- 4) Select from one of the following options through which the destination SharePoint to be connected:
- Prompt me for user context at task run time** - DockKIT will prompt for the user context to use to connect destination SharePoint at the time of DockKIT task run.
  - This user <user name>** - DockKIT will use stored profile context to connect destination SharePoint.

DocKIT Task Wizard

Step 2 of 2: Task Schedule Settings

Enter a unique name for the task and specify schedule task settings.

Task Name: Quick Task

Task Option

- Run later
- Run now
- Schedule

Connect to SharePoint As

- Prompt me for user context at task run time
- This user: johndoe@vyapinlab.local

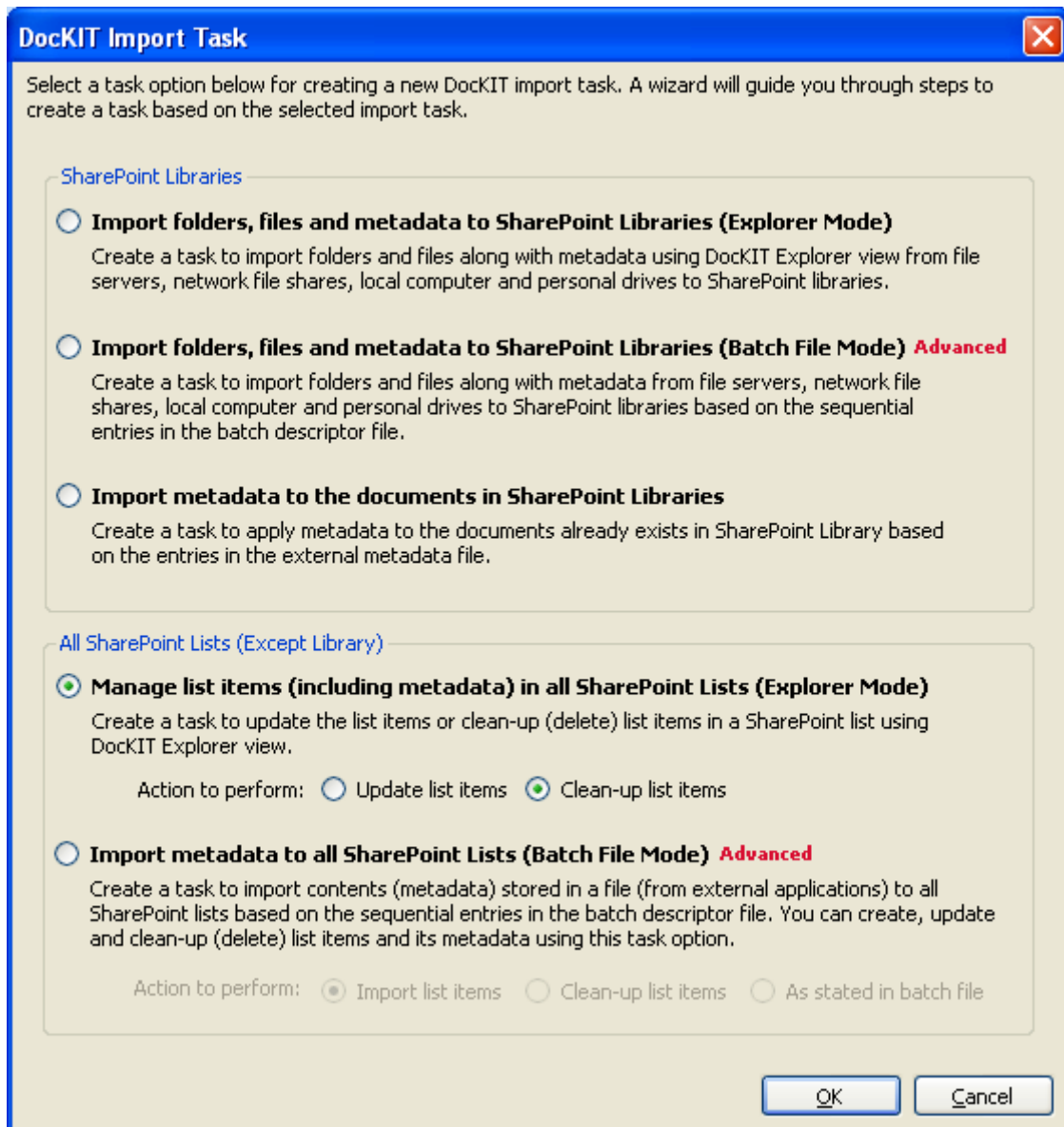
< Back   Next >   Finish   Cancel

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

### 7.4 Clean-up list items (Explorer Mode)

To create a task to clean-up list items in SharePoint list using DockIT Explorer Mode option:

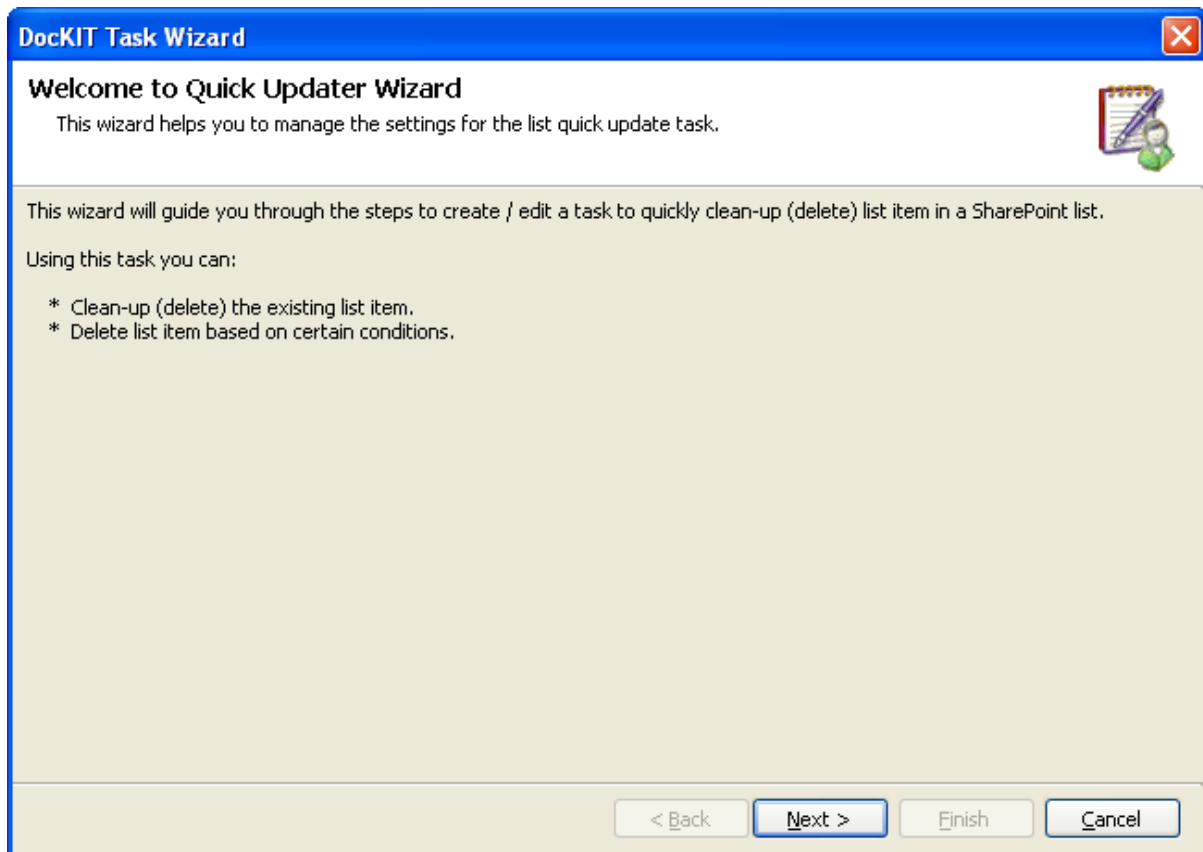
- 1) Select **Manage list items (including metadata) in all SharePoint Lists (Explorer Mode)** option in **DockIT Import Task** dialog as shown below. Select **Clean-up list items** action to perform and click **OK** to proceed.



## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

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2) The **DocKIT Task Wizard** appears as shown below



Click **Next** button

Specify the **SharePoint list location**

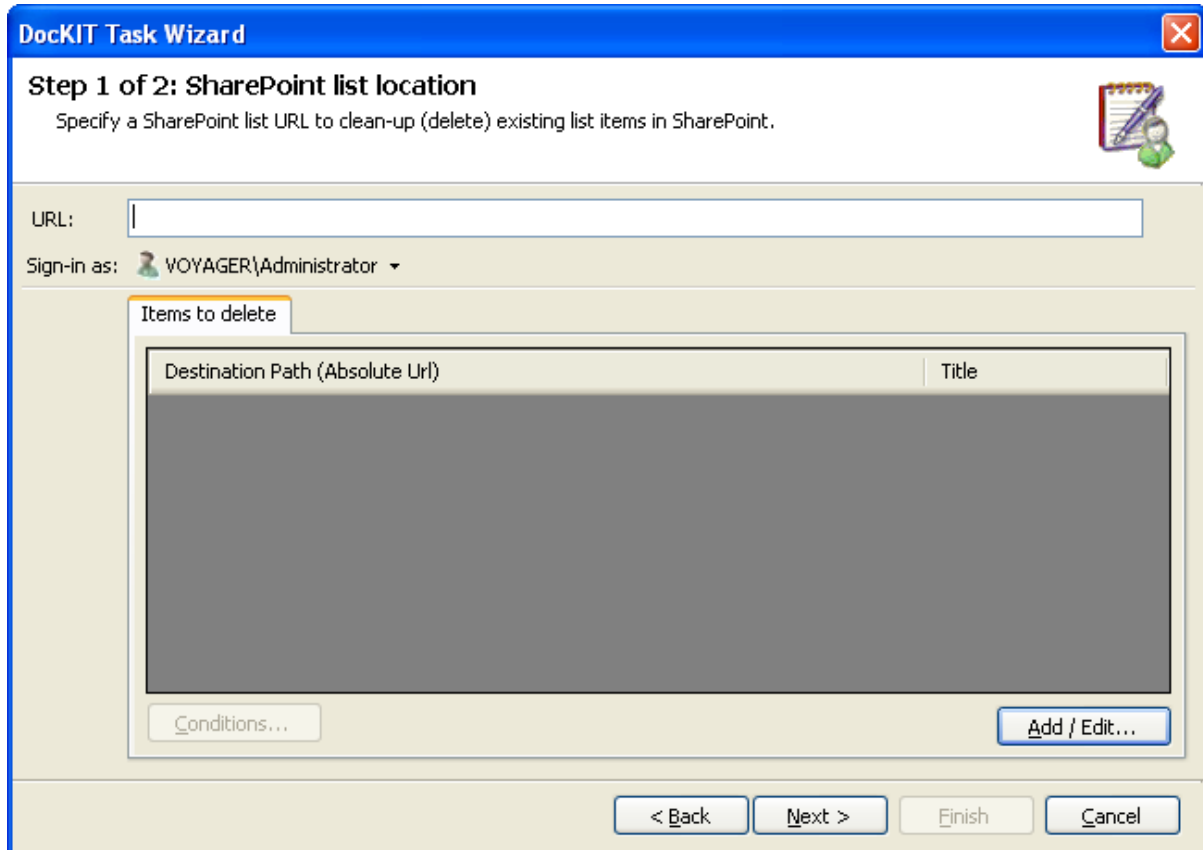
Specify **Task Settings**

Click **Finish** button to create the task, or click **Back** button to change the task settings.

### 7.5 SharePoint list location

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

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



The screenshot shows the 'DocKIT Task Wizard' window. The title bar reads 'DocKIT Task Wizard'. The main heading is 'Step 1 of 2: SharePoint list location'. Below the heading is the instruction: 'Specify a SharePoint list URL to clean-up (delete) existing list items in SharePoint.' There is a small icon of a notepad and pencil in the top right corner. Below the instruction is a text box labeled 'URL:'. Underneath the URL box is a 'Sign-in as:' label followed by a user icon and the text 'VOYAGER\Administrator'. Below this is a section titled 'Items to delete' which contains a table with two columns: 'Destination Path (Absolute Url)' and 'Title'. The table is currently empty. At the bottom left of the table area is a button labeled 'Conditions...'. At the bottom right is a button labeled 'Add / Edit...'. At the very bottom of the window are four navigation buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

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

**DocKIT Task Wizard**

**Step 1 of 2: SharePoint list location**  
Specify a SharePoint list URL to clean-up (delete) existing list items in SharePoint.

URL:

Sign-in as:

Items to delete

Destination Path (Absolute Url)	Title
---------------------------------	-------

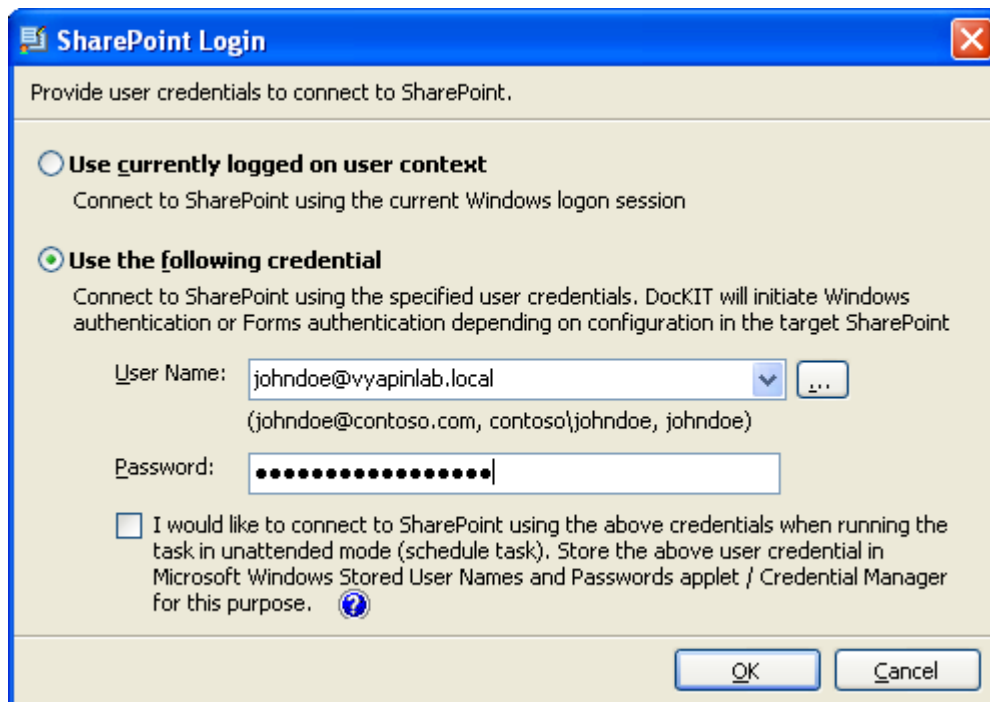
- 3) Click the Sign-in as drop down menu to specify the user credential as shown below:

- Sign in as currently logged on user
- Sign in as different user

- a) **Sign in as currently logged on user** - Connect to SharePoint URL using the currently logged on user context
- b) **Sign in as different user** - Connect to the SharePoint URL using a different user context.

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

On selecting sign in as currently logged on user, **Credential Dialog** will appear as shown below.



Specify the users' credentials to connect to the SharePoint URL specified in step 2 using one of the options given below:

- a) **Use currently logged on user context** - Connect to SharePoint URL using the currently logged on user context.
- b) **Use the following credential** - 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.

**I would like to connect to SharePoint using the above credentials when running the task in unattended mode (schedule task). Store the above user credential in Microsoft Windows Stored User Names and Passwords applet for this purpose** - In scheduled Update process, DockIT allows the user to enter different user credentials to connect to SharePoint and to create a scheduled export task (unattended mode).

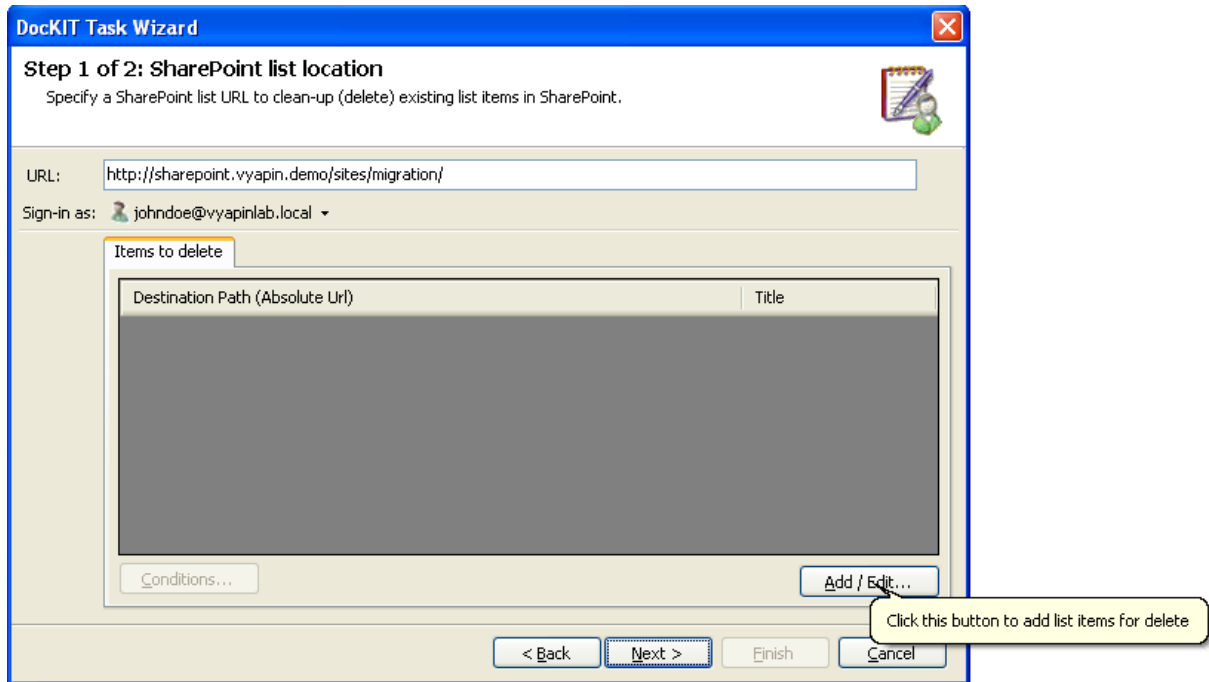
By default, DockIT will use the user account specified in the scheduled 'Run As' user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint when running the scheduled task, you can do so by storing the SharePoint user context for future use.



## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

DockIT will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords 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.

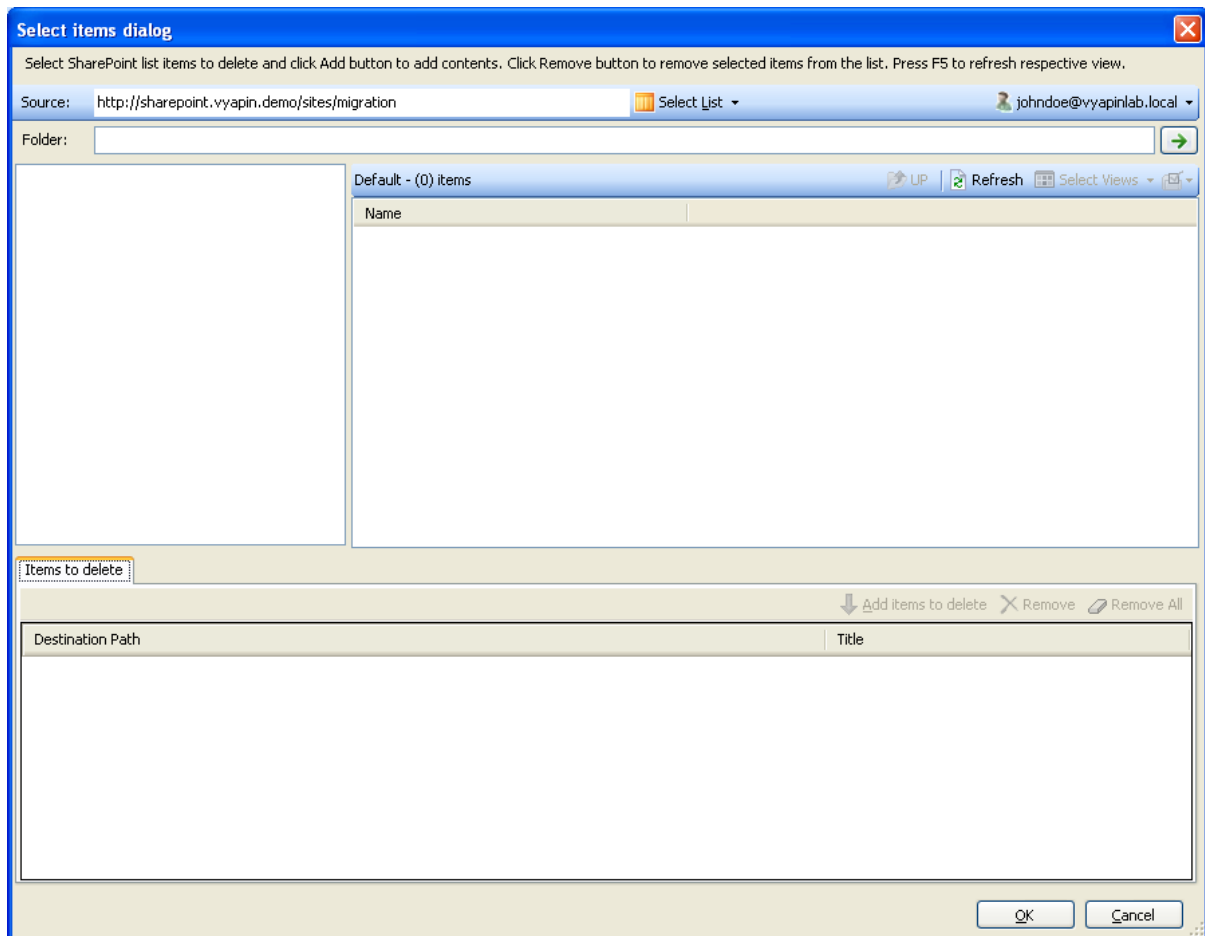
Click **OK** to Proceed.



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

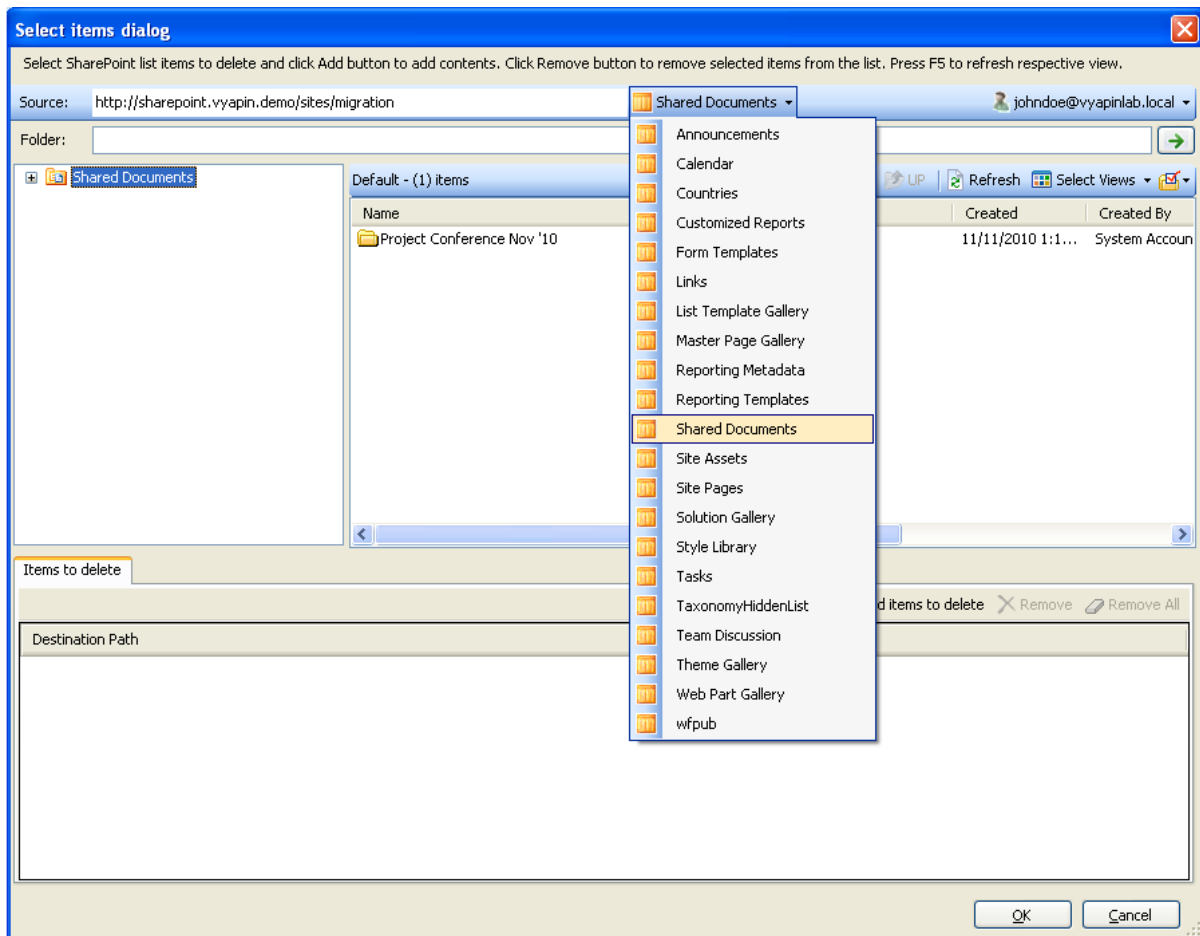
## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)


5) The **Select items dialog** appears as shown below:



## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

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

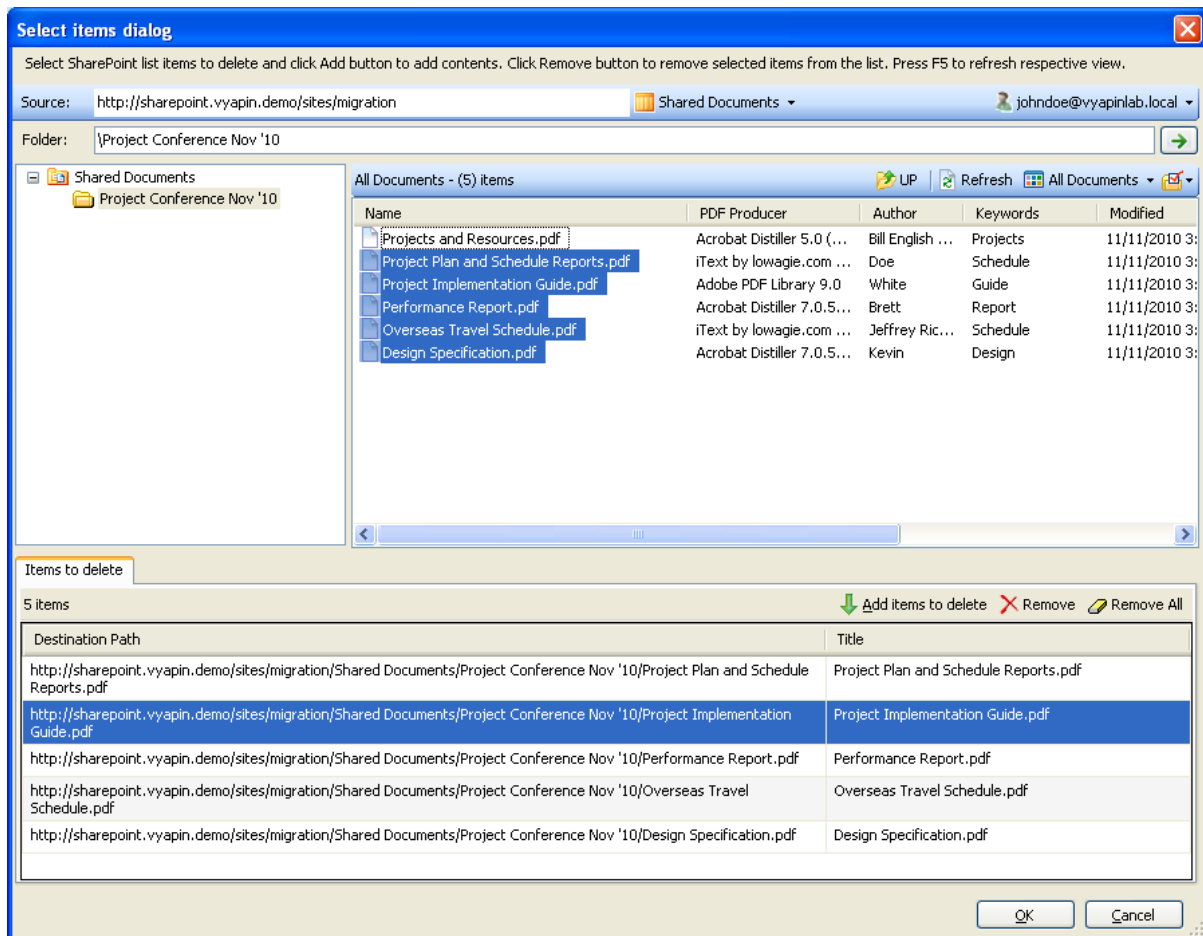


8) **Select items dialog** contains a textbox (top), tree-view (top-left) and a list-view (top-right), which provides explorer like view to select folder / item to delete. The **Folder** textbox allows you to directly browse the specified folder location in the connected SharePoint list. You must specify the folder's relative path and Click  button to mount the specified folder as a root item in the explorer view. This option will be very useful if the connected list contains large number of folders and sub-folders.

9) Browse items in the explorer view and select required items from the list view (top right pane). You can add the selected items to delete process. Select an appropriate tab and click '**Add items**' button to add the selected items to the respective process.

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

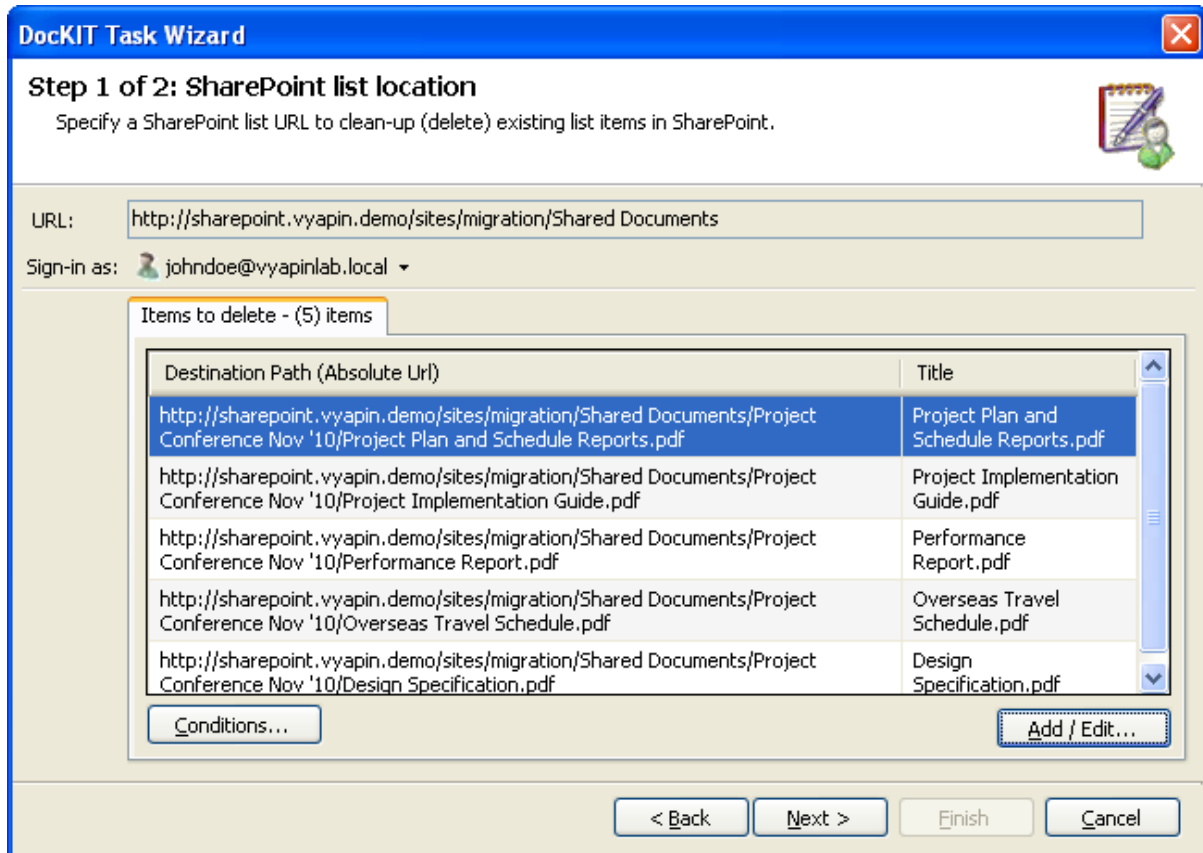
The items added for delete will appear as shown below:



- 10) Click the **Sign-in as** drop down menu at the top-right corner of **Select Items Dialog** to sign in as different user and browse the list items by specifying the user credential as specified in the Step 3.
- 11) Click **OK** button to proceed or click **Cancel** to discard the changes.

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

**12) SharePoint list location** steps contains the folders and list items added for update or delete as shown below:



**13)** Click **Conditions...** button to define the conditions to use when deleting list items in a SharePoint list.

**14)** Click **Next** to Proceed.

### 7.6 Task Schedule Settings

#### Task Settings

To specify the task name and schedule settings for the quick import task:

- 1) The **Task Schedule Settings** step appears as shown below:

**Task Name:**

**Task Option**

- Run later
- Run now
- Schedule

**Connect to SharePoint As**

- Prompt me for user context at task run time
- This user: johndoe@vyapinlab.local

< Back   Next >   Finish   Cancel

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

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

- 4) Select from one of the following options through which the destination SharePoint to be connected:
- a) **Prompt me for user context at task run time** - DockKIT will prompt for the user context to use to connect destination SharePoint at the time of DockKIT task run.
  - b) **This user <user name>** - DockKIT will use stored profile context to connect destination SharePoint.

**DockKIT Task Wizard**

**Step 2 of 2: Task Schedule Settings**  
Enter a unique name for the task and specify schedule task settings.

Task Name: Quick Task

Task Option

- Run later
- Run now
- Schedule

Connect to SharePoint As

- Prompt me for user context at task run time
- This user: johndoe@vyapinlab.local

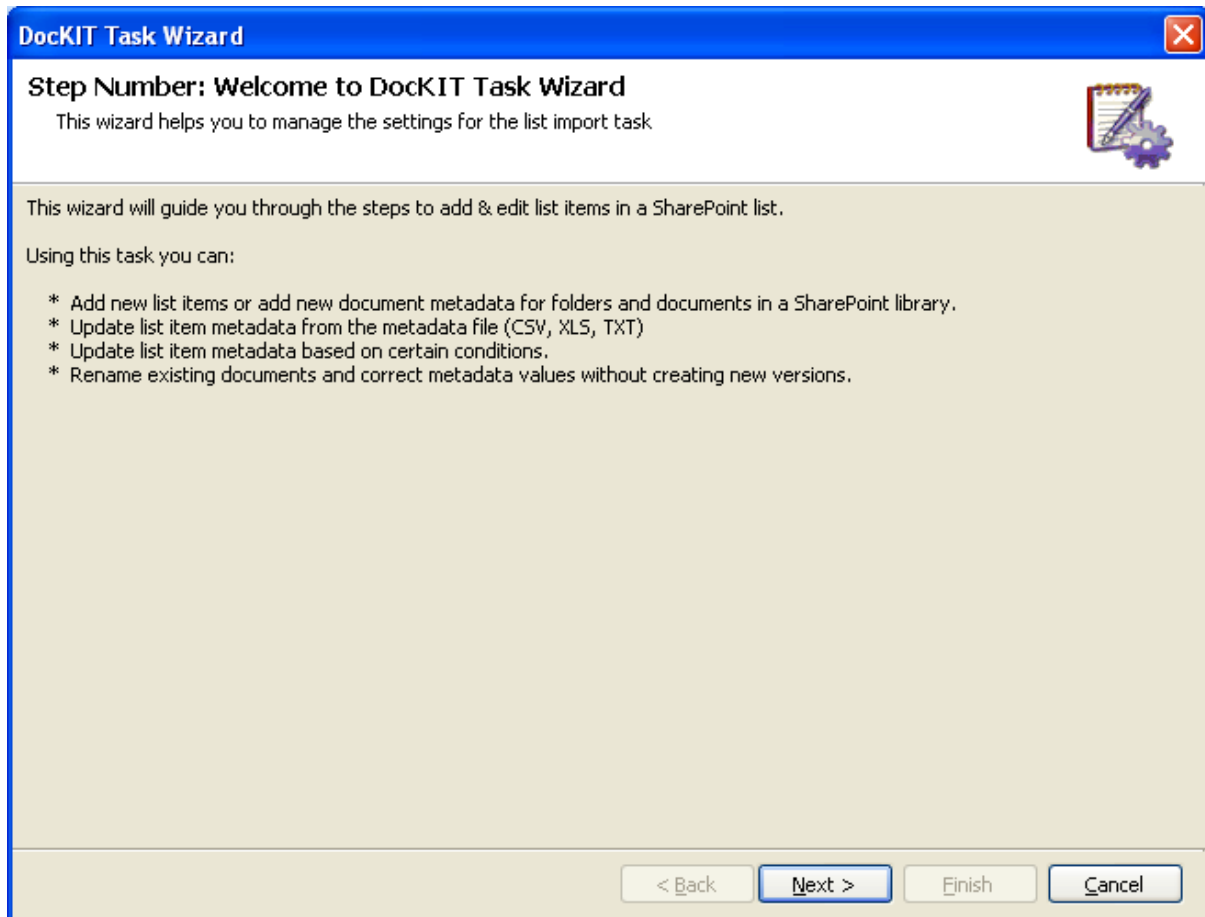
< Back   Next >   Finish   Cancel

- 5) Click **Finish** button to create the task.

### 7.7 Edit Task

Edit task is similar to creating a new task, except that a few settings cannot be altered as shown below:

- 1) The **DocKIT Task Wizard** in edit mode appears as shown below:



- 2) Click **Next** button.
- 3) Specify the **SharePoint List Location**
- 4) In **Task Settings** edit mode, DocKIT Task Wizard the task name cannot be changed. However, you can make a copy of the task using **Copy Task** tool.



## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

The screenshot shows a Windows-style dialog box titled "DockIT Task Wizard - Quick Task". The main heading is "Step 2 of 2: Task Schedule Settings" with a sub-instruction: "Enter a unique name for the task and specify schedule task settings." A red box highlights the "Task Name" field, which contains the text "Quick Task". Below this, there are "Task Option" radio buttons: "Run later", "Run now" (which is selected), and "Schedule". To the right, under "Connect to SharePoint As", there are two radio buttons: "Prompt me for user context at task run time" and "This user:", with the latter selected. The "This user:" option has a dropdown menu showing "johndoe@vyapinlab.local" and a "Manage Profile..." button. At the bottom of the dialog, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

- 5) Click **Finish** button to save the task settings, or click **Back** button to back to a previous step.

## 8 Import metadata to all SharePoint Lists (Batch File Mode)

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- Create a batch task to import list items
- Create a batch task to clean-up list items
- Create a batch task when the import action is specified in the batch file
- Edit Task
- Copy Task
- Delete Task
- Run Task

### 8.1 Batch File Structure

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Please click the link below to read about the Batch File Structure:

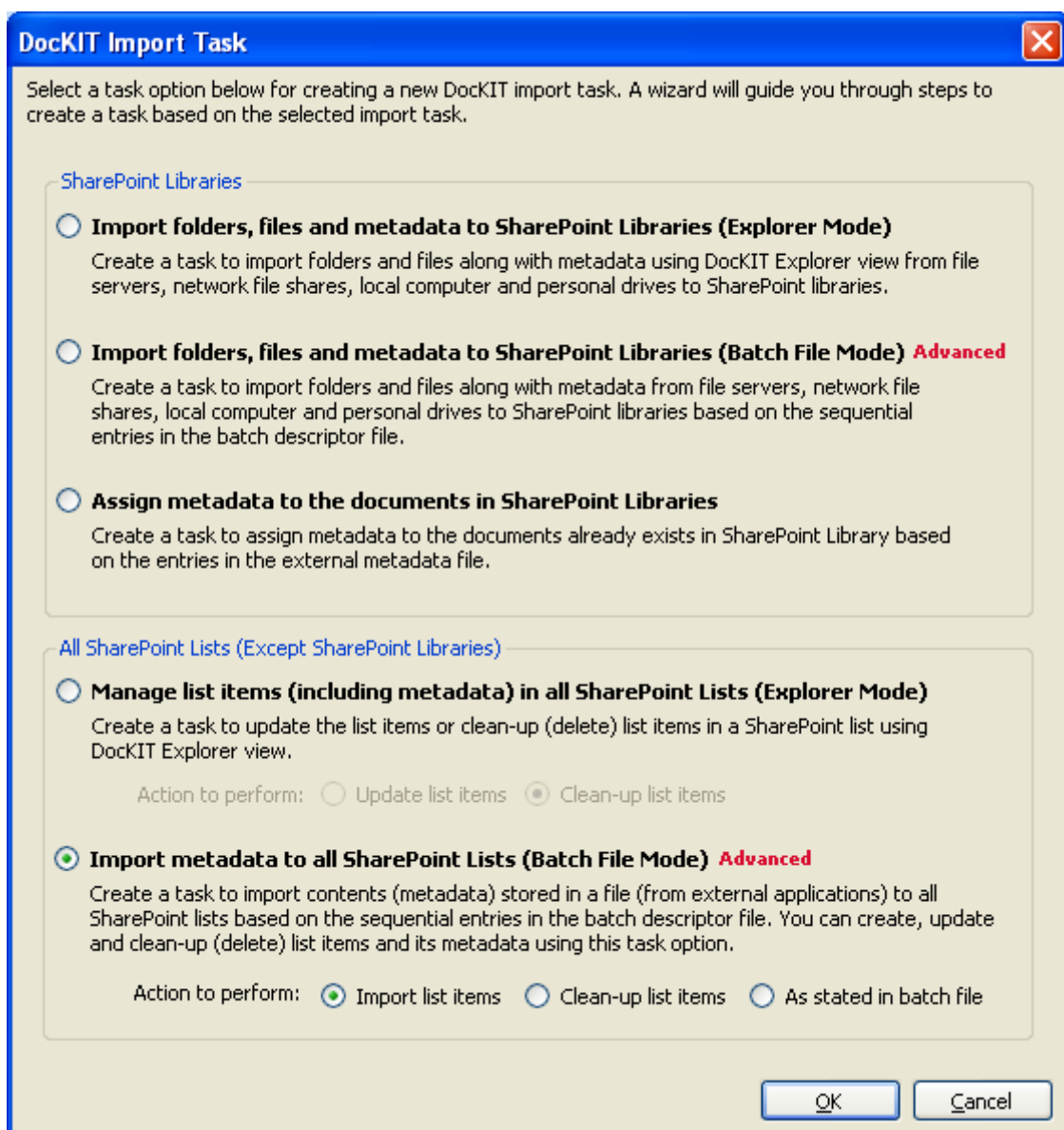
[Batch File Structure](#)

### 8.2 Import list items

#### Import list items (Batch File Mode)

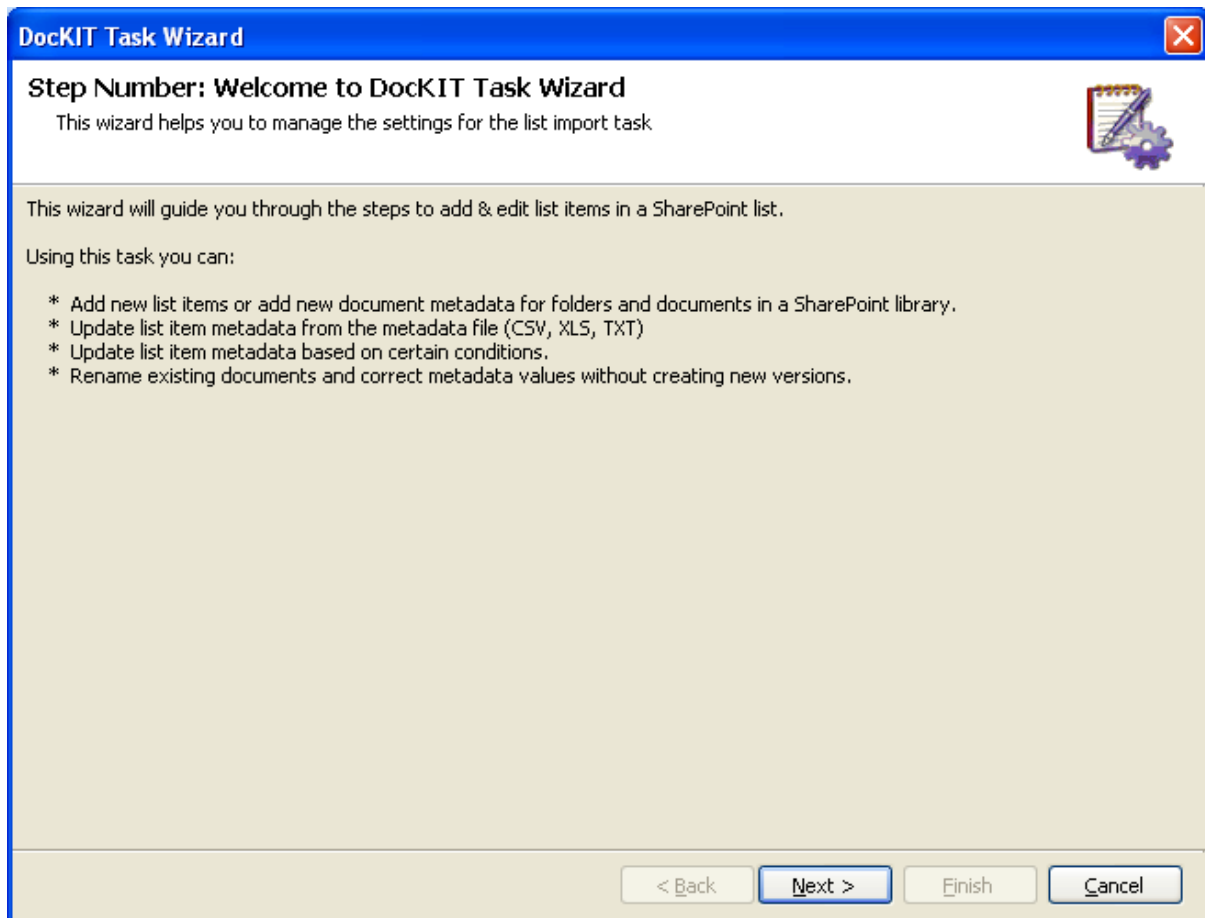
Create a task to import list items in SharePoint based on the entries in the batch file. DockIT will process the list items in the order in which they appear in the batch file.

- 1) Select **Import metadata to all SharePoint Lists (Batch File Mode)** option in **DockIT Import Task dialog** as shown below. Select the action to perform as **Import list items** and click **OK** to proceed.



## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

2) The **DocKIT Task Wizard** appears



3) Click **Next** button

4) Specify the **Batch Import Settings**

5) Specify the **SharePoint System Fields**

6) Specify the **Handling duplicate records**

7) Specify the **Folder Traversal Options**

8) Specify the **Import Conditions**

9) Specify the **Task Schedule Settings**

10) Click **Finish** button to create the task, or click **Back** button to change the any task settings.

### 8.3 Batch Import Settings

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

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

**DocKIT Task Wizard - test 5**

**Step Number: Batch Import Settings**

Select a batch file to import list items in SharePoint list. Specify an unique reference to use to identify the list item. Select the list columns to import metadata.

**Metadata File:**

Batch File Name:  ... (?)

Excel Sheet Name:  ... View... Clear

File Description: Reference column name:  to retain unique values (no duplicates)

Attachment column name:

Date and Time format:

**Allow Fill-in settings (Applicable for Choice, Managed Metadata datatypes only):**

Do not add new values to the column definition

Add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library

Add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination

< Back Next > Finish Cancel

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

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

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

- 4) **Attachments:** Use this option to select the column from the batch file that contains file attachments. The attachment column states the files to be attached to the list items or file attachments to be deleted from the list item.
- 5) Specify the **Date and Time format** for the date fields used in the batch file. If the columns selected to update contains date and time values, specify the date mask to parse the date values correctly. The default value is the current system settings.

**DocKIT Task Wizard - test 5**

**Step Number: Batch Import Settings**

Select a batch file to import list items in SharePoint list. Specify an unique reference to use to identify the list item.  
Select the list columns to import metadata.

**Metadata File:**

Batch File Name: D:\SampleExcelUpdateMetadataFile.xls

Excel Sheet Name: Test\_Support

File Description: Reference column name: <None> to retain unique values (no duplicates)

Attachment column name: <None>

Date and Time format: <Use default> <No Time>

**Allow Fill-in settings (Applicable for Choice, Managed Metadata datatypes only):**

- Do not add new values to the column definition
- Add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library
- Add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination

< Back Next > Finish Cancel

- 7) Specify any one of the below options to how DockIT add new values to Choice and Managed Metadata column types.
  - a) **Do not add new values to the column definition** - When selecting this option, DockIT does not create or add new values to the column definition (For example: Choice field definition, Managed Metadata field definition).
  - b) **Add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination list** - When selecting this option, DockIT

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

will create or add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library.

- c) **Add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination list** - When selecting this option, DockKIT will create or add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination library.

- 8) Click **Next** to Proceed.

### 8.4 Mapping Templates

To specify the mapping templates to use for the task:

- 1) The **Mapping Templates** step appears as shown below:

**DocKIT Task Wizard - test 5**

**Step Number: Mapping Templates**  
This wizard helps you manage the update task settings.

Column Mapping Template:  ▼

Do you want to migrate unmapped columns also ?  Yes  No

Domain Mapping Template :  ▼ \* This mapping will be used for all person or group fields

User / group Mapping Template :  ▼ \* This mapping will be used for all person or group fields

- 2) **Column Mapping Template :**

## **Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)**

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Select any one column mapping template to use from the list of available template(s).

Default Templates

- a) **SharePoint Default** - All columns values available in the metadata file at the time of task run will be imported to its corresponding columns in SharePoint
- b) **DockIT Default** - Values assigned to the destination SharePoint columns depending upon the DockIT default mapping template.

**Do you want to Migrate unmapped columns also? - Enabling this option helps to import the all unmapped columns available in the metadata file along with the columns that are mapped to the destination column in the mapping template to use:**

If external metadata file have some columns that are not mapped to the destination column, DockIT will migrate the unmapped columns to the SharePoint library.

When you deselect this option, DockIT does not migrate the unmapped columns to the destination SharePoint library. It migrate the columns depending up on the mapping template.

### **3) User / Group Mapping Template :**

Select any one user / group mapping template to use from the list of available template(s)


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

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



## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

**DocKIT Task Wizard - test 5** ✕

**Step Number: Mapping Templates** 

This wizard helps you manage the update task settings.

Column Mapping Template:  ▼

Do you want to migrate unmapped columns also?  Yes  No

Domain Mapping Template :  ▼ \* This mapping will be used for all person or group fields

User / group Mapping Template :  ▼ \* This mapping will be used for all person or group fields

Click **Next** to Proceed.

### 8.5 Handling Duplicate Records

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

**NOTE:** If you opt to overwrite the last version of a list item during the update operation, DockIT requires **DockIT Web Service** component to be installed in the Windows Server 2003 (or) Windows Server 2008 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 to activate this feature.

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

The screenshot shows the 'DockIT Task Wizard' window. The title bar reads 'DockIT Task Wizard'. The main content area is titled 'Step Number: Handling duplicate records' with the subtitle 'Specify versioning to be set while updating list item metadata'. Below this, there is a 'Reference Column:' field set to 'None'. The 'SharePoint Lists Version Option Settings' section contains four radio button options: 'Import as new list item' (selected), 'Import as new version', 'Import list item by overwriting existing item', and 'Import list item by overwriting last version of the item'. The 'SharePoint Libraries Additional Options' section has a text box containing 'If the file in library is in checked-out by either current user or other user' and three radio button options: 'Leave as is' (selected), 'Overwrite current version', and 'Check-in and create new version'. At the bottom, there are 'Fail-Safe Settings' with a checkbox 'Do not perform an import if the metadata contains any errors or warnings.' and a dropdown menu 'If the list item does not exist in the destination location, notify as:' set to 'Error'. Navigation buttons '< Back', 'Next >', 'Finish', and 'Cancel' are located at the bottom right.

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**:
- i. **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.
  - ii. **Import as new version** - To update the existing list items in SharePoint. This option requires a **Reference Column** to be set.
  - iii. **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.
  - iv. **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 DockKIT 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:
    - **<User name>** - Replaces this identifier with the current user who performs DockKIT update. For example, *List item was updated by <user name>*.
    - **<Task name>** - Replaces this identifier with the current DockKIT import task name. For example, *List item was updated using <task name> in DockKIT.*
  - c) **Assign from batch file** - You can also assign the check-in comments by selecting a field from the batch file.

**DocKIT Task Wizard**

**Step Number: Handling duplicate records**  
Specify versioning to be set while updating list item metadata

**Reference Column:** Path

**SharePoint Lists Version Option Settings**

**Version Option:**

- Import as new list item
- Import as new version
- Import list item by overwriting existing item
- Import list item by overwriting last version of the item

**SharePoint Libraries Additional Options:**

If the file in library is in checked-out by either current user or other user

- Leave as is
- Overwrite current version
- Check-in and create new version

**Fail-Safe Settings:**  Do not perform an import if the metadata contains any errors or warnings.

If the list item does not exist in the destination location, notify as: Error

< Back   Next >   Finish   Cancel

### 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 lists, unless Content Approval is enabled in the destination SharePoint 2010 list (except in the case of SharePoint 2010 libraries).

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
- All SharePoint 2010 libraries with Content Approval enabled or disabled
- SharePoint 2010 lists (other than libraries) that have Content Approval enabled in Versioning Settings

In SharePoint 2010 lists (except libraries) that have Content Approval disabled, SharePoint will create a new version when the Created Date, Modified Date,

## **Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)**

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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.

### **6) Fail-Safe Settings:**

If the specified metadata contains any errors or warnings, by selecting the option **do not perform any action if the metadata contains any errors or warnings**, DockIT will not perform the specified action and thereby skips the list item.

**'If the list item does not exist in the destination location' notify as** - Select an option from below:

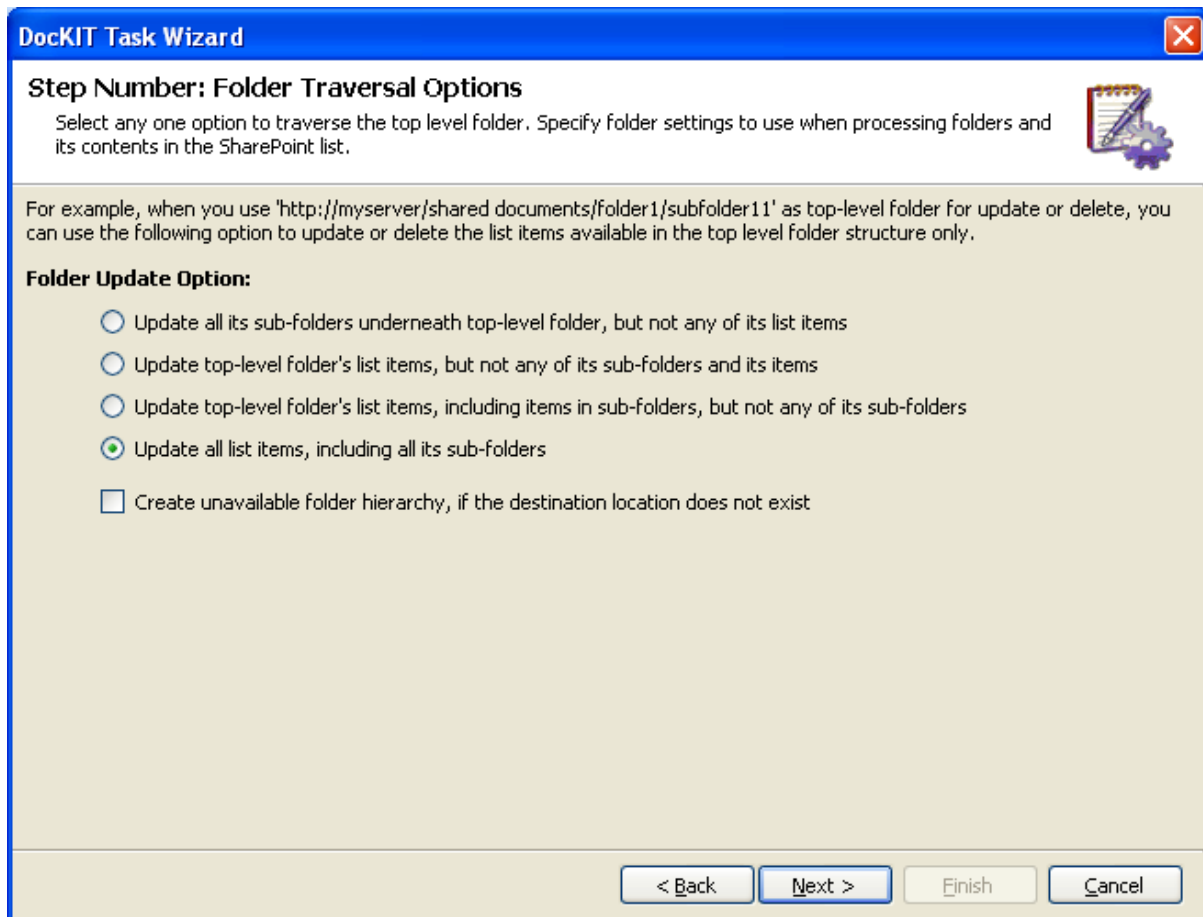
- a) Error** - If the list item does not exist in the destination location, DockIT will treat it as an error.
- b) Warning** - If the list item does not exist in the destination location, DockIT treat it as a warning.

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

### 8.6 Folder Traversal Options

To make the update process easier for users, DockIT provides an ability to specify the contents to update from the folder structure level specified by the user. To specify the folder settings to use in the destination SharePoint list and the necessary items to update, perform the steps as given below:

1) The **Folder Traversal Options** step appears as shown below:



2) Select any of the following folder options given below to specify the contents to be updated from the folders in SharePoint:

**a) Update all its sub-folders underneath top-level folder, but not any of its items** - This option update all its sub-folders available in the top-level folder in SharePoint, but it does not update any of the list items within a folder.

**b) Update top-level folder items, but not any of its sub-folders and its items** - This option update list items available in the top-level folders only. DockIT will not traverse the sub-folders and its list items within the top level folders.

- c) **Update top-level folder items, including items in sub-folders, but not any of its sub-folders** - This option update all list items available in the top-level folders and its sub-folders, but it does not update any sub-folders in SharePoint.
  - d) **Update all items, including all its sub-folders** - This option update all items and sub-folders in SharePoint.
- 3) By default, DockIT expects the destination folder location to exist in SharePoint. If the destination folder is not available in the destination location, DockIT fails to import list items (in case of, *Create new items or Update/Create option*) to the specified folder in SharePoint. You can change this behavior by selecting the option **Create unavailable folder hierarchy if the destination location does not exist**.

In this case, DockIT will automatically create the unavailable folder hierarchy (folder and sub-folders) in destination SharePoint during creation of new list items process. After creating them, it will commence import process to the required folder in SharePoint. By using this option, you can simply avoid the error message 'Unable to locate destination folder with the specified URL' reported in Activity Log Viewer, since DockIT will take care of creating the new folder structure in the destination location.

**NOTE:** DockIT does not create library if it is unavailable in the SharePoint. In other words, DockIT creates unavailable folders alone in an existing SharePoint library.

- 4) Click **Next** to Proceed.

### 8.7 Import Conditions

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

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

DocKIT Task Wizard - task - 5

**Step Number: Import Conditions**

Specify conditions to be satisfied for folders / items to perform the specified action in SharePoint.

Do not apply any conditions  Apply the following conditions

Field Name Operator Value

Add to Filter Add Fields 'OR' to Filter

Conditions:

Perform action against folder / list items if the above conditions are:  satisfied  not satisfied

< Back Next > Finish Cancel

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

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



## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

3) The **DockIT Task wizard** step appears as shown below:

**DocKIT Task Wizard - task - 5**

**Step Number: Import Conditions**  
Specify conditions to be satisfied for folders / items to perform the specified action in SharePoint.

Do not apply any conditions     Apply the following conditions

Field Name	Operator	Value
List Type (SharePoint)	=	DataSources

'AND' to Filter    Add Fields    'OR' to Filter

Conditions:

```
[[Created Date (SharePoint)] > #23-Dec-11#  
AND [List Type (SharePoint)] = 'Comments'  
OR [List Type (SharePoint)] = 'DataSources'
```

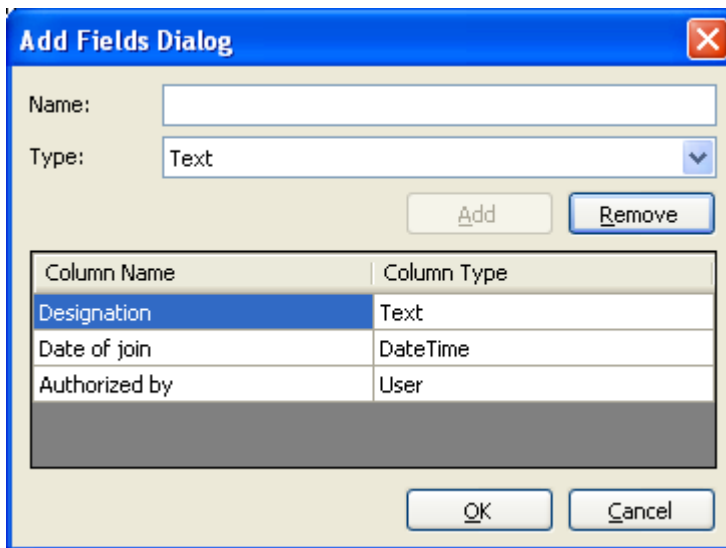
Perform action against folder / list items if the above conditions are:  satisfied     not satisfied

< Back    Next >    Finish    Cancel

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

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

The **Add Fields Dialog** appears as shown below:



Column Name	Column Type
Designation	Text
Date of join	DateTime
Authorized by	User

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

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

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

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

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

**DocKIT Task Wizard - task - 5**

### Step Number: Import Conditions

Specify conditions to be satisfied for folders / items to perform the specified action in SharePoint.

Do not apply any conditions     Apply the following conditions

Field Name	Operator	Value
List Type (SharePoint)	=	DataSources

Conditions:

```
[(Created Date (SharePoint)) > #23-Dec-11#  
AND [List Type (SharePoint)] = 'Comments'  
OR [List Type (SharePoint)] = 'DataSources']
```

Perform action against folder / list items if the above conditions are:     satisfied     not satisfied

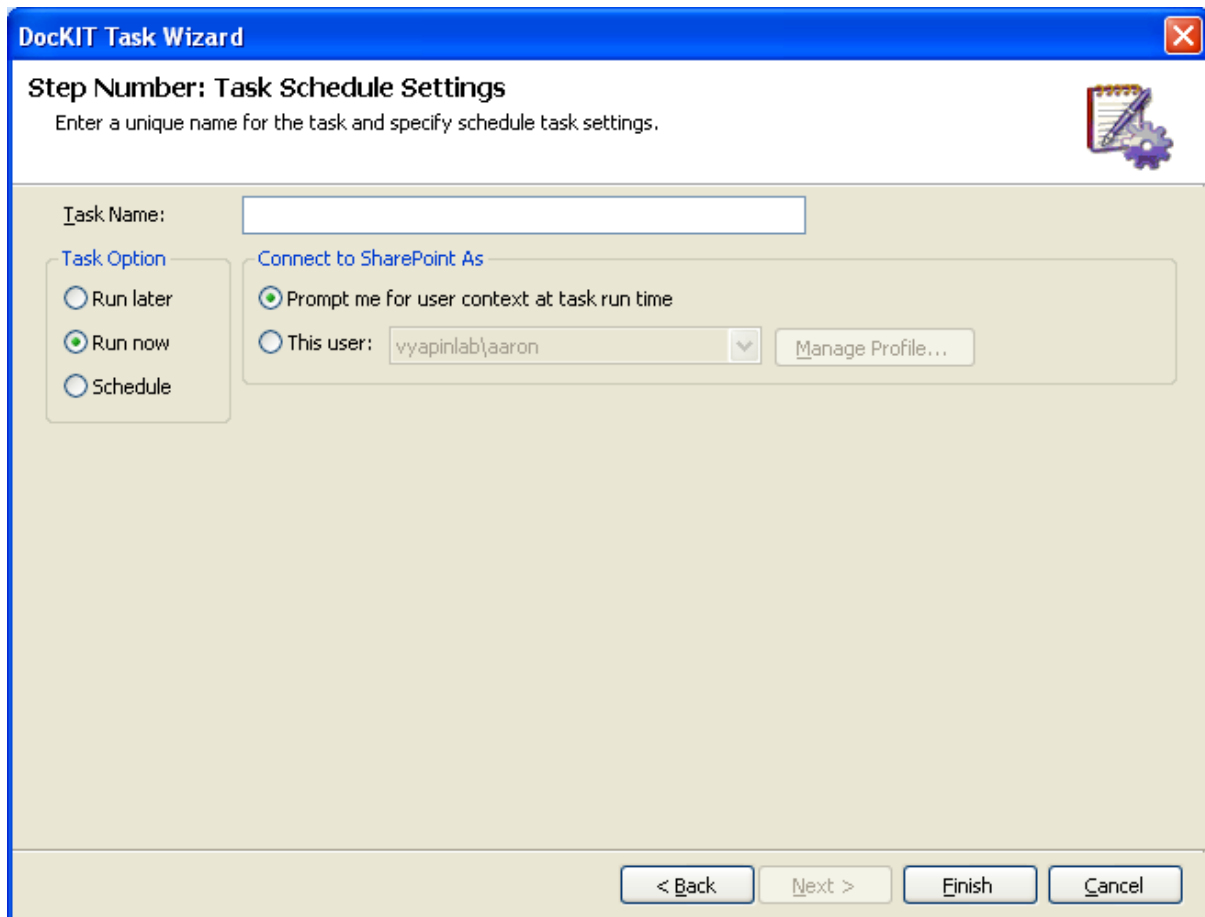
          

6) Click **Next** to Proceed.

### 8.8 Task Schedule Settings

To specify the task name and schedule settings:

- 1) The **Task Schedule Settings** step appears as shown below:

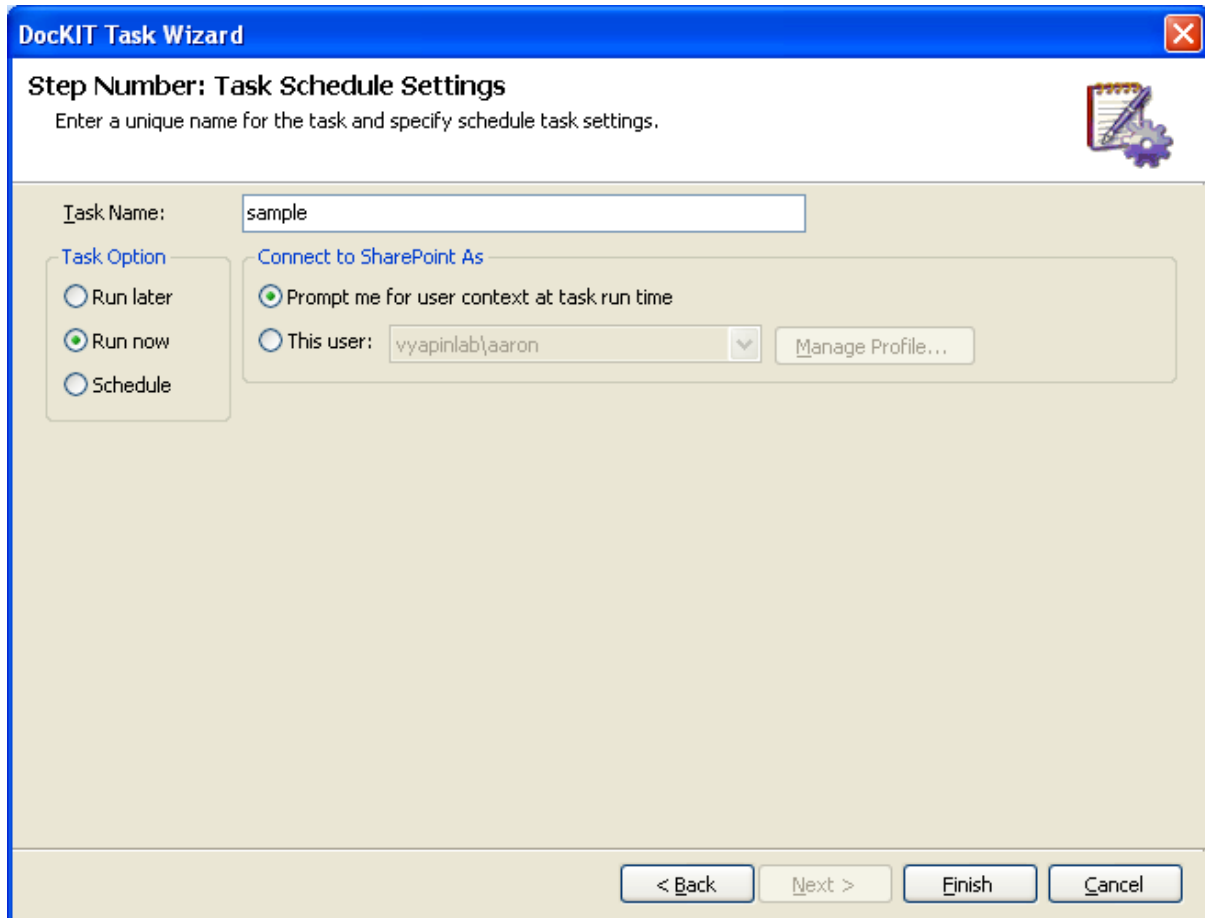


The screenshot shows the 'DocKIT Task Wizard' window at the 'Task Schedule Settings' step. The window title is 'DocKIT Task Wizard' and the step title is 'Step Number: Task Schedule Settings'. Below the title, it says 'Enter a unique name for the task and specify schedule task settings.' There is a 'Task Name:' text box. Under 'Task Option', there are three radio buttons: 'Run later', 'Run now' (which is selected), and 'Schedule'. To the right, under 'Connect to SharePoint As', there are two radio buttons: 'Prompt me for user context at task run time' (which is selected) and 'This user:'. The 'This user:' option has a dropdown menu showing 'vyapinlab\jaaron' and a 'Manage Profile...' button. At the bottom, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

- 2) **Enter** a unique task name in **Task Name** textbox.
- 3) Select a **Task Option** from one of the following options:
  - a) **Run later** - to run the task later as and when desired
  - b) **Run now** - to run the task immediately after clicking Finish button
  - c) **Schedule** - to create a Windows scheduled task. DocKIT will create a schedule task in the Windows Scheduled Tasks with the given settings. DocKIT will perform the specified action based on the Run As user account specified in this step. The Run As account should be a valid Windows domain account.
- 4) Select from one of the following options through which the destination SharePoint to be connected:
  - a) **Prompt me for user context at task run time** - DocKIT will prompt for the user context to use to connect destination SharePoint at the time of DocKIT task run.

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- b) **This user <user name>** - DocKIT will use stored profile context to connect destination SharePoint.



The screenshot shows the 'DocKIT Task Wizard' window, specifically the 'Step Number: Task Schedule Settings' dialog. The window title is 'DocKIT Task Wizard' and it has a close button in the top right corner. The main heading is 'Step Number: Task Schedule Settings' with a sub-instruction: 'Enter a unique name for the task and specify schedule task settings.' There is a small icon of a notepad and a gear in the top right corner of the dialog area.

The dialog contains the following fields and options:

- Task Name:** A text input field containing the word 'sample'.
- Task Option:** A group box containing three radio buttons:
  - Run later
  - Run now
  - Schedule
- Connect to SharePoint As:** A group box containing:
  - Prompt me for user context at task run time
  - This user: A dropdown menu showing 'vyapinlab\aaron' and a 'Manage Profile...' button.

At the bottom of the dialog, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

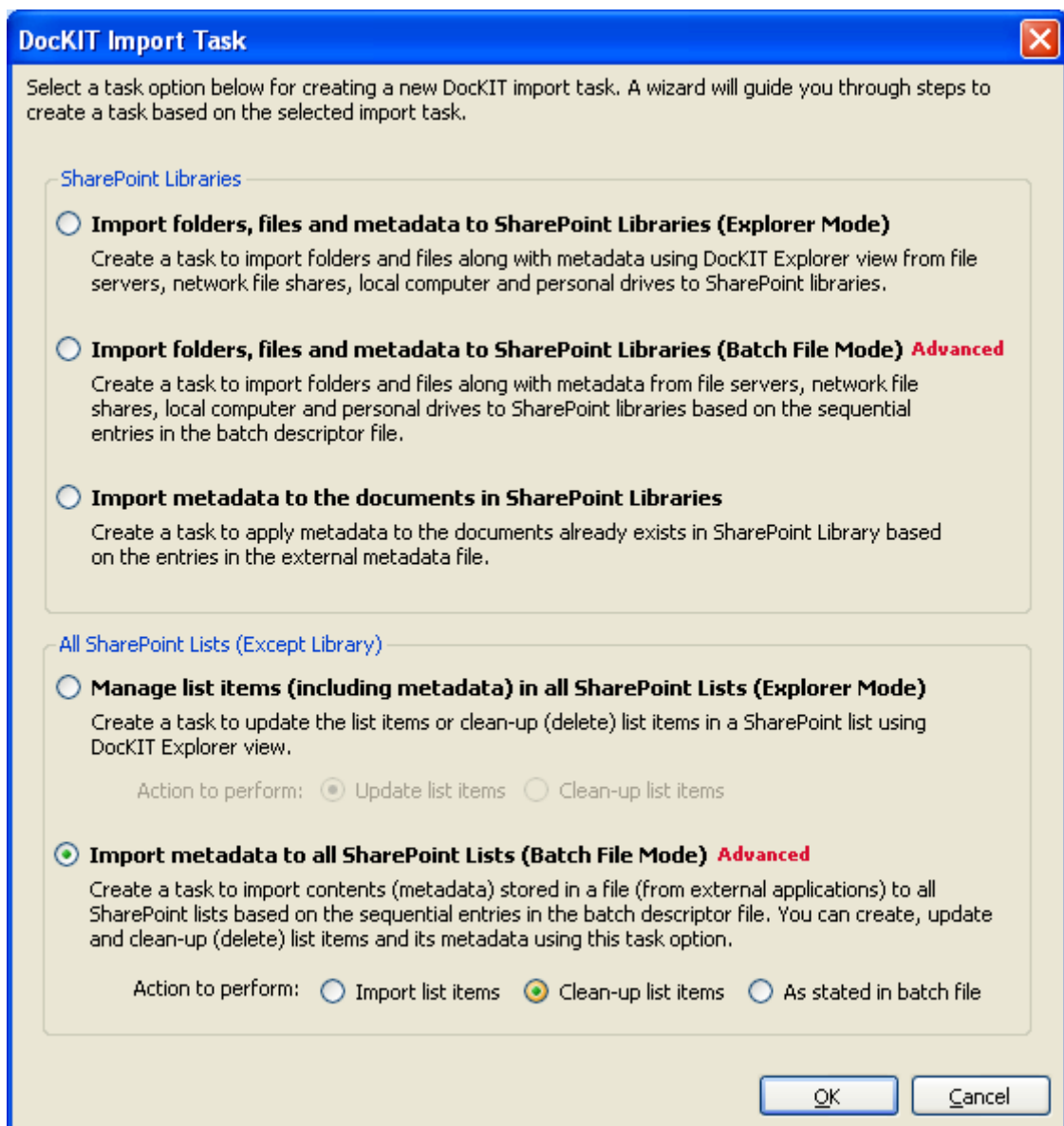
Click **Finish** button to create the task.

### 8.9 Clean-up list items

#### Clean-up list items (Batch File Mode)

Create a task to clean-up (delete) list items in SharePoint based on the entries in the batch file. DockIT will process the list items in the order in which they appear in the batch file.

- 1) Select **Import metadata to all SharePoint Lists (Batch File Mode)** option in **DockIT Import Task** dialog as shown below. Select the action to perform as **Clean-up list items** and **click OK** to proceed.



2) The **DockIT Task Wizard** appears



3) Click **Next** button

4) Specify the **Delete Task - Settings**

5) Specify the **Folder Traversal Options**

6) Specify the **Delete Conditions**

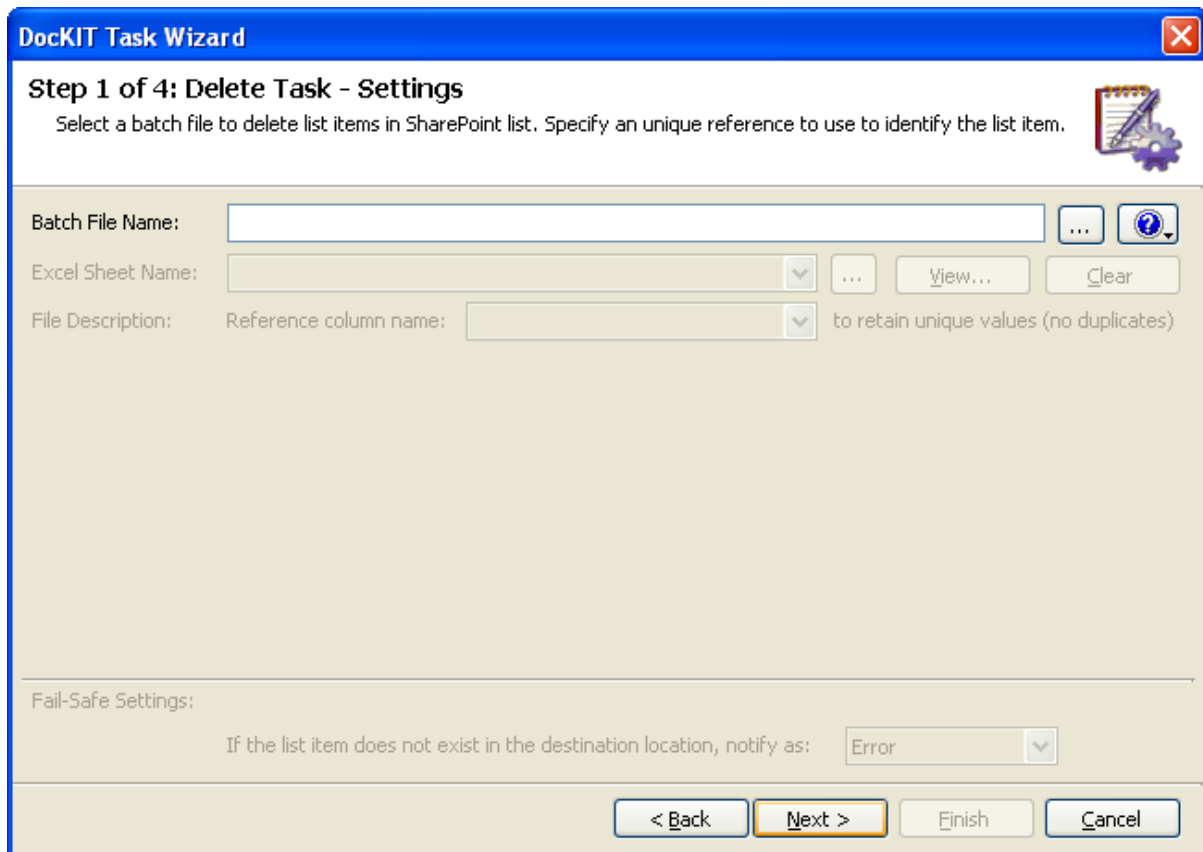
7) Specify the **Task Schedule Settings**

8) Click **Finish** button to create the task, or click **Back** button to change the any task settings.

### 8.10 Delete Task – Settings

To specify the batch file to use to delete list items in SharePoint:

- 1) The **Delete Task - Settings** step appears as shown below:



The screenshot shows the 'DocKIT Task Wizard' window at 'Step 1 of 4: Delete Task - Settings'. The window title is 'DocKIT Task Wizard' and it has a close button in the top right corner. The main heading is 'Step 1 of 4: Delete Task - Settings' with a sub-instruction: 'Select a batch file to delete list items in SharePoint list. Specify an unique reference to use to identify the list item.' There is a gear icon in the top right. The form contains the following fields and controls:

- Batch File Name:** A text input field with a browse button (...).
- Excel Sheet Name:** A dropdown menu with a browse button (...), a 'View...' button, and a 'Clear' button.
- File Description:** A text input field.
- Reference column name:** A dropdown menu with the text 'to retain unique values (no duplicates)' to its right.
- Fail-Safe Settings:** A section with the text 'If the list item does not exist in the destination location, notify as:' followed by a dropdown menu set to 'Error'.
- Navigation:** Buttons for '< Back', 'Next >', 'Finish', and 'Cancel'.

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



**DocKIT Task Wizard**

**Step 1 of 4: Delete Task - Settings**

Select a batch file to delete list items in SharePoint list. Specify an unique reference to use to identify the list item.

Batch File Name: E:\Cleanup Item Batch.csv

Excel Sheet Name: [Dropdown] [View...] [Clear]

File Description: Reference column name: Title to retain unique values (no duplicates)

Fail-Safe Settings:

If the list item does not exist in the destination location, notify as: Error

< Back Next > Finish Cancel

#### 4) Fail-Safe Settings:

If the specified metadata contains any errors or warnings, by selecting the option **do not perform any action if the metadata contains any errors or warnings**, DockIT will not perform the specified action and thereby skips the list item.

**'If the list item does not exist in the destination location' notify as** - Select an option from below:

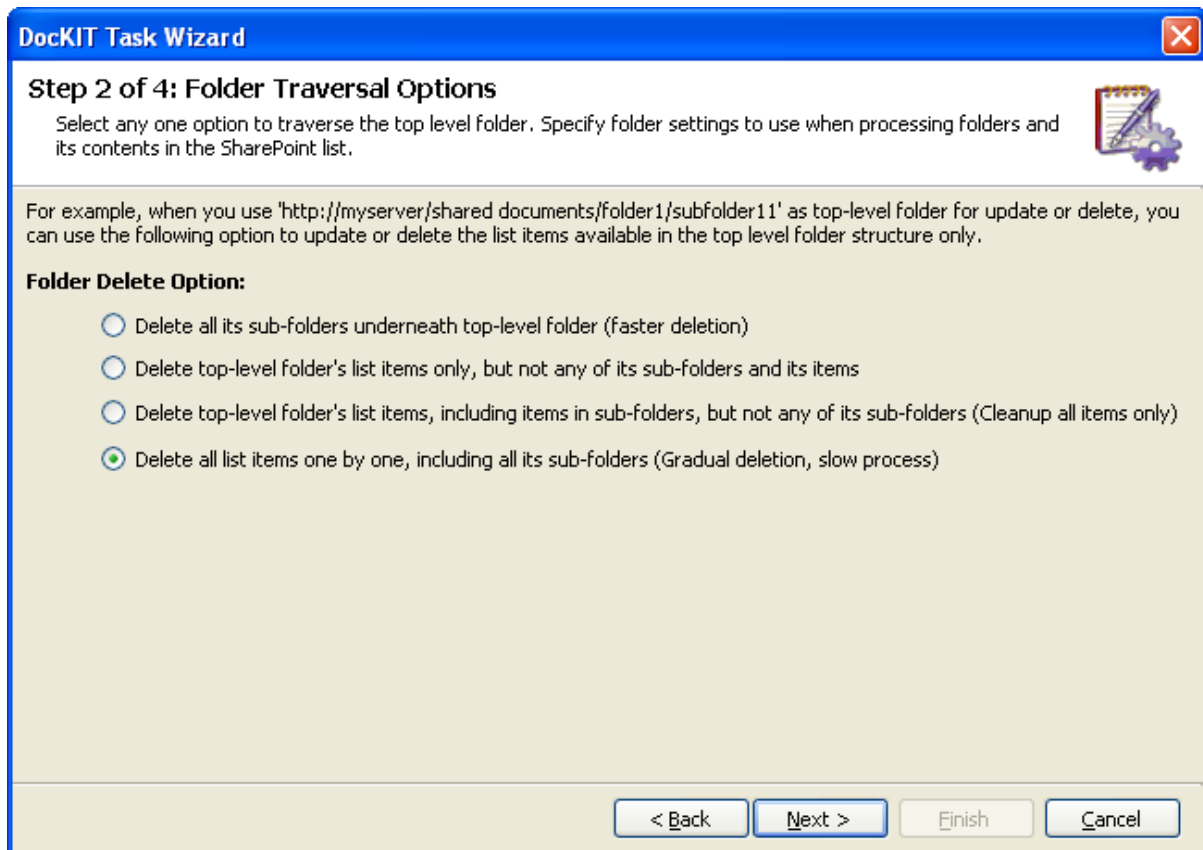
- a) **Error** - If the list item does not exist in the destination location, DockIT will treat it as an error.
- b) **Warning** - If the list item does not exist in the destination location, DockIT treat it as a warning.

5) Click **Next** to Proceed.

### 8.11 Folder Traversal Options

To make the delete process easier for users, DockIT provides an ability to specify the contents to delete from the folder structure level specified by the user. To specify the folder settings to use in the destination SharePoint list and the necessary items to delete, perform the steps as given below:

- 1) The **Folder Traversal Options** step appears as shown below:



- 2) Select any of the following folder options given below to specify the contents to be deleted from the folders in SharePoint:
  - a) **Delete all its sub-folders underneath top-level folder (fast)** - This option deletes all sub-folders available in the top-level folder.
  - b) **Delete top-level folder's list items only, but not any of its sub-folders and its items** - This option delete list items available in the top-level folders only. DockIT will not traverse the sub-folders and its list items within the top level folders.
  - c) **Delete top-level folder's list items, including items in sub-folders, but not any of its sub-folders (Cleanup all items only)** - This option delete all list items available in the top-level folders and its sub-folders, but it does not delete any sub-folders. This option leaves the folder structure intact.

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**d) Delete all list items one by one, including all its sub-folders (Gradual deletion, slow process)** - This option deletes all items and sub-folders in SharePoint gradually.

**3)** Click **Next** to Proceed.

### 8.12 Delete Conditions

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

**1)** The **Conditional Update** step appears as shown below:

**DocKIT Task Wizard**

**Step 3 of 4: Delete Conditions**

Specify conditions to be satisfied for folders / items to perform the specified action in SharePoint.

Do not apply any conditions     Apply the following conditions

Field Name	Operator	Value

Add to Filter    Add Fields    'OR' to Filter

Conditions:

Perform action against folder / list items if the above conditions are:  satisfied     not satisfied

< Back    Next >    Finish    Cancel

**2)** Select any one of the following options given below:

**a) Do not apply any conditions** - No conditions will be used to filter folders / items.

**b) Apply the following conditions** - The conditions specified will be used to filter folders / list items taken for delete in SharePoint

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

3) The DocKIT Task wizard step appears as shown below:

The screenshot shows the 'DocKIT Task Wizard' dialog box, titled 'Step 3 of 4: Delete Conditions'. The subtitle reads 'Specify conditions to be satisfied for folders / items to perform the specified action in SharePoint.' There are two radio buttons: 'Do not apply any conditions' (unselected) and 'Apply the following conditions' (selected). Below this, there are three dropdown menus for 'Field Name', 'Operator', and 'Value'. There are also buttons for 'Add to Filter', 'Add Fields', and a text input field for 'OR' to Filter. A large empty text area is labeled 'Conditions:'. At the bottom, there are radio buttons for 'satisfied' (selected) and 'not satisfied', and navigation buttons for '< Back', 'Next >', 'Finish', and 'Cancel'.

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

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

The screenshot shows the 'Add Fields Dialog' box. It has a 'Name:' text input field and a 'Type:' dropdown menu currently set to 'Text'. There are 'Add' and 'Remove' buttons. Below is a table with two columns: 'Column Name' and 'Column Type'. The table contains three rows: 'Designation' (Text), 'Date of join' (DateTime), and 'Authorized by' (User). The 'Designation' row is highlighted. At the bottom are 'OK' and 'Cancel' buttons.

Column Name	Column Type
Designation	Text
Date of join	DateTime
Authorized by	User

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

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

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

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

- 5) DockIT can delete the folders / list items that **satisfy** the conditions or delete the folders / list items that **do not satisfy** the conditions specified in the step above. Use the appropriate action to follow using the options given below:

a) **Perform action against folder / list items if the above conditions are satisfied** - Folders / List items that satisfy the condition will be marked for delete.

b) **Perform action against folder / file if the above conditions are not satisfied** - Folders / List items that do not satisfy the condition will be marked for delete.

DocKIT Task Wizard

Step 3 of 4: Delete Conditions

Specify conditions to be satisfied for folders / items to perform the specified action in SharePoint.

Do not apply any conditions  Apply the following conditions

Field Name	Operator	Value
Modified Date (SharePoint)	>=	1/ 4/2010

'AND' to Filter Add Fields 'OR' to Filter

Conditions:

[Modified By (Metadata File)] Like 'Join Doe'  
AND [Modified Date (SharePoint)] >= #1/4/2010#

Perform action against folder / list items if the above conditions are:  satisfied  not satisfied

< Back Next > Finish Cancel

- 6) Click **Next** to Proceed.

### 8.13 Task Schedule Settings

To specify the task name and schedule settings:

- 1) The **Task Schedule Settings** step appears as shown below:

**DocKIT Task Wizard**

**Step 4 of 4: Task Schedule Settings**  
Enter a unique name for the task and specify schedule task settings.

Task Name:

Task Option

Run later

Run now

Schedule

Connect to SharePoint As

Prompt me for user context at task run time

This user: johndoe@vyapinlab.local

< Back   Next >   Finish   Cancel

- 2) **Enter** a unique task name in **Task Name** textbox.
- 3) **Select** a **Task Option** from one of the following options:
  - a) **Run later** - to run the task later as and when desired
  - b) **Run now** - to run the task immediately after clicking Finish button
  - c) **Schedule** - to create a Windows scheduled task. DockIT will create a schedule task in the Windows Scheduled Tasks with the given settings. DockIT will perform the specified action based on the Run As user account specified in this step. The Run As account should be a valid Windows domain account.
- 4) Select from one of the following options through which the destination SharePoint to be connected:
  - a) **Prompt me for user context at task run time** - DockIT will prompt for the user context to use to connect destination SharePoint at the time of DockIT task run.

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- b) **This user <user name>** - DockIT will use stored profile context to connect destination SharePoint.

**Task Name:** Batch Clean-up

**Task Option**

- Run later
- Run now
- Schedule

**Connect to SharePoint As**

- Use 'Run As' user context given below
- This user: johndoe@vyapinlab.local

**Schedule Settings**

**Run As:** VOYAGER\Administrator

**Schedule:** Daily  **Start time:** 2:45 PM

**Schedule Task Daily**

Every 1 day(s)

At 2:45 PM every day, starting 11/1/2010

< Back   Next >   Finish   Cancel

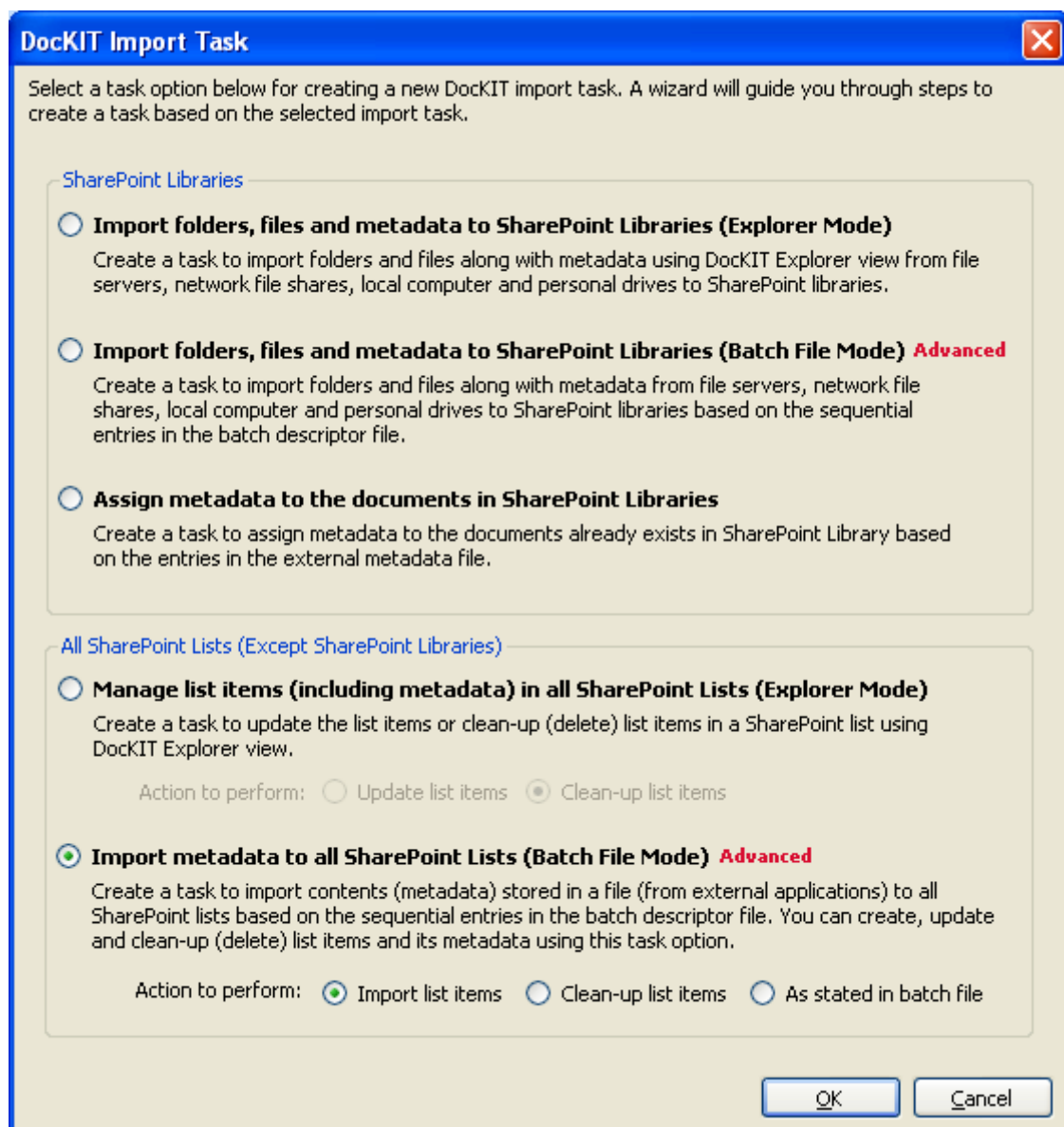
- 5) Click **Finish** button to create the task.

### 8.14 Action Stated in Batch File

#### Import list items (Batch File Mode)

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

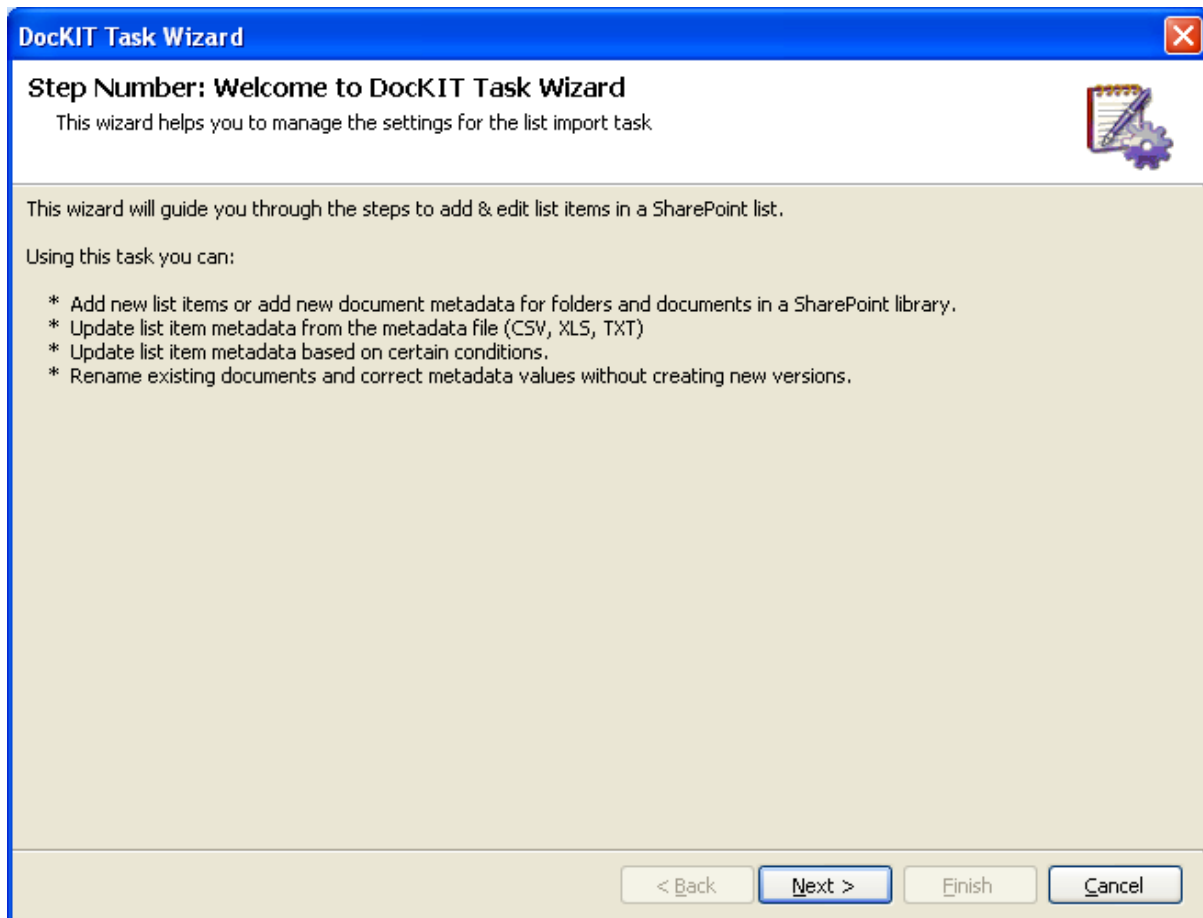
- 1) Select **Import metadata to all SharePoint Lists (Batch File Mode)** option in **DockIT Import Task dialog** as shown below. Select the action to perform as **Import list items** and click **OK** to proceed.





## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

2) The **DocKIT Task Wizard** appears



3) Click **Next** button

4) Specify the **Batch Import Settings**

5) Specify the **SharePoint System Fields**

6) Specify the **Handling duplicate records**

7) Specify the **Folder Traversal Options**

8) Specify the **Import Conditions**

9) Specify the **Task Schedule Settings**

10) Click **Finish** button to create the task, or click **Back** button to change the any task settings.

### 8.15 Batch Import Settings

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

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

**DocKIT Task Wizard - test 5**

**Step Number: Batch Import Settings**

Select a batch file to import list items in SharePoint list. Specify an unique reference to use to identify the list item. Select the list columns to import metadata.

**Metadata File:**

Batch File Name:  ...

Excel Sheet Name:  ... View... Clear

File Description: Reference column name:  to retain unique values (no duplicates)

Attachment column name:

Date and Time format:

**Allow Fill-in settings (Applicable for Choice, Managed Metadata datatypes only):**

Do not add new values to the column definition

Add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library

Add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination

< Back Next > Finish Cancel

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

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

matched item or matched folder from the SharePoint list automatically and then proceed to perform the specified action.

- 4) **Action column name:** Use this option to use an Action column from batch file and you can perform item level or folder level actions for each entry in the batch file. For example: Update, Update Or Create, New, Delete, Delete Attachments actions as specified in the batch file. Refer Batch File Structure for more information.
- 5) **Attachments:** Use this option to select the column from the batch file that contains file attachments. The attachment column states the files to be attached to the list items or file attachments to be deleted from the list item.
- 6) Specify the **Date and Time format** for the date fields used in the batch file. If the columns selected to update contains date and time values, specify the date mask to parse the date values correctly. The default value is the current system settings.

**DocKIT Task Wizard - test 5**

**Step Number: Batch Import Settings**

Select a batch file to import list items in SharePoint list. Specify an unique reference to use to identify the list item. Select the list columns to import metadata.

**Metadata File:**

Batch File Name: D:\SampleExcelUpdateMetadataFile.xls

Excel Sheet Name: Test\_Support

File Description: Reference column name: <None> to retain unique values (no duplicates)

Attachment column name: <None>

Date and Time format: <Use default> <No Time>

**Allow Fill-in settings (Applicable for Choice, Managed Metadata datatypes only):**

- Do not add new values to the column definition
- Add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library
- Add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination

< Back Next > Finish Cancel

- 8) Specify any one of the below options to how DocKIT add new values to Choice and Managed Metadata column types.

## **Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)**

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- a) Do not add new values to the column definition - When selecting this option, DockKIT does not create or add new values to the column definition (For example: Choice field definition, Managed Metadata field definition).
  - b) Add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination list - When selecting this option, DockKIT will create or add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library.
  - c) **Add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination list -** When selecting this option, DockKIT will create or add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination library.
- 9) Click **Next** to proceed.

### **8.16 Mapping Templates**

---

To specify the mapping templates to use for the task:

- 1) The Mapping Templates step appears as shown below:

**DocKIT Task Wizard - test 5**

**Step Number: Mapping Templates**  
This wizard helps you manage the update task settings.

Column Mapping Template:  ▼

Do you want to migrate unmapped columns also?  Yes  No

Domain Mapping Template :  ▼ \* This mapping will be used for all person or group fields

User / group Mapping Template :  ▼ \* This mapping will be used for all person or group fields

### 2) Column Mapping Template :

Select any one column mapping template to use from the list of available template(s).

Default Templates

- a) **SharePoint Default** - All columns values available in the metadata file at the time of task run will be imported to its corresponding columns in SharePoint
- b) **DocKIT Default** - Values assigned to the destination SharePoint columns depending upon the DocKIT default mapping template.

**Do you want to migrate unmapped columns also? - Enabling this option helps to import the all unmapped columns available in the metadata file along with the columns that are mapped to the destination column in the mapping template to use:**

If external metadata file have some columns that are not mapped to the destination column, DocKIT will migrate the unmapped columns to the SharePoint library.

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

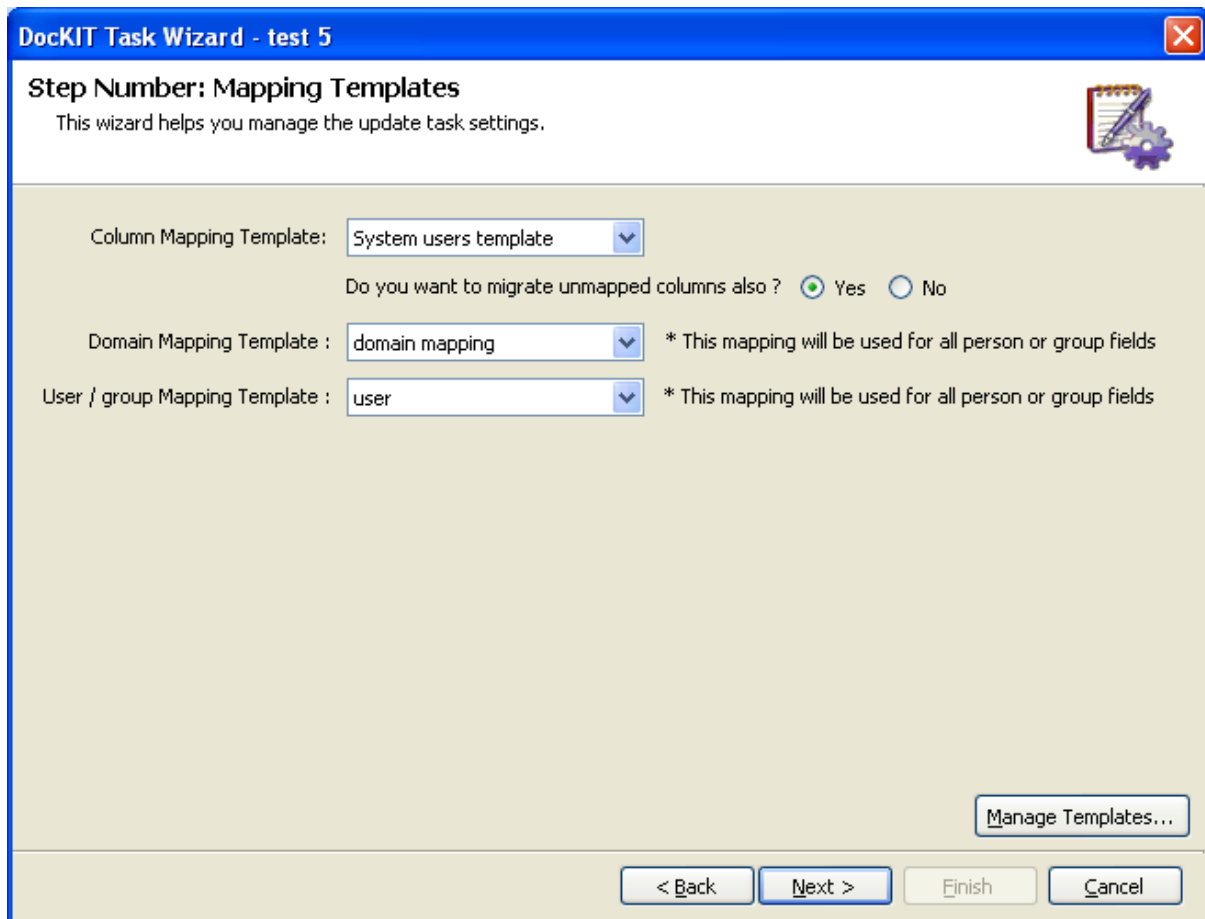
When you deselect this option, DocKIT does not migrate the unmapped columns to the destination SharePoint library. It migrate the columns depending up on the mapping template.

### 3) User / Group Mapping Template :

Select any one user / group mapping template to use from the list of available template(s)

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

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



The screenshot shows a window titled "DocKIT Task Wizard - test 5" with a close button in the top right corner. The main heading is "Step Number: Mapping Templates" with a sub-heading "This wizard helps you manage the update task settings." and a gear icon. The settings are as follows:

- Column Mapping Template: System users template (dropdown)
- Do you want to migrate unmapped columns also ?  Yes  No
- Domain Mapping Template : domain mapping (dropdown) \* This mapping will be used for all person or group fields
- User / group Mapping Template : user (dropdown) \* This mapping will be used for all person or group fields

At the bottom right, there is a "Manage Templates..." button. At the bottom center, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

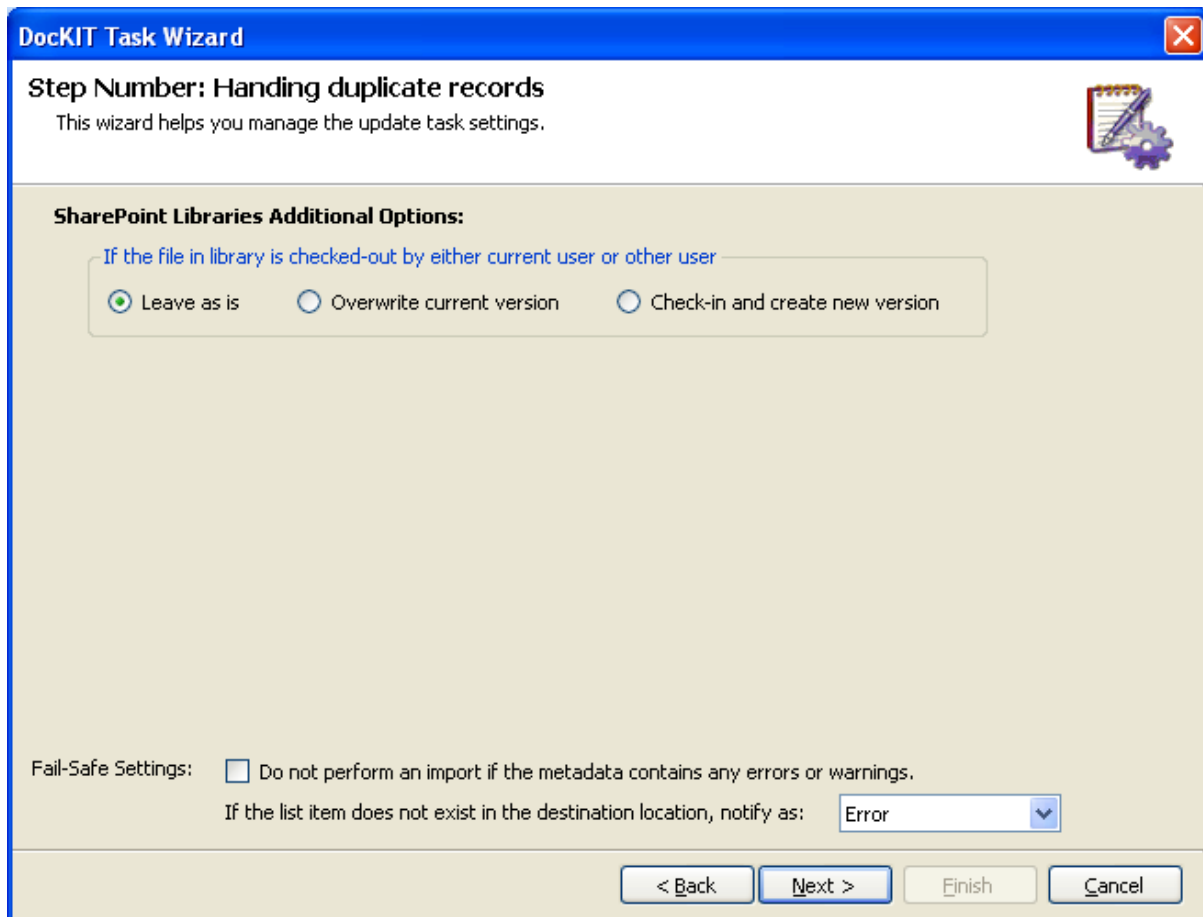
Click **Next** to Proceed.

### 8.17 Handling Duplicate Records

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

**NOTE:** If you opt to overwrite the last version of a list item during the update or delete operation, DockIT requires **DockIT Web Service** component to be installed in the Windows Server 2003 (or) Windows Server 2008 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 to activate this feature.

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



**DockIT Task Wizard**

**Step Number: Handling duplicate records**  
This wizard helps you manage the update task settings.

**SharePoint Libraries Additional Options:**

If the file in library is checked-out by either current user or other user

Leave as is     Overwrite current version     Check-in and create new version

Fail-Safe Settings:  Do not perform an import if the metadata contains any errors or warnings.

If the list item does not exist in the destination location, notify as:

< Back    Next >    Finish    Cancel

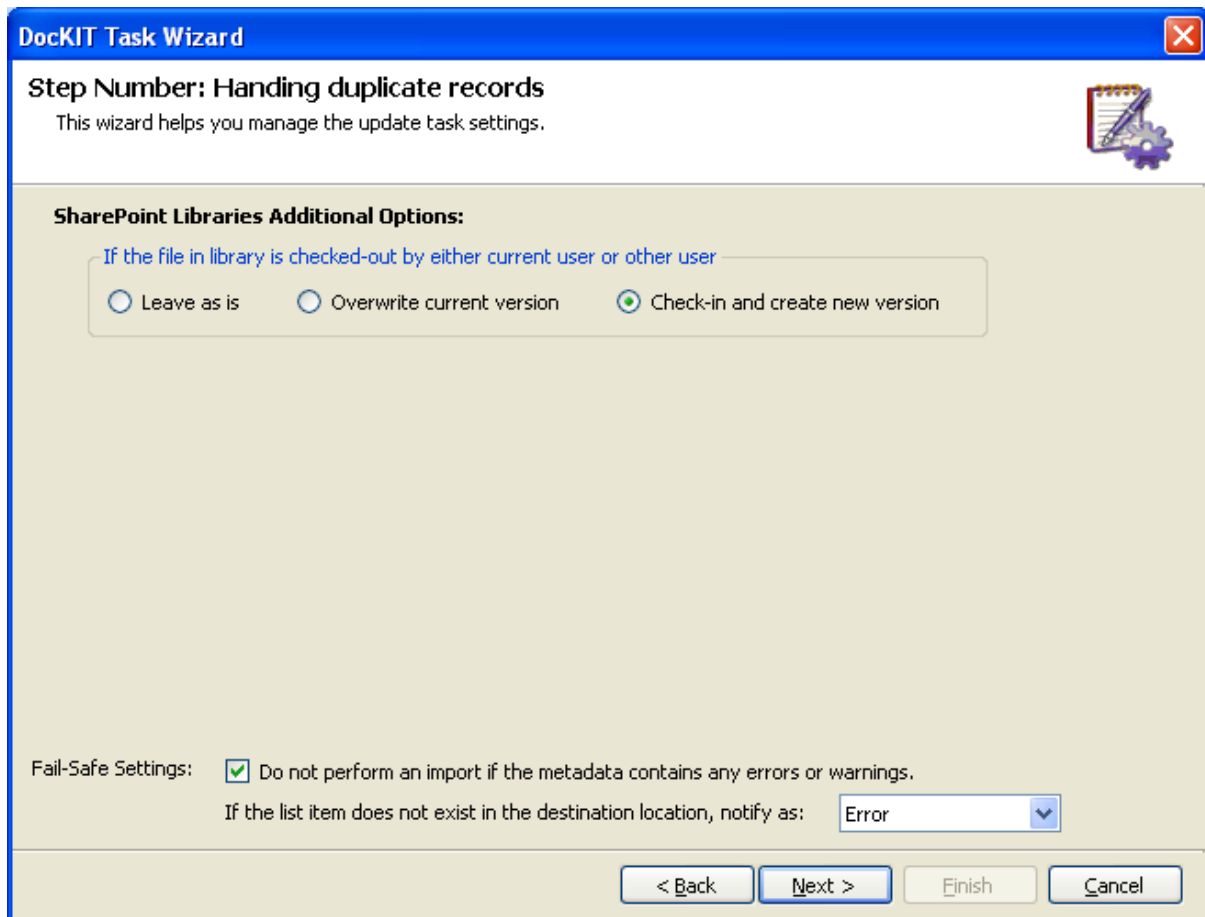
## **Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)**

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- 2) 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.
- 3) Select **Check-In comments** from one of the following options:
  - 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:
    - **<user name>** - Replaces identifier with the current user who performs DockIT update. For example, *List item was updated by <user name>*.
    - **<task name>** - Replaces identifier with the current DockIT task name used to update the list item in SharePoint. For example, *List item was updated using <task name> in DockIT*.
  - c) **Assign from batch file** - You can also assign the check-in comments from the batch file.



## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)



The screenshot shows a Windows-style dialog box titled "DocKIT Task Wizard" with a close button in the top right corner. The main heading is "Step Number: Handling duplicate records" with a sub-heading "This wizard helps you manage the update task settings." and a gear icon. Below this is a section titled "SharePoint Libraries Additional Options:" containing a text prompt "If the file in library is checked-out by either current user or other user" and three radio button options: "Leave as is", "Overwrite current version", and "Check-in and create new version". The "Check-in and create new version" option is selected. At the bottom left, there are "Fail-Safe Settings:" with a checked checkbox for "Do not perform an import if the metadata contains any errors or warnings." and a dropdown menu for "If the list item does not exist in the destination location, notify as:" set to "Error". At the bottom right, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

**DocKIT Task Wizard**

**Step Number: Handling duplicate records**  
This wizard helps you manage the update task settings.

**SharePoint Libraries Additional Options:**

If the file in library is checked-out by either current user or other user

Leave as is     Overwrite current version     Check-in and create new version

Fail-Safe Settings:  Do not perform an import if the metadata contains any errors or warnings.

If the list item does not exist in the destination location, notify as: Error

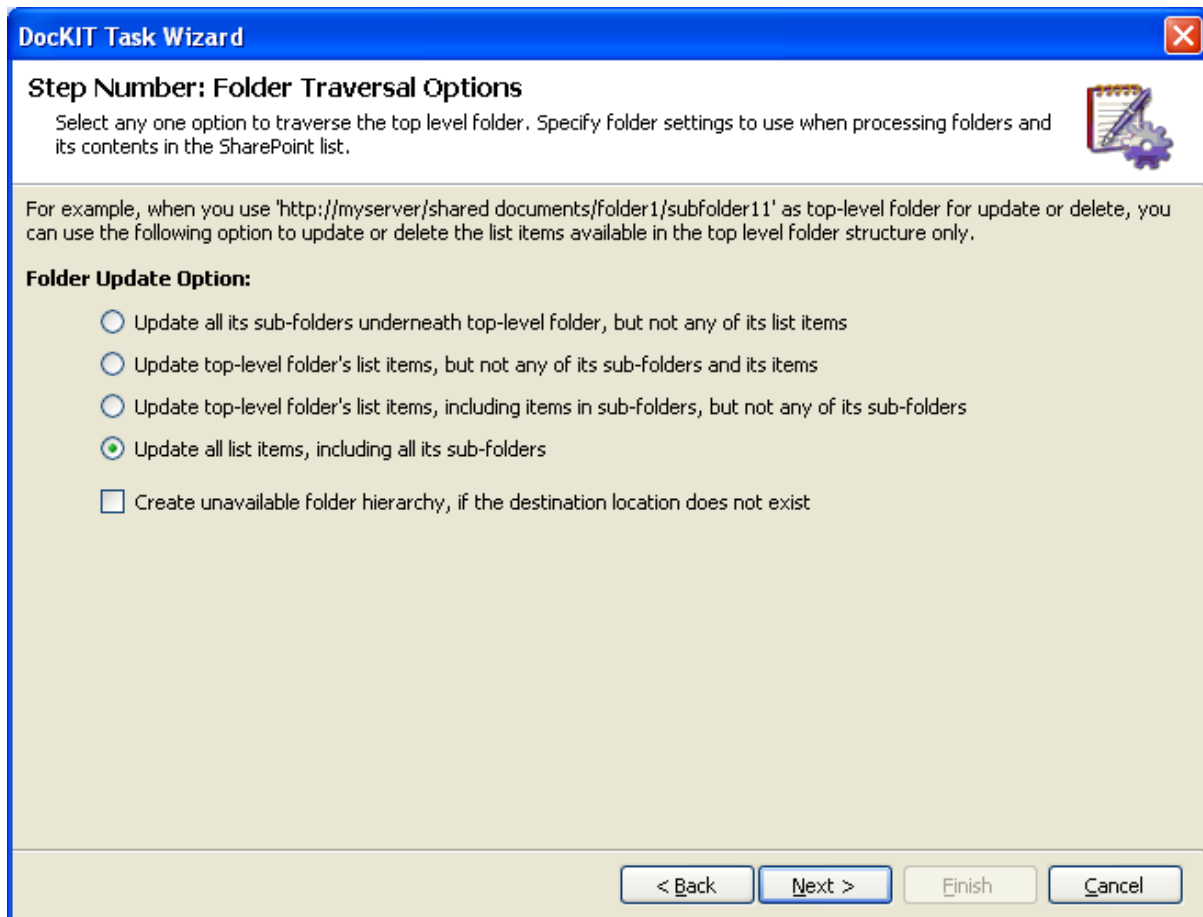
< Back    Next >    Finish    Cancel

**4)** Click **Next** to Proceed.

### 8.18 Folder Traversal Options

To make the update process easier for users, DockIT provides an ability to specify the contents to update from the folder structure level specified by the user. To specify the folder settings to use in the destination SharePoint list and the necessary items to update, perform the steps as given below:

- 1) The **Folder Traversal Options** step appears as shown below:



- 2) Select any of the following folder options given below to specify the contents to be updated from the folders in SharePoint:
  - a) **Update all its sub-folders underneath top-level folder, but not any of its items** - This option update all its sub-folders available in the top-level folder in SharePoint, but it does not update any of the list items within a folder.
  - b) **Update top-level folder items, but not any of its sub-folders and its items** - This option update list items available in the top-level folders only. DockIT will not traverse the sub-folders and its list items within the top level folders.

- c) **Update top-level folder items, including items in sub-folders, but not any of its sub-folders** - This option update all list items available in the top-level folders and its sub-folders, but it does not update any sub-folders in SharePoint.
  - d) **Update all items, including all its sub-folders** - This option update all items and sub-folders in SharePoint.
- 3) By default, DockIT expects the destination folder location to exist in SharePoint. If the destination folder is not available in the destination location, DockIT fails to import list items (in case of, Create new items or Update/Create option) to the specified folder in SharePoint. You can change this behavior by selecting the option **Create unavailable folder hierarchy if the destination location does not exist.**

In this case, DockIT will automatically create the unavailable folder hierarchy (folder and sub-folders) in destination SharePoint during creation of new list items process. After creating them, it will commence import process to the required folder in SharePoint. By using this option, you can simply avoid the error message 'Unable to locate destination folder with the specified URL' reported in Activity Log Viewer, since DockIT will take care of creating the new folder structure in the destination location.

**NOTE:** DockIT does not create library if it is unavailable in the SharePoint. In other words, DockIT creates unavailable folders alone in an existing SharePoint library.

- 4) Click **Next** to proceed.

### 8.19 Import Conditions

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

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

DocKIT Task Wizard - task - 5

**Step Number: Import Conditions**  
Specify conditions to be satisfied for folders / items to perform the specified action in SharePoint.

Do not apply any conditions     Apply the following conditions

Field Name	Operator	Value

Add to Filter    Add Fields    'OR' to Filter

Conditions:

Perform action against folder / list items if the above conditions are:  satisfied     not satisfied

< Back    Next >    Finish    Cancel

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

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

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

3) The DocKIT Task wizard step appears as shown below:

**DocKIT Task Wizard - task - 5**

**Step Number: Import Conditions**  
Specify conditions to be satisfied for folders / items to perform the specified action in SharePoint.

Do not apply any conditions  Apply the following conditions

Field Name	Operator	Value
List Type (SharePoint)	=	DataSources

'AND' to Filter    Add Fields    'OR' to Filter

Conditions:

```
[[Created Date (SharePoint)] > #23-Dec-11#  
AND [List Type (SharePoint)] = 'Comments'  
OR [List Type (SharePoint)] = 'DataSources'
```

Perform action against folder / list items if the above conditions are:  satisfied  not satisfied

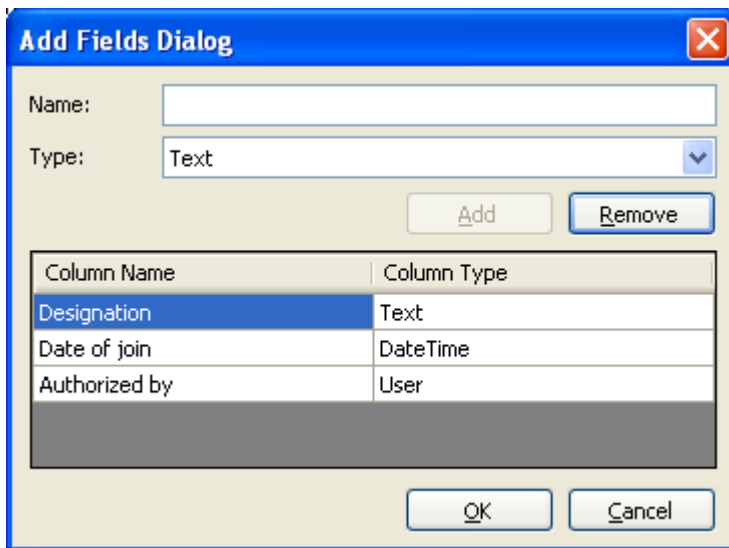
< Back    Next >    Finish    Cancel

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

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

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

The **Add Fields Dialog** appears as shown below:



Column Name	Column Type
Designation	Text
Date of join	DateTime
Authorized by	User

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

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

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

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

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

**DocKIT Task Wizard - task - 5**

### Step Number: Import Conditions

Specify conditions to be satisfied for folders / items to perform the specified action in SharePoint.

Do not apply any conditions     Apply the following conditions

Field Name	Operator	Value
List Type (SharePoint)	=	DataSources

Conditions:

```
[(Created Date (SharePoint)) > #23-Dec-11#  
AND [List Type (SharePoint)] = 'Comments'  
OR [List Type (SharePoint)] = 'DataSources']
```

Perform action against folder / list items if the above conditions are:     satisfied     not satisfied

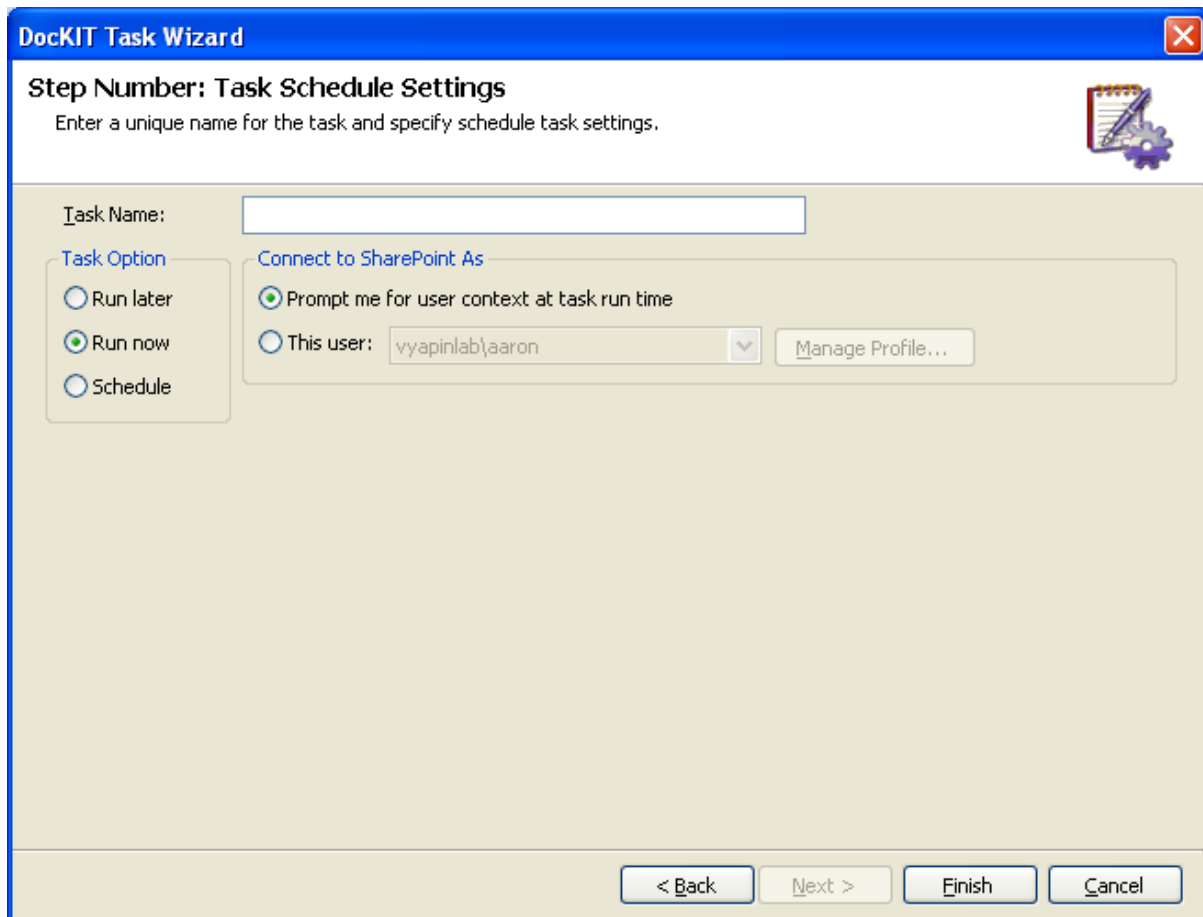
          

6) Click **Next** to Proceed.

### 8.20 Task Schedule Settings

To specify the task name and schedule settings:

- 1) The **Task Schedule Settings** step appears as shown below:



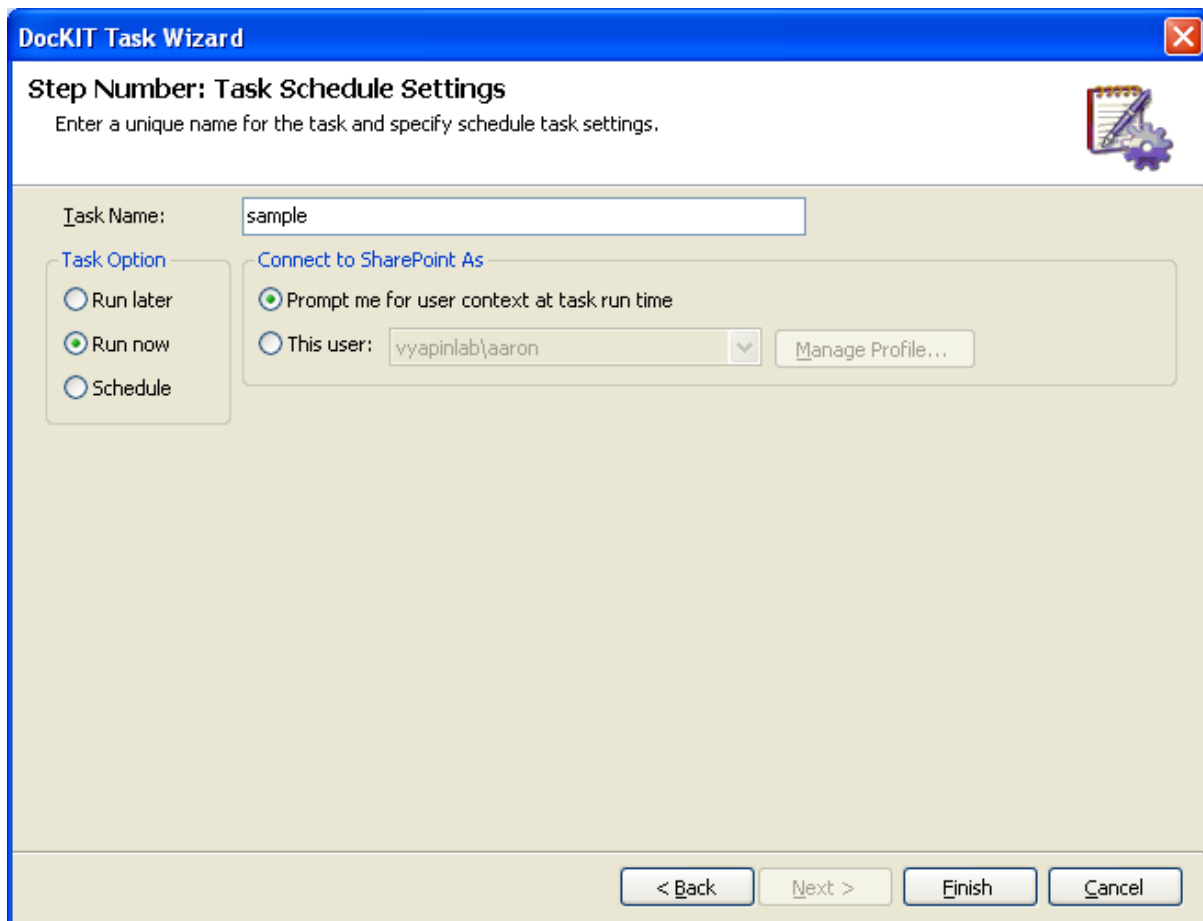
The screenshot shows the 'DocKIT Task Wizard' window at the 'Task Schedule Settings' step. The window title is 'DocKIT Task Wizard' and the step title is 'Step Number: Task Schedule Settings'. Below the title, it says 'Enter a unique name for the task and specify schedule task settings.' There is a 'Task Name:' text box. Under 'Task Option', there are three radio buttons: 'Run later', 'Run now' (which is selected), and 'Schedule'. To the right, under 'Connect to SharePoint As', there are two radio buttons: 'Prompt me for user context at task run time' (which is selected) and 'This user:'. The 'This user:' option has a dropdown menu showing 'vyapinlab\jaaron' and a 'Manage Profile...' button. At the bottom, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

- 2) **Enter** a unique task name in **Task Name** textbox.
- 3) Select a **Task Option** from one of the following options:
  - a) **Run later** - to run the task later as and when desired
  - b) **Run now** - to run the task immediately after clicking Finish button
  - c) **Schedule** - to create a Windows scheduled task. DocKIT will create a schedule task in the Windows Scheduled Tasks with the given settings. DocKIT will perform the specified action based on the Run As user account specified in this step. The Run As account should be a valid Windows domain account.
- 4) Select from one of the following options through which the destination SharePoint to be connected:
  - a) **Prompt me for user context at task run time** - DocKIT will prompt for the user context to use to connect destination SharePoint at the time of DocKIT task run.



## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

- b) **This user <user name>** - DockIT will use stored profile context to connect destination SharePoint.



The screenshot shows the 'DocKIT Task Wizard' window, specifically the 'Step Number: Task Schedule Settings' dialog. The window title is 'DocKIT Task Wizard' and it has a close button in the top right corner. The main heading is 'Step Number: Task Schedule Settings' with a sub-instruction: 'Enter a unique name for the task and specify schedule task settings.' There is a small icon of a notepad and a gear in the top right corner of the dialog area.

The dialog contains the following fields and options:

- Task Name:** A text input field containing the word 'sample'.
- Task Option:** A group box containing three radio buttons:
  - Run later
  - Run now
  - Schedule
- Connect to SharePoint As:** A group box containing:
  - Prompt me for user context at task run time
  - This user: A dropdown menu showing 'vyapinlab\aarón' and a 'Manage Profile...' button.

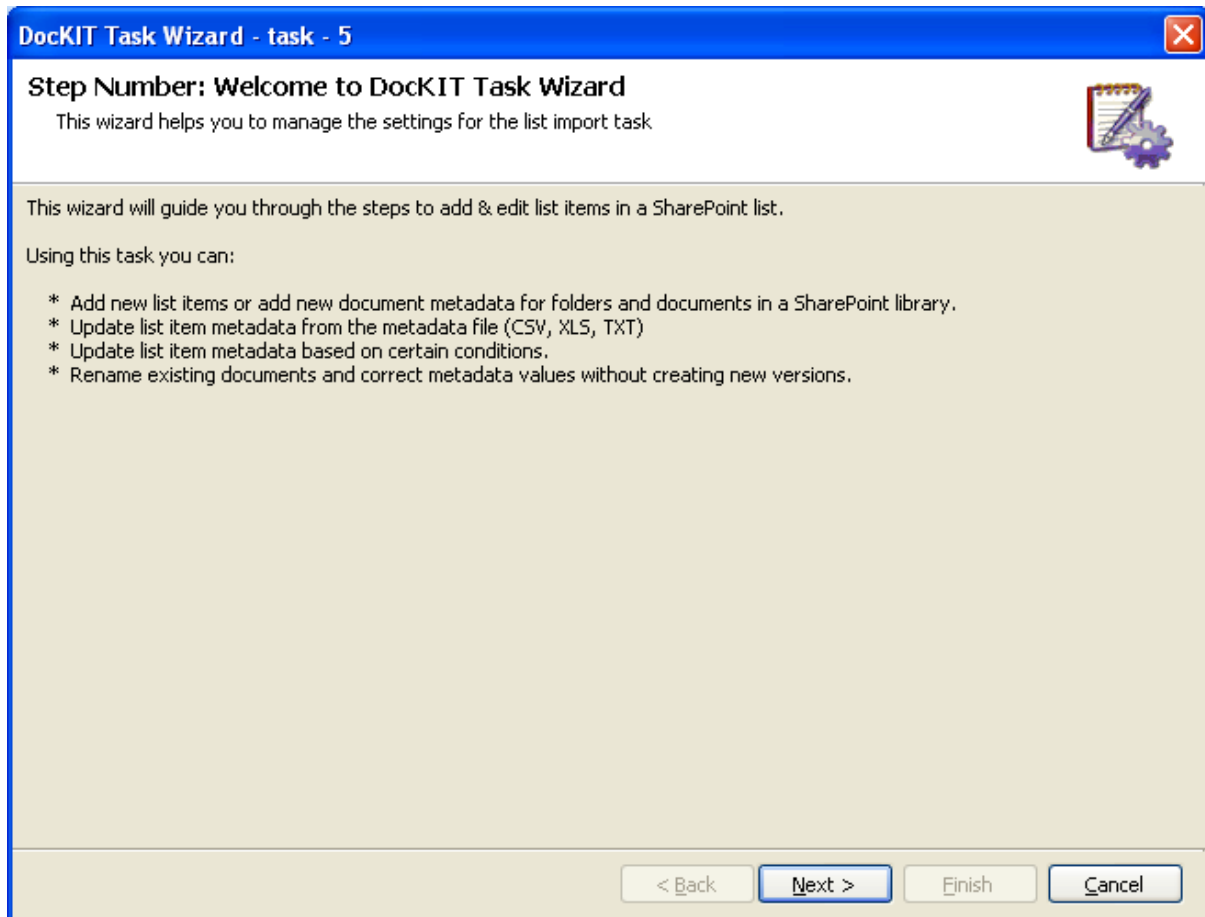
At the bottom of the dialog, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

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

### 8.21 Edit Task

Edit task is similar to creating a task, except that a few settings cannot be altered as stated in this section below.

1) The **DocKIT Task Wizard** appears as shown below:



2) Click **Next** button

3) Specify the **Batch Import Settings**

4) Specify the **SharePoint System Fields**

5) Specify the **Handling duplicate records**

6) Specify the **Folder Traversal Options**

7) Specify the **Import Conditions**

8) In **Task Schedule Settings** edit mode, DocKIT Task Wizard the task name cannot be changed. However, you can make a copy of the task using **Copy Task** tool.

## Chapter-8- Import metadata to all SharePoint Lists (Batch File Mode)

**DockIT Task Wizard - task - 5**

**Step Number: Task Schedule Settings**  
Enter a unique name for the task and specify schedule task settings.

Task Name: task - 5

**Task Option**

- Run later
- Run now
- Schedule

**Connect to SharePoint As**

- Use 'Run As' user context given below
- This user: vyapinlab\aaroon

**Schedule Settings**

Run As: johndoe@contoso.com

Schedule: Daily  Start time: 7:01 PM

**Schedule Task Daily**

Every 1 day(s)

At 7:01 PM every day, starting 23-Dec-11

< Back   Next >   Finish   Cancel

- 10) Click **Finish** button to save the task settings, or click **Back** button to back to a previous step.

## 9 How to Guide?

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- **Import Document Versions**
- **Conditional Import of Documents**
- **Import System Dates**
- **Import System Users**
- **Create Document Sets**
- **Rename documents in file system**
- **Import documents to multiple document libraries**
- **Add new terms in managed metadata column**

### 9.1 Import Document Versions

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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**

##### **a) Import folders, files and metadata to SharePoint Libraries (Explorer Mode) Option:**

Follow the steps in the Import folders, files and metadata to SharePoint Libraries (Explorer Mode) Option task wizard. The relevant section for importing file versions has been described below:

The selected folders and files added for import will be displayed in the **Items added for import** grid. DockIT processes the top-level folders and files added for import in the order in which it appears in the **Items added for import** grid. The import process order

## Chapter-9- How to Guide?

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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.

### **b) Import folders, files and metadata to SharePoint Libraries (Batch File Mode) Option:**

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

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

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

```
"Path","Destination Path"
```

```
"C:\My Documents\Sales Proposals\version1","http://sharepoint/DocLib"
```

```
"C:\My Documents\Sales Proposals\version2","http://sharepoint/DocLib"
```

```
"C:\My Documents\Sales Proposals\version3",http://sharepoint/DocLib
```

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

Importing document versions using the Folders & Files Renaming Rules engine

## Chapter-9- How to Guide?

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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

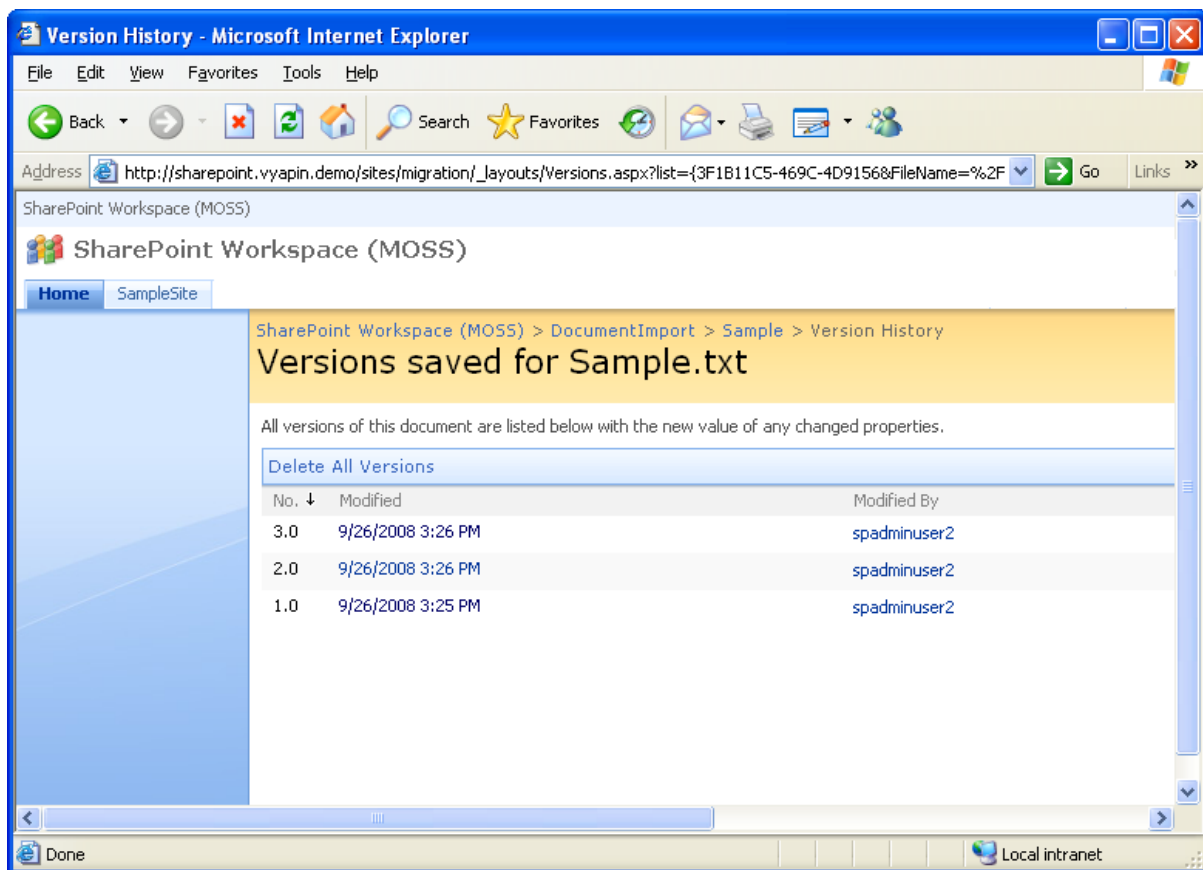
\Sample\_v2.txt

\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 as shown in the sample screenshot below:



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

- 1)** 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.
- 2) 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"
```

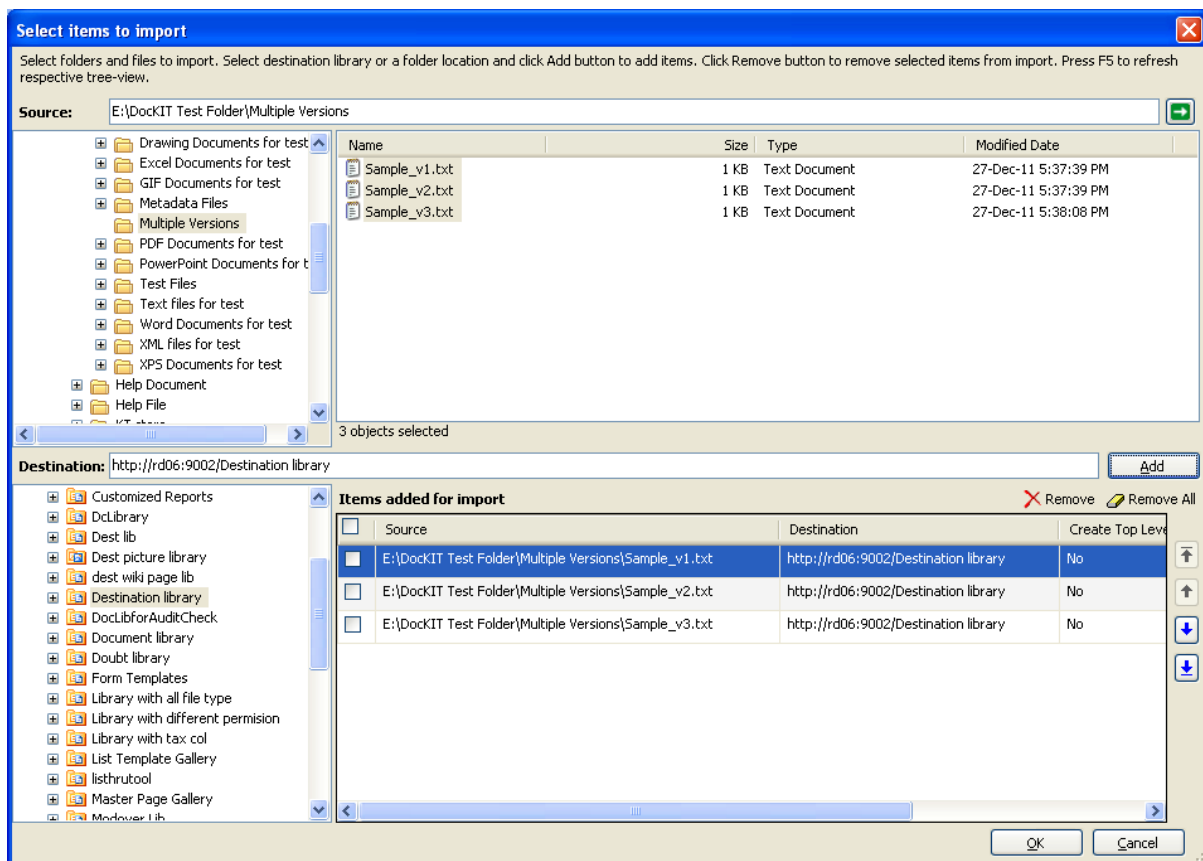
## Chapter-9- How to Guide?

"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. DockKIT 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):

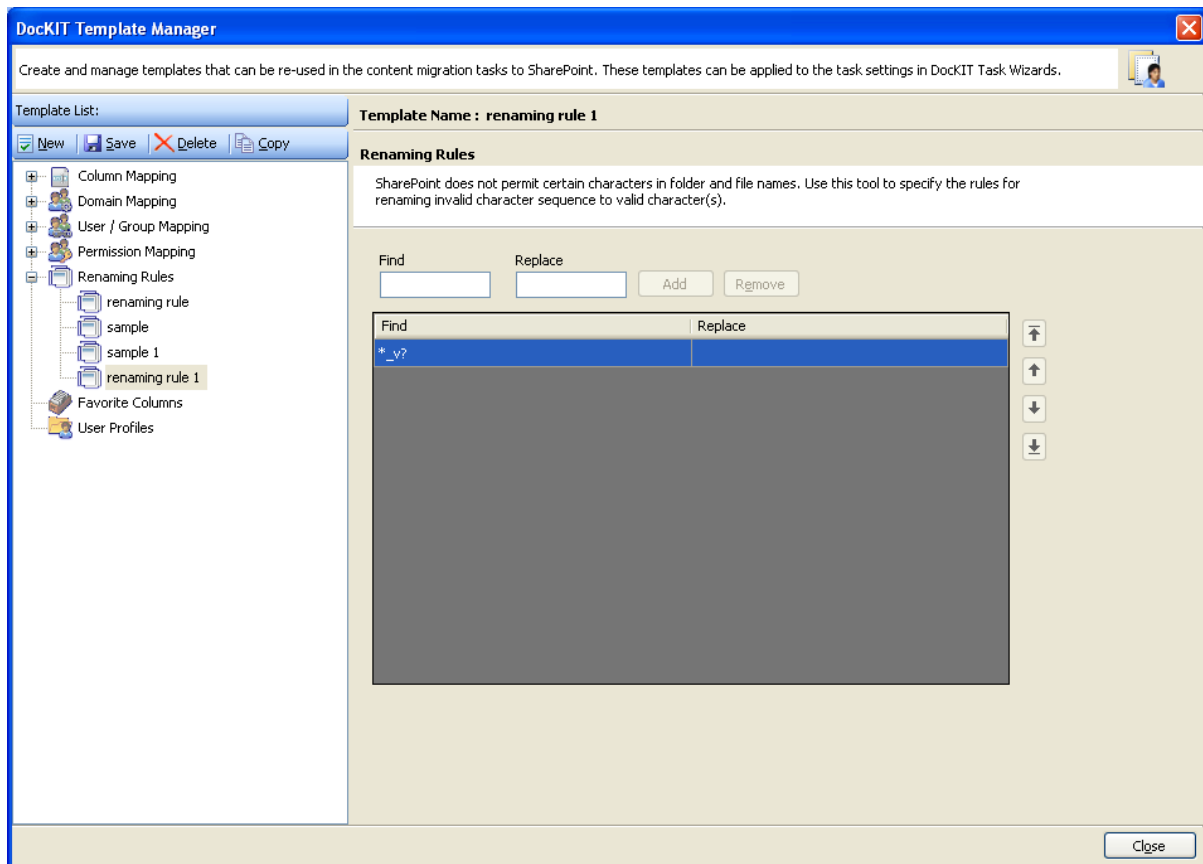
**Select the items to import** into the SharePoint library. In the Select items to import dialog, click **Add** button to add the selected files for import as shown below. The import process order can be changed by the **navigation** buttons available in the right side of the grid. Please note that the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





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3) Go to the **Rename folders and files** step appears as shown below:



4) In Mapping Templates step of DocKIT import task wizard, Select the template 'Renaming rule1' (the template one was created to rename the document) from the list of available templates under File Renaming Rule.

**DockIT Task Wizard - test-renaming**

**Step Number: Mapping Templates**

Select the mapping templates to use for the task and specify the appropriate options.

Column Mapping Template : SharePoint Default

Do you want to migrate unmapped columns also ?  Yes  No

Domain Mapping Template : None \* This mapping will be used for all person or group fields

User / group Mapping Template : None \* This mapping will be used for all person or group fields

Permission Mapping Template : None \* Works only for SharePoint 2010

Folder Renaming Rule : None  Truncate folder names, max length 128

File Renaming Rule : renaming rule 1  Truncate file names, max length 128

Manage Templates...

< Back Next > Finish Cancel

Click Next to proceed.

- 5) Select **Create new version** option in the File Settings wizard step to handle file versions correctly.
- 6) You can use **Pre-migration Validation** step in DockIT Task Wizard to validate the task and avoid common errors.

### 9.2 Import System Dates

---

#### Import System Dates (Created Date and Modified Date)

DockIT updates SharePoint System Dates (Created Date and Last Modified Date) fields for both folders and files in SharePoint from any one of the following sources:

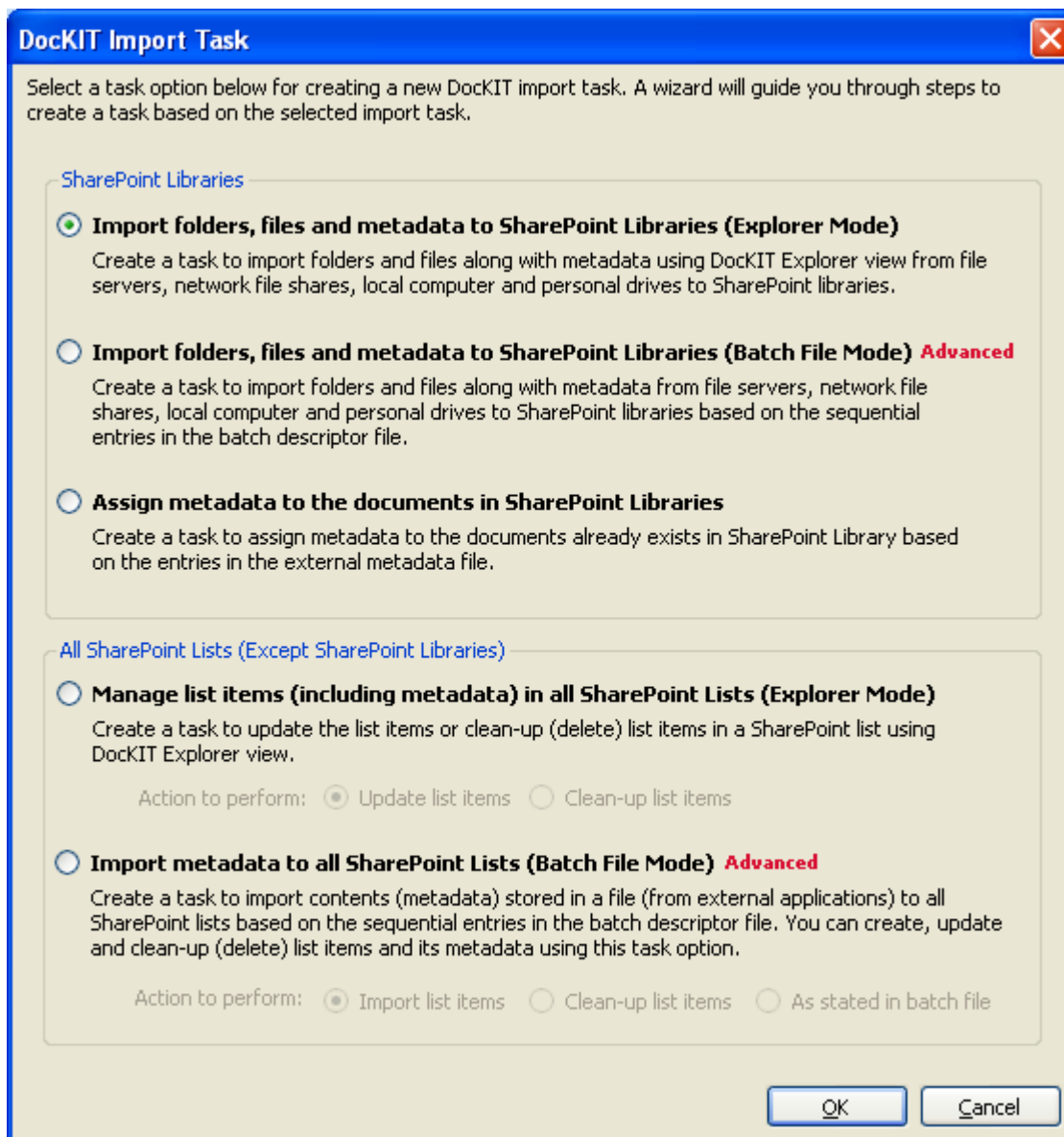
- Original Created Date and Last Modified Date from file system (NTFS)
- Assign from external metadata file
- Assign from custom properties (MS-Office documents only)

**NOTE:** DockIT Web Service allows the user to update the system date fields (for SharePoint 2007) by running DockIT for SharePoint 2010 on a remote computer. To update the date fields, follow the steps given below:

In order to update System Dates from remote computer, please visit the System Requirements section in the help file for more information.

Please follow the instructions given below to assign system date values for folder and files in SharePoint:

- 1)** In DockIT application, create a task using **Import folders, files and metadata to SharePoint Libraries (Explorer Mode)** option in **DockIT Import Task** dialog as shown below and click **OK**.

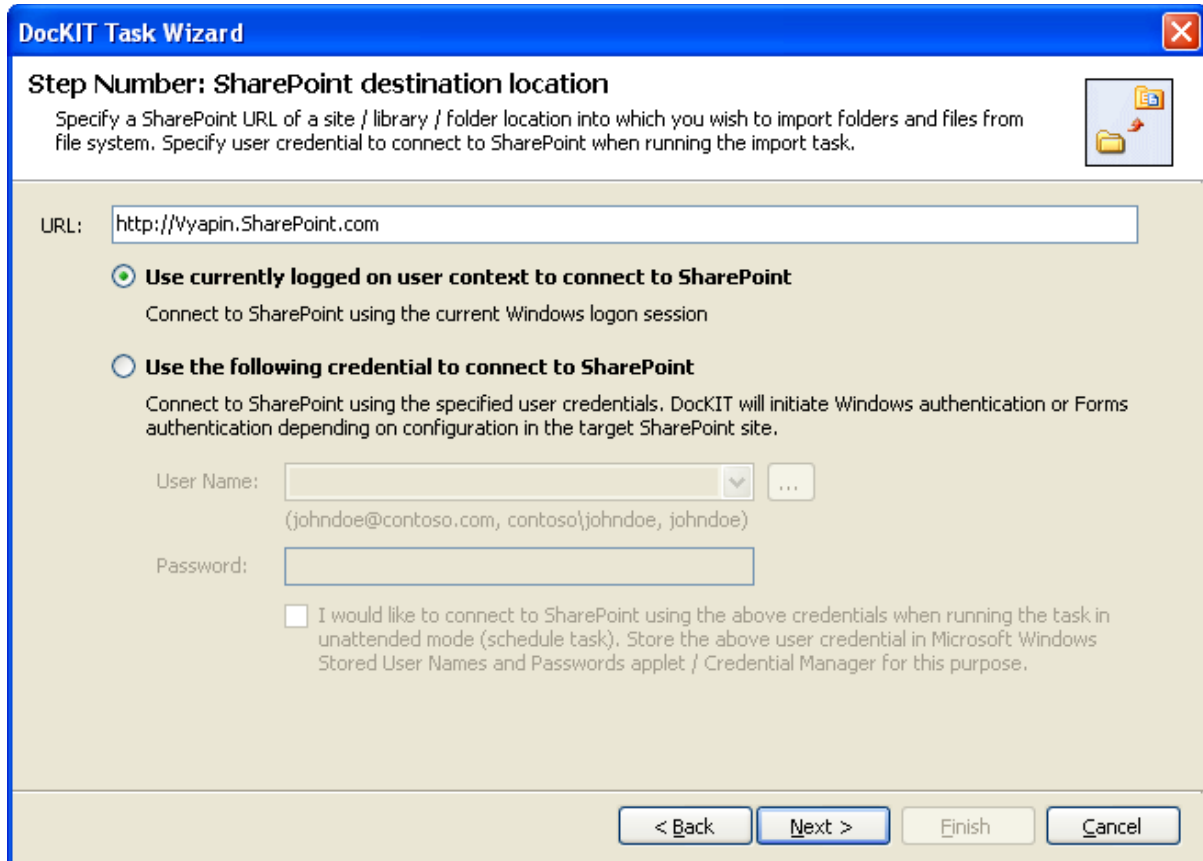


**NOTE:** You can also use **Import folders, files and metadata to SharePoint Libraries (Batch File Mode)** option to update these date fields from remote machine. The requirements of updating date fields are same as the first task type. In this section, we are taking first type to describe how to use DockIT Task Wizard to update date fields successfully.

- 2) 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 : SharePoint destination location step in DockIT Task Wizard.  
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:

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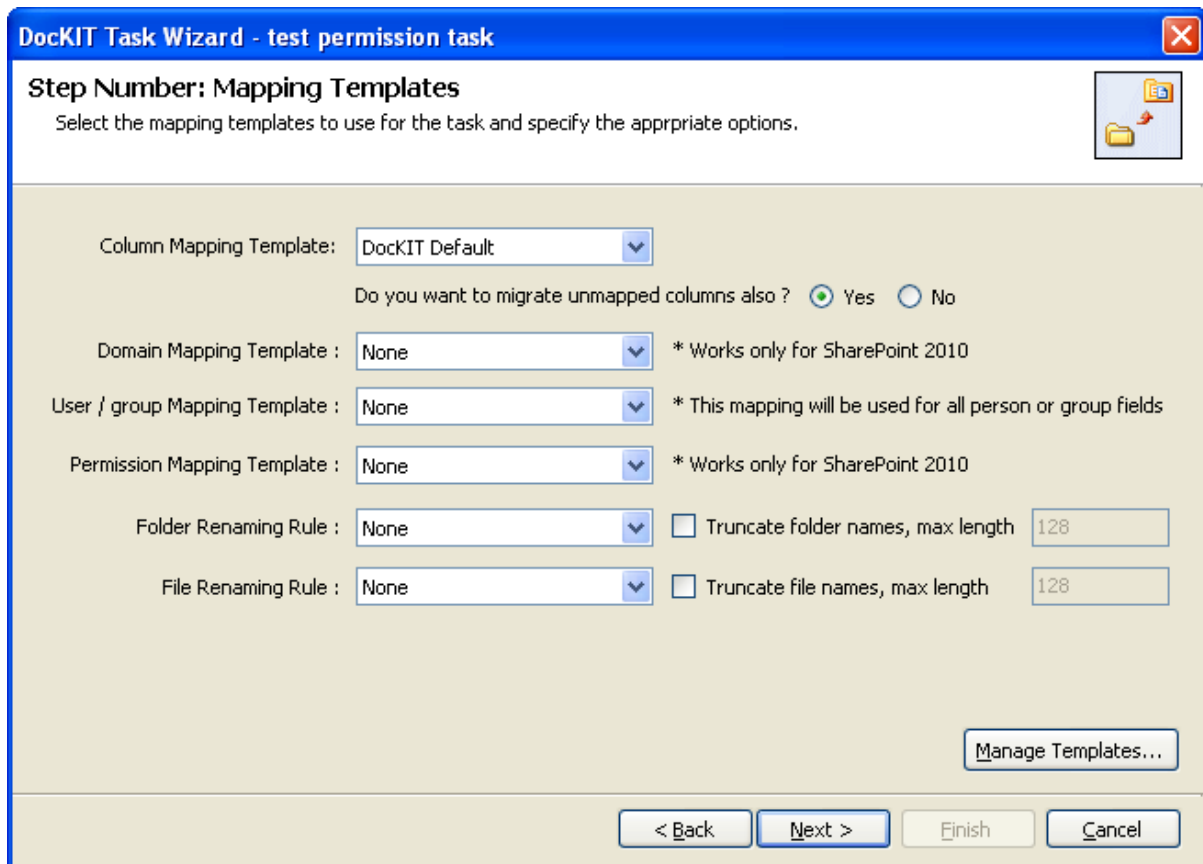
- Member of administrators group in the local server and remote SQL Server (or)
- Application pool user account (or)
- Owner of the site where the destination library resides



The screenshot shows the 'DocKIT Task Wizard' dialog box. The title bar reads 'DocKIT Task Wizard' with a close button. The main heading is 'Step Number: SharePoint destination location'. Below the heading is a descriptive text: '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.' To the right of this text is a small icon of a folder with a document and an arrow. Below the text is a text box for the URL, containing 'http://Vyapin.SharePoint.com'. There are two radio button options for connection: 'Use currently logged on user context to connect to SharePoint' (which is selected) and 'Use the following credential to connect to SharePoint'. The second option has a 'User Name:' label, a dropdown menu with a list of email addresses and names, and a 'Password:' label with a text box. At the bottom of the dialog are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

Click **Next** to Proceed.

- 3) Select **DocKIT Default** under Column Mapping Template dropdown in Mapping Templates step as shown below:



**DockIT Task Wizard - test permission task**

**Step Number: Mapping Templates**  
Select the mapping templates to use for the task and specify the appropriate options.

Column Mapping Template:    
Do you want to migrate unmapped columns also ?  Yes  No

Domain Mapping Template :   \* Works only for SharePoint 2010

User / group Mapping Template :   \* This mapping will be used for all person or group fields

Permission Mapping Template :   \* Works only for SharePoint 2010

Folder Renaming Rule :    Truncate folder names, max length

File Renaming Rule :    Truncate file names, max length

**4)** Proceed with steps provided in DockIT Task Wizard.

You can use **Pre-migration Validation** step in DockIT Task Wizard to validate the task and avoid common errors. Please see respective help section depending on the task type to get more information about **Pre-migration Validation Tool**.

### 9.3 Import System Users (Created By and Modified By)

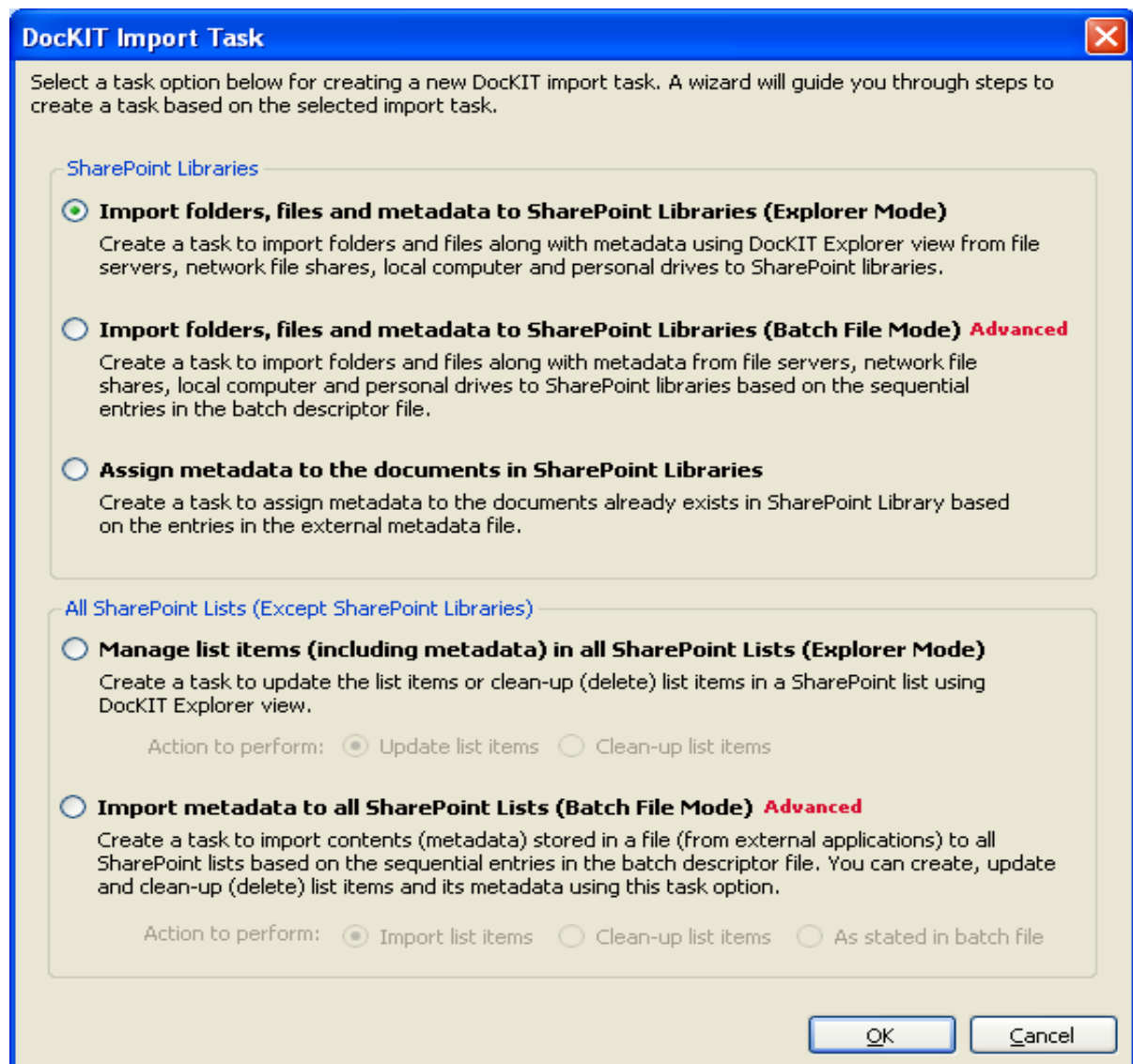
---

DockIT updates SharePoint system users (Created By and Last Modified By) fields for both folders and/or files in SharePoint from any one of the following sources:

- User specified username for all folders and/or files
- Assign from external metadata file
- Assign from file system
- Assign from custom properties (MS-Office documents only)

Please follow the instructions given below to assign system users to folders and files in SharePoint:

- 1) In DockIT application, create a task using **Import folders, files and metadata to SharePoint Libraries (Explorer Mode)** option in DockIT **Import Task** dialog as shown below and click **OK**.



**NOTE:** You can also use **Import folders, files and metadata to SharePoint Libraries (Batch File Mode)** option to update these system users (Created By / Modified By) from a remote machine. The requirements of updating system fields are same as the first task type. In this section, we are taking first task type to describe how to use DocKIT Task Wizard to update the system user fields - Created By & Modified By successfully.

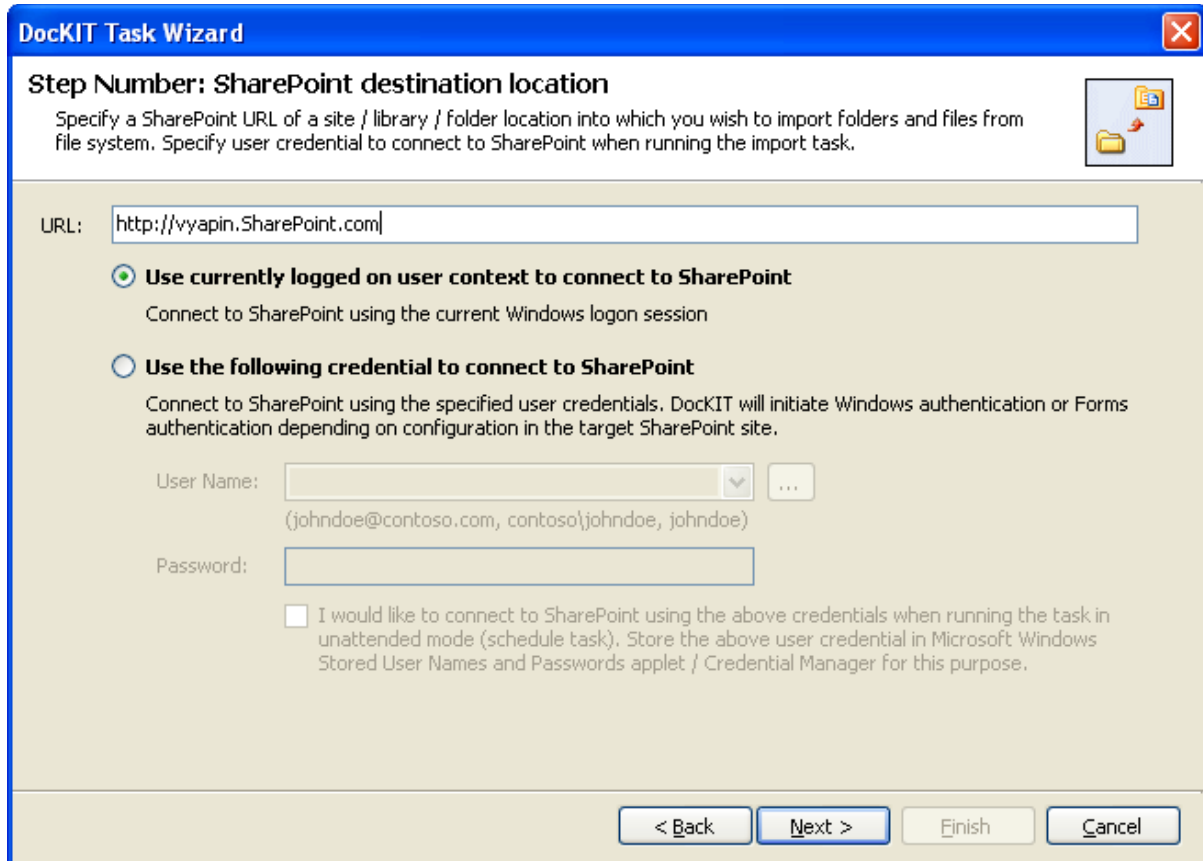
- 2) Specify a SharePoint URL of a site / library / folder location to which you wish to import folders and files from the file system. Specify the users' credentials to connect to the SharePoint URL specified in **SharePoint destination location** step in DocKIT Task Wizard.

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:



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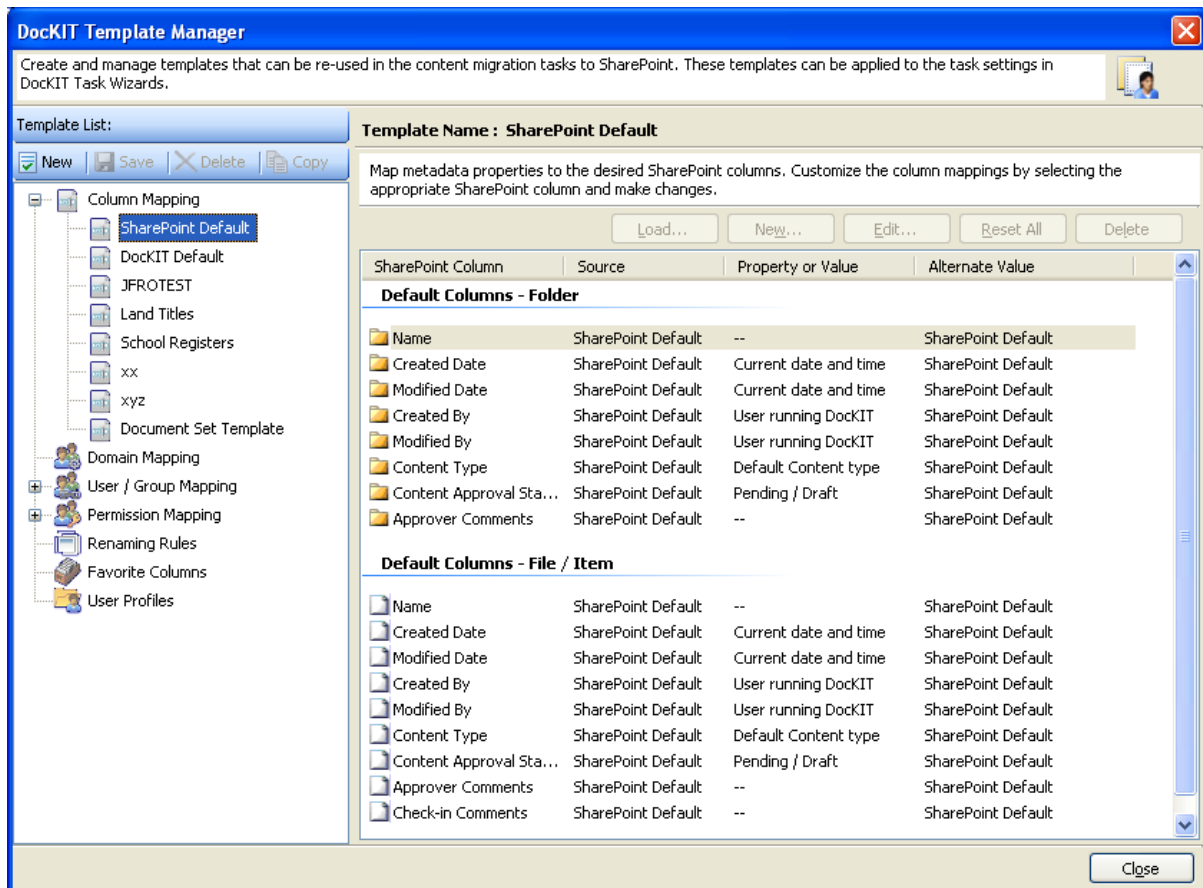
- Member of administrators group in the local server and remote SQL Server (or)
- Application pool user account (or)
- Owner of the site where the destination library resides



The screenshot shows the 'DocKIT Task Wizard' dialog box. The title bar reads 'DocKIT Task Wizard' with a close button. The main heading is 'Step Number: SharePoint destination location'. Below this, there is a descriptive text: '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.' To the right of this text is a small icon showing a folder and a document. Below the text is a text box for the URL, containing 'http://vyapin.SharePoint.com'. There are two radio button options for connecting to SharePoint: 'Use currently logged on user context to connect to SharePoint' (which is selected) and 'Use the following credential to connect to SharePoint'. The second option includes fields for 'User Name' (with a dropdown and a button) and 'Password'. Below these fields is a checkbox with the text: 'I would like to connect to SharePoint using the above credentials when running the task in unattended mode (schedule task). Store the above user credential in Microsoft Windows Stored User Names and Passwords applet / Credential Manager for this purpose.' At the bottom of the dialog are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

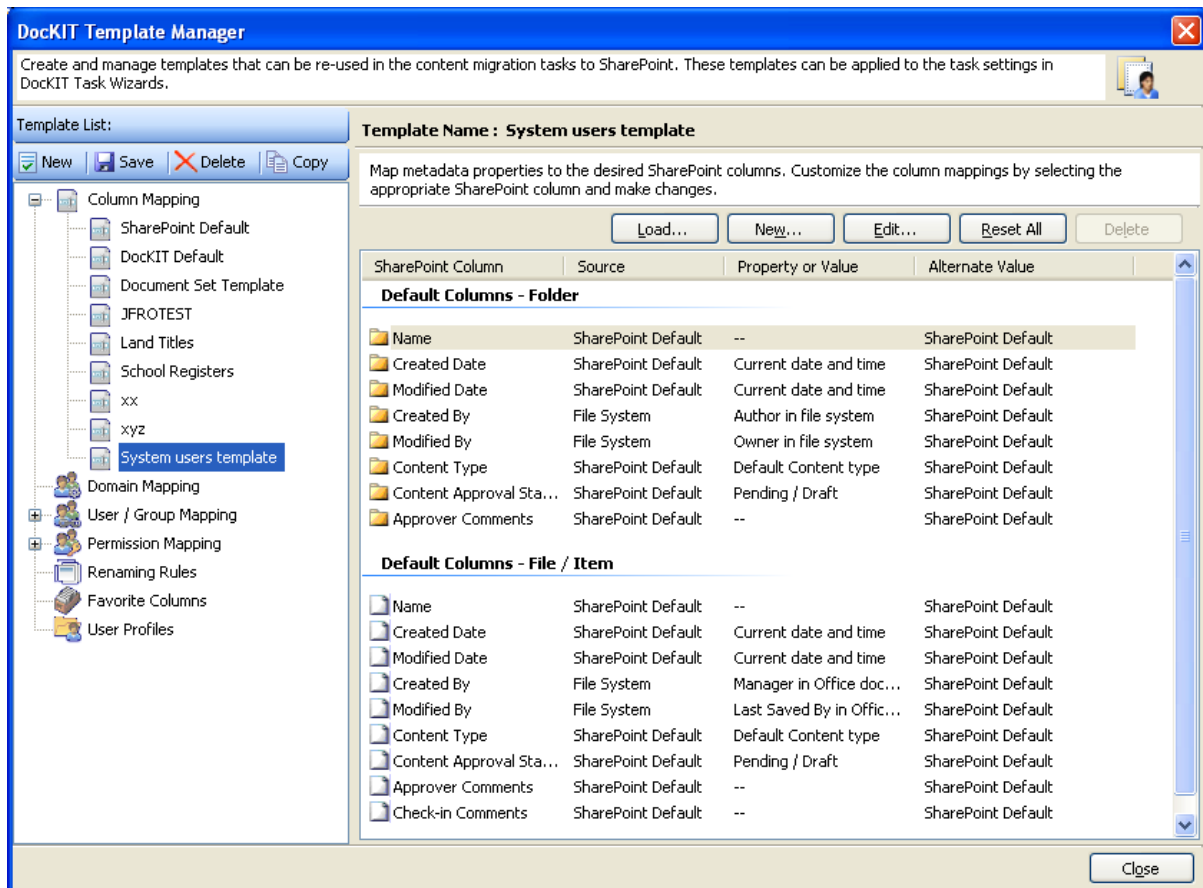
- 3) In '**Items to import**' step, select and add the desired folders which you want to create as document set in SharePoint library.
- 4) Proceed with steps provided in DocKIT Task Wizard.
- 5) In Mapping Templates step, click **Manage Templates...** button to create a template with the necessary values to assign metadata for user columns. The Column Mapping Templates dialog will appear as shown below:

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- 6) Create a new template (say, 'System User Template') and double click on the Created By / Modified By under 'Default Columns - Folder' in Column Mapping pane. Edit Column dialog will appear as shown below:

**NOTE: Similarly you can change the Created By / Modified By columns under 'Default Columns - File / Item' in Column Mapping pane.**



7) You can assign the system user fields - Created By and Modified By for folders and/or files by selecting one of the options given below:

- a) **Metadata File** - The user fields can be assigned from the external metadata file by including the respective user field columns (e.g., Created By, Modified By) in the metadata file. If the user fields are invalid or if the user is unavailable, SharePoint by default will set the user to be the user account performing the import into the SharePoint library.
- b) **Custom Property (MS-Office documents only)** - The user field values can also be assigned from the custom property of the MS-Office document. DocKIT can assign the date fields from the custom property value of the respective MS-Office documents. If the user fields are invalid or if the user is unavailable, SharePoint by default will set the user to be the user account performing the import into the SharePoint library.
- c) **File System** - The system users can also be assigned from the file summary property of the document. DocKIT can assign the system users from the selected summary property value of the respective documents.
- d) **Specific Value** - The user value can be specified in any one of the following formats:

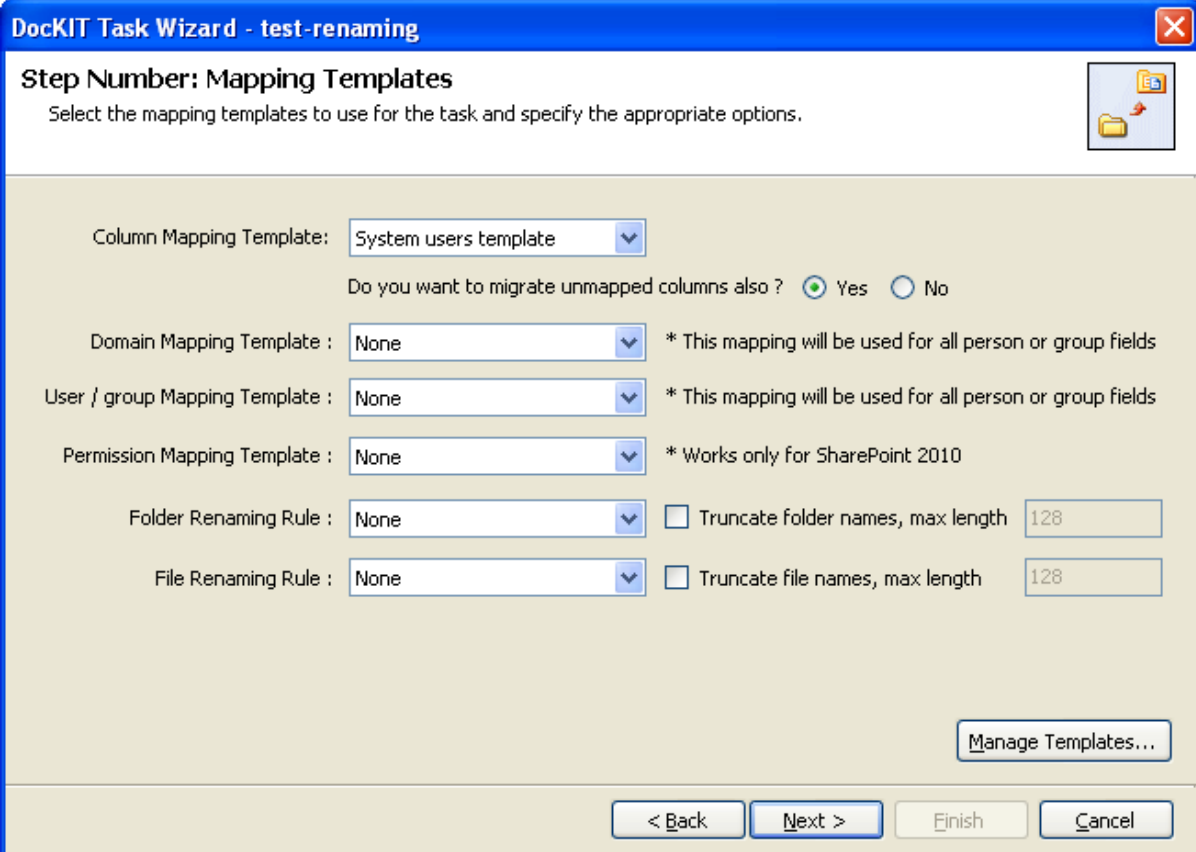
## Chapter-9- How to Guide?

**Login name** - Login name of the user in domain\username format. e.g., DockITDomain\user1.

**Display Name** - Display name of the user. e.g., John Doe.

**E-mail address** - E-mail address of the user in someone@example.com format.

- 8) Save and close the column mapping template dialog.
- 9) Select Use **Column Mapping Template** and select the newly created template ('**System user Template**') from the list of available templates.



**DocKIT Task Wizard - test-renaming**

**Step Number: Mapping Templates**  
Select the mapping templates to use for the task and specify the appropriate options.

Column Mapping Template: System users template

Do you want to migrate unmapped columns also ?  Yes  No

Domain Mapping Template : None \* This mapping will be used for all person or group fields

User / group Mapping Template : None \* This mapping will be used for all person or group fields

Permission Mapping Template : None \* Works only for SharePoint 2010

Folder Renaming Rule : None  Truncate folder names, max length 128

File Renaming Rule : None  Truncate file names, max length 128

Manage Templates...

< Back Next > Finish Cancel

- 9) Click **Next** and proceed with the subsequent steps.

### 9.4 Create Document Sets

---

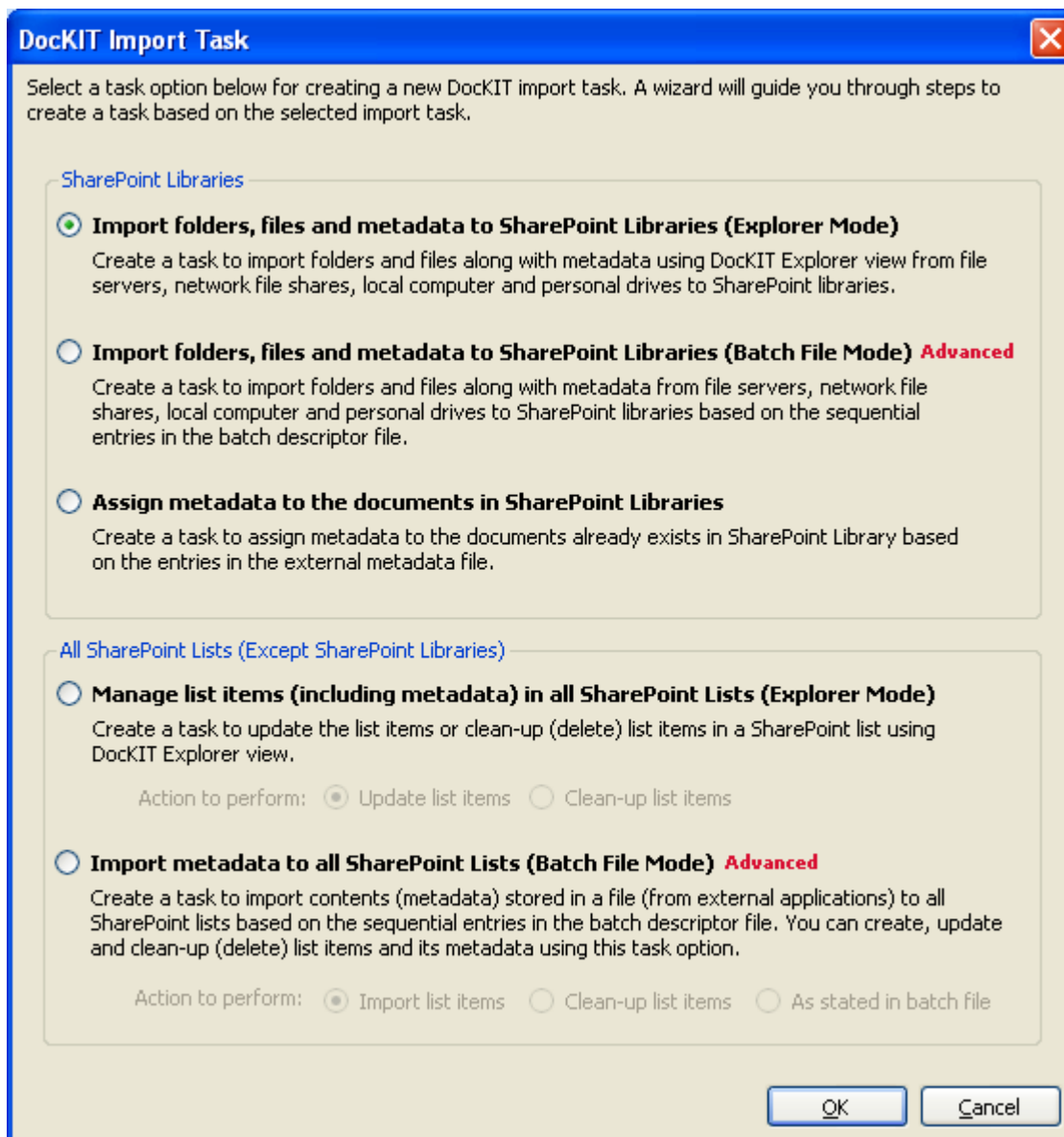
DockKIT enables you to create the folders as document set and update the metadata for document sets in SharePoint 2010 library. In order to create a new document set, you must specify the folder content type as a 'Document Set'.

Based on the specified content type, DockKIT 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, DockKIT 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 DockKIT import task wizard.

In order to create new documents sets from a remote computer, please visit the System Requirements section in the help file for more information.

Please follow the instructions given below to create document sets and import documents into the new document sets created in SharePoint:

- 1) In DockKIT application, create a task using **Import folders, files and metadata to SharePoint Libraries (Explorer Mode)** option in **DockKIT Import Task** dialog as shown below and click **OK**.

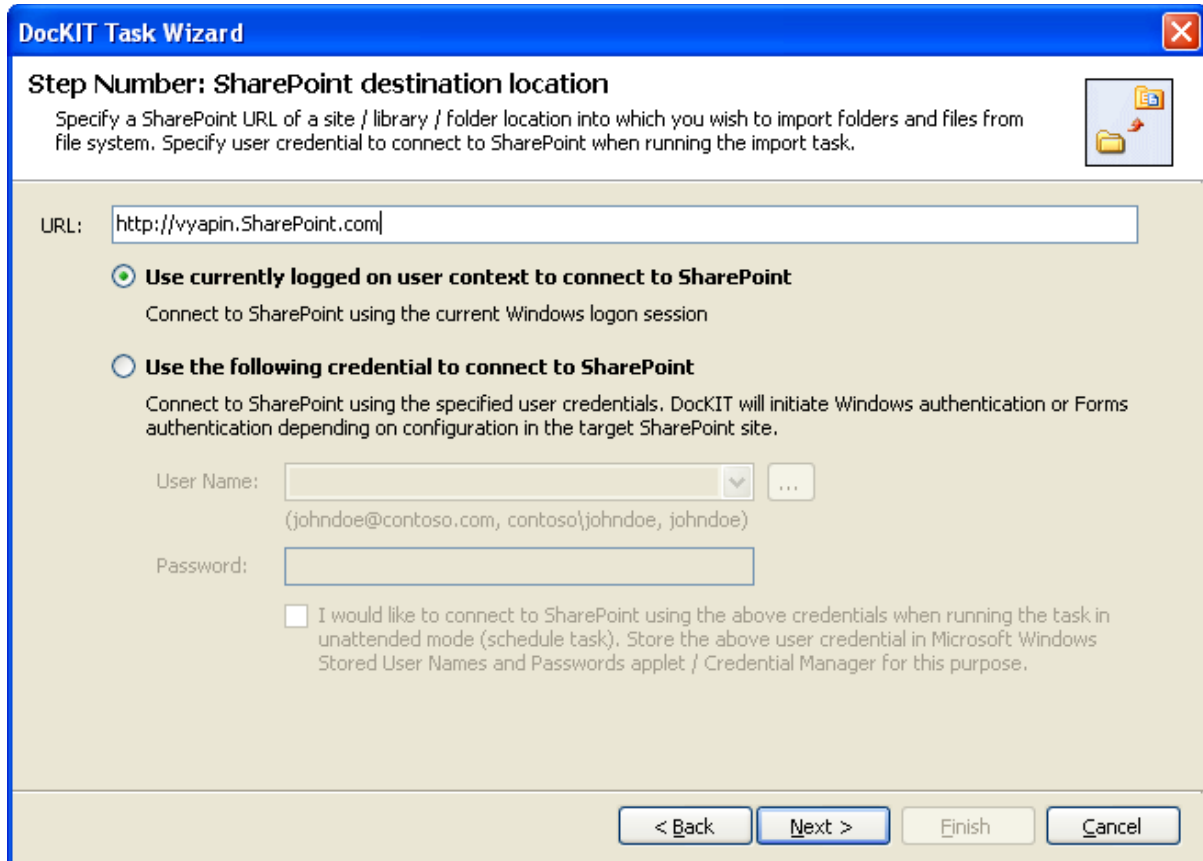


**NOTE:** You can also use **Import folders, files and metadata to SharePoint Libraries (Batch File Mode)** option to create folders as new document sets from remote computer. In this section, we will discuss using the **Import folders, files and metadata to SharePoint Libraries (Explorer Mode)** import task option to describe how to use DockIT Task Wizard to create folders as new document sets in SharePoint.

- 2) 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.  
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:

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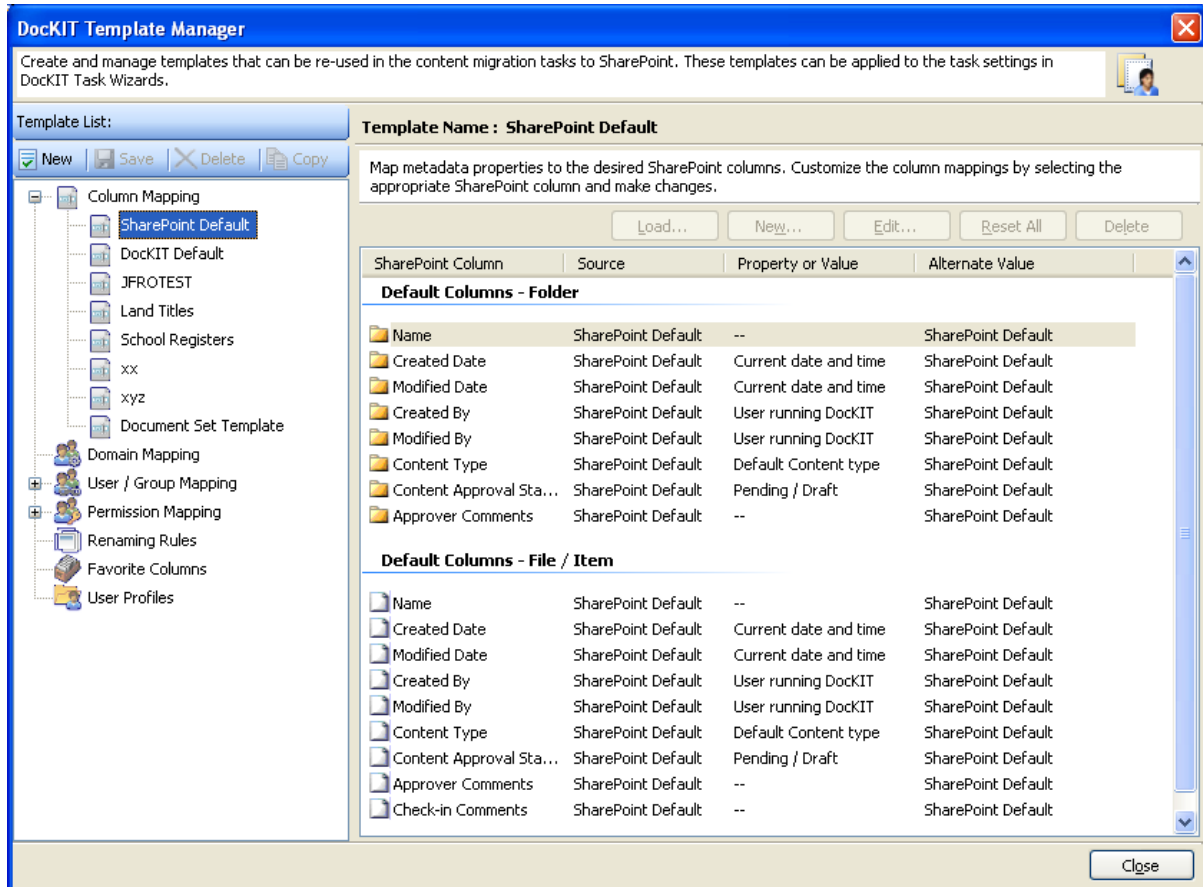
- Member of administrators group in the local server and remote SQL Server (or)
- Application pool user account (or)
- Owner of the site where the destination library resides



The screenshot shows the 'DocKIT Task Wizard' dialog box. The title bar reads 'DocKIT Task Wizard'. The main heading is 'Step Number: SharePoint destination location'. Below the heading, there is a descriptive text: '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.' To the right of this text is a small icon of a folder with a document and an arrow. Below the text is a text box for the URL, containing 'http://vyapin.SharePoint.com'. There are two radio button options for connection: 'Use currently logged on user context to connect to SharePoint' (which is selected) and 'Use the following credential to connect to SharePoint'. The second option has a 'User Name:' label, a dropdown menu with a list of email addresses and names, and a 'Password:' label with a text box. At the bottom, there is a checkbox for unattended mode and four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

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

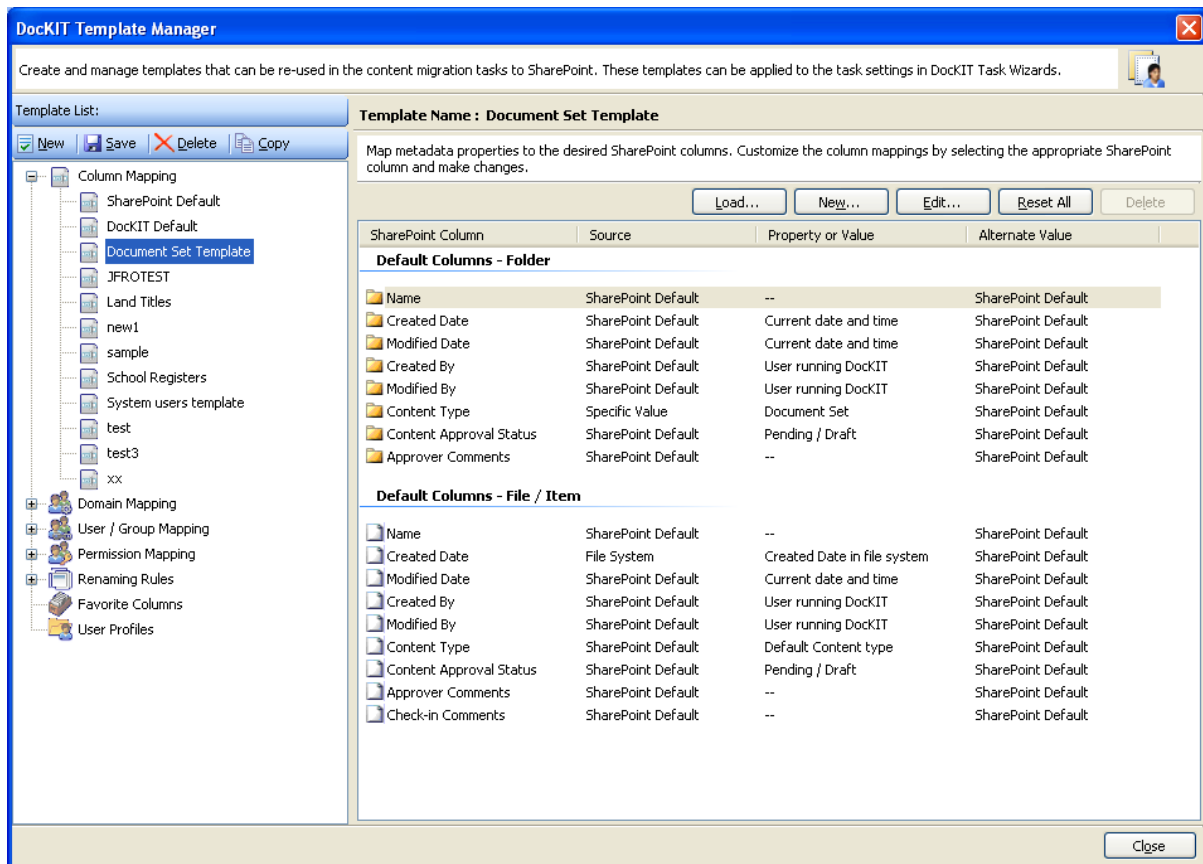
## Chapter-9- How to Guide?



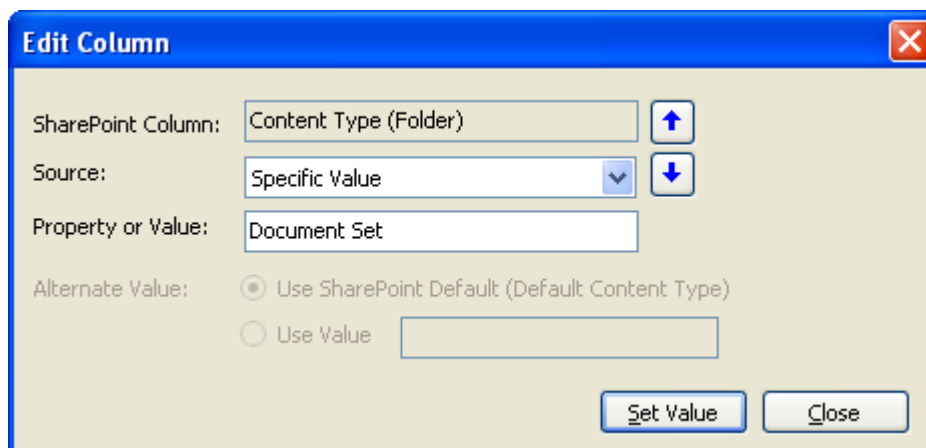
Create a new template (Say Document Set Template)



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- 7) Double click on the Content type under 'System Fields - Folder' in Column mapping pane. then the Edit Column dialog will appear as shown below:



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

- a) Specify the content type - Specify any 'Document Set' derived content type to create a document set and assign this specific content type to it. If the content type specified in the textbox does not exist, DockIT will create the folder and will assign the default content type of the library for the newly created folders.

## Chapter-9- How to Guide?

- 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, DockKIT 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, DockKIT will create the folder and will assign the default content type of the library for the newly created folders
- 9) Save and Close the DockKIT Template Manager.
- 10) In Mapping Templates step of DockKIT import task wizard, Select the newly created template ('Document Set Template') under Column Mapping Template dropdown as shown below:

**DocKIT Task Wizard - test-renaming**

**Step Number: Mapping Templates**  
Select the mapping templates to use for the task and specify the appropriate options.

Column Mapping Template: Document Set Template

Do you want to migrate unmapped columns also ?  Yes  No

Domain Mapping Template : None \* This mapping will be used for all person or group fields

User / group Mapping Template : None \* This mapping will be used for all person or group fields

Permission Mapping Template : None \* Works only for SharePoint 2010

Folder Renaming Rule : None  Truncate folder names, max length 128

File Renaming Rule : None  Truncate file names, max length 128

Manage Templates...

< Back Next > Finish Cancel

- 11) Click Next and proceed the subsequent steps.

### 9.5 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.

### 9.6 Conditional Import of Documents

---

DockIT allows the user to selectively import documents from the source location to SharePoint library by specifying the Import Conditions. DockIT imports folders and files along with metadata to SharePoint library based on import conditions defined in the import task. Import conditions can be constructed using metadata columns and its values (from external metadata file), file properties (include Office document properties) and other file attributes (file created date, file modified date and file extension).

In **Import Conditions** wizard step, 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'. By using relational operators, you can selectively import documents from the source location into the destination SharePoint library.

A few examples of import conditions are as follows:

Import Conditions	Description
<b>[Modified Date (File Property)] &gt; '09/12/2008'</b>	Assume date is specified by the user in MM/DD/YYYY format. DockIT Imports documents that have been modified after September 12th 2008
<b>[Author (File Property) = 'John Doe']</b>	Imports documents that have been authored by John Doe (Author field in the file property must be 'John Doe')
<b>[Created Date (File Property)] &gt;= #09/01/2008# AND [Created Date (File Property)] &lt;= #09/30/2008#</b>	Assume date is specified by the user in MM/DD/YYYY format. DockIT imports documents created in the month of September 2008
<b>[Department (Metadata file)] &gt;= 'Purchasing'</b>	Imports documents that have the metadata value for the Department column as 'Purchasing'
<b>[Character Count (File Property)] &gt; '100'</b>	Import documents that have the Character Count value is above hundred characters (Character Count is the Office document property).

### A Handy Operator

Apart from relational operators, DockIT allows you to construct flexible import conditions by using the **Changed** operator for periodic import for the fields 'Created Date (File Property)' and 'Modified Date (File Property)'. The following built-in values can be used for this operator:

**Today, Yesterday, This Week, This Month, Last Week, Last Month, Since Last Update in SharePoint, Since Last Import in DockIT, Last 7 days and Last 14 days.**

By using **Changed** operator, you can filter the documents from your central file server or network share / drive or local computer.

For example, if you need to import documents that were modified in the file system today, you can specify an import condition follows:

#### **[Modified Date (File Property)] Changed [Today]**

<b>Operator &amp; Value</b>	<b>Description</b>	<b>An Example</b>	<b>Result/Remarks</b>
<b>Changed Today</b>	Imports documents that were created or modified in the present day (at the time of import) in the file system.	[Modified Date (File Property)] Changed [Today]	DockIT compares the source document's modified date value that got changed the present day (at the time of import) and imports the specific document only.
<b>Changed Yesterday</b>	Imports documents that were created or modified yesterday (at the time of import) in the file system.	[Created Date (File Property)] Changed [Yesterday]	DockIT compares the source document's created date values that were changed yesterday (at the time of import) and imports the specific document only.
<b>Changed This Week</b>	Imports documents that were created or modified in the current week.	[Modified Date (File Property)] Changed [This Week]	DockIT compares the source documents modified date

<b>Changed This Month</b>	Imports documents that were created or modified in the current month.	[Modified Date (File Property)] Changed [This Month]	values that were changed in the current week. DockKIT compares the source document's modified date value that was changed in the current month.
<b>Changed Last Week</b>	Imports the document that were created or modified in the last week.	Created Date (File Property)] Changed [Last Week]	DockKIT compares the source document's created date value that was changed last (previous) week.
<b>Changed Last Month</b>	Imports the documents that were created or modified in the last month.	[Modified Date (File Property)] Changed [Last Month]	DockKIT compares the source document's modified date value that was changed last (previous) month.
<b>Changed Since Last Update in SharePoint</b>	Imports documents that were modified in the source folder, since the last import based on 'Last Modified Date' field value of the document in SharePoint.	[Modified Date (File Property)] Changed Since Last Update in SharePoint.	DockKIT compares the source document's modified date value with document's modified date value in SharePoint library and proceeds with the import accordingly.
<b>Changed Since Last Import in DockIT</b>	Imports documents that were modified in the source folder, since the last import based on last 'Import date and time' value of the document.	[Modified Date (File Property)] Changed Since Last Import in DockIT.	DockKIT compares the source document's modified date value with document's last import date and time and proceeds with the import accordingly.
<b>Changed Last 7 days</b>	Imports documents that were created or modified in the last 7 days.	[Modified Date (File Property)] Changed [Last 7 days].	DockKIT compares the source document's modified date value that was changed in the last 7 days.
<b>Changed Last 14 days</b>	Imports documents that were created or modified in the last 14 days.	[Modified Date (File Property)] Changed [Last 14 days].	DockKIT compares the source document's modified date

value that was changed in the last 14 days.

A sample screenshot of the **Import Conditions** is shown below:

The screenshot shows the 'DocKIT Task Wizard' window at the 'Step Number: Import Conditions' stage. The window title is 'DocKIT Task Wizard' and it has a close button in the top right corner. The main heading is 'Step Number: Import Conditions' with a sub-instruction: 'Specify import conditions to be satisfied for folders / files to be imported to SharePoint.' There is a folder icon with a red arrow pointing to a document icon in the top right corner of the dialog.

There are two radio buttons for selecting import conditions: 'Do not apply any import conditions' (unselected) and 'Apply the following import conditions' (selected).

Below this, there is a table-like structure for defining conditions:

Field Name	Operator	Value
Modified Date (File Property)	Changed	Since Last Import in DockIT

Below the table, there are two buttons: 'AND' to Filter and 'OR' to Filter. There are also several small icons for editing the conditions: a left arrow, a right arrow, a red 'X', a blue 'X', a red 'X', and a pencil icon.

The 'Conditions:' text area contains the following logic:

```
(([Modified Date (File Property)] >= #09-Dec-11#  
AND [Title (File Property)] = 'Office Documents'  
AND [Character Count (File Property)] >= 100)  
OR [Modified Date (File Property)] Changed Since Last Import in DockIT
```

At the bottom, there are two radio buttons for 'Import folder / file if the above conditions are:': 'satisfied' (selected) and 'not satisfied' (unselected).

At the very bottom, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

Please note that DockIT can import the folders / files that **satisfy** the import conditions or import the folders / files that **do not satisfy** the import conditions specified in the step above.

### Moving Files to a target location

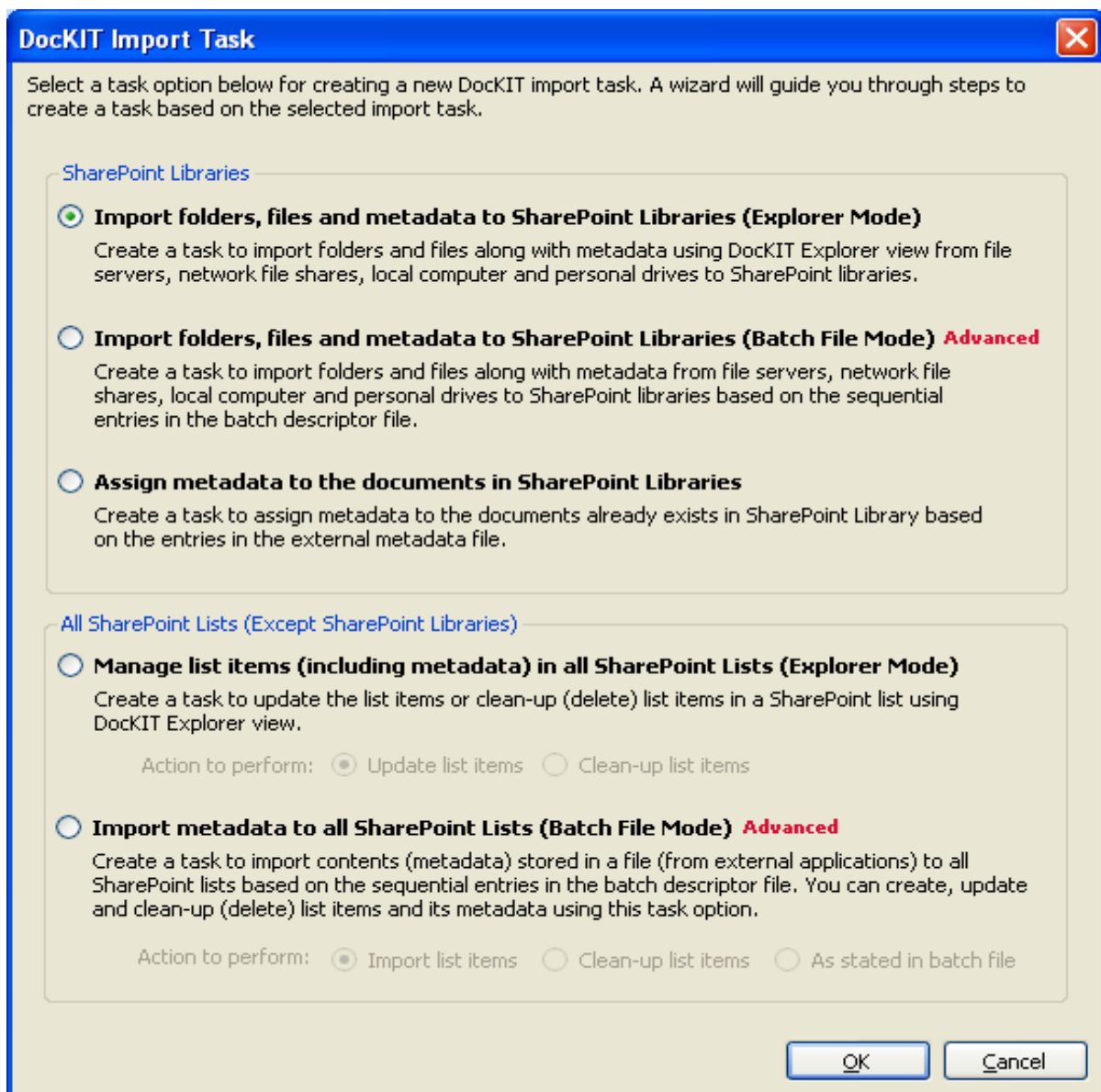
The 'Move Files' option in DockIT will enable you to move the source folders and files to the user specified folder location once the import process is complete. This feature is handy in situations where you need to periodically import newer files that arrive in the source folder in the file system to the SharePoint library. The files that were successfully imported through DockIT are moved to the target location, thereby making way for the newer files. In the subsequent import schedules, DockIT imports only the recently added files to the destination library.

### 9.7 Import Documents to Multiple document Libraries

DockIT allows the user to import documents into multiple document libraries in SharePoint in a single import task. You must ensure that the library settings are uniform across these multiple libraries to achieve the best results, especially when importing metadata values, multiple file versions etc.

The relevant section for importing documents to multiple document libraries has been described below:

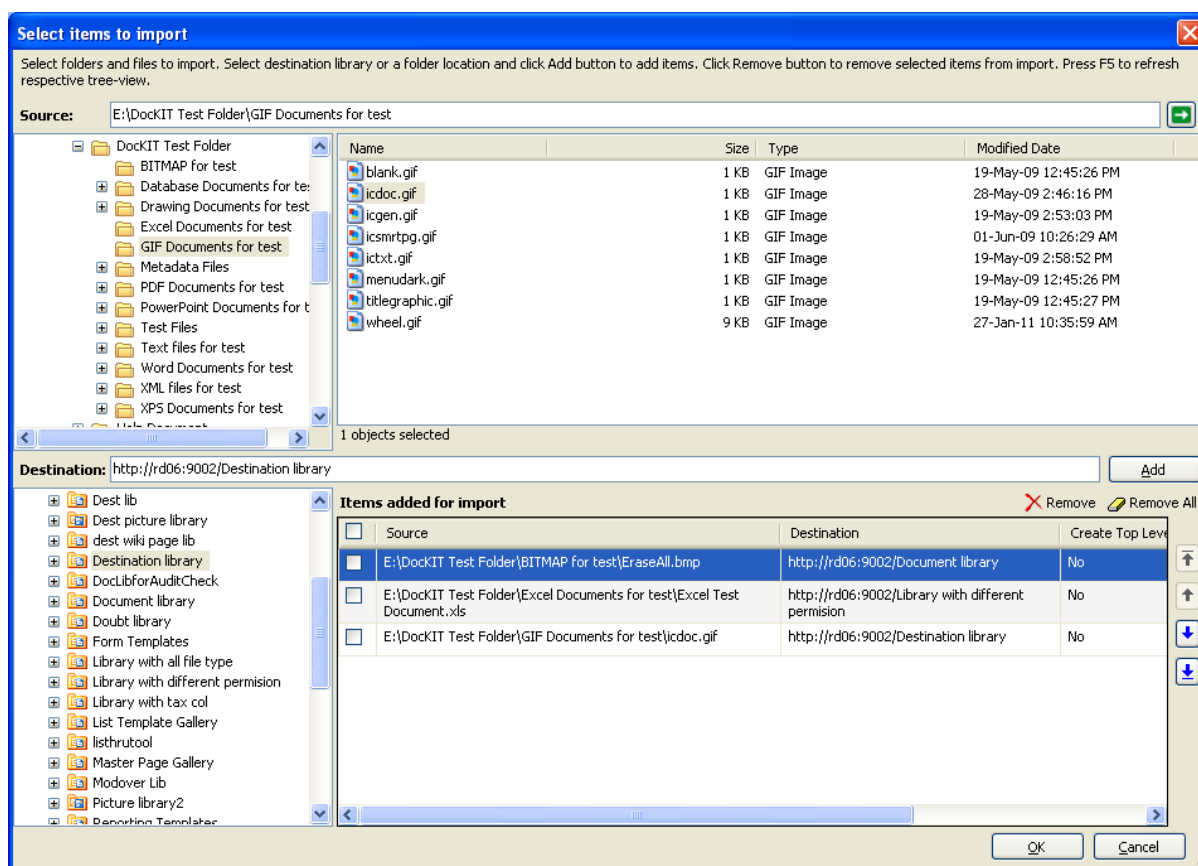
- 1) When you click on New Task, the **DockIT Import Task** dialog appears as shown below. Click **OK**.





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

Proceed with the steps provided in DockIT Task Wizard, Click **Add** button to add folders and files to import to the destination location in SharePoint from **Select items to import** dialog. Browse the source folders and files of your local machine / network shares and select the required folders and files from list view (top right pane). Select a destination location or enter the destination location URL in the textbox and click **Add** button to import selected items.



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

Create a **batch descriptor file** to import documents into multiple document libraries as follows:

"Path", "Destination Path"

"C:\Sample Documents\Sample Brochure.doc",

"http://sharepoint.vyapin.demo/sites/migration/library1"

"C:\My Sales\Sample Sales  
Template.xls","http://sharepoint.vyapin.demo/sites/migration/library2"

"C:\My Sales\Sample Product  
Demo.ppt","http://sharepoint.vyapin.demo/sites/migration/live/Shared Documents"

Specify this batch descriptor file in **Batch File Options** wizard step.

**NOTE:** The document 'Sample Brochure.doc' can be imported into the document library named as 'library1' and also the file 'Sample Sales Template.xls' can be imported into the another library named 'library2' from the same batch descriptor file.

### 9.8 Adding new terms in Managed Metadata columns

---

#### 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</i>

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			<i>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 America Country United States States California; Continent North America Country United States States Alaska	If there are duplicates in the same term sets, it is recommended to use Absolute Term Path as stated in this example. DockIT will assign the specified term to the associated column.

You can also specify options to create unavailable terms as part of document import. DockIT checks if the term set is open to creating new terms and then adds the unavailable terms to the exact term hierarchy. Apart from SharePoint term set settings, you can also configure **Allow Fill-in Settings** available in **Metadata Options** step to decide when DockIT can create new term to the associated term set.

The **Metadata Options** step in DockIT import task wizard as shown below:

**DockIT Task Wizard - test permission task**

**Step Number: Metadata Options**  
Specify mapping template to update document properties in SharePoint.

**Metadata File:** \_\_\_\_\_

File Name:  ... ?

Sheet Name:  ... View... Clear

Date format:  Time format:

**Allow Fill-in settings (Applicable for Choice, Managed Metadata datatypes only):** \_\_\_\_\_

Do not add new values to the column definition

Add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library

Add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination library

**Fail-safe Settings**

Import a document to SharePoint even if it contains any errors or warnings in the metadata. Enabling this option may result in documents having partial or incomplete metadata in the destination library.

< Back Next > Finish Cancel

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Select the **Allow Fill-in choice settings** as below,

- a) **Do not add new values to the column definition** - When selecting this option, DockIT does not create or add new values to the column definition (For example: Choice field definition, Managed Metadata field definition).
- b) **Add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library** - When selecting this option, DockIT will create or add new values to the column definition regardless of 'Allow Fill-in choices' option in the destination library.
- c) **Add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination library** - When selecting this option, DockIT will create or add new values to the column definition only if the column has 'Allow Fill-in choices' option is set to 'Yes' in the destination library.

## 10 References

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- **Error Messages and Resolution**
- **Troubleshooting**
- **How to uninstall DocKIT?**
- **How to upgrade DocKIT existing tasks?**

### 10.1 Error Messages and Resolution

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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.

Error Message	Resolution
The remote server returned an error: (407) Proxy Authentication Required.	Enable the <b>Bypass proxy server for local addresses</b> option available at <b>LAN Settings</b> of <b>Internet Options</b> of Internet Explorer Browser.
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 <b>Folder &amp; File Renaming Rules</b> 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

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	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	Ensure that the specified term value is available in the corresponding managed metadata field termset definition in

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there are no matching value defined in the taxonomy field definition.	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.
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 Web Service version mismatch	Ensure DockIT application version matches with DockIT Web Service version installed in the destination SharePoint

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	Server. Ensure the same version of DockKIT desktop application and DockKIT Web Service is used when importing the Created Date and Last Modified Date fields to SharePoint.
[Created Date], [Modified Date] could not be updated	Ensure DockKIT Web Service is installed and running in the destination SharePoint Server. DockKIT will carry forward the two date fields to a SharePoint library residing in the SharePoint server in which DockKIT Web Service 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. If you noticed that this error has occurred for MS Office 2010 / 2007 documents, please ensure that the machine running DockKIT has met the System Requirements for MS Office 2010 / 2007 documents.
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. If you notice this error for MS Office 2010 / 2007 documents, please ensure that the machine running DockKIT has met the System Requirements for importing MS Office 2010 / 2007 documents.
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.
Content Type <name> found in the library, but it is not a valid folder content type	Ensure that the list content type is derived from a 'Folder' parent content type in the SharePoint site.
Import condition not satisfied	The file does not satisfy the import condition specified in the task settings. DockKIT 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 are correct. The find string used in renaming rules may have



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message>	reserved characters which cause to misinterpret the rule. Please refer Folder & File Renaming Rules section for more information.
The Microsoft Jet database engine cannot open the file '<file name>'. It is already opened exclusively by another user, or you need permission to view its data.	Ensure that the specified file is not currently in use / open by any other application or user. Close the file and try again (or) close and re-launch DockIT application.
The 'Microsoft.ACE.OLEDB.12.0' provider is not registered on the local machine.	Ensure that the machine running DockIT has either Office 2007 System Suite or Office 2007 System Driver (Data Connectivity Components) installed.
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.

### 10.2 Troubleshooting

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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>\DockIT6x\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>\DockIT6x\TaskHistory\DockIT183919\logs\ActivityLog.txt
  - b) Error log file - e.g., <Application Data Folder>\DockIT6x\TaskHistory\DockIT183919\logs\ActivityErrors.txt
  - c) Metadata log file - e.g., <Application Data Folder>\DockIT6x\TaskHistory\DockIT183919\logs\MetadataErrors.txt
  - d) DockIT error log file - e.g., <Application Data Folder>\DockIT6x\TaskHistory\DockIT183919\logs\DockITErrorLog.txt
  - e) Move Activity log file - e.g., <Application Data Folder>\DockIT6x\TaskHistory\DockIT183919\logs\MoveActivityLog.txt
  - f) Task settings file - e.g., <Application Data Folder>\DockIT6x\TaskHistory\DockIT183919\settings\Details.xml
  - g) Library settings file - e.g., <Application Data Folder>\DockIT6x\TaskHistory\DockIT183919\settings\LibrarySettings.xml
  - h) Process details file - e.g., <Application Data Folder>\DockIT6x\TaskHistory\DockIT183919\settings\ListItemProcessCount.xml

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

- a) Windows XP, Windows 2003 - C:\Documents and Settings\All Users\Documents
- b) Windows 7, Windows 2008, Windows Vista - C:\Users\Public\Documents

### 10.3 How to Uninstall DocKIT?

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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.

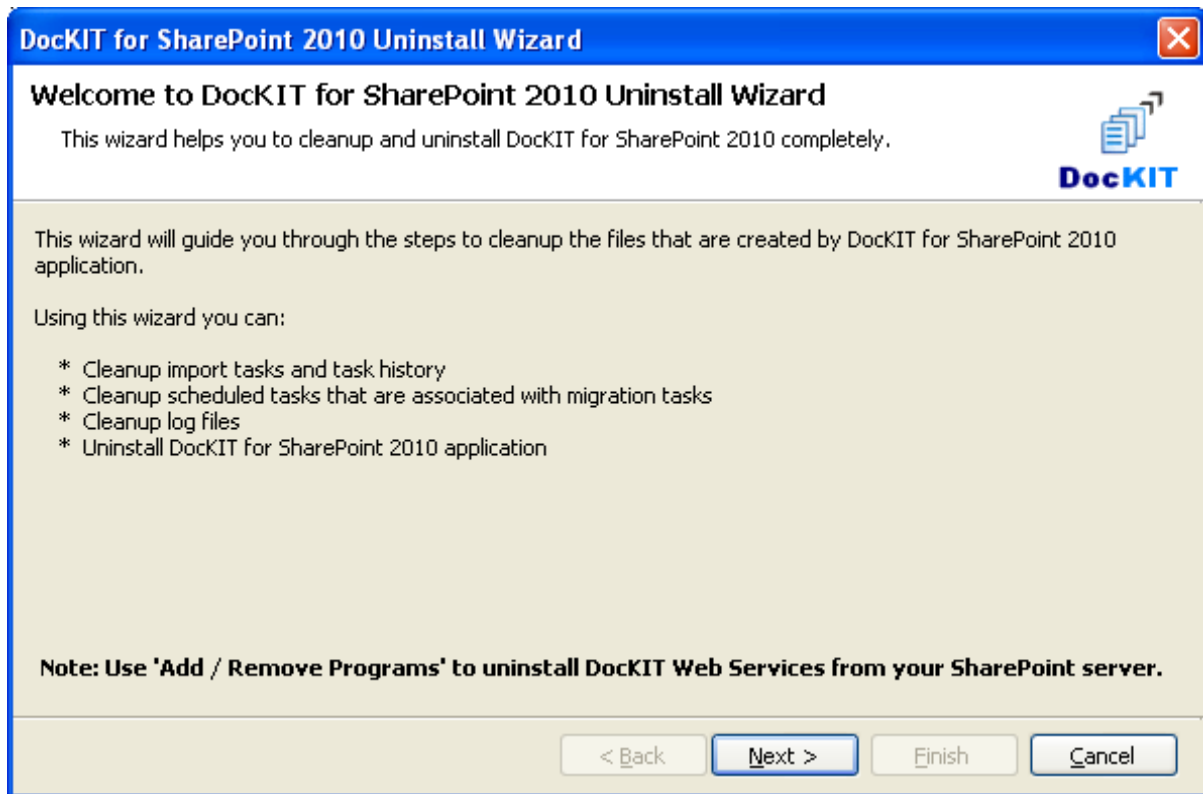
When you uninstall DockIT through Control Panel - Add / Remove Programs applet, Windows Installer program will remove only the application files from your machine. But, the application related files created by DockIT remain in the computer. In order to remove DockIT worker files completely, the uninstall wizard provides a set of cleanup options to perform the cleanup operation based your selection.

Use this wizard to cleanup the files / profiles that are created by DockIT for SharePoint 2010 application selectively and uninstall DockIT completely from the machine.

**NOTE: You need to uninstall DockIT Web Service for SharePoint 2010 / SharePoint 2007 component separately from your SharePoint server if installed.**

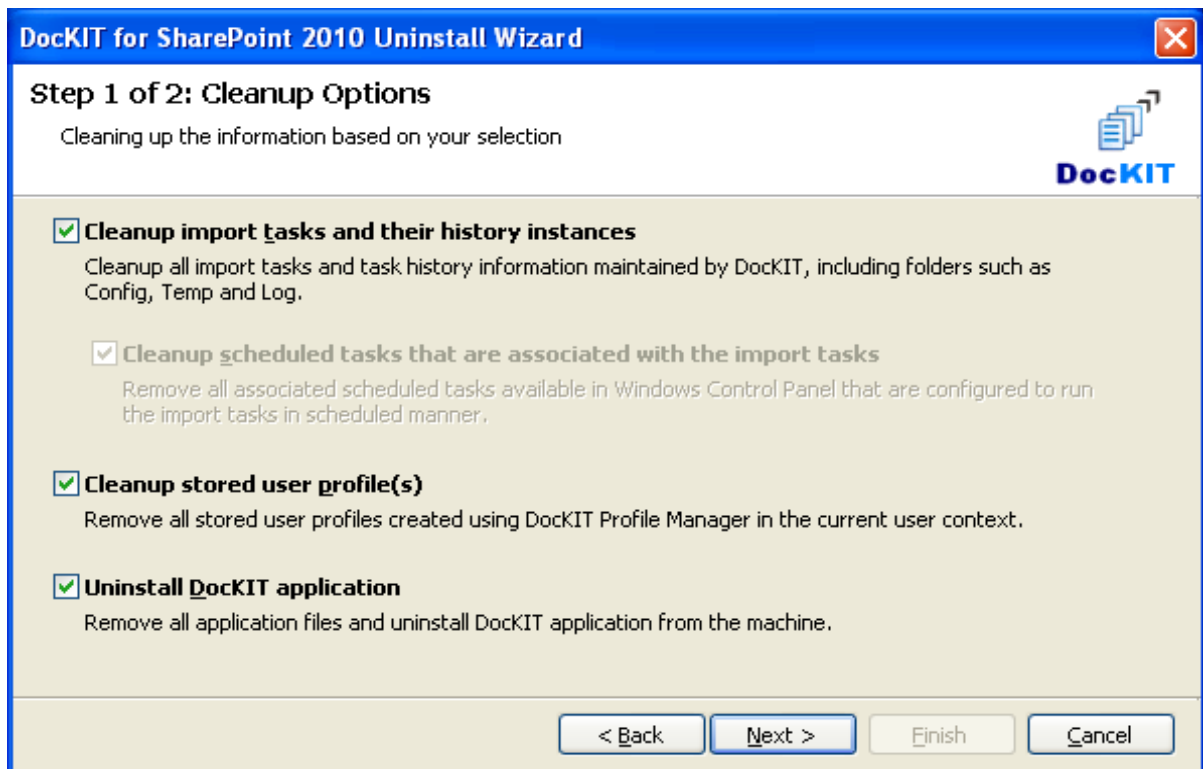
- 1) Launch the uninstall wizard by clicking Start -> Programs -> DockIT for SharePoint 2010 -> DockIT Uninstall Wizard.

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



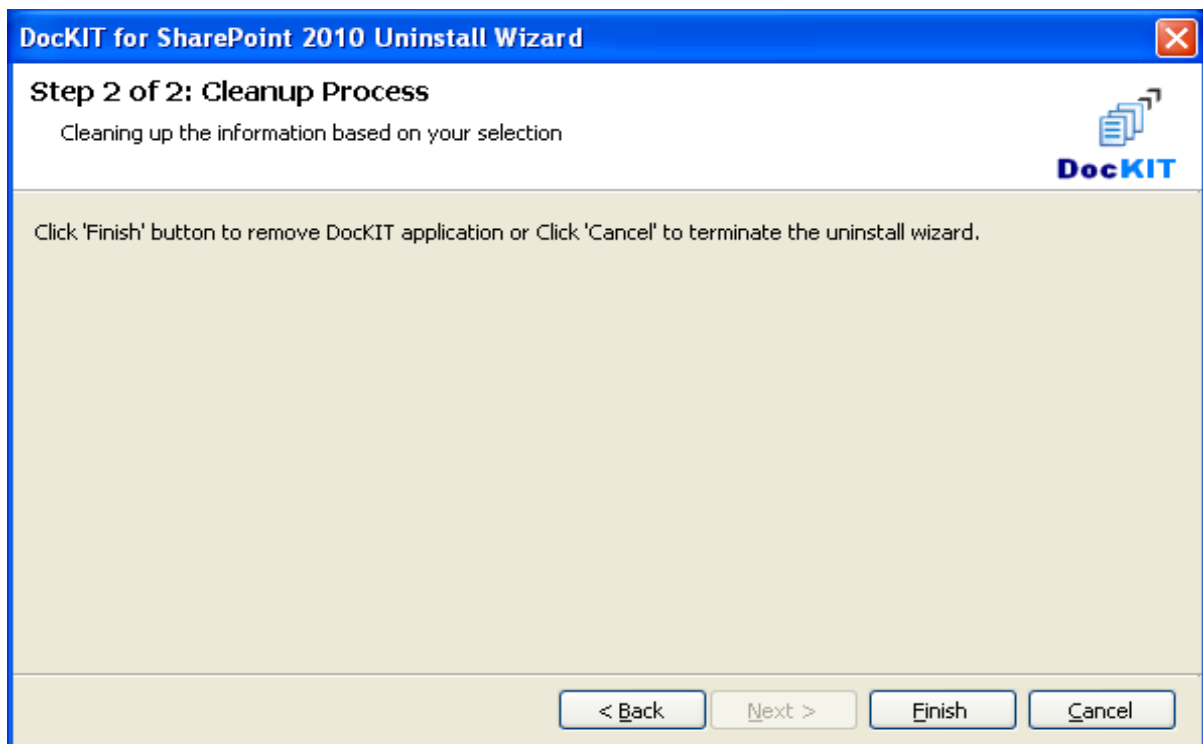
Click **Next** to proceed.

2) Select required **cleanup options** as shown below:



Click **Next** to Proceed.

- 3) Confirm the **cleanup** and/or uninstall process.



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

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

### 10.4 Upgrade Tasks

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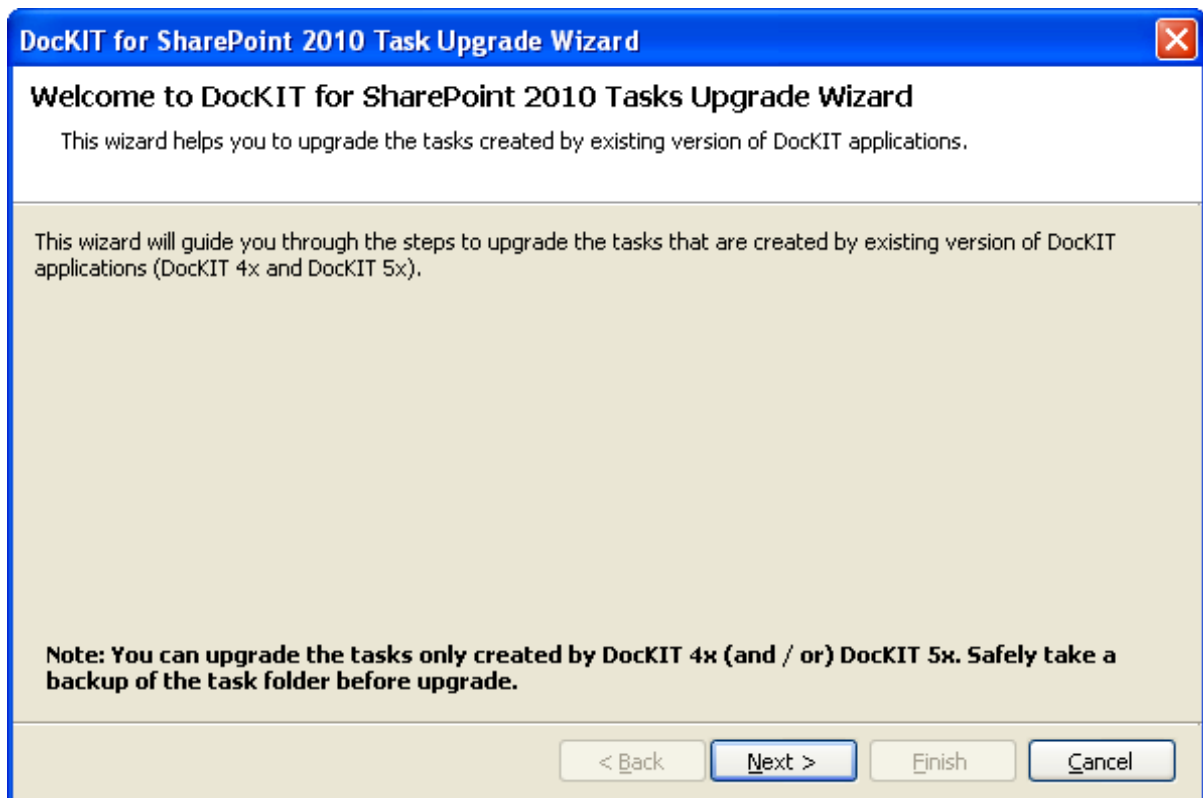
#### How to Upgrade DockIT Existing Tasks

DockIT provide you a tool task upgrade that helps you to upgrade the tasks created using existing DockIT versions (either DockIT 4x or DockIT 5x).

**NOTE: You can upgrade the tasks only created by using DockIT 4x or later only.**

- 1) Launch the upgrade wizard either by clicking Start -> Programs -> DockIT for SharePoint 2010 -> DockIT Upgrade Wizard. Or Tasks -> Tasks Upgrade

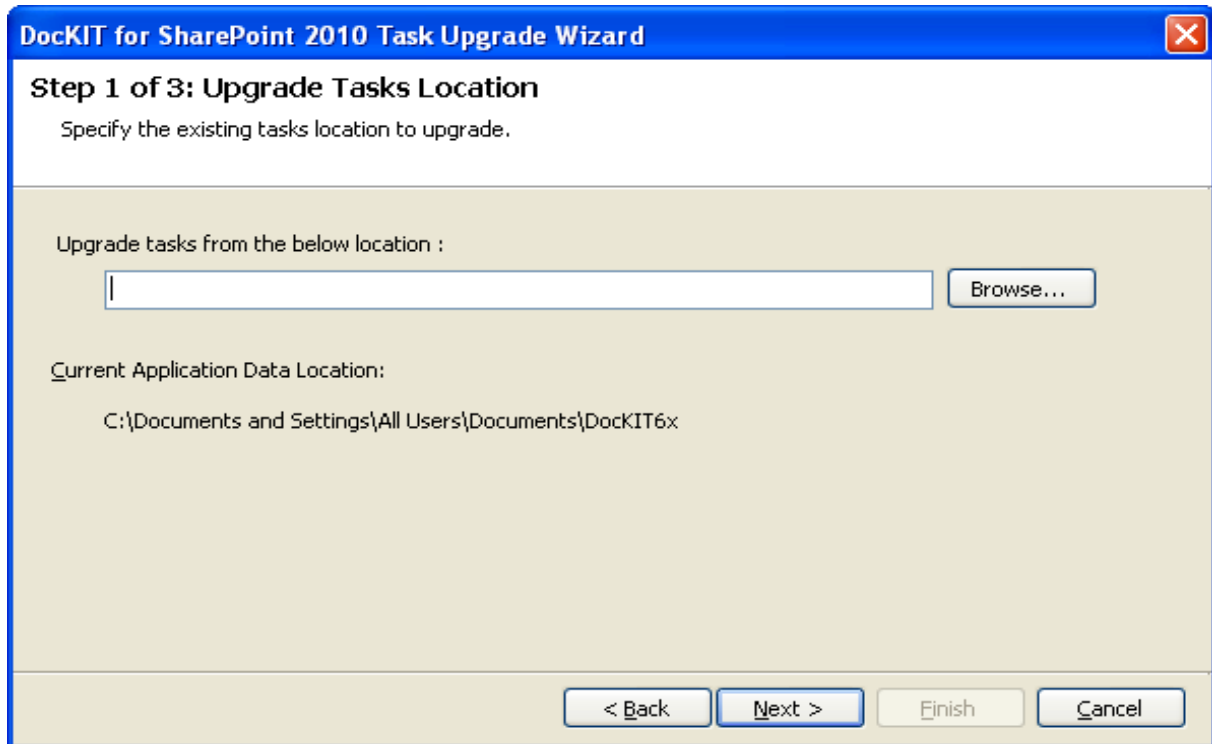
The **DockIT Task Upgrade Wizard** dialog will be shown as below:



Click **Next** to Proceed.

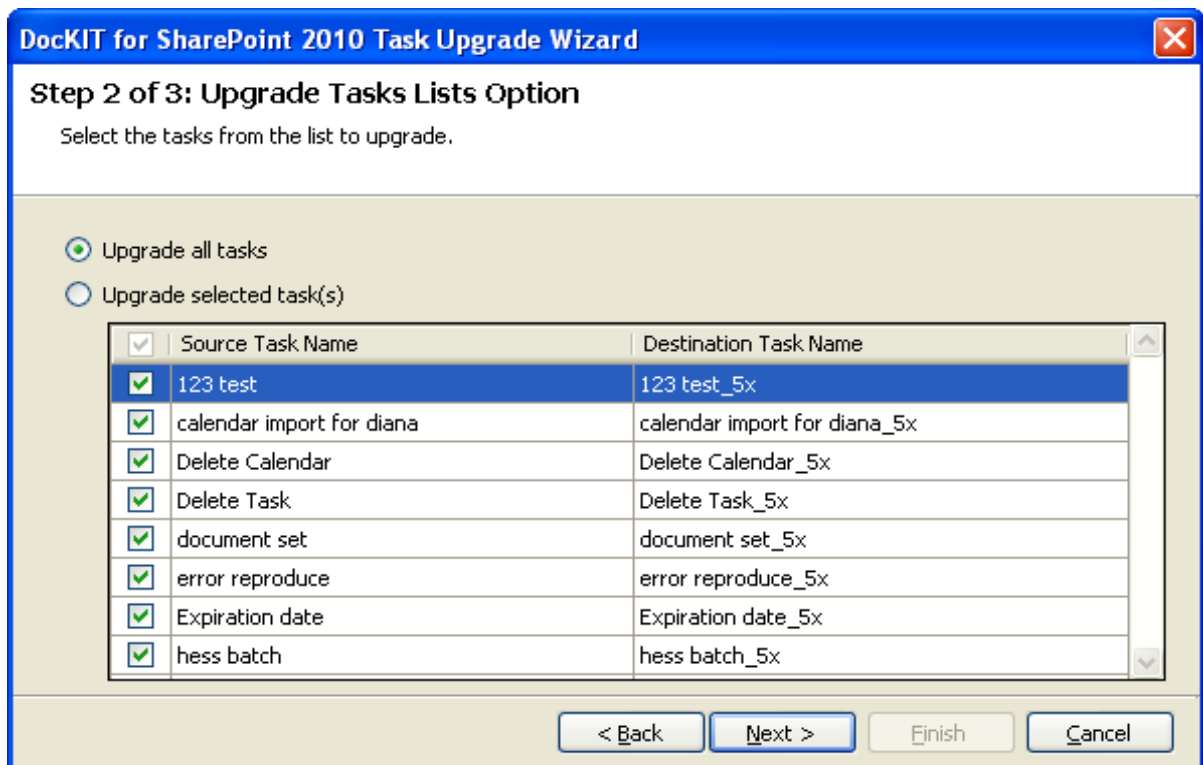
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- 2) Specify the existing tasks folder location in **Upgrade task location** step as shown below:



Click **Next** to Proceed.

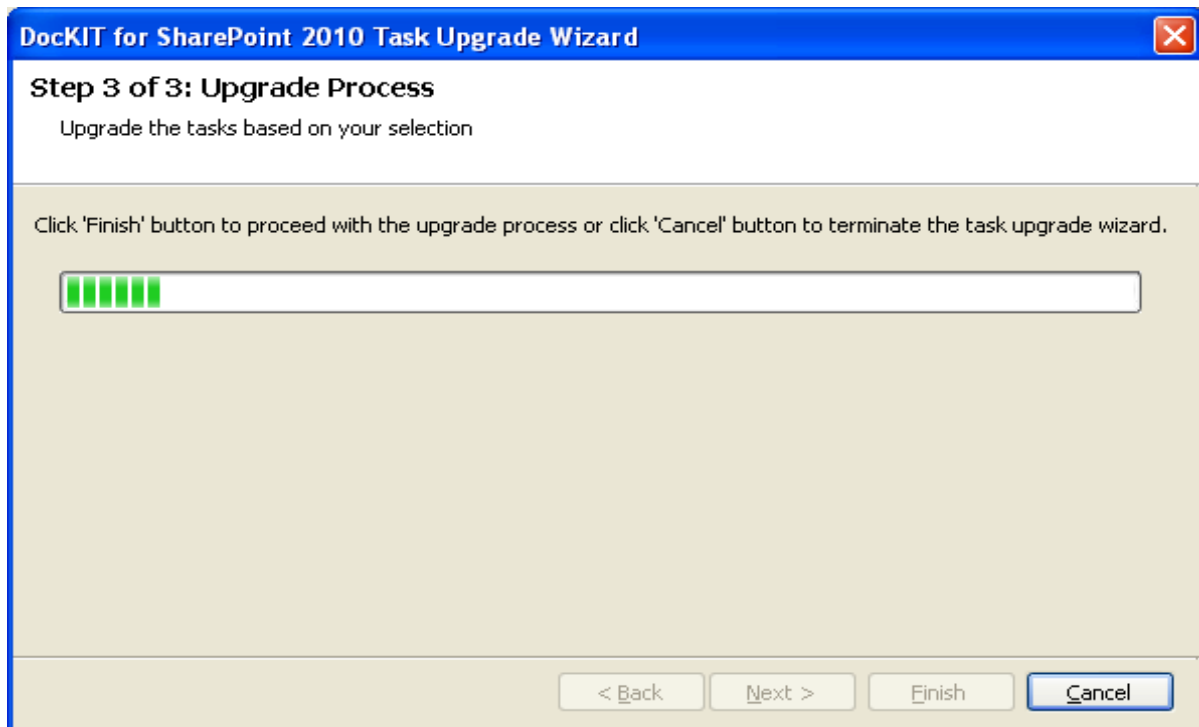
- 3) Select the task(s) to upgrade from the list of available task as shown below:



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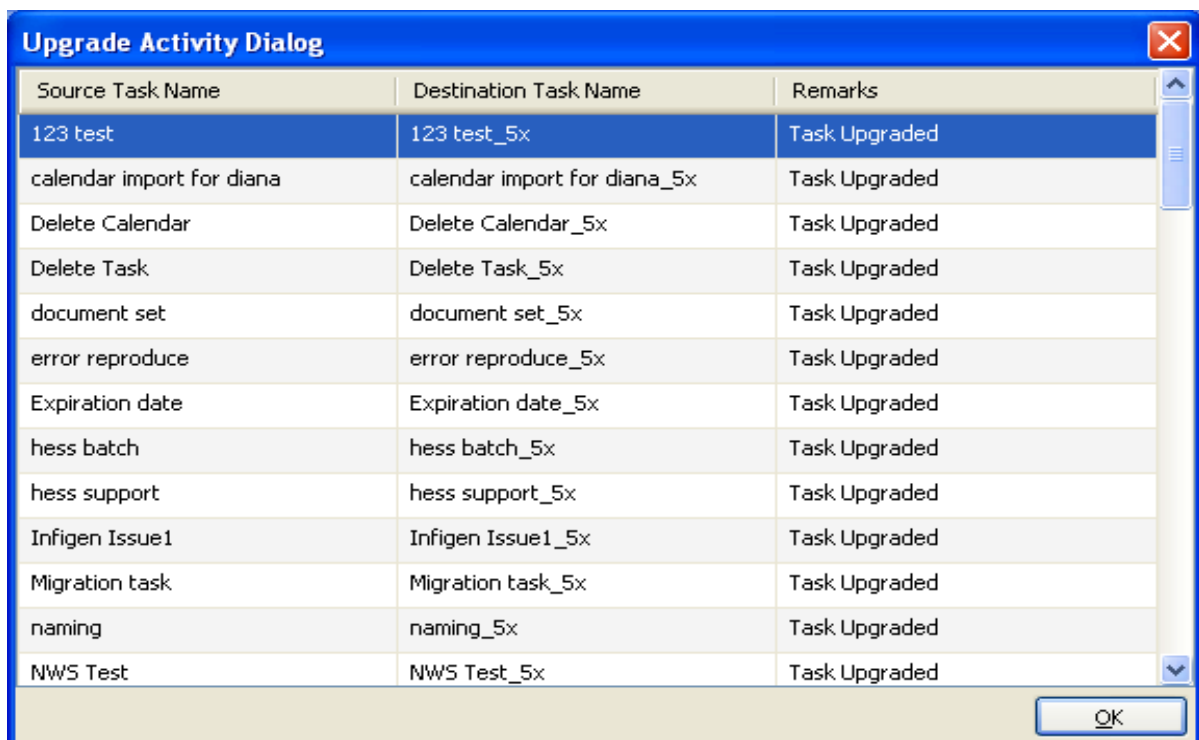
Click **Next** to Proceed.

4) **Upgrade process** view step will appear as shown below:



Click **Finish** to upgrade the tasks. Click **Cancel** to close the wizard.

5) Once the upgrade is complete, **upgrade activity dialog** is shown as below with the tasks upgrade activity lists:



Source Task Name	Destination Task Name	Remarks
123 test	123 test_5x	Task Upgraded
calendar import for diana	calendar import for diana_5x	Task Upgraded
Delete Calendar	Delete Calendar_5x	Task Upgraded
Delete Task	Delete Task_5x	Task Upgraded
document set	document set_5x	Task Upgraded
error reproduce	error reproduce_5x	Task Upgraded
Expiration date	Expiration date_5x	Task Upgraded
hess batch	hess batch_5x	Task Upgraded
hess support	hess support_5x	Task Upgraded
Infigen Issue1	Infigen Issue1_5x	Task Upgraded
Migration task	Migration task_5x	Task Upgraded
naming	naming_5x	Task Upgraded
NWS Test	NWS Test_5x	Task Upgraded

The screenshot shows a dialog box titled "Upgrade Activity Dialog" with a close button (X) in the top right corner. It contains a table with three columns: "Source Task Name", "Destination Task Name", and "Remarks". The table lists 14 rows of task upgrade activities, all with "Task Upgraded" in the Remarks column. An "OK" button is located at the bottom right of the dialog.



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