Chronodat Easy2Upload
Document Migration Tool

User Manual

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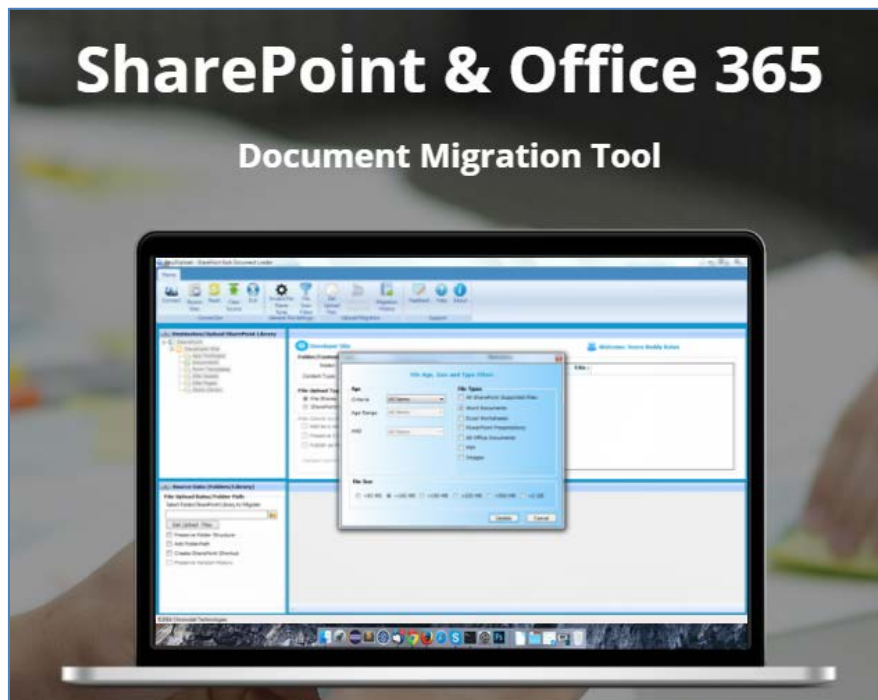
Introduction

Easy2Upload document migration tool helps you to migrate documents from File Shares to SharePoint and SharePoint to SharePoint (SharePoint online, on premise or a hybrid of the two) with metadata.

Scope & Purpose

The Easy2Upload Migration Tool is intended to provide an easy way to scan, search, filter and upload documents to SharePoint using tagging in bulk.


Overview

Using simple steps Upload/Migrate bulk documents to SharePoint with metadata tagging. Easy2Upload is a client side tool can be installed on a laptop or desktop with Windows OS. No need to install it on server. Copy documents from SharePoint to SharePoint document library with version history. Migrate emails to SharePoint preserving "To", "From", "Subject" and "Received Date" fields.

Features:

- Migrate documents from File Shares to SharePoint or SharePoint to SharePoint (SharePoint online, on premise or a hybrid).

- Migrate documents from files shares optionally preserving date creation, modified and folder structure to SharePoint.

- Set file type filters and size filters to scan targeted documents and upload to SharePoint.

- Set Invalid filename character rules to change the file names that doesn't supported by SharePoint.

- Update documents metadata in an existing document library in bulk or selected documents.

- Scan File Shares or SharePoint documents library before uploading the documents and upload sleeted documents.

- Upload unlimited content for day to day use or bulk migration.

- Copy documents from SharePoint to SharePoint document library with version history

- Easy2Upload is a client side tool can be installed on a laptop or desktop with Windows OS. No need to install it on server.

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Installation Steps:

- Download "**Easy2Upload_install.zip**" from the site

- Extract the zip file and run the setup file "**Easy2Upload_Std.exe**"

- Once setup is complete, you can find Easy2Upload tool shortcut menu on your desktop.

- Click the shortcut to open **Easy2Upload** Document Migration Tool.
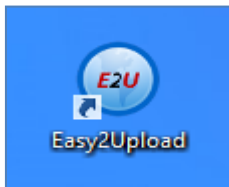
- Click "**Start Trial**" button in trial pop-up.
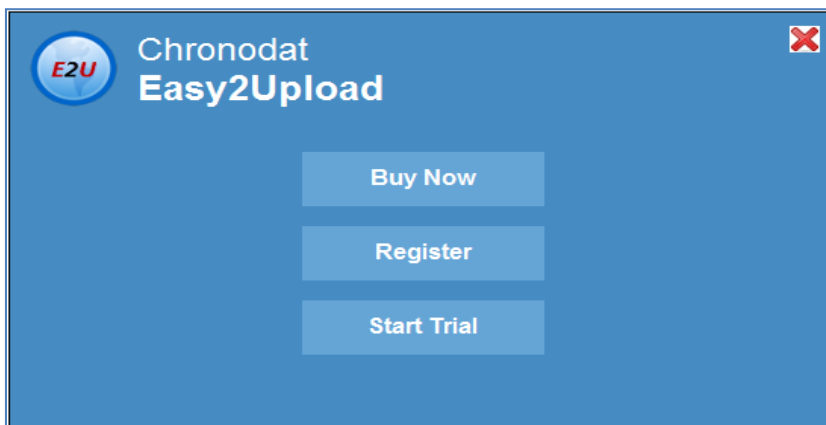
- Now, you are ready to explore the tool options and use the tool to migrate/upload documents to SharePoint.

Migrate/Upload Documents:

Step #1:

- Click "**Connect**" button to connect to SharePoint site to upload/migrate documents. Tool remembers site name for next time use. You can use "Recent Sites" option and select site for next time use.
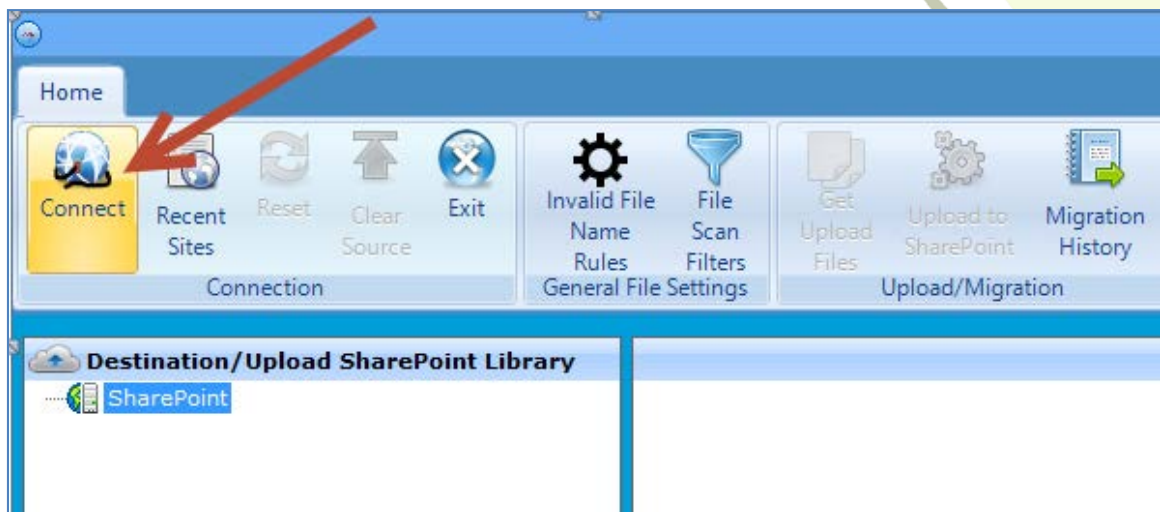
- Provide site collection/sub-site URL in the "**SharePoint site URL**" textbox. Make sure to provide URL in correct format.

- Click "**Connect**".

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Step #2:

- Select a "Document Library" from the site libraries tree view to upload/migrate documents.
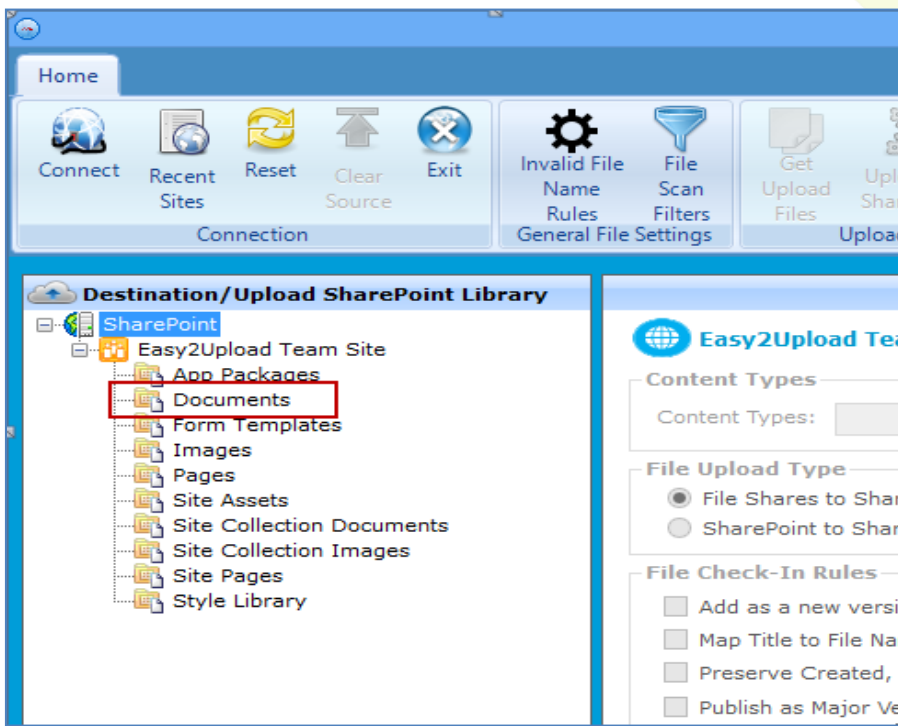
- Easy2Upload tool populates related content types for that library in "**Content Types**" dropdown list. Select the required content type and click "**Get Metadata**" button
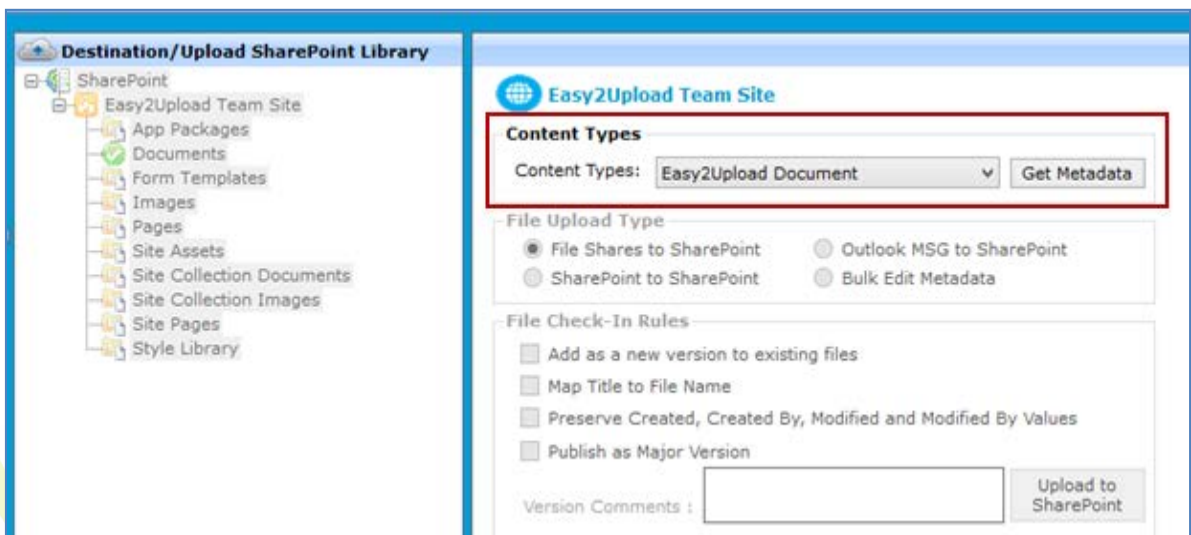
- Tool populates the metadata for the selected content type.

- Fill the required and any optional filed values.

Step #3:

- Once the metadata is populated, go to "**Source Data**" section and click "**Folder Icon**" button to select source documents folder.
  - Optionally, select the below mentioned options:
    - Preserve Folder Structure
    - Add Folder Path (Make sure to add "**FolderPath**" field to document library before getting source files information.)
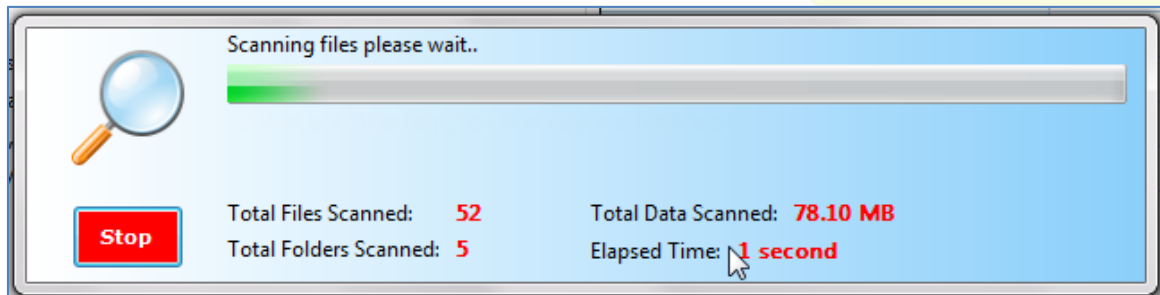   - Create SharePoint document Shortcut

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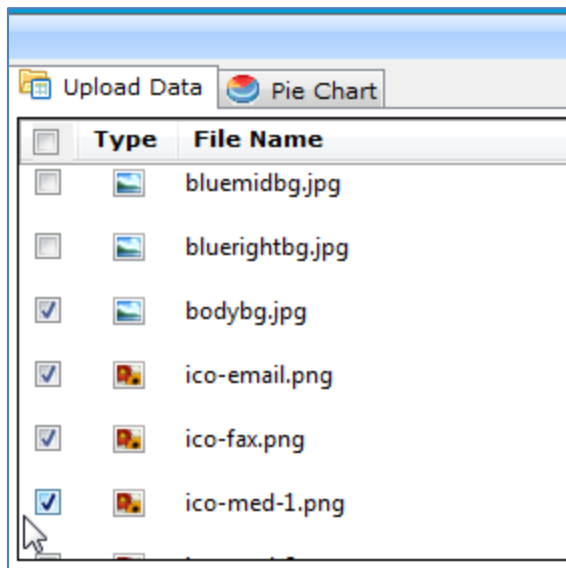- Select source folder from the folders list
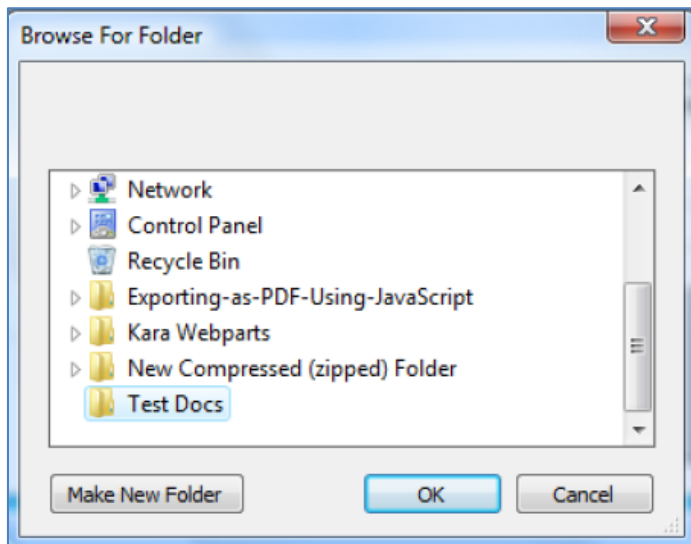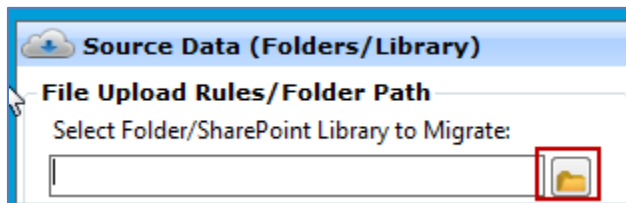
- Click "**Get Upload Files**" button.
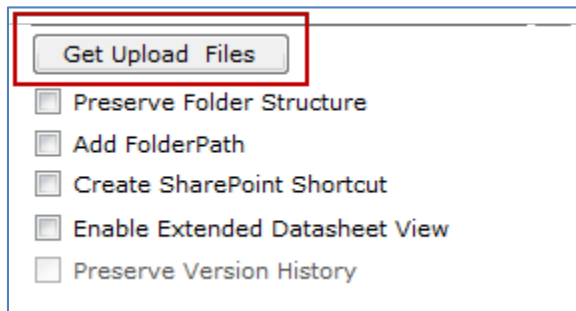
- Tool scans through your folder structure (including sub-folders) and populates data

- Choose the required files to upload to SharePoint

Step #4:
- Go to "**File Check-In Rules**" section, and optionally check the check boxes:
    - Add as new version to existing files
    - Map Title to File Name
    - Preserve Created, Created By, Modified and Modified By Values
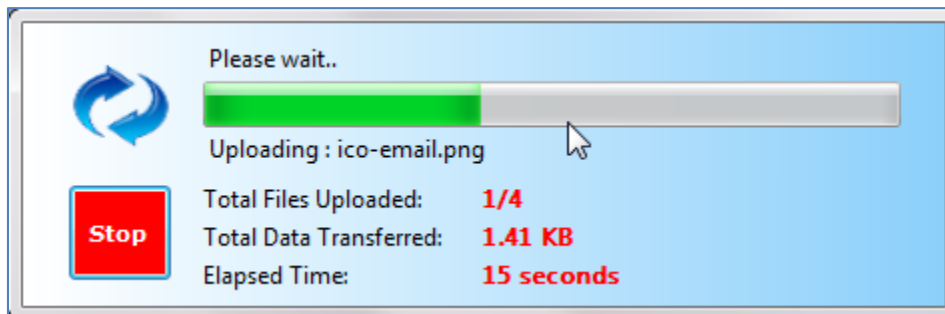   - Publish as Major Version etc.

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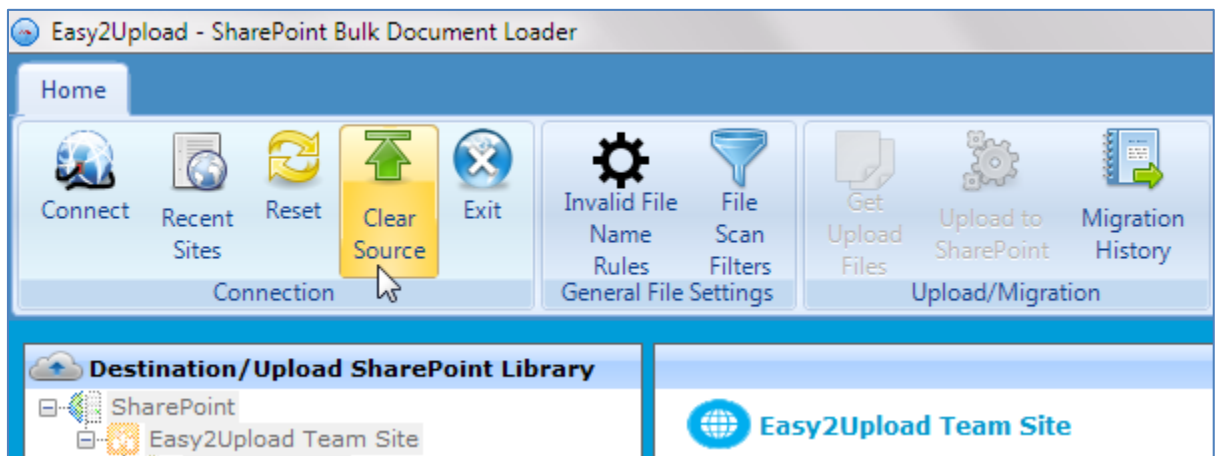o   Provide version comments and click "**Upload to SharePoint**"

- Wait until all files are uploaded to SharePoint

- Done! Files are uploaded with metadata tagging.

Step #5:

- Click "**Clear Source**" to preserve metadata information and upload files from a different source folder.

- Go to "**Step #3**".

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- Or, click "**Reset**" option to select a different document library to upload documents and go to "**Step #3**".