Documents: Bulk Import

Overview

Follow this guide if you wish to bulk import documents and files which are previously stored in the old intranet or cloud storage into Claromentis. Please note this task does come at a cost, which will be determined by the amount of data needing to be imported and will be discussed with your Project Manager or Account Manager.

> If you host your own system this will be something you can do yourself however **if your system is hosted by us (SaaS)** please submit a change request for this to be arranged with our team.

Step1 - Export all of your files

The objective here is to export all of the files you wish to import to Claromentis into a directory on your computer.
here are just some examples of how you can get access to the files in the cloud or any shared drive

Box - Downloading from Box

DropBox - If you are using dropbox then the copy of your files is already located within dropbox folder on your computer

Share Point - How to export all files from sharepoint

Step 2 - Bulk Upload to Claromentis Server

Uploading via a browser may not be the most reliable way, we recommend using a dedicated program to upload the files into location on the same server as Claromentis such as SCP or FTP tools. If you need help getting your files into Claromentis Server which we hosted please raise a Change request. Please note depending on the size of the imported documents there might be additional services required.

Here is an example that I have imported the files into a location on the server

```
/Claromentis/doc_import/old_intranet
```
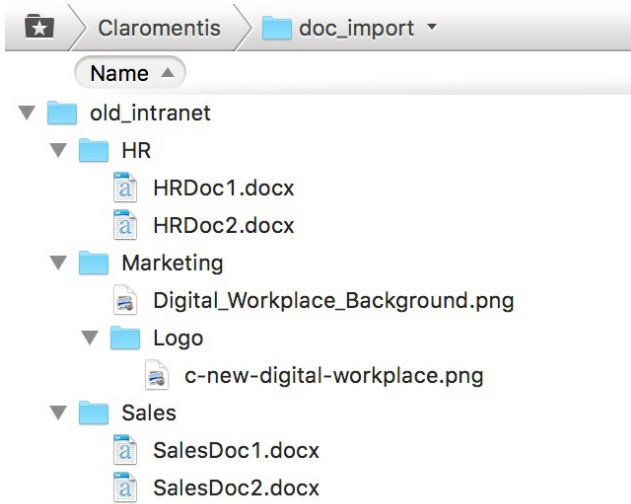
Step 3 - Importing Documents

Navigate to Admin > Documents > Document Import (under Utilities) and select Import document from file system

Enter the source which is the file location on the server and set the destination folder where you wish these documents to be imported.

In the example below I have created a folder called "Old Intranet" in the Documents application and I wish to import all file types.

Source [/Claromentis/doc_i] [Check]
This is the file location on your server

Destination [Old Intranet] [Change]

Filters **Date** from [📅] [ ] to [📅] [ ]

Size from [ ] [Kb ⌄] to [ ] [Kb ⌄]

File types to import
☑ **All listed file types**

☑ ARJ-compressed Archive   ☑ RAR-compressed Archive   ☑ ZIP-compressed Archive
☑ Microsoft Word Document   ☑ Microsoft Excel Document   ☑ HTML (HyperText Markup Language)
☑ CompuServe Bitmap Image   ☑ JPEG Image   ☑ Windows Bitmap Image
☑ Text Document   ☑ XML (Extensible Markup Language) ☑ Adobe PDF (Portable Document Format)
☑ Audio Video Interleaved   ☑ MPEG Video   ☑ QuickTime Movie
☑ Music sample   ☐ **All other types**

Alternative file types   Please separate each file type with a comma. For file types without an extension, please add a comma to the end of the list.

Additional file types [ ]

Exclude these file types [ ]

Duplicate files   Please choose an option what to do with files if file with the same name already exists in DMS
◉ Skip
○ Overwrite
○ Create version
[Show report]

Set the following metadata fields

☐ **All metadata fields**
☐ Review Date   ☐ Author   ☐ Related Documents   ☐ Additional notes
☐ Description   ☐ Version comment

Set the following Record types

☐ **All record types**

Set Folder metadata as

☐ **All metadata fields**
☐ Description

[Continue]

Click on "Show Report" to simulate the process otherwise simply click "Continue" to proceed with the import.

On the next screen click "Import" to proceed - depending on the size this may take a while.

Once complete you will see a report from the system, click "Finish".

	Source	/Claromentis/doc_import/old_intranet			
	Destination	Old Intranet			
Free space on destination		132.91 Gb			

Type	Amount	Duplicates	Errors	Total size
docx	4	0	0	83.62 Kb
png	2	0	0	397.25 Kb
Total	6	0	0	480.87 Kb

Folders

Import more   Finish

Step 4 - Finish

You can now access the file and folder in the documents and set appropriate permission and metadata.

As you might notice the sub-folder structure is preserved.

Documents

Filter the current folder   ✕

📁 Documents ▶ ⓘ Old Intranet

☐ ↰ Parent folder

☐ 📁 HR   ☐ 📁 Marketing   ☐ 📁 Sales

Advance Import

If you need a more sophisticated import for example

- Bulk import document metadata
- Large files & directory
- Preserving older versions

Please submit a change request and we will be able to help you further.

Related Article

Migrating Document

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Tags: bulk, documents, files, import