Export / Import Instance Library

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The steps below explain how to export and import an existing collection of documents in an instance's library.

For instructions on adding new files to the library, see here.

Export library documents and metadata

From the system menu, select **Library** > **Manage Library**. Above the library files grid, select (1)**Export to CSV** to download the metadata associated with the library files, and (2) **Download ZIP** to bulk download the actual library files.

The library folder structure will also need to be copied if the documents will later be imported to DocBoss.

To copy entire folder structure,

- Navigate to **Library** > **Library Folders.**
- Select all of the folders. Copy and paste them into a word document or spreadsheet and save.

Import library documents and metadata

Important!

This process is intended to be followed after the Export library documents and metadata steps from above are completed.

From the system menu, select **Library** > **Library Folders**. Add the folder names that were saved earlier. (There is no import option for folders, so these must be added manually.)
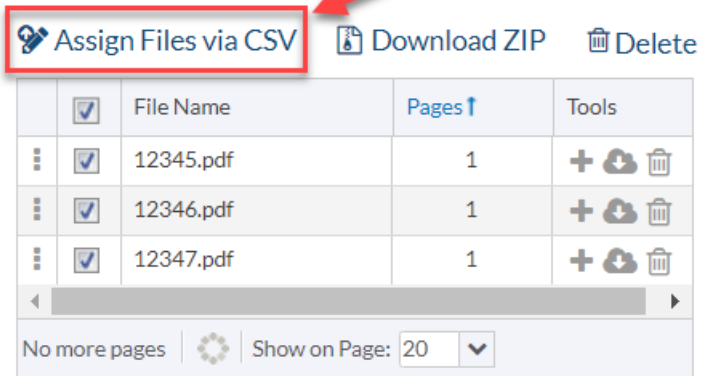
Navigate to **Library** > **Manage Library**. If the ZIP file containing the library files is under 400 MB, simply drag the

entire ZIP file into the **Inbound Documents** drag and drop area. DocBoss will separate out the individual files.

If the ZIP file is over 400 MB, extract the files locally and then upload them to DocBoss.

After the files have completed processing, select all and then choose **Assign Files via CSV**.

On the **Import from CSV** popup, upload the exported CSV file containing the library document metadata, then select **Save** to process the changes.