

# Data Transfer Guide

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May 8, 2024

# Table of Contents

<b>1 Data transfer</b>	<b>9</b>
1.1 Data transfer considerations	9
1.2 Data transfer network considerations	9
1.3 Data transfer workflows in RelativityOne	9
1.3.1 Workflow 1: Loading processed and unprocessed data directly into RelativityOne using Import/Export with Express Transfer (recommended)	10
1.3.2 Workflow 2: Loading processed and unprocessed data directly into RelativityOne using Import/Export with Express Transfer from the Utility Server	10
1.3.3 Workflow 3: Loading processed data to the staging directory and then into RelativityOne	10
1.3.4 Workflow 4: Loading unprocessed data to your RelativityOne staging directory for processing	11
1.3.5 Workflow 5: Migrating case data to the staging directory into RelativityOne	11
<b>2 Staging Area</b>	<b>12</b>
2.1 Staging Area folders	12
2.2 Billable	13
2.3 Best Practices	13
<b>3 Utility Server</b>	<b>14</b>
3.1 Utility server access	15
3.2 Connecting to your Utility Server	15
3.3 Folders accessible via your Utility Server	16
3.4 GlobalProtect VPN client	17
3.4.1 GlobalProtect VPN requirements	17
3.4.2 Current VPN portal URL	18
3.4.3 Accepting the invitation from Microsoft Entra ID	19
3.4.4 Downloading and installing the GlobalProtect VPN client	19
3.4.5 Logging in using your GlobalProtect VPN client	22
3.4.6 Changing your VPN password	26
3.4.7 Adding an additional VPN region to GlobalProtect	27
<b>4 Import/Export overview</b>	<b>28</b>
4.1 Getting started with Import/Export checklist	28
4.2 Available import and export workflows	29

4.3 Import/Export transfer modes .....	29
4.4 Considerations when to use and not use Express Transfer with Import/Export .....	30
4.5 Supported file types .....	30
4.6 Data upload size limitation .....	31
4.7 Concurrent and consecutive jobs .....	31
4.8 Import/Export overview .....	31
4.8.1 Getting started with Import/Export checklist .....	32
4.8.2 Available import and export workflows .....	33
4.8.3 Import/Export transfer modes .....	33
4.8.4 Considerations when to use and not use Express Transfer with Import/Export .....	34
4.8.5 Supported file types .....	34
4.8.6 Data upload size limitation .....	35
4.8.7 Concurrent and consecutive jobs .....	35
4.9 Installing Import/Export .....	35
4.9.1 Requirements .....	35
4.9.2 Installing Import/Export .....	35
4.10 Permissions .....	36
4.11 Import/Export load file specifications .....	37
4.11.1 Supported file types .....	37
4.11.2 Metadata, extracted text, and native files .....	38
4.11.3 Image and extracted text files .....	45
4.11.4 Processed data .....	46
4.11.5 Transcript file types supported .....	47
4.12 General recommendations for structured data import and export jobs .....	47
4.12.1 Load file import recommendations .....	47
4.12.2 Load file export recommendations .....	48
4.13 Express Transfer overview .....	48
4.13.1 Prerequisites .....	48
4.13.2 Considerations when to use and not use Express Transfer with Import/Export .....	49
4.13.3 Express Transfer overview .....	49
4.13.4 Installing and updating Express Transfer desktop application .....	50
4.13.5 Activating and deactivating Express Transfer .....	60

4.13.6 Express Transfer system tray menu .....	64
4.13.7 Express Transfer Preferences .....	65
4.13.8 Express Transfer Connectivity check .....	76
4.13.9 Express Transfer Job tracking and history .....	79
4.13.10 Express Transfer reporting jobs failed or completed with errors .....	84
4.14 Importing via Import/Export .....	86
4.14.1 Importing via Import/Export .....	86
4.14.2 Importing a document load file via Import/Export .....	87
4.14.3 Importing an image load file via Import/Export .....	96
4.14.4 Importing a production load file via Import/Export .....	104
4.14.5 Importing Relativity Dynamic Object data via Import/Export .....	111
4.14.6 Importing raw unprocessed data for Processing via Import/Export .....	120
4.15 Exporting via Import/Export .....	127
4.15.1 Exporting via Import/Export .....	128
4.15.2 Exporting a folder via Import/Export .....	128
4.15.3 Exporting a production set load file via Import/Export .....	141
4.15.4 Exporting RDO data load file via Import/Export .....	154
4.15.5 Exporting a saved search load file via Import/Export .....	166
4.16 Import/Export Job tracking and history .....	180
4.17 Import/Export queue .....	181
<b>5 Integration Points .....</b>	<b>184</b>
5.1 Using Integration Points scenarios .....	184
5.2 Installing Integration Points .....	185
5.2.1 Installing Integration Points .....	185
5.2.2 Security permissions .....	185
5.3 Integration Points profiles .....	189
5.3.1 Creating Integration Point profiles .....	189
5.3.2 Copying Integration Point profiles .....	191
5.4 Importing data through Integration Points .....	193
5.4.1 Creating an import Integration Point .....	193
5.4.2 Importing a CSV file .....	193
5.4.3 Importing LDAP .....	199



5.4.4 Importing a document load file .....	204
5.4.5 Importing an image load file .....	211
5.4.6 Importing a production load file .....	216
5.4.7 Importing from Microsoft Entra ID .....	220
5.4.8 Manually running the import job .....	224
5.4.9 Downloading the error file .....	225
5.4.10 Disabling a scheduled Integration Point job .....	226
5.4.11 Scheduler date format considerations .....	226
5.4.12 Automatically stopping a scheduled job that repeatedly fails .....	228
5.5 Exporting data through Integration Points .....	229
5.5.1 Exporting a folder to load file .....	229
5.5.2 Exporting a folder and subfolders to a load file .....	238
5.5.3 Exporting a production to a load file .....	247
5.5.4 Exporting a saved search to a load file .....	256
5.5.5 Exporting to a Relativity workspace .....	265
5.5.6 Running the export job .....	265
5.5.7 Stopping (disabling) an Integration Point from promoting data .....	268
5.5.8 Scheduler date format considerations .....	268
5.5.9 Automatically stopping a scheduled job that repeatedly fails .....	270
5.6 Promoting data between workspaces through Integration Points .....	271
5.6.1 Special considerations for large data promotion workflows .....	271
5.6.2 Promoting (exporting) to a Relativity workspace .....	271
5.6.3 Mapping saved searches .....	279
5.6.4 Working with promoted documents .....	279
5.6.5 Calculating integration point job statistics on-demand .....	280
5.7 Viewing destination workspaces .....	282
5.8 Monitoring job history and errors .....	284
5.8.1 Job History .....	284
5.8.2 Job History Errors .....	286
5.8.3 Troubleshooting job history errors .....	289
5.9 Microsoft Entra ID provider .....	291
5.9.1 Registering an Azure application and credentials .....	291

5.9.2 Finding Azure credentials .....	292
5.9.3 Removing application access .....	293
<b>6 Staging Explorer .....</b>	<b>294</b>
6.1 Staging Explorer .....	295
6.2 Permissions .....	296
6.3 User access permissions to fileshares .....	296
6.3.1 Default workflow in RelativityOne for user access to fileshares .....	297
6.3.2 Granting user access to specific fileshares .....	298
6.4 Best practices, limitations, and data transfer performance considerations .....	303
6.4.1 Best practices .....	304
6.4.2 Limitations .....	304
6.4.3 Data transfer performance considerations .....	304
6.5 Installing, launching, and updating Staging Explorer .....	306
6.5.1 System requirements .....	306
6.5.2 Installing Staging Explorer .....	307
6.5.3 Launching Staging Explorer .....	307
6.5.4 Manually updating Staging Explorer .....	309
6.5.5 Automatically updating Staging Explorer .....	310
6.6 Navigation .....	311
6.6.1 User drop-down menu .....	311
6.6.2 General navigation .....	312
6.6.3 Sorting file lists .....	313
6.6.4 Pagination .....	314
6.7 Transfer workflows .....	315
6.7.1 Uploading files .....	315
6.7.2 Downloading files .....	317
6.7.3 Starting and canceling a transfer .....	318
6.7.4 Retrying a transfer .....	318
6.7.5 Deleting a transfer .....	319
6.7.6 Viewing transfer history .....	319
6.7.7 Viewing and editing transfer details .....	320
6.7.8 Saving the path issues report .....	322

6.8 File and folder operations (copy, move, and delete)	322
6.8.1 Copying files and folders	323
6.8.2 Moving files and folders	326
6.8.3 Deleting files and folders	328
6.9 Requesting a Throughput Check	329
6.10 Updating Transfer Settings	330
6.11 Calculating folder size in Local/Staging panes	332
<b>7 Relativity Desktop Client</b>	<b>334</b>
7.1 RDC menu bar	336
7.2 Workspace folder options	337
7.3 Starting the RDC	338
7.4 Logging on to the RDC	339
7.5 RDC OAuth2 client	340
7.6 RDC transfer modes	340
7.6.1 Direct mode	343
7.7 Importing through the RDC	344
7.7.1 Importing RDC Permissions	344
7.7.2 Importing multiple load files simultaneously	344
7.7.3 Handling errors	344
7.7.4 Saving import settings	345
7.7.5 Viewing audit information for an import	346
7.7.6 Load file specifications	347
7.7.7 Importing document metadata, native files, and extracted text	355
7.7.8 Importing an image file	367
7.7.9 Importing a production file	372
7.7.10 Import errors for Desktop Client	377
7.8 Exporting with the RDC	380
7.8.1 Exporting RDC Permissions	380
7.8.2 Technical considerations for .kwx files	380
7.8.3 Exporting a production set	381
7.8.4 Exporting a saved search	391
7.8.5 Exporting a folder	401

7.8.6 Exporting a folder and its subfolders .....	411
7.9 Configuring the RDC .....	421
7.9.1 RDC configuration file .....	421

# 1 Data transfer

Data transfer refers to moving your case data from one environment to another environment. This can be transferring your data between Relativity instances or from a legacy system. Relativity provides you with a suite of tools that can help you with this.

## 1.1 Data transfer considerations

- Before you can begin working in your RelativityOne environment, you may need to get your legacy data into Microsoft Azure. If you are a new RelativityOne customer or considering RelativityOne, we recommend that you first review RelativityOne data migration.
- RelativityOne also offers a variety of tools for managing your data. For more information on the methods in which data can be stored within your RelativityOne environment, refer to RelativityOne data management.
- Changing root folder permissions during a mass import is not a supported workflow.

## 1.2 Data transfer network considerations

Before anyone in your organization can transfer data, you should ensure that your network and firewall settings have been configured correctly. See RelativityOne network access in the RelativityOne technical overview.

## 1.3 Data transfer workflows in RelativityOne

For RelativityOne, you have two major options for data transfer:

- **Loading data directly into RelativityOne using Import/Export with Express Transfer**—you can import raw (unstructured) data files that require processing, document load files, image load files, production files, and Relativity Dynamic Objects (RDO) files into RelativityOne.
- **Transferring data to the designated RelativityOne staging area**—you can upload files to your RelativityOne staging directory using the Staging Explorer.

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**Note:** The [staging directory](#) is a cloud folder where you can view and edit data using the Utility Server before loading it into RelativityOne. The Utility Server is a virtual machine that can be connected to your RelativityOne instance that contains additional support tools to help you edit and view the data in your designated staging directory before loading it into RelativityOne. For example, you may want to access your uploaded files to edit in the staging directory before you add them to your RelativityOne workspaces or save them to a RelativityOne file storage location. You can also access and verify any production sets before you download them locally. Once you use the GlobalProtect VPN client to connect to the RelativityOne network, and then use the Utility Server, you have access to viewing the staging area.

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Refer to the following topics to assist you in choosing your preferred method of data transfer.

### 1.3.1 Workflow 1: Loading processed and unprocessed data directly into RelativityOne using Import/Export with Express Transfer (recommended)

You can use Import/Export with Express Transfer locally to import raw (unstructured) data files that require processing, document load files, image load files, production files, and Relativity Dynamic Object (RDO) files into RelativityOne. For more information, see [Import/Export overview](#) and [Express Transfer overview](#).

### 1.3.2 Workflow 2: Loading processed and unprocessed data directly into RelativityOne using Import/Export with Express Transfer from the Utility Server

You can use Import/Export to import document load files, image load files, and production files into your RelativityOne environment from the [staging directory](#). Import/Export is accessible via the web browser on Utility Server. For more information see [Utility Server](#), [Import/Export overview](#) and [Express Transfer overview](#).

### 1.3.3 Workflow 3: Loading processed data to the staging directory and then into RelativityOne

If you need to edit or rename processed data, you can do so on your local machine prior to uploading or you can upload the processed data to the [staging directory](#) in the cloud and then ingest it into RelativityOne.

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**Note:** Relativity ended support for and access to the Relativity Desktop Client (RDC) for RelativityOne commercial customers on December 31, 2023. Import/Export is being used for all importing and exporting workflows.

For RelativityOne Government customers, beginning March 31, 2024, RDC will only operate in web transfer mode, which will result in significantly slower transfer speeds. It is highly recommended that Government customers begin using Import/Export in RelativityOne as soon as possible to prepare for the deprecation of RDC on June 30, 2024. Starting July 1, 2024, RDC will no longer be operational. See the Community article [RDC Deprecation FAQ](#) for additional information.

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1. Upload local files to your RelativityOne the [staging directory](#) using the RelativityOne Staging Explorer.
2. After you upload the files to your staging directory you can then ingest those files from your staging directory into RelativityOne using one of these options:
  - **Integration Points**—Integration Points provides you with the ability to import data directly into your workspace through the same functionality that the RDC provides for importing the document object. This includes importing a CSV file, LDAP, or load file directly into your workspace, and scheduling future or recurrent import jobs.
  - **Relativity Desktop Client (RDC)**—The RDC provides the functionality for importing document load, image, and production files into your RelativityOne environment from your staging directory. The RDC is accessible from your Utility Server.

### 1.3.4 Workflow 4: Loading unprocessed data to your RelativityOne staging directory for processing

If you have unprocessed raw data, you can upload the raw data to the Processing folder in the [staging directory](#) in the cloud and then ingest it into RelativityOne using the **Relativity Processing** application.

1. Upload local files to the **Processing Source** folder in your RelativityOne staging directory using the RelativityOne Staging Explorer.
2. Using the **Relativity Processing** application, ingest your raw data directly into your RelativityOne workspace for eventual search, review, and production without the need for an external tool. You can use the various processing objects to create custom processing jobs that handle a wide array of information.

### 1.3.5 Workflow 5: Migrating case data to the staging directory into RelativityOne

If you have case/workspace data you need to migrate, you can upload the workspace archives to the ARM folder in the [staging directory](#) in the cloud and then ingest them into RelativityOne using the ARM application. The ARM application is used to archive and restore Relativity workspaces between Relativity installations and RelativityOne. You can also use this application to convert a DBMT archive into an ARM archive.

1. Use the ARM tool to archive a workspace to the directory of your choosing. See Performance considerations for RelativityOne for more information on considerations for creating the archive file.
2. Use RelativityOne Staging Explorer to upload the ARM archive to the **ARM** folder in your RelativityOne staging directory in the cloud.
3. Execute an ARM Restore job to restore the ARM archive into your RelativityOne instance. ARM restore will recognize the ARM archive on the [Utility Server](#) and make it easily available for restoring.

## 2 Staging Area

The Staging Area is a storage area where you can upload, manipulate, and organize your data before processing and importing it into RelativityOne. The volume size of the Staging Area is based on your current subscription. It is used for:

- Preparing client data (upload, manage, organize) prior to importing data into RelativityOne.
- Storing raw client data prior to processing into a Repository or Review Workspace.
- Exporting client productions for opposing counsel.
- Temporarily storing ARM archives for restoration into RelativityOne

See RelativityOne data management for more information regarding our current data tiers.

### 2.1 Staging Area folders

Within each tenant or client domain storage area, the Staging Area consists of the four folders listed below. You are only able to write to and access data within these Staging Area folders:

- **ARM**—a folder for archiving workspaces and for staging restores via the ARM application.
- **StructuredData**—a folder for importing and exporting workspace data using Import/Export and Integration Points. Refer to [Import/Export](#) and [Integration Points](#) documentation for more information.

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**Note:** Relativity is deprecating the existing Export folder in September 2024 and is providing a new StructuredData folder in May 2024 to allow you to import and export data from the folder for easier integration with Import/Export and Integration Points. Begin using the StructuredData folder once it's available. This folder will be included in your Staging threshold and will be calculated and billed the same as the existing Staging folders (ProcessingSource, ARM, and TenantVM). The Export folder will be removed in September 2024 and will no longer be billable.

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- **ProcessingSource**—a folder for storing files you want to process into your RelativityOne workspace.
- **TenantVM**—a folder to temporarily store Utility Server virtual machine (UVM) workflows. Refer to [Utility Server](#) documentation for more information.

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**Note:** Starting in September 2024, RelativityOne will be streamlining its staging boundaries to bolster platform security and accelerate the delivery of innovation to your environment. With this change, you will no longer be able to write to or access data outside of the defined staging area folders listed above, and the FTA, Temp, Export, and dtSearch folders will be deprecated. It is strongly recommended that you begin utilizing the ProcessingSource, StructuredData, and ARM folders as soon as possible and be sure to transfer any data you would like to retain access to that is currently housed outside of the designated staging area to an appropriate folder by September 1, 2024. After that date, the folders and data will not be accessible. For more information, see the [Staging FAQ](#) article in Community.

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## 2.2 Billable

The Staging Area is billable data storage included in your subscription. It's calculated based on the highest consumption peak during a given month. The amount of data storage size and storage limits are based on your contract. Please contact your CSM or Sales Account Manager for more information on your contract. Also see RelativityOne data management for more information.

## 2.3 Best Practices

- [Staging Explorer](#) is Relativity's recommended product for all data manipulation, uploads and downloads to and from the Staging Area.
- Use Staging Reports via the Management Console to understand your volume size and cost.

## 3 Utility Server

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**Note:** This functionality is not currently available for FedRAMP customers / government entities.

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The Utility Server is a virtual machine that can optionally be connected to your RelativityOne instance. It contains additional support tools to help you work with data in your RelativityOne staging area before editing and loading it into your RelativityOne instance. You access your Utility server through a remote desktop connection, using an issued set of credentials and a custom IP address.

Once you are connected to your Utility Server, you can perform the following actions:

- **Access a mapped drive for the file share** (TenantUser accounts) - access your uploaded files to edit in the staging area before you add them to your RelativityOne workspaces or save them to a RelativityOne file storage location. You can also access and verify any production sets before you download them locally.
- **Install applications** - if you have TenantAdmin access you can install applications
- **Manage user administration** - if you have TenantAdmin access and have Terminal Services licensed on the computer you can manage user administration yourself.

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**Note:** It's not recommended to store files on your Utility Server. If your Utility Server becomes inaccessible, you will lose the files you stored.

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**Note:** Direct SQL Access on the Utility Server is not supported.

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The Utility Server comes pre-loaded with the following tools:

- **Notepad++**—to correct any errors in load files or other data editing needs.

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**Notes:**

- You can install Microsoft Office using your own license to correct any errors in load files or other, more robust data editing needs.
  - You can add other minor third-party tools to perform file manipulations. If your Utility Server becomes inaccessible, we will issue you a new Utility Server.
- 

**Note:** Relativity does not install any third party or custom applications on customer utility servers. You must re-install any custom applications if you're issued a new Utility Server.

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## 3.1 Utility server access

### Notes:

- Customers are assigned one utility server per RelativityOne instance. You may request up to 10 additional utility servers for a maximum of 11 utility servers per RelativityOne instance, including Client Domains. To request an additional utility server, contact your Customer Success Manager.
- Access is limited to two users (TenantUser and TenantUser2) concurrently. You can increase the number of concurrent tenant users to 10. Additionally, you can request access for a TenantAdmin user if you need to install custom applications. To request additional users, contact your Customer Success Manager.

By default, the Utility Server is issued to you these roles:

- TenantUser
- TenantUser2

**Note:** If additional user accounts are required, please contact your Implementation Specialist or Customer Success Manager.

The TenantAdmin account can install third-party applications on the Utility Server, create additional users, and grant file share access to additional users.

Refer to the table below for details on security permissions on the utility server by role.

Role	Can install applications	Can access file share	Issued by request	Issued by default
TenantAdmin	X	X	X	
TenantUser1		X		X
TenantUser2		X		X

**Note:** Refer to [RelativityOne - Creating a Windows user on the Utility Server](#) in the Community for more details on Utility Server user administration.

## 3.2 Connecting to your Utility Server

**Note:** If you are using Client Domains functionality in RelativityOne, the Relativity Processing Console is not installed to the utility server. Client domain administrators will not have access to the Relativity Processing Console from the client domain's utility server.

1. If you haven't already, connect to the [Global Protect VPN](#) using the credentials provided.
2. **After you have connected to the VPN client**, open the ZIP file you downloaded, and then open the **Credentials** text file to view your provided Utility Server credentials.
3. Launch the **Windows Remote Desktop Connection** tool.

4. When the Windows Remote Desktop Connection window appears, enter the IP address provided via the Credentials file in the **Computer** field.
5. Click **Connect**.
6. Enter the **Username** and **Password** (provided in the Credentials text file) when prompted, and then click **OK**.
7. When prompted again, enter your TenantUser, TenantUser2, or TenantAdmin (by request only) Utility Server credentials, and then click **OK**.

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**Note:** For added security, change your password after you log in. We recommend changing the password every 90 days.

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You have successfully logged into the RelativityOne Utility Server.

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**Note:** If you are unable to connect to the Remote Desktop session, ensure you are connected to the provided VPN client.

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If you experience issues accessing your Utility Server, contact Customer Support via the Community site.

### 3.3 Folders accessible via your Utility Server

Your Utility Server grants you access to the following [Staging Area](#) fileshare folders which map to the folders in [Staging Explorer on page 295](#) (which is used to upload and download data for Relativity Processing and ARM):

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**Note:** Zipping or unzipping files on the Utility Server is not supported.

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- **ARM**—a folder for archiving workspaces and for staging restores via the ARM application.
- **StructuredData**—a folder for importing and exporting workspace data using Import/Export and Integration Points. Refer to [Import/Export](#) and [Integration Points](#) documentation for more information.

---

**Note:** Relativity is deprecating the existing Export folder in September 2024 and is providing a new StructuredData folder in May 2024 to allow you to import and export data from the folder for easier integration with Import/Export and Integration Points. Begin using the StructuredData folder once it's available. This folder will be included in your Staging threshold and will be calculated and billed the same as the existing Staging folders (ProcessingSource, ARM, and TenantVM). The Export folder will be removed in September 2024 and will no longer be billable.

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- **ProcessingSource**—a folder for storing files you want to process into your RelativityOne workspace.
- **TenantVM**—a folder to temporarily store Utility Server virtual machine (UVM) workflows. Refer to [Utility Server](#) documentation for more information.

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**Note:** Starting in September 2024, RelativityOne will be streamlining its staging boundaries to bolster platform security and accelerate the delivery of innovation to your environment. With this change, you will no longer be able to write to or access data outside of the defined staging area folders listed above, and the FTA, Temp, Export, and dtSearch folders will be deprecated. It is strongly recommended that you begin utilizing the ProcessingSource, StructuredData, and ARM folders as soon as possible and be sure to transfer any data you would like to retain access to that is currently housed outside of the designated staging area to an appropriate folder by September 1, 2024. After that date, the folders and data will not be accessible. For more information, see the [Staging FAQ](#) article in Community.

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## 3.4 GlobalProtect VPN client

Your VPN enables a secure connection between your computer and resources on your Relativity instance's network. The following resources are available when you connect to the GlobalProtect VPN client:

- Utility Server VM via Windows Remote Desktop Connection (RDP)
- Direct access to SQL

For Sandbox environments, you can access the following back end resources via the VPN:

- Direct access to SQL

### 3.4.1 GlobalProtect VPN requirements

#### 3.4.1.1 Local machine requirements

Consider the following:

- Refer to the [GlobalProtect compatibility matrix](#) to ensure that the VPN client is compatible with your operating system.
- For RelativityOne, you should be using GlobalProtect 4.1 and above.
- The VPN software, Global Protect, must be installed locally. This needs to be done under a *Local Administrator* account. It is possible to install GlobalProtect with group policy as an active directory admin.

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**Note:** Without local administrator, or the ability to install via group policy, you will be unable to install the GlobalProtect client.

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#### 3.4.1.2 Port requirements

The following ports must be opened on user machines and/or firewalls for the GlobalProtect VPN to use when accessing file data in RelativityOne.

Destination Port	Protocol	Description
443	TCP	Used for communication between GlobalProtect agents and portals, or GlobalProtect agents and gateways and for SSL tunnel connections. GlobalProtect gateways also use this port to collect host information from GlobalProtect agents and perform host information profile (HIP) checks.

Destination Port	Protocol	Description
4501	UDP	Used for IPSec tunnel connections between GlobalProtect agents and gateways.

See RelativityOne network access in the [RelativityOne technical overview](#) for complete information on network access requirements.

### 3.4.2 Current VPN portal URL

There are different geographic data centers that your Relativity instance or sandbox may reside in. Enter the VPN portal URL as it appears below.

**Note:** As of October 2023, Microsoft renamed Azure Active Directory (Azure AD) to Microsoft Entra ID. This site has been updated to reflect the name change, where applicable. Refer to [Microsoft documentation](#) for more information.

The IP addresses listed below are for both VPN and regular, non-VPN, access.

All VPN portal URL are formatted as **vpn.[regional domain].relativity.one**

**Note:** VPN portal URL are only accessed when connecting to your Utility Server or Direct SQL via the VPN.

Primary Azure/Entra ID region	VPN Portal URL
US-Central (CTUS)	vpn.ctus.relativity.one
US-East (ESUS)	vpn.esus.relativity.one
Canada-Central (CACT)	vpn.cact.relativity.one
UK-South (UKSO)	vpn.ukso.relativity.one
Asia-East (ESAS)	vpn.esas.relativity.one
Brazil-South (BRSO)	vpn.brso.relativity.one
Europe-West (WSEU)	vpn.wseu.relativity.one
France - Central (FRCT)	vpn.frct.relativity.one
Germany-West Central (DECT)	vpn.dect.relativity.one
Switzerland North (CHNO)	vpn.chno.relativity.one
Australia-East (AUEA)	vpn.auea.relativity.one
Korea-Central (KRCT)	vpn.krct.relativity.one
United Arab Emirates (AENO)	vpn.aeno.relativity.one
India (INCT)	vpn.inct.relativity.one
Ireland (NOEU)	vpn.noEU.relativity.one
South Africa (ZANO)	vpn.zano.relativity.one

Primary Azure/Entra ID region	VPN Portal URL
Southeast Asia (SEAS)	vpn.seas.relativity.one
Japan (JPES)	vpn.jpes.relativity.one
Legacy Sandboxes	vpn.ctusssbx.relativity.one

### 3.4.3 Accepting the invitation from Microsoft Entra ID

1. [Customer Support](#) will issue an invitation from Microsoft Active Directory with the following information:
  - **Sender**—Microsoft Invitations on behalf of [RelativityOneVPNinvites@microsoft.com](mailto:RelativityOneVPNinvites@microsoft.com).
  - **Subject**—RelativityOneVPN invited you to access applications within their organization.
2. Click on the **Accept Invitation** link in the email.
  - If your organization does not use Active Directory, please continue with the prompts to complete creating the Microsoft account.
  - If your organization has Active Directory, your account will be connected automatically.
3. Your account creation is complete when you log in to Azure/Entra ID Portal.
4. Proceed to [Downloading and installing the GlobalProtect VPN client below](#) to install the GlobalProtect VPN client.

### 3.4.4 Downloading and installing the GlobalProtect VPN client

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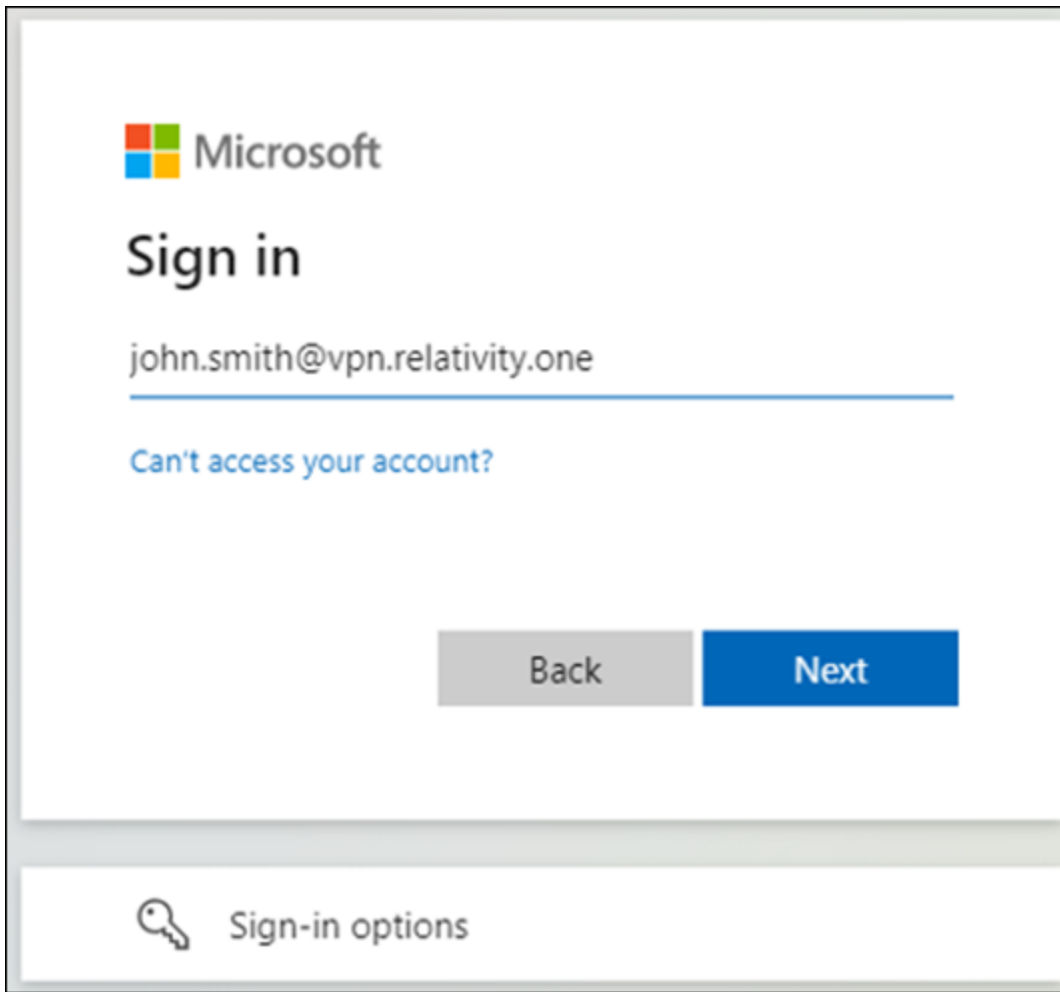
**Note:** You must have local admin rights to install the VPN client. If you are not a local admin, contact your IT department to install it via Group Policy. Instructions for installing the client via Group Policy are found at <https://live.paloaltonetworks.com/t5/Management-Articles/Using-Active-Directory-GPO-to-Install-the-GlobalProtect-Client/ta-p/61120>.

---

Your VPN connection is typically created during the onboarding process for RelativityOne. If you have questions, please contact your designated Customer Success Manager.

1. Navigate to the portal for the geographic region you use RelativityOne in. The correct portal address for you to use can be found in the table listed under [Current VPN portal URL on the previous page](#) section above.
2. In the Microsoft *Pick an account* prompt, click the **Use another account** option.

3. Enter your own credentials.



The image shows a Microsoft sign-in interface. At the top left is the Microsoft logo. Below it, the text "Sign in" is displayed in a large, bold font. Underneath, the email address "john.smith@vpn.relativity.one" is entered into a text field. Below the text field is a blue link that says "Can't access your account?". At the bottom of the main content area are two buttons: a grey "Back" button and a blue "Next" button. At the very bottom of the interface, there is a section with a key icon and the text "Sign-in options".



4. Once you are logged in, download the appropriate VPN client to your computer.



5. Install the GlobalProtect VPN client you just downloaded. Follow the default prompts.

---

**Note:** If you are using macOS and are unable to use GlobalProtect after installing, review the General tab in your Security and Privacy settings and ensure that system software from **PanGPS** is not blocked from loading.

---

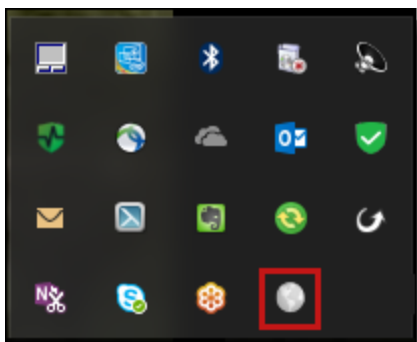
---

**Note:** To download and re-install the VPN client, follow the instructions above, but skip the steps related to resetting your password.

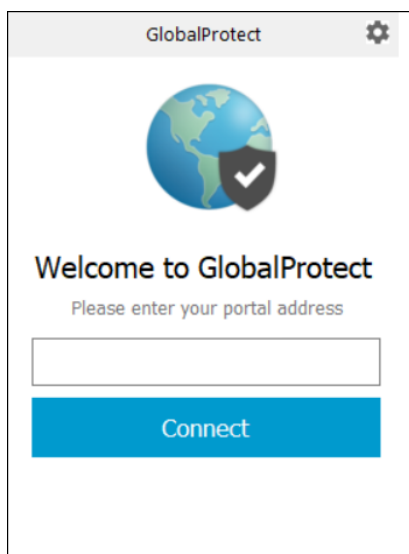
---

### 3.4.5 Logging in using your GlobalProtect VPN client

1. After installing the VPN client, the GlobalProtect toolbar menu will open. If it does not open automatically, you can search for GlobalProtect in the bottom left-hand search bar to open it.



2. Click the **gear icon** in the upper right-hand corner of the toolbar menu, and then select **Settings** to access the Settings dialog window and configure the VPN client.



3. Under the General tab, click the **Add** button to add the RelativityOne **Portal Address**.

---

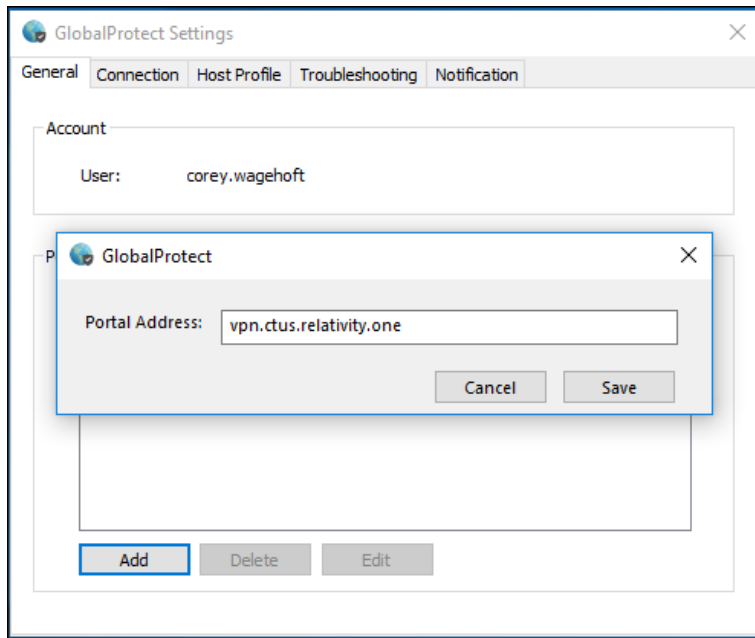
**Note:** Ensure you enter the correct portal. This depends on which geographic region your

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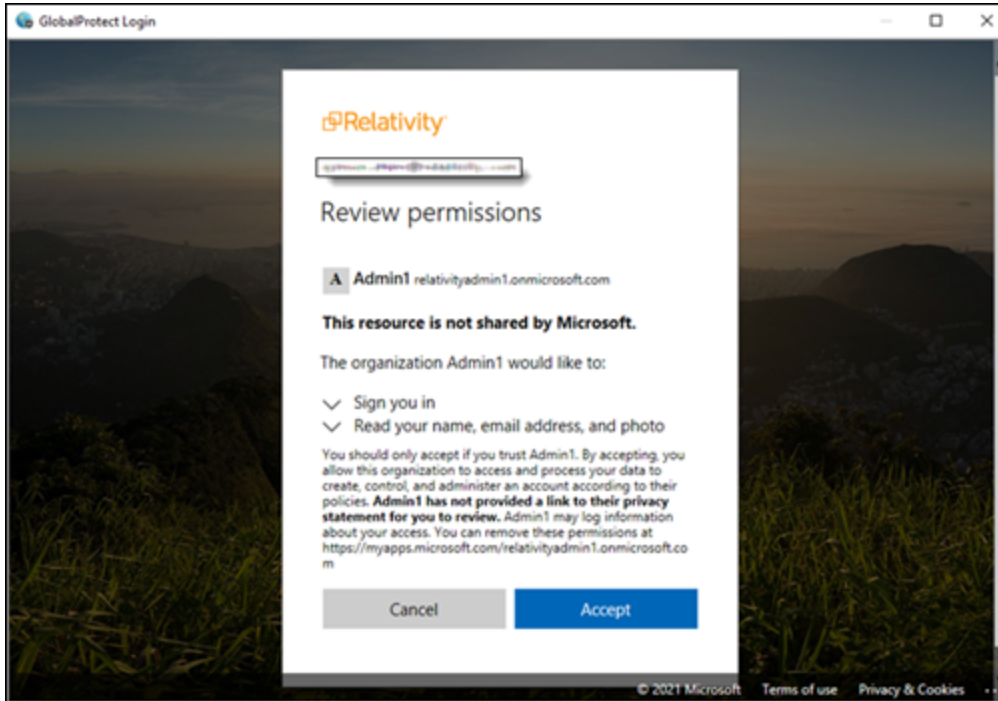
RelativityOne instance resides in. You should not enter the "http://" preceding the portal address.

---

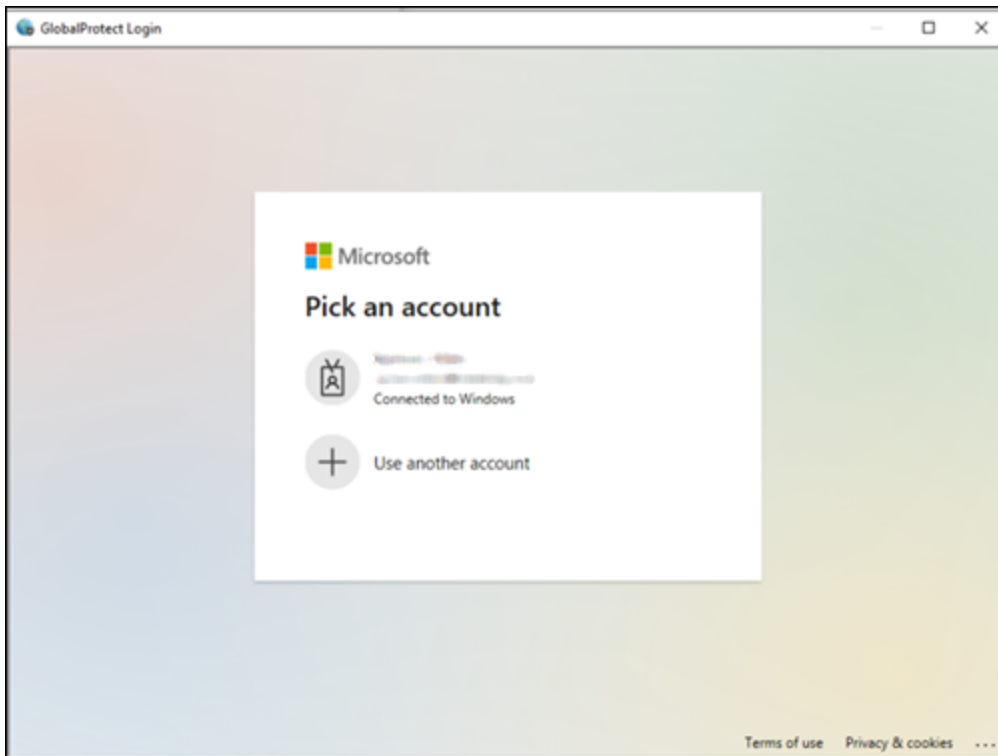


4. Click **Save**.
5. Close the Settings dialog.
6. Click on the GlobalProtect icon in your tray, and then click the blue **Connect** button. A pop-up window for reviewing permissions displays.

7. After reviewing the terms, click **Accept**.



A prompt for your VPN user credentials displays.



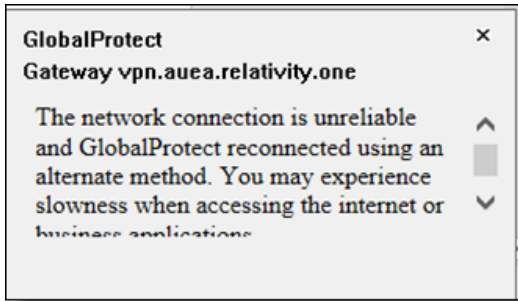
8. Choose the appropriate VPN user credentials to sign in with in the Microsoft *Pick an account* screen. Please note that this prompt might appear twice depending on your organization's settings.

A window will display momentarily while you are connected to the VPN.

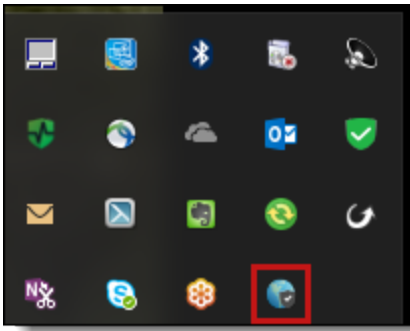
---

**Note:** If the GlobalProtect warning displayed below appears, dismiss the window. This is a known issue with the GlobalProtect client itself and will be addressed in future versions.

---



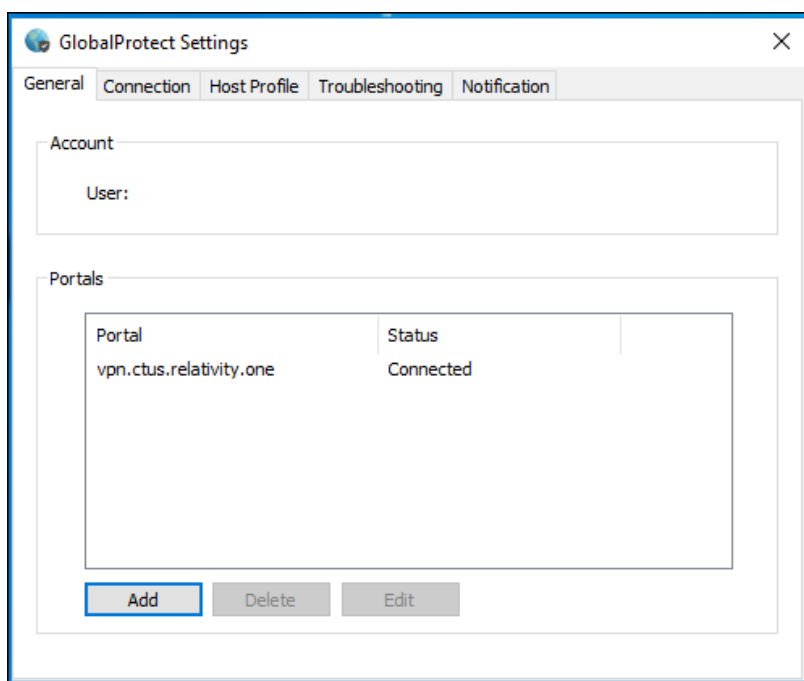
9. To check your connection status, you can view the GlobalProtect icon in your system tray. When connected, it will look like the following image.



---

**Note:** You can click the gear icon, then select **Settings** to launch the Settings dialog which also shows your connection status. You can perform troubleshooting from this window.

---



### 3.4.6 Changing your VPN password

If you are using VPN user credentials that are based on a real email address, not the *firstname.last@vpn.relativity.one* legacy VPN credentials, the password reset policies are determined either by you or the overall corporation in which your email exists. Please make sure to check with your IT department on how to change your password as Relativity will no longer have any control over performing a password reset for your VPN user.

To change your expiring or expired passwords:

1. Access <https://login.microsoftonline.com>. Log in using your Relativity credentials.

---

**Note:** If you are already logged into Microsoft at your organization, you may need to open a private browsing window in your internet browser, incognito or InPrivate, and access <https://login.microsoftonline.com> from there or log out and log back in with the correct credentials. If you do not do this, you will not be prompted to change your temporary password or may receive an error when you try to log out and then log back in.

---

2. Change your password.  
There are two ways to change your password:
  - Access your account settings in the upper right corner menu containing your initials by clicking **View Account**, and then clicking **Change Password** in the Password tile to change your password. You will be redirected to new password form. Please enter your old, expired, password and new one, and then click **Submit**.

---

**Note:** After changing your password, you must wait 30 minutes before attempting to log in with your new password.

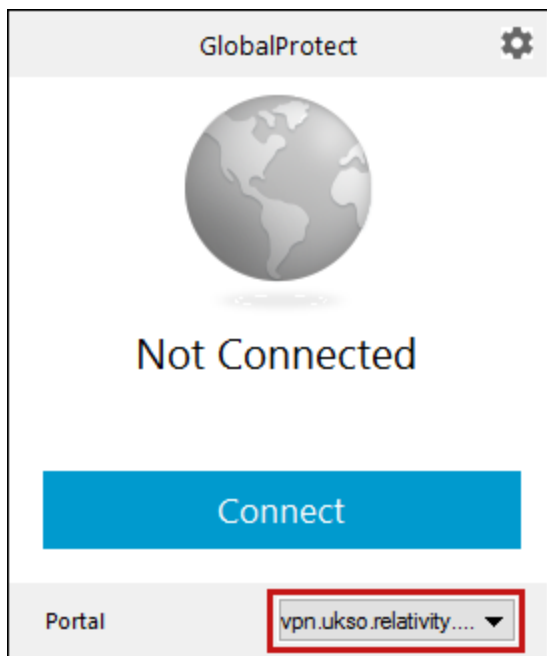
---

### 3.4.7 Adding an additional VPN region to GlobalProtect

This guide will show you how to connect to RelativityOne in an additional region. If you need [Utility Server](#) details, please contact your Customer Success Manager.

To add an additional VPN region to your client:

1. Search for GlobalProtect icon in the task bar to open it.
2. Click the **gear icon** in the upper right-hand corner of the toolbar menu, and then select **Settings** to access the Settings dialog window.
3. Under the General tab, click the **Add** button to add the new RelativityOne portal URL in **Portal Address**.
4. Click **Save**.
5. Close the **Settings** dialog.
6. Click on the **GlobalProtect icon** in your tray.
7. Select the newly added **Portal** from the drop-down menu on the GlobalProtect connection screen.



8. Click the blue **Connect** button.  
A prompt for your VPN user credentials displays.
9. Enter your VPN user credentials.  
A window will display momentarily while you are connected to the VPN for the new URL.

## 4 Import/Export overview

Import/Export provides an efficient and streamlined ability to import raw data files, document load files, image load files, production files, RDO files, as well as to export folders and subfolders, production sets, saved searches, and RDO files. It is the recommended method for importing and exporting data for RelativityOne.

You can use Import/Export with or without activating Express Transfer, however, we recommend activating Express Transfer. For more information on Express Transfer, see [Express Transfer overview on page 49](#) and review the section below on considerations when to use and not use Express Transfer.

---

### Notes:

- Relativity ended Relativity Desktop Client (RDC) support for and access to RelativityOne commercial customers on December 31, 2023. Use Import/Export for your RelativityOne importing and exporting needs. For RelativityOne Government customers, beginning March 31, 2024, RDC will only operate in web transfer mode, which will result in significantly slower transfer speeds. It is highly recommended that Government customers begin using Import/Export in RelativityOne as soon as possible to prepare for the deprecation of RDC on June 30, 2024. Starting July 1, 2024, RDC will no longer be operational. See the Community article [RDC Deprecation FAQ](#) for additional information.
  - For customers whose file shares haven't been fully migrated to ADLS yet, Import/Export offers a solution where the import process utilizes the primary file share to store the uploaded data. See the Community article [Import/Export uses ADLS if one is present on the tenant](#) for details.
  - After documents are imported using Import/Export, you can automate creating a dtSearch index or run a search terms report with those documents using Automated Workflows
- 

### 4.1 Getting started with Import/Export checklist

Ready to get up-to-speed with Import/Export? Learn more about the functionality, how to get it installed in your instance of RelativityOne, and workflow specifics with the resources listed below.

#### Overview Sessions:

- Take a deeper dive by watching our recorded [Import/Export Overview](#) session.
- Explore more training sessions on the [Relativity Training Center](#) site.

**Before you can start working with Import/Export, you will have to set things up in your RelativityOne instance:**

1. Reach out to your IT Department and ensure [TCP port 443](#) is open to transfer data in RelativityOne with Express Transfer.
2. [Install Import/Export](#) from the Relativity Application Library.
3. Open Import/Export and [install Express Transfer](#) for larger data transfers and to streamline structured data loads. Only complete this step if your organization intends to use Express Transfer with Import/Export.
4. Ensure that users have the proper [permissions](#).

**Now that Import/Export is set up, you are ready to perform these workflows and benchmark your speeds:**



- [Import data](#), both structured and unstructured
- [Export folders, RDO data, productions and saved searches](#)
- [Import and export data using Express Transfer with Import/Export](#)
- [View the Job History](#)

#### Have questions?

- Join one of our Live Monthly [Import/Export What's New and Q&A Sessions](#).
- Email [Solutions@Relativity.com](mailto:Solutions@Relativity.com) for workflow assistance.
- Visit our [What's New](#) page, [Relativity Documentation](#) or our [Community Site](#).
- Contact [Relativity Customer Support](#).

## 4.2 Available import and export workflows

The following workflows can be performed using Import/Export .

#### ■ Import workflows:

- Raw (Unprocessed/Unstructured) Data
  - Unstructured data workflow with Processing

#### ■ Structured (Processed) Data

Structured data includes natives, text, and image files, and load files containing metadata.

- Document load file import
- Image load file import
- Production load file import
- Relativity Dynamic Object load file import

#### ■ Export workflows:

- Folder export
- Production set export
- Saved Search export
- RDO export

## 4.3 Import/Export transfer modes

There are two methods available to transfer data using Import/Export. Refer to the next section for considerations when to use each one.

#### ■ Import/Export with Express Transfer

This refers to activating Express Transfer within Import/Export to transfer data into and out of RelativityOne. This mode is the recommended method for data transfer. Express Transfer is a separately installed desktop application that sits outside of the RelativityOne browser software and handles the data transfer process. See [Express Transfer overview](#) and [Installing Express Transfer](#) for more information

- **Import/Export only**

This refers to only using the Import/Export browser application within the RelativityOne software to import and export data without Express Transfer activated. This mode is sometimes referred to as web mode or web only mode. See [Installing Import/Export](#). Even if the Express Transfer application is installed on the desktop, it must not be activated when using web mode.

## 4.4 Considerations when to use and not use Express Transfer with Import/Export

We recommend using Import/Export *with* Express Transfer activated whenever possible for all importing and exporting workflows, and particularly when:

- data file size is greater than 20 GB (although Express Transfer can be used for any size data transfer).
- processing multiple import jobs. The jobs will be queued and executed when the previous job is complete.
- slow or unstable network connection. Express Transfers enables you to retry the upload.

Use Import/Export *without* activating Express Transfer when:

- your company policy prohibits installing desktop applications.
- your network configuration does not allow third party applications to send or receive data, such as proxy settings.
- data file size is less than 20 GB.
- data is in ZIP files.

---

**Note:** You need to use Express Transfer to upload and process encrypted materials, such as password-protected zip files or Case files (L01/N01) that require Password Bank functionality. If you cannot use Express Transfer for such imports, zip your encrypted materials in a single unencrypted ZIP container (the 20 GB limit for the zip file size applies). Import/Export will transfer and extract the top-level zip file, preparing your encrypted materials for Processing. Then, Processing will utilize Password Bank to decrypt materials.

---

## 4.5 Supported file types

Import/Export supports the following file types. Refer to [Import/Export load file specifications](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 47](#).

- **ZIP and PST files**—for transferring data to the server-side.
- **Native files for processing**—see the list of supported file types for processing within the Processing guide.
- **Document Load File import**—.dat, .csv and .txt load files.
- **Image Load File import**—Opticon-formatted page-level files. Formats supported: single page TIFF (Group IV) files, single page JPG files, and single and multiple PDF files.

---

**Note:** RelativityOne allows users to restrict given file types from being imported into their instances with the RestrictedFileTypes instance setting. Import/Export reads and applies this instance setting when importing materials into RelativityOne, therefore, all file types listed as restricted file types will be skipped.

---

## 4.6 Data upload size limitation

When Express Transfer is activated for use with Import/Export, there is no data upload limit. See Express Transfer overview and Activating Express Transfer for more information.

When Express Transfer is not activated for use with Import/Export, the application accepts single .zip or .pst containers or a single structured import data set load file up to 20 GB for a single import.

## 4.7 Concurrent and consecutive jobs

The concurrent or consecutive nature of a job depends on what stage the job is at, which data transfer mode you're using (web only or Express Transfer), and what type of job you're running (Processing, Import, or Export). For more information, see the Community article [Import/Export Concurrent and Consecutive Jobs](#).

## 4.8 Import/Export overview

Import/Export provides an efficient and streamlined ability to import raw data files, document load files, image load files, production files, RDO files, as well as to export folders and subfolders, production sets, saved searches, and RDO files. It is the recommended method for importing and exporting data for RelativityOne.

You can use Import/Export with or without activating Express Transfer, however, we recommend activating Express Transfer. For more information on Express Transfer, see [Express Transfer overview on page 49](#) and review the section below on considerations when to use and not use Express Transfer.

---

**Notes:**

- Relativity ended Relativity Desktop Client (RDC) support for and access to RelativityOne commercial customers on December 31, 2023. Use Import/Export for your RelativityOne importing and exporting needs. For RelativityOne Government customers, beginning March 31, 2024, RDC will only operate in web transfer mode, which will result in significantly slower transfer speeds. It is highly recommended that Government customers begin using Import/Export in RelativityOne as soon as possible to prepare for the deprecation of RDC on June 30, 2024. Starting July 1, 2024, RDC will no longer be operational. See the Community article [RDC Deprecation FAQ](#) for additional information.
  - For customers whose file shares haven't been fully migrated to ADLS yet, Import/Export offers a solution where the import process utilizes the primary file share to store the uploaded data. See the Community article [Import/Export uses ADLS if one is present on the tenant](#) for details.
  - After documents are imported using Import/Export, you can automate creating a dtSearch index or run a search terms report with those documents using Automated Workflows
- 

### 4.8.1 Getting started with Import/Export checklist

Ready to get up-to-speed with Import/Export? Learn more about the functionality, how to get it installed in your instance of RelativityOne, and workflow specifics with the resources listed below.

**Overview Sessions:**

- Take a deeper dive by watching our recorded [Import/Export Overview](#) session.
- Explore more training sessions on the [Relativity Training Center](#) site.

**Before you can start working with Import/Export, you will have to set things up in your RelativityOne instance:**

1. Reach out to your IT Department and ensure [TCP port 443](#) is open to transfer data in RelativityOne with Express Transfer.
2. [Install Import/Export](#) from the Relativity Application Library.
3. Open Import/Export and [install Express Transfer](#) for larger data transfers and to streamline structured data loads. Only complete this step if your organization intends to use Express Transfer with Import/Export.
4. Ensure that users have the proper [permissions](#).

**Now that Import/Export is set up, you are ready to perform these workflows and benchmark your speeds:**

- [Import data](#), both structured and unstructured
- [Export folders, RDO data, productions and saved searches](#)
- [Import and export data using Express Transfer with Import/Export](#)
- [View the Job History](#)

**Have questions?**

- Join one of our Live Monthly [Import/Export What's New and Q&A Sessions](#).
- Email [Solutions@Relativity.com](mailto:Solutions@Relativity.com) for workflow assistance.

- Visit our [What's New](#) page, [Relativity Documentation](#) or our [Community Site](#).
- Contact [Relativity Customer Support](#).

## 4.8.2 Available import and export workflows

The following workflows can be performed using Import/Export .

### ■ Import workflows:

- Raw (Unprocessed/Unstructured) Data
  - Unstructured data workflow with Processing

### ■ Structured (Processed) Data

Structured data includes natives, text, and image files, and load files containing metadata.

- Document load file import
- Image load file import
- Production load file import
- Relativity Dynamic Object load file import

### ■ Export workflows:

- Folder export
- Production set export
- Saved Search export
- RDO export

## 4.8.3 Import/Export transfer modes

There are two methods available to transfer data using Import/Export. Refer to the next section for considerations when to use each one.

### ■ Import/Export with Express Transfer

This refers to activating Express Transfer within Import/Export to transfer data into and out of RelativityOne. This mode is the recommended method for data transfer. Express Transfer is a separately installed desktop application that sits outside of the RelativityOne browser software and handles the data transfer process. See [Express Transfer overview](#) and [Installing Express Transfer](#) for more information

### ■ Import/Export only

This refers to only using the Import/Export browser application within the RelativityOne software to import and export data without Express Transfer activated. This mode is sometimes referred to as web mode or web only mode. See [Installing Import/Export](#). Even if the Express Transfer application is installed on the desktop, it must not be activated when using web mode.

#### 4.8.4 Considerations when to use and not use Express Transfer with Import/Export

We recommend using Import/Export *with* Express Transfer activated whenever possible for all importing and exporting workflows, and particularly when:

- data file size is greater than 20 GB (although Express Transfer can be used for any size data transfer).
- processing multiple import jobs. The jobs will be queued and executed when the previous job is complete.
- slow or unstable network connection. Express Transfers enables you to retry the upload.

Use Import/Export *without* activating Express Transfer when:

- your company policy prohibits installing desktop applications.
- your network configuration does not allow third party applications to send or receive data, such as proxy settings.
- data file size is less than 20 GB.
- data is in ZIP files.

---

**Note:** You need to use Express Transfer to upload and process encrypted materials, such as password-protected zip files or Case files (L01/N01) that require Password Bank functionality. If you cannot use Express Transfer for such imports, zip your encrypted materials in a single unencrypted ZIP container (the 20 GB limit for the zip file size applies). Import/Export will transfer and extract the top-level zip file, preparing your encrypted materials for Processing. Then, Processing will utilize Password Bank to decrypt materials.

---

#### 4.8.5 Supported file types

Import/Export supports the following file types. Refer to [Import/Export load file specifications](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 47](#).

- **ZIP and PST files**—for transferring data to the server-side.
- **Native files for processing**—see the list of supported file types for processing within the Processing guide.
- **Document Load File import**—.dat, .csv and .txt load files.
- **Image Load File import**—Opticon-formatted page-level files. Formats supported: single page TIFF (Group IV) files, single page JPG files, and single and multiple PDF files.

---

**Note:** RelativityOne allows users to restrict given file types from being imported into their instances with the RestrictedFileTypes instance setting. Import/Export reads and applies this instance setting when importing materials into RelativityOne, therefore, all file types listed as restricted file types will be skipped.

---

## 4.8.6 Data upload size limitation

When Express Transfer is activated for use with Import/Export, there is no data upload limit. See Express Transfer overview and Activating Express Transfer for more information.

When Express Transfer is not activated for use with Import/Export, the application accepts single .zip or .pst containers or a single structured import data set load file up to 20 GB for a single import.

## 4.8.7 Concurrent and consecutive jobs

The concurrent or consecutive nature of a job depends on what stage the job is at, which data transfer mode you're using (web only or Express Transfer), and what type of job you're running (Processing, Import, or Export). For more information, see the Community article [Import/Export Concurrent and Consecutive Jobs](#).

# 4.9 Installing Import/Export

The Import/Export application will not be installed automatically in all your workspaces so you must do so manually in each one from the Relativity Application Library.

## 4.9.1 Requirements

Refer to the sections below for the necessary requirements for Import/Export.

### 4.9.1.1 Workspace requirements

When using Import/Export, you need the following RelativityOne applications installed in your workspace from the Relativity Application Library:

---

**Note:** Import/Export requires the *Relativity.Transfer.Service* to be installed in your RelativityOne instance. This is a global RelativityOne application that is installed and updated automatically.

---

- Import/Export (see installation steps below)
- Export
- Import
- Processing (only required if you intend to process [unstructured raw data for processing](#) with Import/Export)
- Relativity Lists (version 1.2.305 or newer)

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**Note:** Import/Export requires Relativity Lists version 1.2.305 or newer to be installed and enabled in the workspace for running import and export jobs. If the Relativity Lists application is not available, all Import/Export workflows will be disabled.

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### 4.9.1.2 Port Access

Import/Export requires TCP port 443 to be open to transfer data. For further assistance, please contact your IT Department. Also refer to the Import Export Application - Required Ports article in Community for additional information.

## 4.9.2 Installing Import/Export

To manually install Import/Export in the workspace:

1. Log into RelativityOne as an Admin user.
2. Navigate to the **Application Library**.
3. Type **Import/Export** in the Name field's filter and press **Enter**.
4. Click the **Import/Export** application name to go to the **Application Information** tab.
5. Click **Select** in the Workspaces Installed pane.
6. Find and select your workspace(s) and click the **right arrow** button to move it to the right-hand pane.
7. Click **Apply**.

If you want to use Import/Export with Express Transfer, which is recommended in most cases, you must activate Express Transfer within the Import/Export application. Refer to [Express Transfer overview on page 49](#) and [Activating Express Transfer on page 61](#) for more information.

## 4.10 Permissions

Import/Export validates the user's permissions and checks if all required applications are installed in their workspace. If the user does not have permission to run a given workflow or if any application needed for that workflow is not installed, Import/Export grays out the workflow button and displays a warning message below it explaining why it's inactive. This validation process works separately for each workflow. For example, if a user does not have permission to run a Processing job, they may still be able to import load file data but will not be able to process it.

All permissions are set in Workspace security.

The following permissions are required for **all** import and export workflows:

Object security	Tab visibility	Other Settings
<ul style="list-style-type: none"> <li>■ <b>Document</b> - Add, Edit, View</li> <li>■ <b>Folder</b> - Add, Edit</li> <li>■ <b>Import/Export Extraction Job</b> - Add, Edit</li> <li>■ <b>Import/Export Job</b> - Add, Edit</li> <li>■ <b>Relativity Time Zone</b> - View</li> </ul>	<ul style="list-style-type: none"> <li>■ Documents</li> <li>■ Import/Export Job</li> </ul>	

Additional permissions required for [Raw \(Unprocessed\) Data import workflow](#) only:

Object security	Tab visibility	Other Settings
<ul style="list-style-type: none"> <li>■ <b>Entity</b> - Add, Edit</li> <li>■ <b>OCR Language</b> - View</li> <li>■ <b>Processing Data Source</b> - Add, View</li> <li>■ <b>Processing Error</b> - Add, Edit</li> <li>■ <b>Processing Set</b> - Add, Edit, View</li> </ul>		Mass operations <ul style="list-style-type: none"> <li>■ Allow Import</li> <li>■ Assign to Entity</li> </ul>



Object security	Tab visibility	Other Settings
<ul style="list-style-type: none"> <li>▪ <b>Quick Create Set</b> - Add, Edit</li> </ul>		

Additional permissions required for [Structured Data import workflows](#) only:

Object security	Tab visibility	Other Settings
<ul style="list-style-type: none"> <li>▪ <b>Production</b> - View</li> <li>▪ <b>Relativity Import Data Source</b> - Add, Edit, View</li> <li>▪ <b>Relativity Import Job</b> - Add, Edit, View</li> </ul>		Admin operations <ul style="list-style-type: none"> <li>▪ Allow Import</li> </ul>

Additional permissions required for [Export workflows](#) only:

Object security	Tab visibility	Other Settings
<ul style="list-style-type: none"> <li>▪ <b>Import/Export Job</b> - Add, Edit</li> <li>▪ <b>Production</b> - View</li> <li>▪ <b>Relativity Export Service Job</b> - Add, Edit, View</li> </ul>		Admin operations <ul style="list-style-type: none"> <li>▪ Allow Export</li> </ul>

## 4.11 Import/Export load file specifications

A load file is used to transfer data and its associated metadata into a database. During import, the application reads the load file to determine what metadata should be written into each field and to copy it to the workspace. If your organization uses a processing vendor, you'll need to upload case data with a load file. You'll also use load files when you receive a subset of data from another party, such as a production from opposing counsel.

Below are the load file specifications for Import/Export.

### 4.11.1 Supported file types

Import/Export supports the following file types.

- **ZIP and PST files**—for transferring data to the server-side.
- **Native files for processing**—see the list of supported file types for processing within the Processing guide.
- **Document Load File import**—.dat, .csv and .txt load files.
- **Image Load File import**—Opticon-formatted page-level files. Formats supported: single page TIFF (Group IV) files, single page JPG files, and single and multiple PDF files.

---

**Note:** RelativityOne allows users to restrict given file types from being imported into their instances with the RestrictedFileTypes instance setting. Import/Export reads and applies this instance setting when importing materials into RelativityOne, therefore, all file types listed as restricted file types will be skipped.

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Import/Export [web only](#) accepted file types:

For Unstructured Processing Jobs

- PST - Individual Entity and Custodian files
- ZIP containers:
  - All loose files must be in a ZIP container
  - Entity and Custodian identifier at the folder level

For Load Files and Structured Data Sets

- Load file - Keep the Load File (.dat, .opt, etc.) separate from zipped documents
- Files - Native or Image/Production files must be in a ZIP container

### 4.11.2 Metadata, extracted text, and native files

Import/Export uses a flat, document-level load file to load metadata, document level extracted text, and natives files. Each line should represent one document.

#### 4.11.2.1 Encoding

You must choose the proper encoding of a file when a load file is first selected. Import/Export supports the following encodings:

- Arabic (ASMO 708)
- Arabic (ISO)
- Arabic (Windows)
- Baltic (ISO)
- Baltic (Windows)
- Central European (ISO)
- Central European (Windows)
- Chinese Simplified (GB18030)
- Chinese Simplified (GB2312)
- Chinese Traditional (Big5)
- Cyrillic (DOS)
- Cyrillic (ISO)
- Cyrillic (KOI8-R)
- Cyrillic (KOI8-U)

- Cyrillic (Mac)
- Cyrillic (Windows)
- Estonian (ISO)
- Greek (ISO)
- Greek (Windows)
- Hebrew (ISO-Logical)
- Hebrew (ISO-Visual)
- Hebrew (Windows)
- Japanese (EUC)
- Japanese (JIS 0208-1990 and 0212-1990)
- Japanese (JIS)
- Japanese (JIS-Allow 1 byte Kana - SO/SI)
- Japanese (JIS-Allow 1 byte Kana)
- Japanese (Shift-JIS)
- Korean
- Korean (EUC)
- Latin 3 (ISO)
- Latin 9 (ISO)
- Thai (Windows)
- Turkish (ISO)
- Turkish (Windows)
- Ukrainian (Mac)
- Unicode (UTF-16)
- Unicode (Big-Endian)
- Unicode (UTF-8)
- US-ASCII
- Vietnamese (Windows)
- Western European (ISO)
- Western European (Mac)
- Western European (Windows)

#### 4.11.2.2 Header row

Import/Export does not require load file header rows. However, they are strongly recommended to ensure accuracy.

The field names in your header do not need to match the field names in your workspace.

#### 4.11.2.3 Fields

RelativityOne doesn't require any specific load file field order. You can create any number of workspace fields to store metadata or coding.

During the load process, you can match your load file fields to the fields in your workspace. The identifier field is required for each load. When loading new records, this is your workspace identifier.

When performing an overlay, you can use the workspace identifier or select another field as the identifier. This is useful when overlaying production data. For example, you could use the Bates number field rather than the document identifier in the workspace.

All fields except Identifier are optional; however, you may find some of the following system fields beneficial.

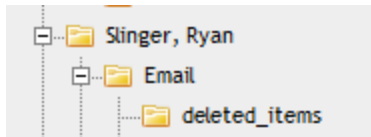
1. **Identifier**—the unique identifier of the record.
2. **Group Identifier**—the identifier of a document's family group.
  - The group identifier repeats for all records in the group.
  - Usually, this is the document identifier of the group's parent document. For example:
    - If an email with the document identifier of AS00001 has several attachments, the email and its attachments have a group identifier of AS00001.
  - If a group identifier for a record is not set, the document identifier populates the group identifier field in the case. This effectively creates a "group" of one document.
3. **MD5 Hash**—the duplicate hash value of the record.
  - You can enter any type of hash value (and rename the field in your case).
  - If documents share the same hash value, the software identifies the documents as a duplicate group.
  - If a hash field for a record is not set, the document identifier populates the hash field in the case. This effectively creates a "group" of one document.
4. **Extracted Text**—the text of the document. Either the OCR or Full Text. The extracted text appears in the viewer and is added to search indexes. This field can contain either:
  - The actual OCR or Full Text.
  - The path to a document level text file containing the OCR or Full Text. Both relative and absolute (full) paths are supported; however, to import load file data that contains absolute paths, Express Transfer must be activated. Relative paths can start with Blank or .\, as in: MainFolder\SubFolder\File.extension or .\MainFolder\SubFolder\File.extension. Absolute paths can start with a backslash (\), as in: \MainFolder\SubFolder\File.extension.
5. **Native File Path**—the path to any native files you would like to load. Both relative and absolute (full) paths are supported; however, to import load file data that contains absolute paths, Express Transfer must be activated. Relative paths can start with Blank or .\, as in: MainFolder-

\SubFolder\File.extension or \MainFolder\SubFolder\File.extension. Absolute paths can start with a backslash (\), as in: \MainFolder\SubFolder\File.extension.

6. **Folder Info**—builds the folder browser structure for the documents.

- This field is backslash “\” delimited.
- If not set, the documents load to the root of the case.
- Each entry between backslashes is a folder in the system's folder browser.
- Each backslash indicates a new subfolder in the browser.

**Note:** For example, if the load file contained the following entry in the folder information field, “Slinger, Ryan\Email\deleted\_items”, then the software would build the following folder structure:



Each document with the above entry would be stored in the “deleted\_items” folder.

7. **Relativity Native Time Zone Offset**—RelativityOne's native viewer technology displays all email header dates and times in GMT. This numeric field offsets how email header dates and times appear in the viewer.

- If the value in this field is blank, or 0, for a document, then the email header date and time appears in GMT.
- You can enter a whole number in this field (positive or negative) to offset the time from GMT to the local time zone of the document. For example, if the document was collected from US CDT time, enter “-5” in the field, because the CDT offset from GMT is -5.
- This ONLY applies when viewing email header dates and times in the RelativityOne Native File Viewer. Your metadata fields display as imported.

#### 4.11.2.4 Accepted date formats

RelativityOne accepts date and time as one field. For example, Date Sent and Time Sent should be one field. If date sent and time sent ship separately, you must create a new field for time. You can format date fields to accept the date without the time, but not the time without the date. Dates cannot have a zero value. Format dates in a standard date format such as “6/30/2023 1:23 PM” or “6/30/2023 13:23”.

**Note:** To import or export data with a date/time format that differs from the US format, be sure to select the correct Regional Settings option when creating a new Import/Export job.

The table below lists the date formats recognized by Import/Export and Import Service (IAP). It contains both valid and invalid date formats:

Entry in Load File	Object Type	Definition
Monday January 4 2023	1/4/2318 0:00	
05/28/2023 7:11	05/28/2023	

Entry in Load File	Object Type	Definition
AM	7:11 AM	
5:08:40 PM	6/30/2023 17:08	The current date will be entered if the date is missing. For this example, assume the import was done on 6/30/2023.
17:08:33	6/30/2023 17:08	The current date will be entered if the date is missing. For this example, assume the import was done on 6/30/2023.
17:08	6/30/2023 17:08	The current date will be entered if the date is missing. For this example, assume the import was done on 6/30/2023.
5:08 PM	6/30/2023 17:08	The current date will be entered if the date is missing. For this example, assume the import was done on 6/30/2023.
14-Apr	4/14/2023 0:00	The current year will be entered if the year is missing.
9-Apr	4/9/2023 0:00	The current year will be entered if the year is missing.
14-Mar	3/14/2023 0:00	The current year will be entered if the year is missing.
1-Mar	3/1/2023 0:00	The current year will be entered if the year is missing.
22-Feb	2/22/2023 0:00	The current year will be entered if the year is missing.
20230420	4/20/2023 0:00	
20230420 2:22:00 AM	4/20/2023 0:00	
4/9/2023 16:13	4/9/2023 16:13	
4/9/2023 8:49	4/9/2023 8:49	
9-Apr-23	4/9/2023 0:00	
Apr. 9, 23	4/9/2023 0:00	
4.9.2023	4/9/2023 0:00	
4.9.23	4/9/2023 0:00	
4/9/2023	4/9/2023 0:00	

Entry in Load File	Object Type	Definition
4;9;2023	4/9/2023 0:00	
Wednesday, 09 April 2023	4/9/2023 0:00	
12-31-2023	12/31/2023 12:00 AM	
2023-11- 28T17:45:39.744- 08:00	11/28/2023 0:00	
4/9/23 13:30 PM		Results in an error
2023-044-09		Results in an error
4/9/2023 10:22:00 a.m.		Results in an error
00/00/0000		Results in an error unless the CreateErrorForInvalidDate value is set to false.

#### 4.11.2.5 Delimiters

During import, you can designate which delimiters are used in your load file. You can select each delimiter from the ASCII characters, 001 – 255.

The delimiter characters have the following functions:

- **Column**—separates load file columns.
- **Quote**—marks the beginning and end of each load file field (also known as a text qualifier).
- **Newline**—marks the end of a line in any extracted or long text field.
- **Multi-value**—separates distinct values in a column. This delimiter is only used when importing into a RelativityOne multi-choice field.
- **Nested-values**—denotes the hierarchy of a choice. This delimiter is only used when importing into a RelativityOne multi-choice field.  
For example, say a load file contained the following entry, and was being imported into a multi-choice field: “Hot\Really Hot\Super Hot; Look at Later”  
With the multi-value delimiter set as “;” and the nested value delimiter set as “\”, the choices would appear in RelativityOne as:

- ☒ Hot
  - ☒ Really Hot
    - ☒ Super Hot
      - ☐ en fuego
  - ☐ 정
  - ☐ 박사 (Med Expert)
  - ☒ Look at Later

All checkboxes are automatically selected under each nested value. The full path to each multi-choice element is required. For example:

DocID	New Privilege
NZ997.001.00000048	04. Redact;01. Yes\b. Solicitor/Client;

appears as:

Privilege: ☒ 01. Yes

- ☐ a. Litigation
- ☒ b. Solicitor/Client
- ☐ c. Without Prejudice
- ☐ 02. No
- ☐ 03. Discuss
- ☒ 04. Redact

Manage

To select "01. Yes/a. Litigation," add it to the record after ";".

#### 4.11.2.6 Default delimiters

If you generate your own load files, you may choose to use the system defaults:

- **Column**—Unicode 020 (ASCII 020 in the application)
- **Quote**—Unicode 254 (ASCII 254 in the application)
- **Newline**—Unicode 174 (ASCII 174 in the application)
- **Multi-Value**—Unicode 059 (ASCII 059 in the application)
- **Nested Values**—Unicode 092 (ASCII 092 in the application)


#### 4.11.2.7 ZIP archive with extracted text and natives

To import any text or native file when not using Express Transfer, you need to zip the files and upload the zip file in the **Choose Load File And Location** dialog in Import/Export.

The zip file structure can be either flat or hierarchical with multiple levels of sub-folders. You must ensure that file paths in the related load file match the zip file's structure.

See below for a sample of a hierarchical zip file structure and a matching load file:



MainFolder > SubFolderTextA > SubFolderTextB	
Name	Type
 TextFile12345	Text Document

^Control Number^|^Extracted Text^|^Native File^

^DOCUMENT\_12345^|^MainFolder\SubFolderTextA\SubFolderTextB\TextFile12345.txt^|^MainFolder\SubFolderNatives\NativeFile12345.xls^

### 4.11.3 Image and extracted text files

For image imports, Import/Export requires Opticon load files with ANSI/Western European encoding. This .opt text file references the Control ID on a page level. The first page should match up to any data you intend to load. You can use this same process for importing page-level extracted text.

Import/Export does not support Unicode .opt files for image imports. When you have a Unicode .opt file, you must save it in ANSI/Western European encoding.

You must convert images in unsupported formats using a third-party conversion tool before Import/Export can successfully upload them.

#### 4.11.3.1 Supported image file formats

Import/Export accepts only the following file types for image loads:

- Single page, Group IV TIF (1 bit, B&W)
- Single page JPG
- Single page PDF
- Multi page PDF
- Multi page TIF can be imported into the system, but you must load them as native files
- Only one PDF per document is supported

#### 4.11.3.2 Load file format

The Opticon load file is a page-level load file, with each line representing one image.

Below is a sample:

```
REL00001,REL01,D:\IMAGES\001\REL00001.TIF,Y,,,3
REL00002,REL01,D:\IMAGES\001\REL00002.TIF,,,,
REL00003,REL01,D:\IMAGES\001\REL00003.TIF,,,,
REL00004,REL01,D:\IMAGES\001\REL00004.TIF,Y,,,2
REL00005,REL01,D:\IMAGES\001\REL00005.TIF,,,,
```

The fields are, from left to right:

- Field One – (REL00001) – the page identifier
- Field Two – (REL01) – the volume identifier is not required.

- Field Three – (D:\IMAGES\001\REL00001.TIF) – a path to the image to be loaded
- Field Four – (Y) – Document marker – a “Y” indicates the start of a unique document.
- Field Five – (blank) – can be used to indicate folder
- Field Six – (blank) – can be used to indicate box
- Field Seven – (3) – often used to store page count, but unused in Import/Export

#### 4.11.3.3 ZIP archive with images

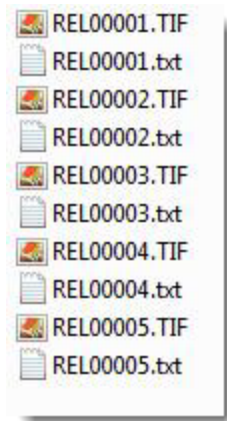
To import images when not using Express Transfer, you need to zip the image files and upload the zip file in the Choose Load File And Location dialog in Import/Export.

The zip file structure can be either flat or hierarchical with multiple levels of sub-folders. You must ensure that image file paths in the related load file match the zip file's structure.

#### 4.11.3.4 Importing extracted text during an image load

You can also import extracted text during the image import process by setting an option in Import/Export. For more information about importing extracted text during an image load, see Importing an image file via Import/Export.

No changes are needed in the Opticon load file. If the aforementioned setting is active, Import/Export looks for page level .txt files that are named identically to their corresponding TIF files. For example:



#### 4.11.4 Processed data

Some data originates from client files and needs processing to extract the metadata. The following table shows the delimiters that your internal processing software must use to present data as fields.

Value	Character	ASCII Number
Column	¶	020
Quote	”	254
Newline	®	174
Multi-Value	;	059
Nested Value	\	092

You can provide this list to your vendor to help communicate the required delivery format for load files. The fielded data should be delivered as delimited files with column or field names located in the first line.

```
pControl NumberpAttachmentpAttachment Parent IDpAuthorpCategorizationpCategorization F
pAMEYERS_0000001p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000003pK Petersonp0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000004pJ Calzasp0.64pResponsive;TAG #22872p01C9D027B28A4
pAMEYERS_0000005pdeal 539246.1 REliant HLP dms 7634/7636p
pAMEYERS_0000006p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000007p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000008p0.64pResponsive;TAG #22872p01C9D027B28A4
pAMEYERS_0000009pNEW PAC Numbersp01C9D027B2966CFD0EBEC93
pAMEYERS_0000010pDates to Keep in mindp01C9D027B29647CD3
pAMEYERS_0000011p0.76pResponsive;Accomplishments and Goals 20
pAMEYERS_0000012p0.77pResponsive;LV Cogen cut for HE 19p0
pAMEYERS_0000013p0.83pNon Responsive;Cut on TAG 23841p01C
pAMEYERS_0000014p0.89pNon Responsive;TAG 25883p01C9D027B2
pAMEYERS_0000015p0.75pNon Responsive;TAG 26235p01C9D027B2
pAMEYERS_0000016pFrontier Unit Outage for 07/21/01p01C9D
pAMEYERS_0000017pTag #27652 & 27656p01C9D027B2C0BCE9AED1
pAMEYERS_0000018pLV COGEN for 07/21/01p01C9D027B2C090D68
```

### 4.11.5 Transcript file types supported

Import/Export only supports these transcript file types: .ptf, .xmptf, .rtf, .txt, .trn, and .lef. See Uploading transcripts in the User Guide for more information on transcripts.

## 4.12 General recommendations for structured data import and export jobs

### 4.12.1 Load file import recommendations

- When using Import/Export in [web only mode](#), ensure that the full path listed in the load file is captured in the ZIP file.
- Try to limit the number of fields in a single import job to 100 to minimize risk of job failure due to SQL exception related issues.
- When importing new choice fields, you may experience the following unexpected behaviors:
  - Errors occur when importing choice fields
  - Import job for choice fields is slow

So, try to limit the number of choice values in a single import job to 100. This number indicates the maximum of new values in all choice type fields across the entire set of records.

- Extracted Text import:
  - There is no limitation or performance impact related to size of extracted text when the import is performed to Data Grid.
  - Performance and stability will be affected for extracted texts import to SQL. If there is no other option and you must use SQL, please import extracted text separately from other data fields.

- Depending on the job configuration, the extracted text import to Data Grid is 60-80% faster than similar import to SQL.
- Performance is improved when extracted text files use UTF-16 encoding.

### 4.12.2 Load file export recommendations

- Depending on the exported data structure, a Workspace folder structure can degrade performance significantly, up to 30 times slower in edge cases, so we recommend using the File Type folder structure.
- Setting too high value of the volume and sub-directory size can also cause significant performance degradation. We recommend using default settings. Default Volume Max size (MB)=650. Sub-directory Max files=500.
- Exporting images as PDFs or multi-page TIFFs is slower than exporting them as single page images.
- Exporting to a ZIP archive is significantly slower than exporting data with Express Transfer or exporting data to the Staging only.
- Exporting text files in Unicode (UTF-16) encoding is faster than in other encodings.

## 4.13 Express Transfer overview

Express Transfer is an integral part of Import/Export workflows when [activated](#) for use with Import/Export. Using Express Transfer with Import/Export is the recommended method of transferring data in Relativity. The Express Transfer application is designed especially for transferring large structured and unstructured data files greater than 20 GB; however, it can be used for any data size.

Using the application with Import/Export helps reduce the time and effort it takes to transfer data in Relativity. For additional information on performance considerations when transferring data using desktop applications, see [Data transfer performance considerations on page 63](#)

Express Transfer is a separately [installed](#) desktop application that operates outside of RelativityOne. Although you are accessing and using Import/Export within RelativityOne to process transfer jobs, it is the activated Express Transfer application that is handling the actual data transfer process in the background to and from RelativityOne and the staging area or local disk. You can monitor import and export job transfers [through the Express Transfer application](#) as well as from the [Import/Export Jobs page](#).

To ensure that you always have the most recent version and features of Express Transfer, the default update setting is configured to automatically prompt you when a new version is available. We recommend keeping this setting enabled. See [Installing and updating Express Transfer desktop application on page 50](#) for more information. You can manually check for updates anytime by right-clicking the Express Transfer icon in your system tray. See [Express Transfer system tray menu on page 64](#) for more information.

### 4.13.1 Prerequisites

To use Import/Export with Express Transfer, the following must be completed in this order:

1. Import/Export application must be installed in the workspace from the Application Library. Refer to Installing Import/Export for more information.
2. Express Transfer desktop application must be installed on your computer. Refer to Installing Express Transfer for more information.

- Express Transfer must be activated within Import/Export. Refer to [Activating Express Transfer](#) for more information.

### 4.13.2 Considerations when to use and not use Express Transfer with Import/Export

We recommend using Import/Export *with* Express Transfer activated whenever possible for all importing and exporting workflows, and particularly when:

- data file size is greater than 20 GB (although Express Transfer can be used for any size data transfer).
- processing multiple import jobs. The jobs will be queued and executed when the previous job is complete.
- slow or unstable network connection. Express Transfers enables you to retry the upload.

Use Import/Export *without* activating Express Transfer when:

- your company policy prohibits installing desktop applications.
- your network configuration does not allow third party applications to send or receive data, such as proxy settings.
- data file size is less than 20 GB.
- data is in ZIP files.

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**Note:** You need to use Express Transfer to upload and process encrypted materials, such as password-protected zip files or Case files (L01/N01) that require Password Bank functionality. If you cannot use Express Transfer for such imports, zip your encrypted materials in a single unencrypted ZIP container (the 20 GB limit for the zip file size applies). Import/Export will transfer and extract the top-level zip file, preparing your encrypted materials for Processing. Then, Processing will utilize Password Bank to decrypt materials.

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[page](#) for more information. You can manually check for updates anytime by right-clicking the Express Transfer icon in your system tray. See [Express Transfer system tray menu on page 64](#) for more information.

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1. Import/Export application must be installed in the workspace from the Application Library. Refer to Installing Import/Export for more information.
2. Express Transfer desktop application must be installed on your computer. Refer to Installing Express Transfer for more information.
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- data file size is greater than 20 GB (although Express Transfer can be used for any size data transfer).
- processing multiple import jobs. The jobs will be queued and executed when the previous job is complete.
- slow or unstable network connection. Express Transfers enables you to retry the upload.

Use Import/Export *without* activating Express Transfer when:

- your company policy prohibits installing desktop applications.
- your network configuration does not allow third party applications to send or receive data, such as proxy settings.
- data file size is less than 20 GB.
- data is in ZIP files.

---

**Note:** You need to use Express Transfer to upload and process encrypted materials, such as password-protected zip files or Case files (L01/N01) that require Password Bank functionality. If you cannot use Express Transfer for such imports, zip your encrypted materials in a single unencrypted ZIP container (the 20 GB limit for the zip file size applies). Import/Export will transfer and extract the top-level zip file, preparing your encrypted materials for Processing. Then, Processing will utilize Password Bank to decrypt materials.

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#### 4.13.4 Installing and updating Express Transfer desktop application

The Express Transfer application must be installed on your computer in order to use it with Import/Export workflows. The instructions below can be used for both Microsoft Windows and Apple macOS installations. You can configure preferences to automatically check for new software versions or you can check for them manually. We recommend keeping the default setting to enable the system to automatically check for new software versions to ensure you're using the latest software features available.

For additional information on performance considerations when transferring data using desktop applications, see [Data transfer performance considerations on page 63](#)

#### 4.13.4.1 Requirements

Refer to the sections below for the necessary requirements for Express Transfer.

##### System requirements

To use Express Transfer, your computer must meet the following minimum system requirements:

System Configuration	Requirement
Operating system	MS Windows 10, MS Windows 11, or Apple macOS
Windows Server operating system	Windows Server 2019 or Windows Server 2022
System memory	4 GB RAM, recommended 8 GB RAM

##### Port access

Express Transfer requires TCP port 443 to be open to the public internet to transfer data. For further assistance, please contact your IT Department. Also refer to the Express Transfer Application - Required Ports article in Community for additional DNS address information.

#### 4.13.4.2 Prerequisites

To use Express Transfer, the following must be completed in this order:

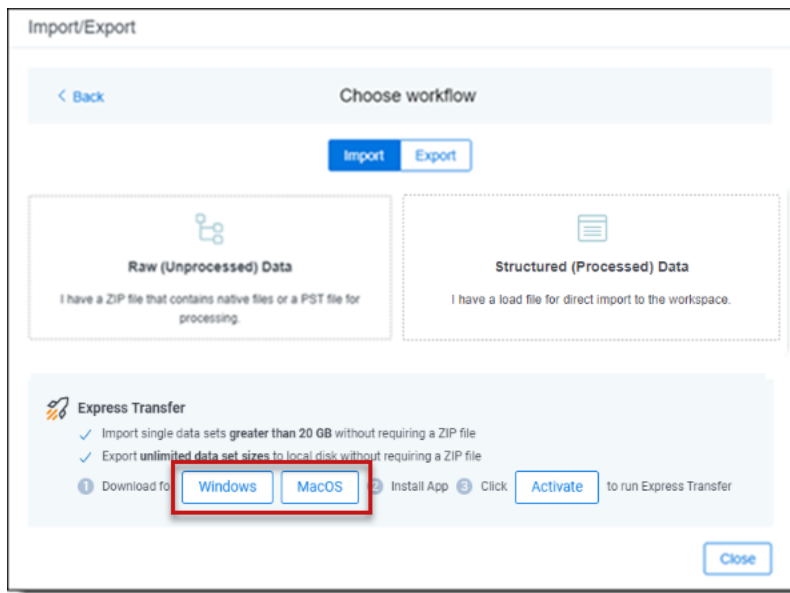
1. Import/Export application must be installed in the workspace from the Application Library. Refer to Installing Import/Export for more information.
2. Express Transfer desktop application must be installed on your computer. Refer to Installing Express Transfer for more information.
3. Express Transfer must be activated within Import/Export. Refer to Activating Express Transfer for more information.

#### 4.13.4.3 Installing Express Transfer

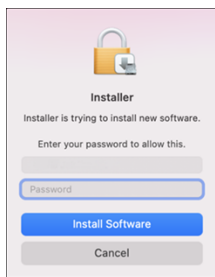
To install the Express Transfer application on your computer for use with Import/Export:

1. Navigate to the **Import/Export Job** page.
2. Click the **New Import/Export Job** button.
3. Depending on the operating system used, click the **Windows** or **MacOS** button to download the installer file.





**Note:** For macOS systems, you need to have administrative privileges to use and install the software, as well as to receive automatic software updates. On the Installer dialog, enter your user name and password, then click **Install Software**.



4. Navigate to the folder on your computer where the installer file was downloaded. Depending on the operation system, double-click one of the following files to begin the installation process:
  - For Windows OS: **Express Transfer Setup.exe**
  - For macOS: **Express Transfer Setup.pkg**
5. Click one of the options on the Select Setup Install Mode dialog:
  - **Install for me only (recommended)**—enables Express Transfer to be used by your account only.
  - **Install for all users**—enables Express Transfer to be used by anyone who logs on to this computer. You will need Admin credentials to select this option.
6. Click **Next**.
7. Use the default destination folder already displayed or click **Browse** to select a different location for the Express Transfer application.
8. Click **Next**.
9. (Optional) On the Select Additional Tasks dialog, do any of the following:

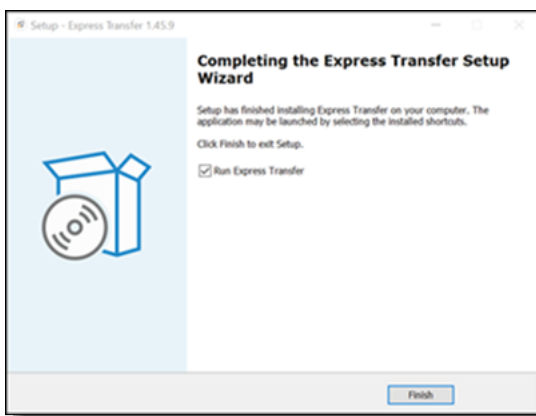


- **Autostart Express Transfer on system startup**—select this check box to automatically launch the Express Transfer application each time your computer starts. Leave it blank if you want to manually launch Express Transfer when you want to use it.
  - **Create a desktop shortcut**—select this checkbox to create a shortcut icon on your desktop for Express Transfer. Otherwise, leave it blank.
10. Click **Next**.
  11. Click **Install** on the Ready to Install dialog to begin the installation process.
  12. When the installation is complete, click **Finish** to close the installation wizard. Express Transfer is now installed.


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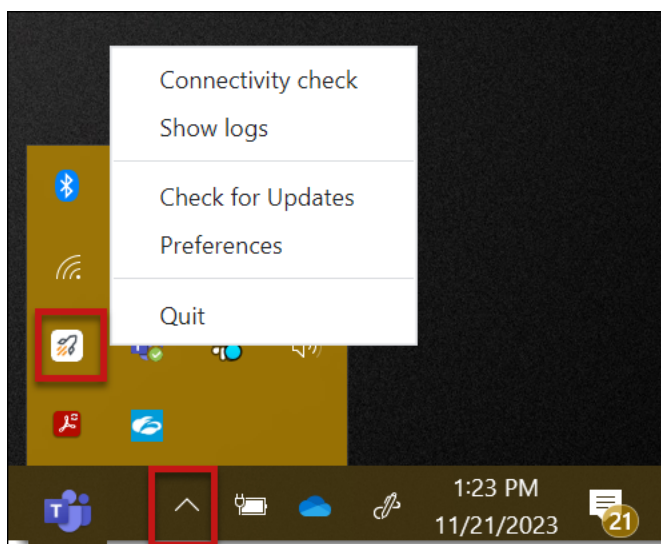
**Note:** To use Express Transfer for import and export workflows, you must activate it within Import/Export. See [Activating Express Transfer](#) for more information.

---



If you selected the **Run Express Transfer** checkbox on the finish setup dialog of the wizard, the Express

Transfer application will open and its  icon will be available in the system tray. Right-click on the icon to display an application menu with these options:



- **Connectivity check**—choose this option to check if Express Transfer is successfully accessing the Internet and the Import/Export application. See [Express Transfer Connectivity check](#) for more information.
- **Show logs**—choose this option if instructed to do so by Relativity Support to investigate or troubleshoot an issue with Express Transfer transaction logs and text files. File explorer will open the logs folder on your local drive (for example, C:\Users\<username>\AppData\Local\Express Transfer\logs). With Express Transfer open, you can also press F8 to display the logs folder.
- **Check for Updates**—choose this option if you want to manually check to see if your version is up-to-date or if a new version of Express Transfer is available. See [Manually checking for software updates on page 59](#) for more information.
- **Preferences**—choose this option to modify the application settings. You can also view the software version number from this dialog.
- **Quit**—choose this option to completely exit the Express Transfer application. The Express Transfer icon will no longer display in the system tray. To reopen Express Transfer, double-click on its desktop shortcut, if you saved one for it, or select it from your computer's list of programs.

#### 4.13.4.4 Silent installation of Express Transfer

In some organizations, the IT department or System Administrator may be the one to install the Express Transfer desktop application installer file behind the scenes over a network instead of having each end user do it themselves on their individual desktop. This method is often referred to as a silent, or unattended, installation because it requires no end user interaction with the installation wizard. The Express Transfer end user is not aware that the installation process is occurring. Typically, this type of installation is used in large enterprise organizations to help control the software installation process to ensure that it's done consistently so that all users have the same installation configuration.

When installing Express Transfer from command line tools, we support **silent** and **verysilent** mode:

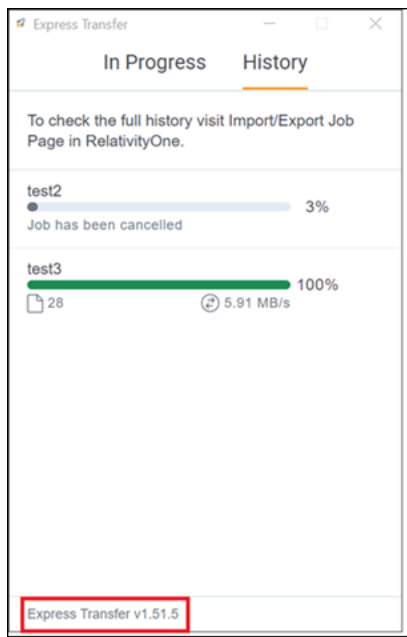
- **/silent**—this option displays the installation wizard as it goes through the installation process. All the default options are automatically selected.
- **/verysilent**—this option does not display the installation wizard as it goes through the installation process. All default options are selected automatically.

#### Prerequisites


- Administrator rights to run the command prompt.
- Knowledge of how to use command line interface (CLI) tools.
- Obtain the downloaded Express Transfer installer file for Windows OS, which is **Express Transfer Setup.exe**. See [Installing Express Transfer](#) for more information on how to download the file using the Import/Export application.

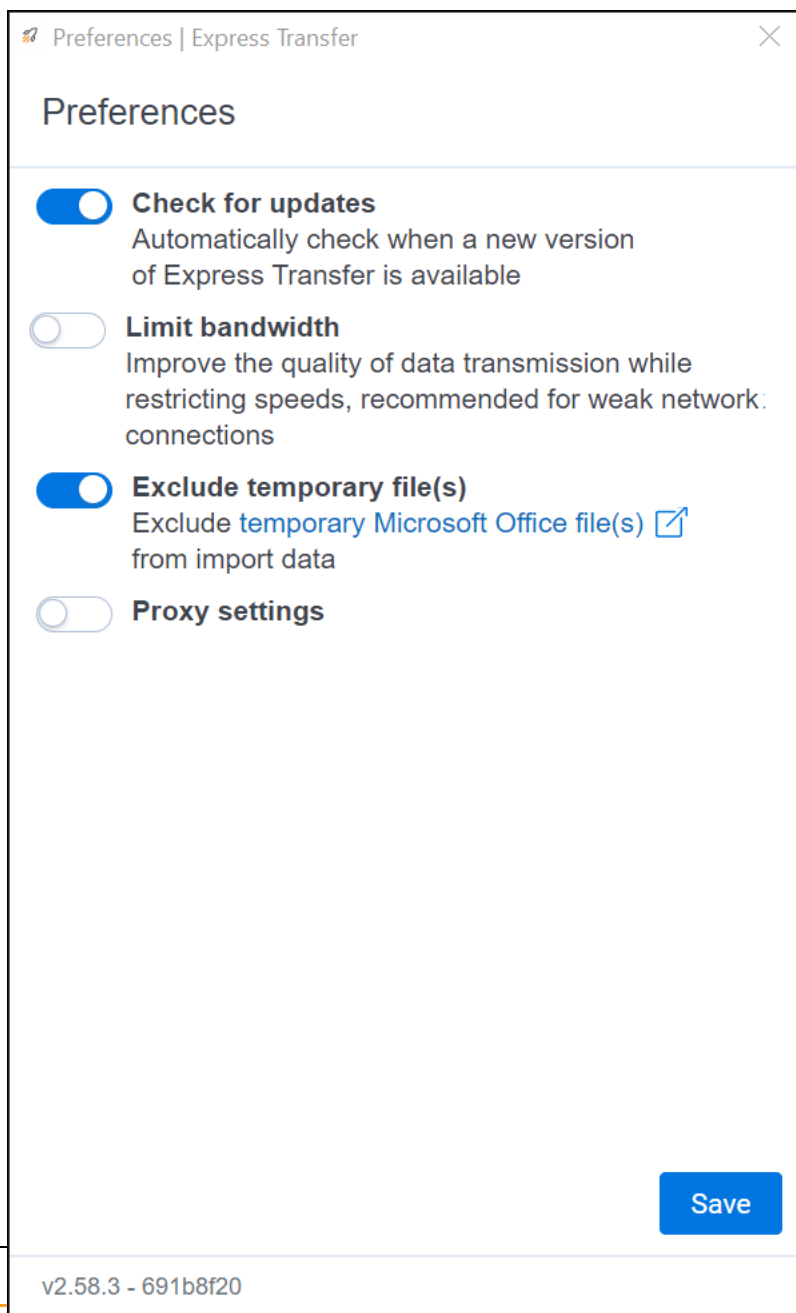
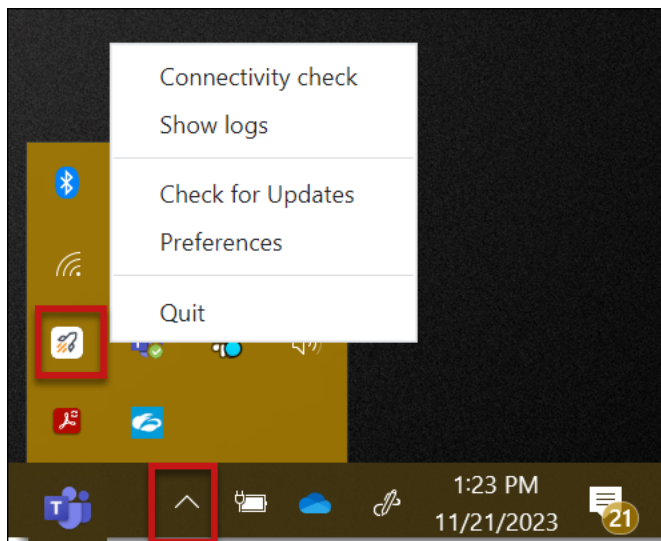
#### 4.13.4.5 Locating the Express Transfer version number

The Express Transfer version number is displayed at the bottom of the **In Progress** and **History** tabs within the application.



You can also find it in the bottom left corner of the Preferences dialog by right-clicking on the **Express**

**Transfer**  icon in the system tray and selecting **Preferences**.



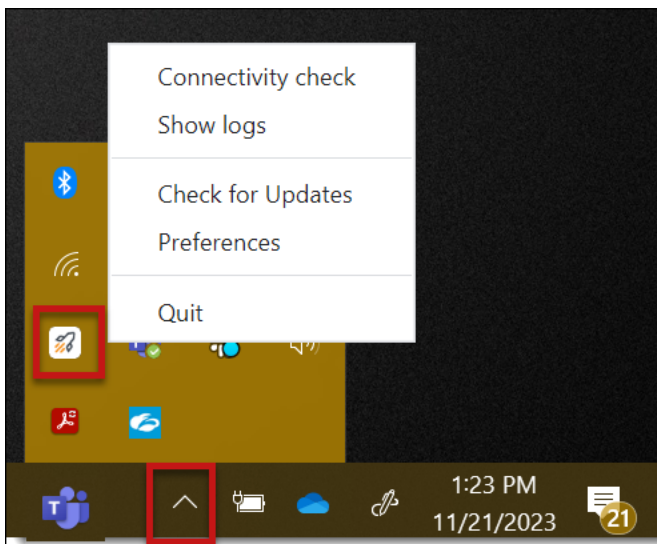
The Express Transfer software version number is contained in the first few numbers after the "v", for example "v2.49.0." The numbers after the hyphen are session identifiers that change each time you launch Express Transfer after quitting the application. These numbers may be used by Customer Support if you encounter a problem with the software. You can disregard them otherwise.

#### 4.13.4.6 Automatically checking for software updates

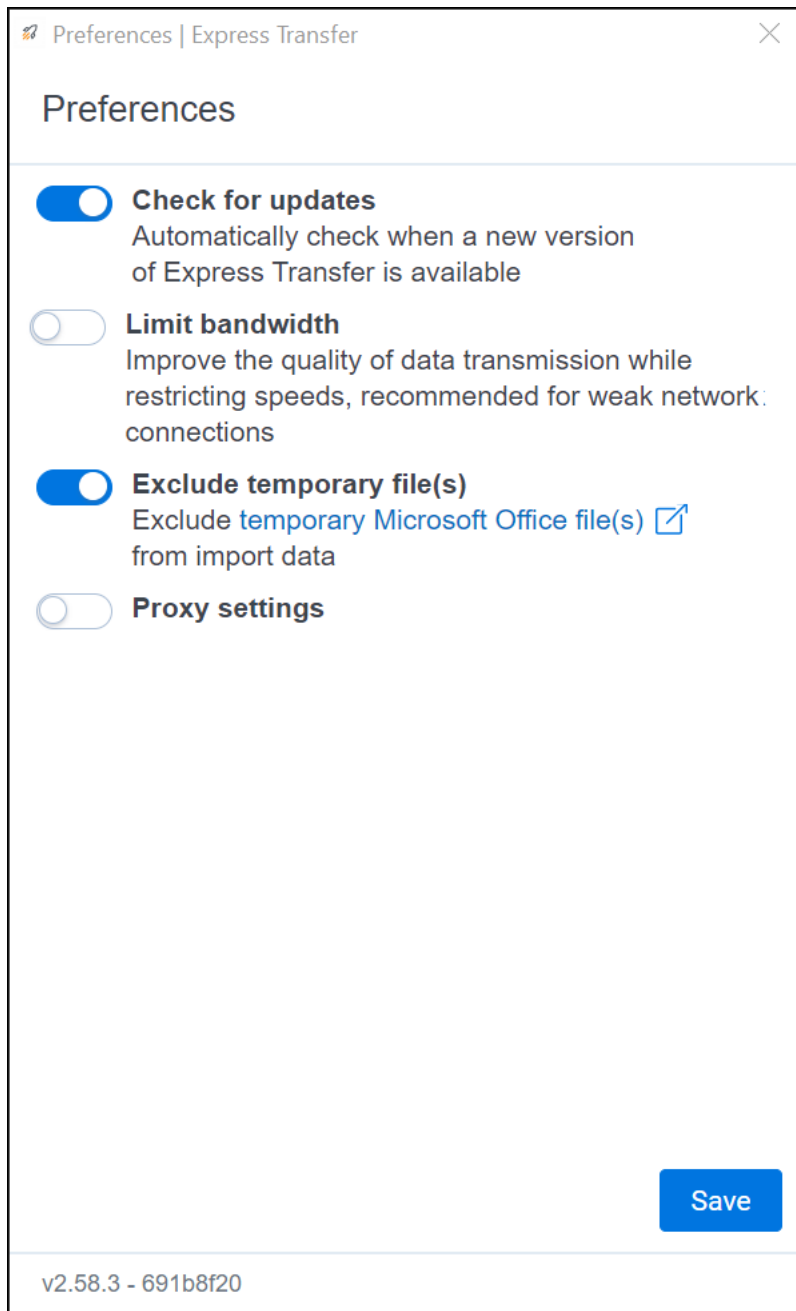
You can configure whether or not you want the system to automatically check for new software versions of Express Transfer each time it opens and notify you with a message box. By default, this feature is enabled in Express Transfer Preferences. We recommend that you keep it enabled to ensure your system is running the latest software version containing the most recent software features available. If you choose to change this default setting, you will need to use the Check for Updates option in the Express Transfer system tray. See [Manually checking for software updates on page 59](#) for more information.

To automatically check for software updates:

1. Right-click on the **Express Transfer**  icon in your system tray.



2. Click **Preferences**.




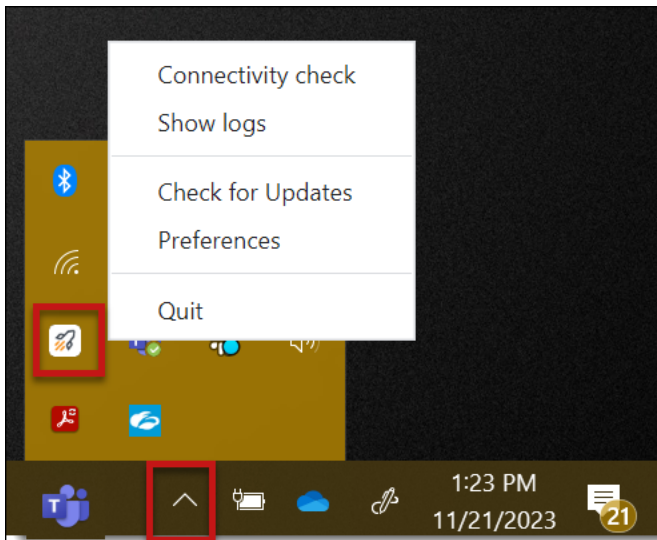
3. By default, the **Check for Updates** is toggled on. If you do not want the system to automatically check for updates and notify you, toggle it off.

---

**Note:** We do not recommend turning this option off. If it is off, your Express Transfer version may not contain the latest features. If it is off, you will need to regularly use the Check for Updates option in the Express Transfer system tray to determine if your software version is current. See [Manually checking for software updates on the next page](#) for more information.

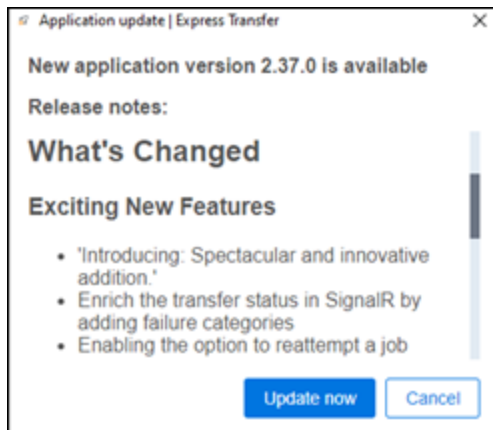
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4. Click **Save** after updating the setting.
5. To apply any changes made to Preferences, quit the Express Transfer application by right-clicking on the **Express Transfer**  icon in your system tray and clicking **Quit**.




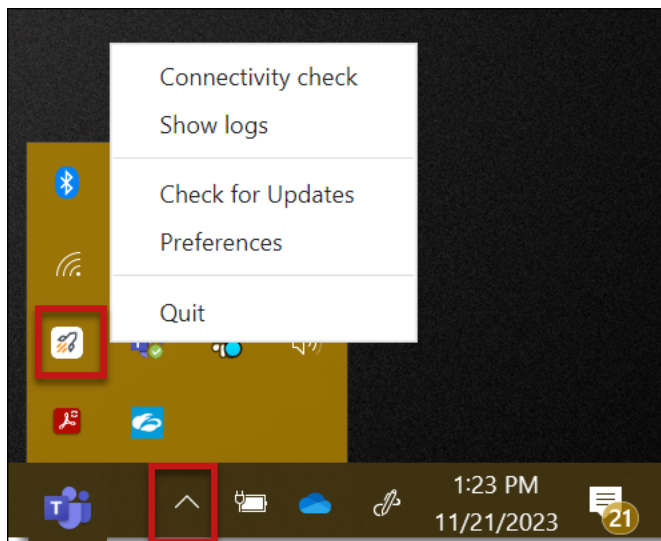
6. Reopen the application by double-clicking on its desktop shortcut, if you saved one for it, or select it from your computer's list of programs.

Whenever a new version is available, you'll be notified with an Application update dialog displaying the new version number available and release notes for it. Click **Update now** to download the new version's executable file, and then follow the [Installing Express Transfer on page 51](#) steps to finish installing the update on your system.

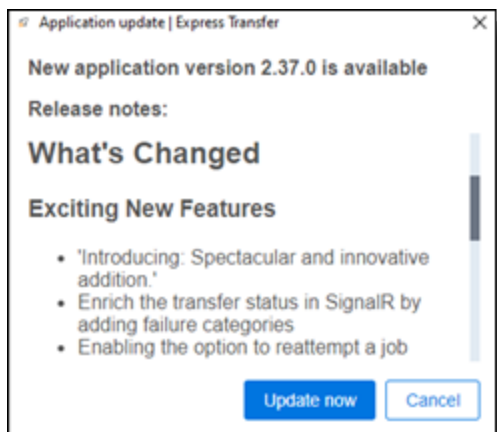


#### 4.13.4.7 Manually checking for software updates

You can check for software updates anytime by right-clicking on the **Express Transfer**  icon in your system tray and clicking **Check for Updates**. If your software version is current, a message displays letting you know it's up-to-date.



If a new version is available, the Application update window displays the new version number available and release notes for it. Click **Update now** to download the new version's executable file, and then follow the [Installing Express Transfer on page 51](#) steps to finish installing the update.



#### 4.13.5 Activating and deactivating Express Transfer

You have the ability to activate and deactivate Express Transfer for use with Import/Export; however, the recommended method for transferring data is with Express Transfer activated.

##### 4.13.5.1 Prerequisites

To use Express Transfer, the following must be installed in this order:

1. Import/Export application must be installed first in the workspace from the Application Library. Refer to Installing Import/Export for more information.
2. Express Transfer desktop application must be installed on your computer. Refer to Installing Express Transfer for more information.



#### 4.13.5.2 Considerations when to use and not use Express Transfer with Import/Export

We recommend using Import/Export *with* Express Transfer activated whenever possible for all importing and exporting workflows, and particularly when:

- data file size is greater than 20 GB (although Express Transfer can be used for any size data transfer).
- processing multiple import jobs. The jobs will be queued and executed when the previous job is complete.
- slow or unstable network connection. Express Transfers enables you to retry the upload.

Use Import/Export *without* activating Express Transfer when:

- your company policy prohibits installing desktop applications.
- your network configuration does not allow third party applications to send or receive data, such as proxy settings.
- data file size is less than 20 GB.
- data is in ZIP files.

---

**Note:** You need to use Express Transfer to upload and process encrypted materials, such as password-protected zip files or Case files (L01/N01) that require Password Bank functionality. If you cannot use Express Transfer for such imports, zip your encrypted materials in a single unencrypted ZIP container (the 20 GB limit for the zip file size applies). Import/Export will transfer and extract the top-level zip file, preparing your encrypted materials for Processing. Then, Processing will utilize Password Bank to decrypt materials.

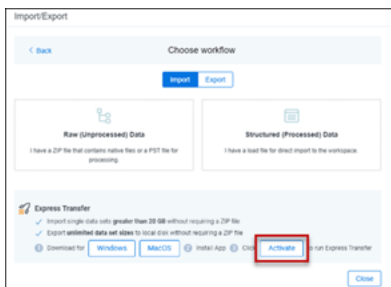
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#### 4.13.5.3 Activating Express Transfer

To use Import/Export with Express Transfer, you need to activate Express Transfer. Once activated, it will remain active until your Relativity session ends or until you [deactivate](#) it.

To activate Express Transfer for use with Import/Export:

1. Navigate to the **Import/Export Job** page.
2. Click the **New Import/Export Job** button to start a new job.
3. Click **Activate** on the Choose workflow dialog to activate Express Transfer.

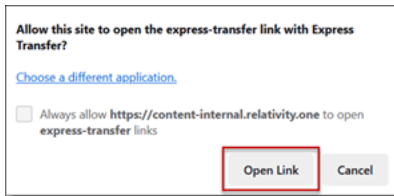


4. If a browser message box appears asking to allow the site to open Express Transfer, click **Open Link** to proceed with activating Express Transfer. If you do not, then Express Transfer will not be activated.

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**Note:** To always allow your system to open the link to Express Transfer, select the "Always allow" checkbox, and the message box will not display anymore.

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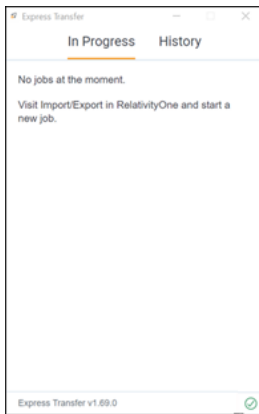


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**Note:** If the activation process fails, click the **Complete activation** button on the message that displays to initiate the activation process. Refer to [Express Transfer Connectivity check on page 76](#) for more information on connection status information.

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5. When the activation process successfully completes, the Express Transfer application displays.

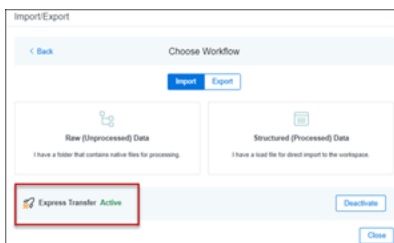


6. Return to the Import/Export application. The Express Transfer status will change to **Active** on the Choose Workflow dialog.

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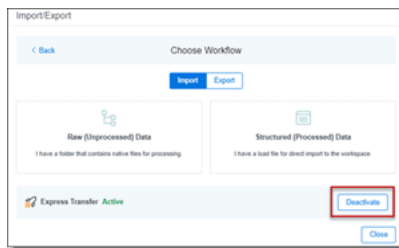
**Note:** The Express Transfer application will remain active until you click the Deactivate button or log out of RelativityOne. You do not need to keep reactivating it to use it. However, if you [deactivate](#) it or log out of RelativityOne, you will need to reactivate Express Transfer to use it again with Import/Export.

---



#### 4.13.5.4 Deactivating Express Transfer

If you do not want to use an active session of Express Transfer with Import/Export, you can click the **Deactivate** button on the Choose Workflow dialog.



In order to use Express Transfer again with Import/Export, you will need to [reactivate](#) it.

#### 4.13.5.5 Data transfer performance considerations

There are many variables that can degrade or improve the performance of data transfers for desktop applications, such as Express Transfer. Transfer rates when using desktop applications are influenced by several variables and results may vary based on factors such as RAM, CPU, local drive specifications, network drive specifications, and available bandwidth at the time of the transfer.

Review the list of performance considerations below before beginning to use Express Transfer. If you experience issues despite following the information below, please contact Support for assistance. For additional information, refer to the Community article [Performance considerations for data transfers](#).

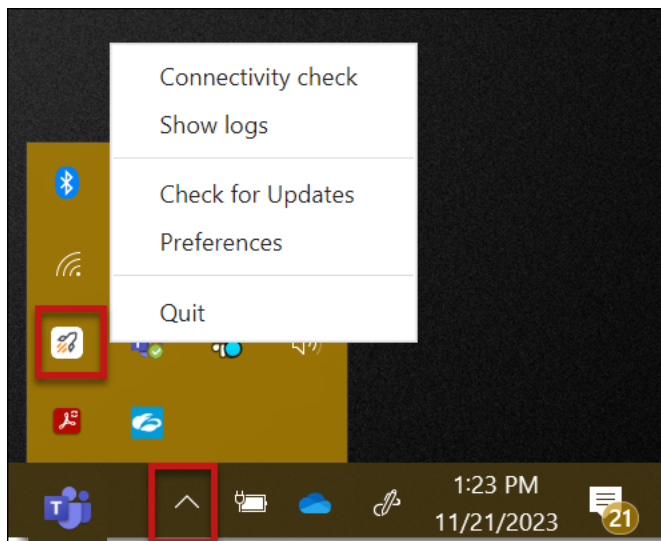
- **Run on local machine:** Express Transfer has been designed and tested as a desktop application being run on a user's local machine.
- **Read access:** Ensure that Express Transfer has read access to all files/folders (remove system / hidden attributes).
- **Port 443:** Ensure that port 443 is open to the public internet and is not blocked or traffic is restricted to it. See the Community article [Performance considerations for data transfers](#) for more information.
- **Internet connection:** Use a strong and stable internet connection for data transmission. Wi-Fi is not recommended.
- **Internet speed:** Transfer speeds are dependent on your internet speeds. Check your internet connection using [Speedtest](#) or any other bandwidth testing website. Make note of the upload speed in megabits per second. Also refer to Express Transfer [Limit bandwidth](#) setting if needed.
- **Local storage speed:** Transfers from network drives or external disks (such as thumb drives/USB drives) will degrade performance and/or cause issues maintaining a connection. It is most effective to copy data to and from a fast local storage.
- **Local machine specs:** Ensure your local machine and browser adheres to the Express Transfer minimum [system requirements](#) and is operating the latest version of the software.
- **Level of data fragmentation:** Due to bandwidth sharing, avoid performing large and fragmented transfers in parallel. The more fragmented the dataset, the lower the transfer performance.
- **Concurrent transfers:** Number of concurrent transfers that are happening at the same time within the network by various tools, services, and users.
- **Concurrent utilization:** Level of concurrent utilization of the user's computer resources (CPU, RAM, I/Os) by other processes on that computer.
- **Compressed datasets:** Avoid compressing datasets (with ZIP, 7z, etc.). The faster transfer time due to fewer multi-part files is negated by the time and effort to compress and decompress data.

However, compressing datasets without decompressing in the destination folder (staging directory) can be considered when all the following are true:

- Dataset consist of fragmented data
  - Destination folder is a Processing source location
  - The dataset uploaded is going to be processed by Relativity Processing
- **VPN usage:** Using a VPN can potentially slow down internet traffic. When workstations use a VPN session, it can interfere with transfers from that workstation. RelativityOne is hosted in a public cloud and does not require VPN to use. See the Community article [Performance considerations for data transfers](#) for more information.
  - **Traffic monitoring and data protection software:** These types of software tools influence data transfer. See the Community article [Performance considerations for data transfers](#) for more information on each of these:
    - **Firewall:** Firewall configuration may require special tuning to use the Express Transfer.
    - **Antivirus software:** Antivirus software may disrupt the transfer protocol in Express Transfer.
    - **Anti-malware software:** An exception should be created for Express Transfer in Windows Defender or in other anti-malware software installed on the user's machine.

#### 4.13.6 Express Transfer system tray menu

Once the Express Transfer application is installed, its  icon will be available in the system tray. Right-click on the icon to display an application menu with these options:



- **Connectivity check**—click this option to check if Express Transfer is successfully accessing the Internet and the Import/Export application. See [Express Transfer Connectivity check](#) for more information.
- **Show logs**—click this option if instructed to do so by Relativity Support to investigate or troubleshoot an issue with Express Transfer transaction logs and text files. File explorer will open the logs folder on your local drive (for example, C:\Users\<username>\AppData\Local\Express Transfer\logs). With Express Transfer open, you can also press the F8 key on your keyboard to display the logs folder.
- **Check for Updates**—click this option if you want to manually check to see if your version is up-to-date or if a new version of Express Transfer is available. See [Manually checking for software updates on page 59](#) for more information. If you do not have Express Transfer Preferences set to automatically check for updates, you will need to use this option frequently to ensure your version of Express Transfer is the most current one available. We recommend keeping the Check for updates option in Express Transfer Preferences toggled on. See [Installing and updating Express Transfer desktop application on page 50](#) for more information.
- **Preferences**—click this option to modify the application settings. You can also view the software version number from this dialog. See [Express Transfer Preferences below](#) for more information.
- **Quit**—choose this option to completely exit the Express Transfer application. The Express Transfer icon will no longer display in the system tray. To reopen Express Transfer, double-click on its desktop shortcut, if you saved one for it, or select it from your computer's list of programs.

## 4.13.7 Express Transfer Preferences

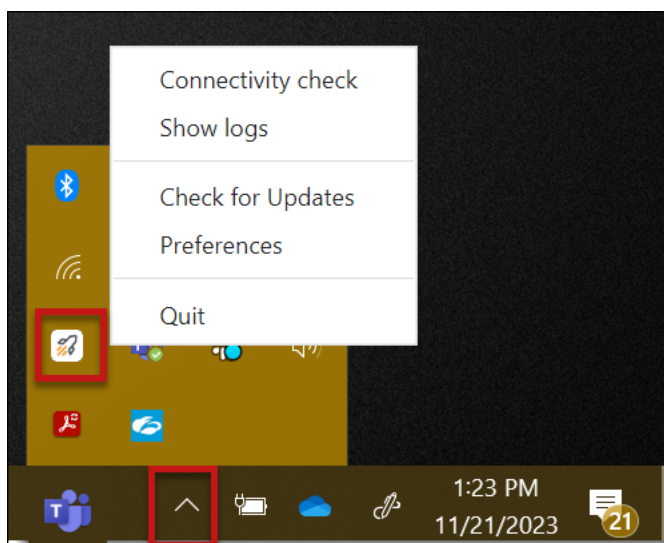
Use Express Transfer Preferences to modify the Check for Updates setting, to limit bandwidth, to exclude temporary Microsoft Office files from data import, and to configure proxy settings.

### 4.13.7.1 Automatically checking for software updates

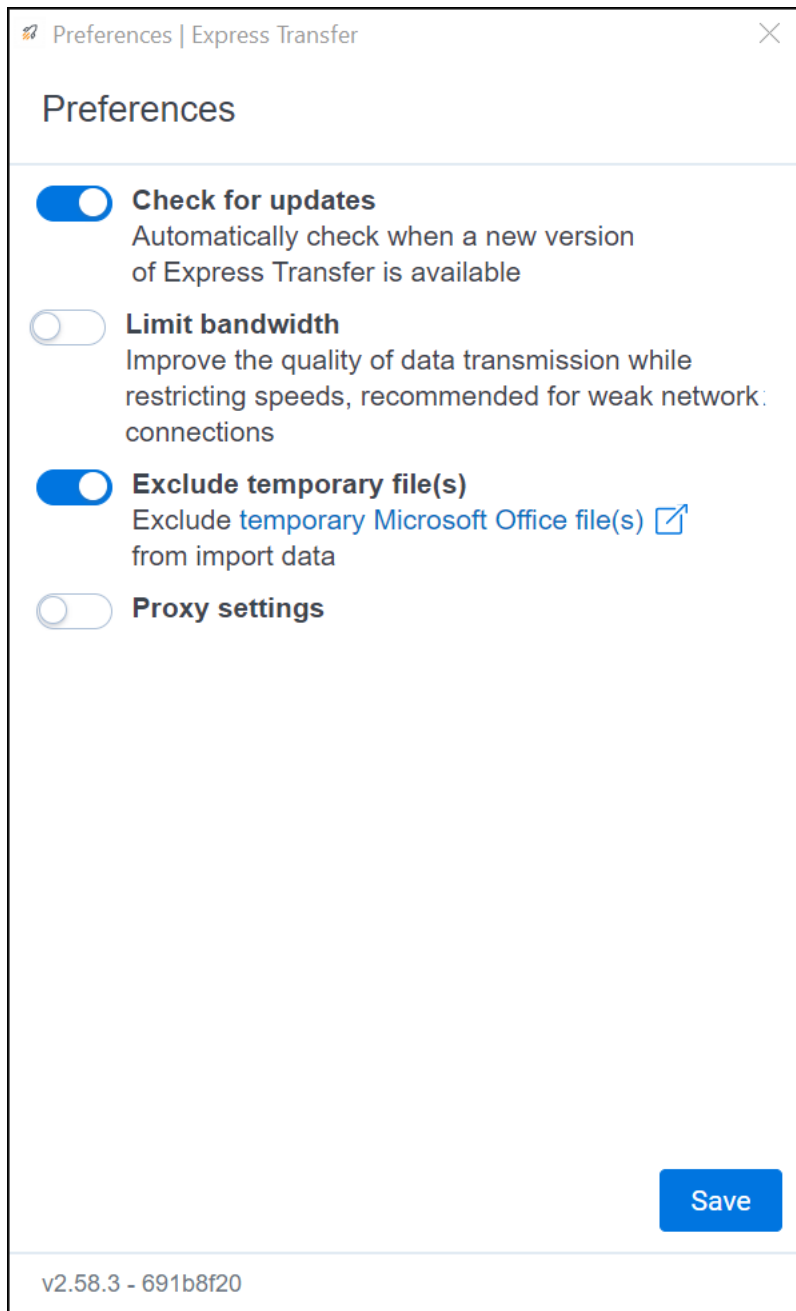
You can configure whether or not you want the system to automatically check for new software versions of Express Transfer each time it opens and notify you with a message box. By default, this feature is enabled in Express Transfer Preferences. We recommend that you keep it enabled to ensure your system is running the latest software version containing the most recent software features available. If you choose to change this default setting, you will need to use the Check for Updates option in the Express Transfer system tray. See [Manually checking for software updates on page 59](#) for more information.

To automatically check for software updates:

1. Right-click on the **Express Transfer**  icon in your system tray.



2. Click **Preferences**.




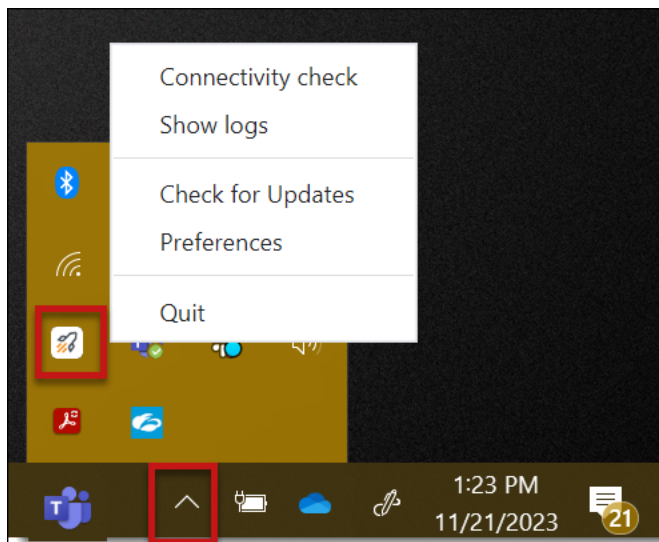
3. By default, the **Check for Updates** is toggled on. If you do not want the system to automatically check for updates and notify you, toggle it off.

---

**Note:** We do not recommend turning this option off. If it is off, your Express Transfer version may not contain the latest features. If it is off, you will need to regularly use the Check for Updates option in the Express Transfer system tray to determine if your software version is current. See [Manually checking for software updates on page 59](#) for more information.

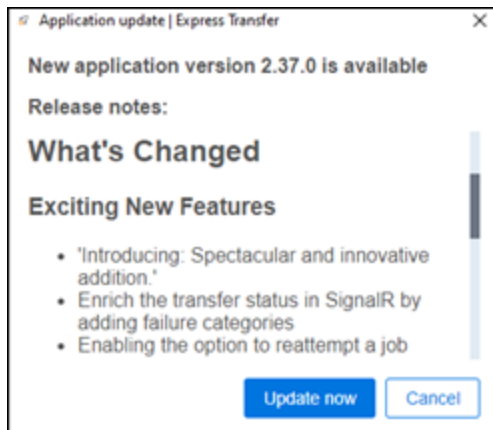
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4. Click **Save** after updating the setting.
5. To apply any changes made to Preferences, quit the Express Transfer application by right-clicking on the **Express Transfer**  icon in your system tray and clicking **Quit**.



6. Reopen the application by double-clicking on its desktop shortcut, if you saved one for it, or select it from your computer's list of programs.

Whenever a new version is available, you'll be notified with an Application update dialog displaying the new version number available and release notes for it. Click **Update now** to download the new version's executable file, and then follow the [Express Transfer Preferences on page 65](#) steps to finish installing the update on your system.



#### 4.13.7.2 Limit bandwidth

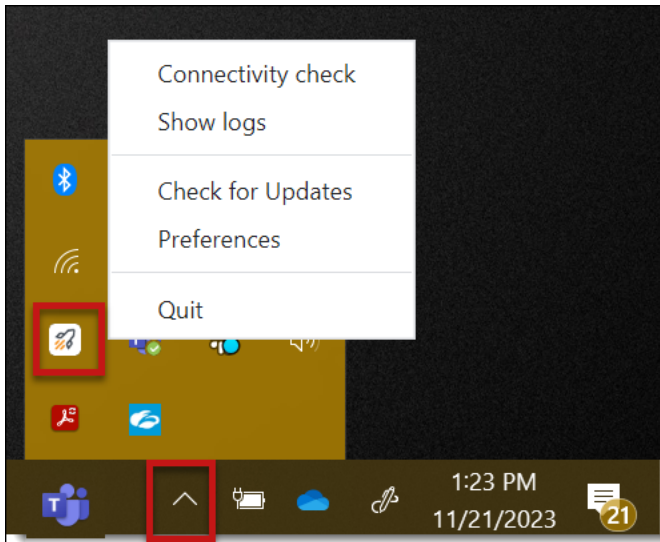
Some organizations may have slow internet speeds and experience issues with transfer job stability causing jobs to fail due to connection timeouts. In this situation, the organization may want to limit bandwidth so that it's shared with Import/Export transfers and other business activities. This may help improve the efficiency and stability of job transfers. Limiting bandwidth can be configured in Express



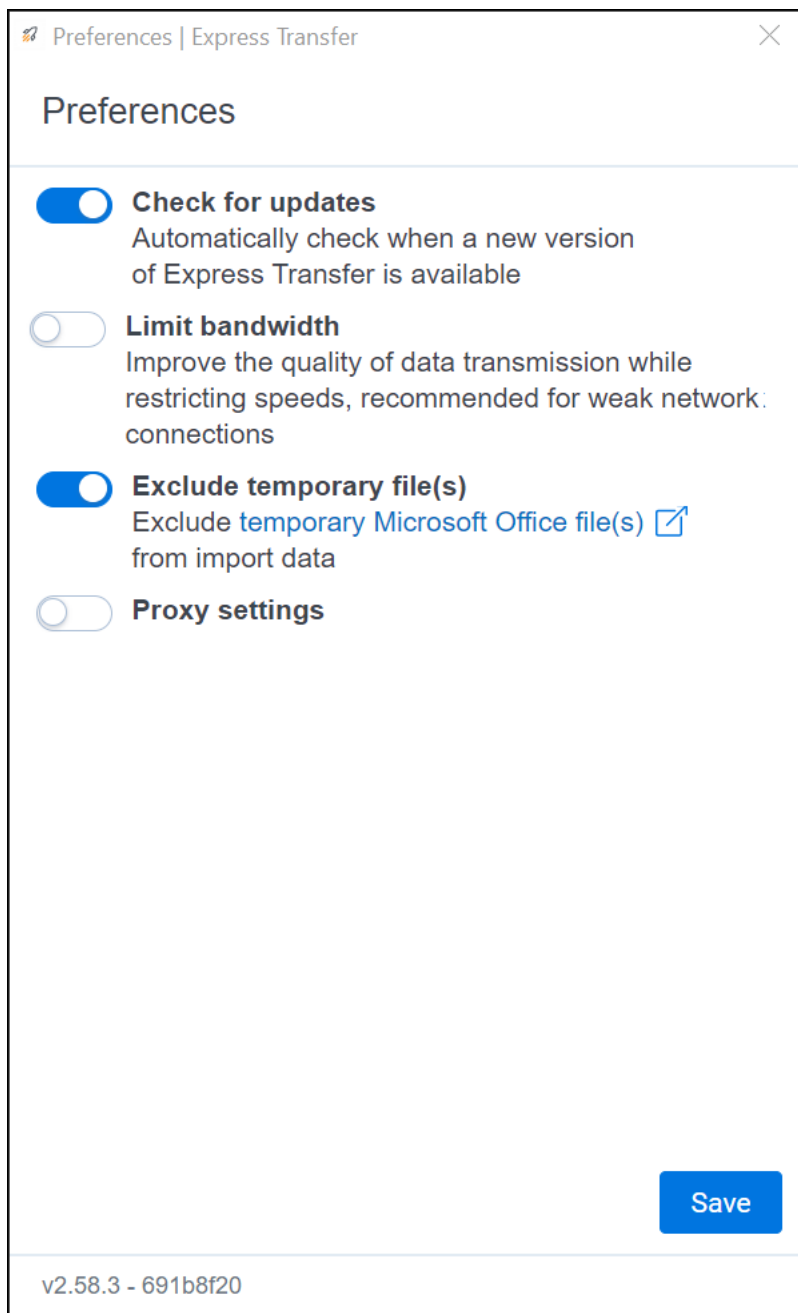
Transfer by turning on the **Limit bandwidth** option in Preferences. When this option is on, Express Transfer job transfers will be slower, but more stable.


To configure Limit bandwidth:

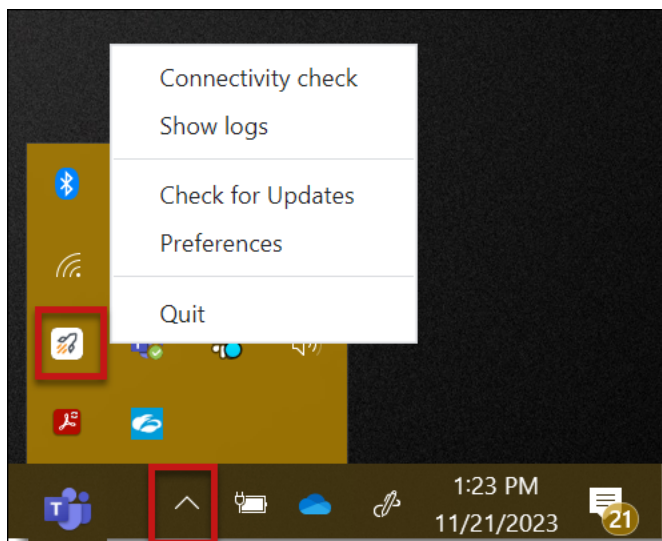
1. Right-click on the **Express Transfer**  icon in your system tray.



2. Click **Preferences**.



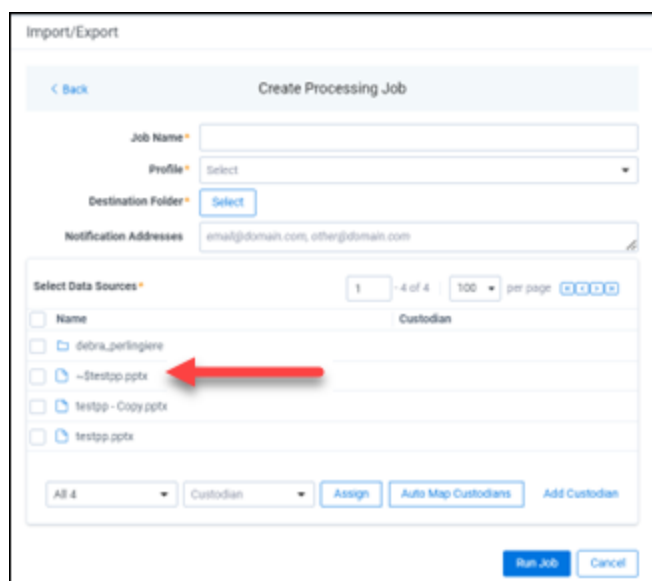
3. The **Limit bandwidth** option is off by default. If you wish to turn the option on, click the toggle.
4. Click **Save** after updating the setting.
5. To apply any changes made to Preferences, quit the Express Transfer application by right-clicking on the **Express Transfer**  icon in your system tray and clicking **Quit**.



6. Reopen the application by double-clicking on its desktop shortcut, if you saved one for it, or select it from your computer's list of programs.

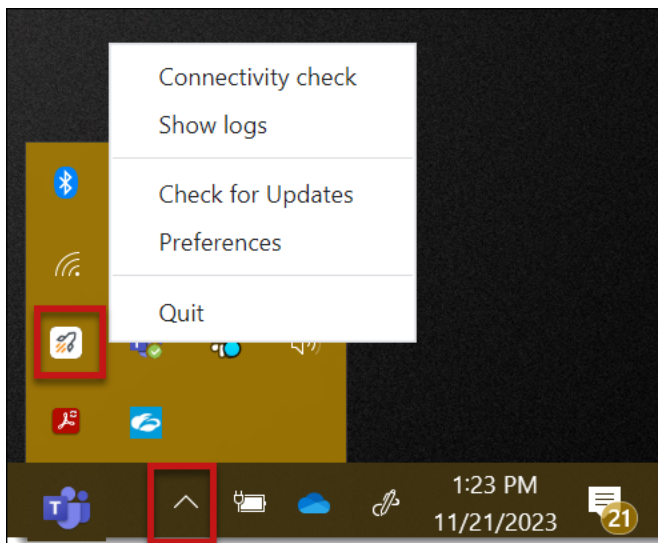
#### 4.13.7.3 Exclude temporary Microsoft Office files from data import

Whenever you open a Microsoft Office file, a temporary file is created which contains a ~ (tilde) sign at the beginning of the file name. When you're [importing unprocessed data for Processing](#) and selecting the data source on the [Create Processing Job dialog](#), these temporary files will display in the file list and will also be included in the data import process. To prevent these temporary files from being included in the import process, the **Exclude temporary file(s)** option defaults to the On position in Express Transfer Preferences. If you wish to change that setting and include those temporary files, refer to the steps below.

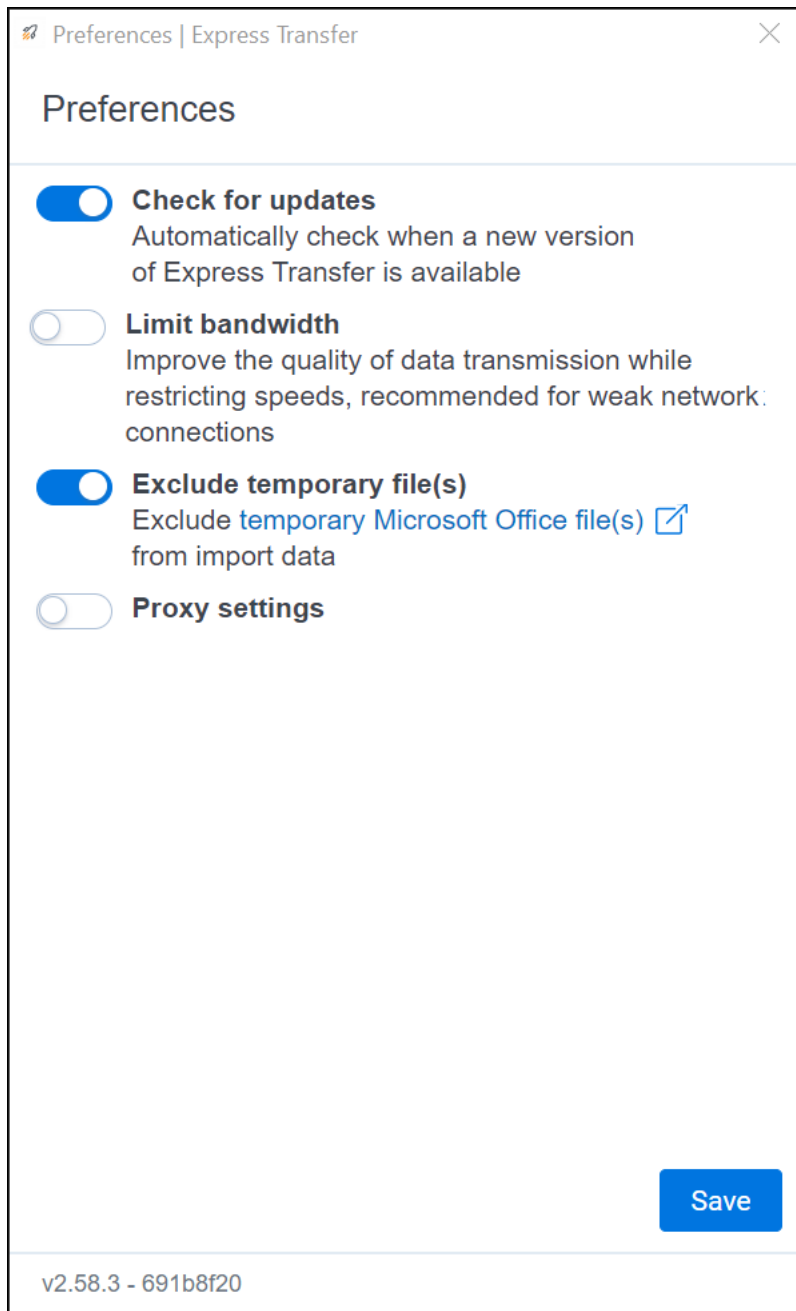



To include temporary Microsoft Office files in import jobs:

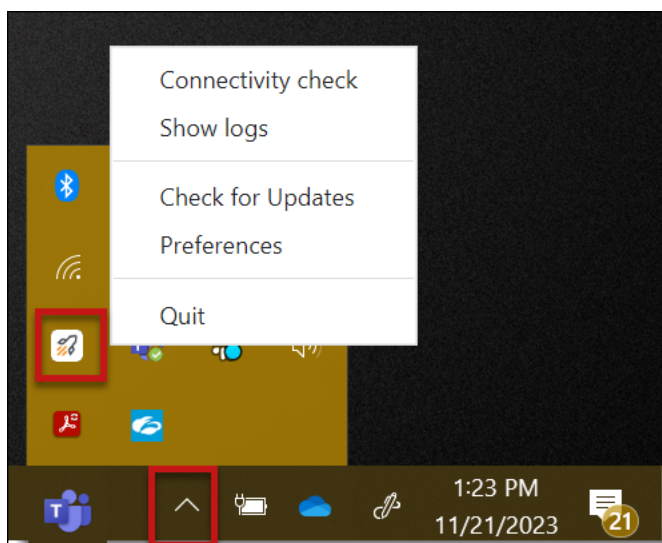
1. Right-click on the **Express Transfer**  icon in your system tray.



2. Click **Preferences**.



3. The **Exclude temporary file(s)** option is on by default. If you wish to turn the option off, click the toggle.
4. Click **Save** after updating the setting.
5. To apply any changes made to Preferences, quit the Express Transfer application by right-clicking on the **Express Transfer**  icon in your system tray and clicking **Quit**.



6. Reopen the application by double-clicking on its desktop shortcut, if you saved one for it, or select it from your computer's list of programs.

#### 4.13.7.4 Configuring proxy settings

If your organization or IT department requires using Express Transfer with a proxy server, follow the steps below to set up the necessary credentials. Contact your IT Department for the required information

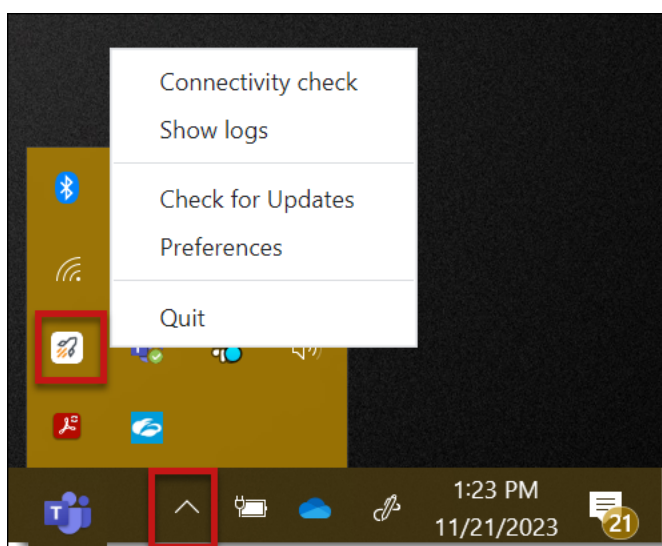
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**Note:** The port number used in the steps below will be different from Port 443, which is still required to be open to the public Internet regardless of this proxy configuration. See [Port access on page 51](#) for more information.

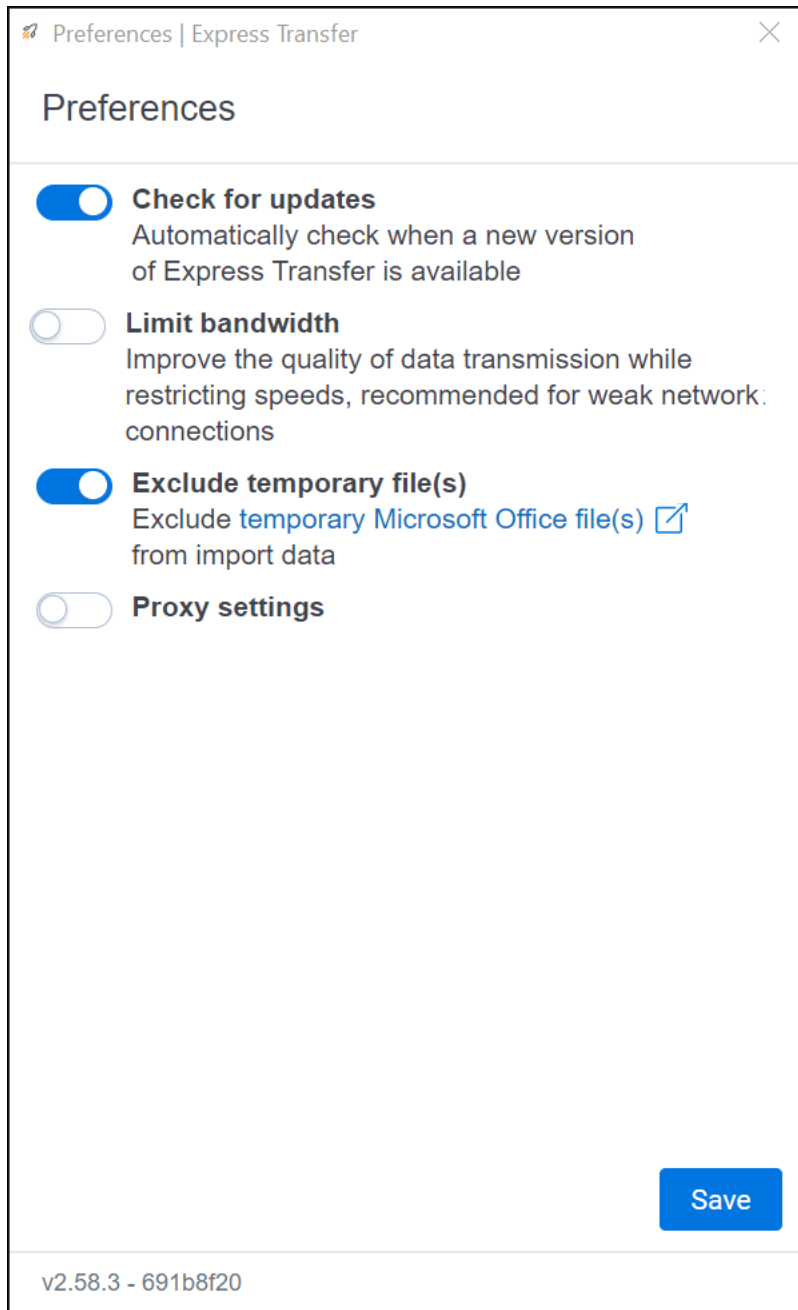
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To configure proxy settings:


1. Right-click on the **Express Transfer**  icon in your system tray.

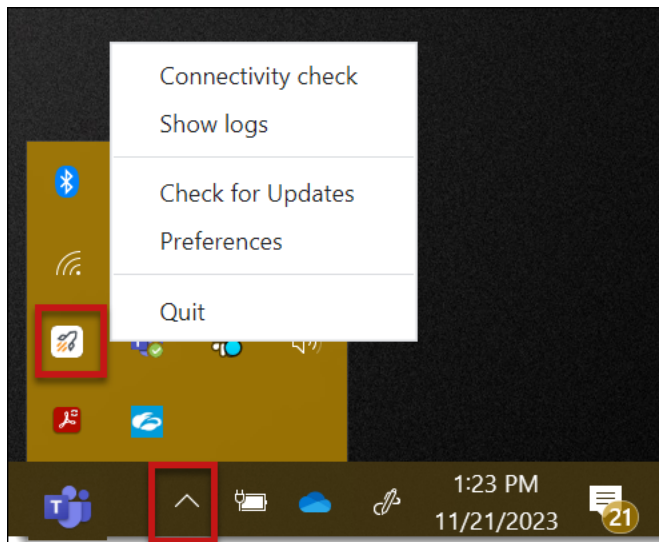


2. Click **Preferences**.



3. The **Proxy settings** option is off by default. If you wish to turn the option on, click the toggle, and then enter the necessary information for the following fields. Contact your IT Department for the correct information:
  - Proxy address (*required*)
  - Port (*required*)

- Username
  - Password
4. Click **Save** after updating the setting.
  5. To apply any changes made to Preferences, quit the Express Transfer application by right-clicking on the **Express Transfer**  icon in your system tray and clicking **Quit**.



6. Reopen the application by double-clicking on its desktop shortcut, if you saved one for it, or select it from your computer's list of programs.
7. Perform a [Connectivity Check](#) to make sure Express Transfer is connected to the Internet. If not, then the proxy settings are incorrect and will need changed.

#### 4.13.8 Express Transfer Connectivity check


Connectivity check ensures that the Express Transfer desktop application authenticates and successfully accesses the Internet, the necessary ports, and the Import/Export application to transfer data. This check executes automatically when you activate Express Transfer from the Import/Export application within RelativityOne. You can also manually perform a connectivity check anytime, even when there are active transfers.

The following checks occur during the connectivity check process:

Connectivity Check	Description
Internet connection	This step confirms your system is connected to the internet. If this step fails, there is either no internet connection available or the proxy or firewall is blocking the connection for Express Transfer. Please contact your IT department for help.
Access to Express Transfer gateway	This step confirms Express Transfer successfully set up all ports needed to connect to your specific region. If this step fails, please contact your IT department for help.

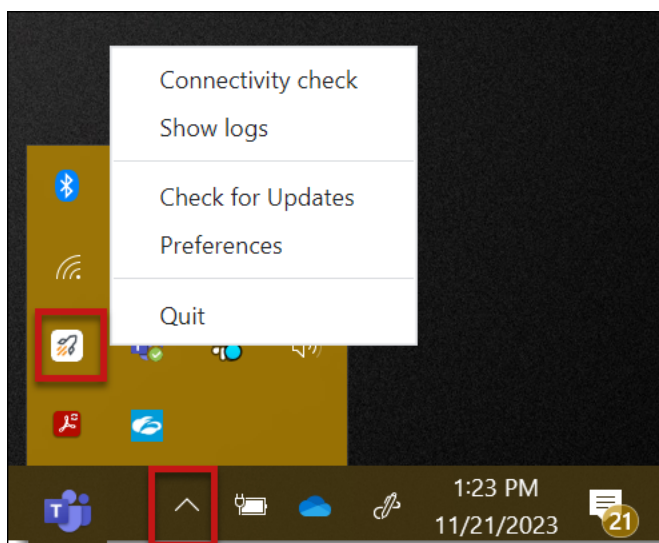


Connectivity Check	Description
Connection with Express Transfer infrastructure	This step confirms Express Transfer successfully connected to the infrastructure specific to your RelativityOne region. If this step fails, please contact your IT department so they can verify the correct port configuration. For more information, refer to the <a href="#">Express Transfer Application - Required Ports</a> article in Community.
Activation status	This step confirms Express Transfer is active. If it fails, see <a href="#">Activating and deactivating Express Transfer</a> for more information on reactivating it.
Connection with Import/Export	This step confirms Express Transfer is communicating with Import/Export in RelativityOne.

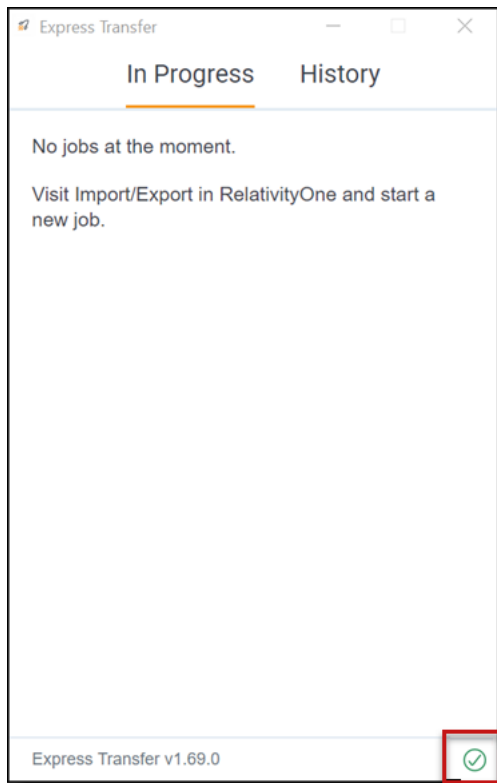
**Note:** If you perform a connectivity check before activating Express Transfer in Import/Export, only the Internet connection is checked and the others display the no connectivity  icon. Express Transfer must be [active](#) to perform the full connectivity check.

To manually run a connectivity check, use any of these methods:

- **From the System tray:** Right-click on the icon in the desktop system tray and choose **Connectivity check** from the pop-up menu.



- **From within Express Transfer:** Click the circled check mark icon at the bottom of the Express Transfer application.



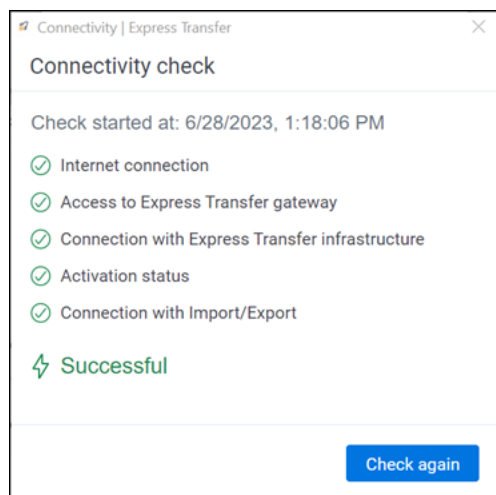
The test results display after each process completes. The word "Successful" displays when all connections are working properly. If any of the system checks fail, Express Transfer will not work.

Click the **Check again** button to refresh the connection in the event you lose connectivity.

---

**Note:** If the "Activation status" test fails, the **Activate** button will display next to an inactive **Check again** button. Click the **Activate** button to try to activate Express Transfer again.

---



Icon legend:



icon indicates the connectivity test was successful.



icon indicates the connectivity test failed.



icon indicates the connectivity test is in progress.



icon indicates the connectivity test was not performed on this item. (*Tip:* If this displays, double check to be sure Express Transfer is active in Import/Export.)

#### 4.13.8.1 Network Throughput Check

If there are issues with your network speeds and connectivity, a notice displays next to the Connectivity check icon to notify you that the network connection is poor and this may cause slow transfer speeds. Check your internet connection or consult your IT department for further assistance.

### 4.13.9 Express Transfer Job tracking and history

You can track the progress and history of jobs that were started with Express Transfer without logging into RelativityOne.

To do so, open Express Transfer by double-clicking the shortcut on your desktop.

---

**Note:** Once the job is running using Express Transfer, you can close the Import/Export application, if desired, and the transfer job will continue and not be affected. You can monitor the job using the steps below. You do not have to be logged into RelativityOne to view information within the Express Transfer application.

---

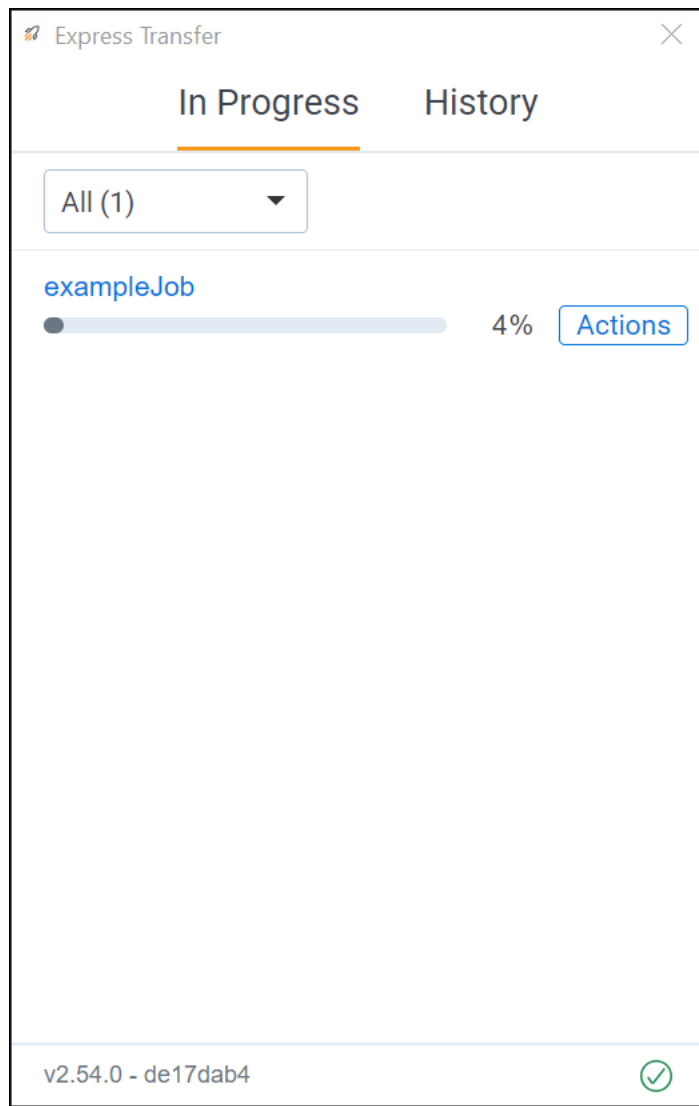
#### Prerequisites

To use Express Transfer, the following must be completed in this order:

1. Import/Export application must be installed in the workspace from the Application Library. Refer to Installing Import/Export for more information.
2. Express Transfer desktop application must be installed on your computer. Refer to Installing Express Transfer for more information.
3. Express Transfer must be activated within Import/Export. Refer to Activating Express Transfer for more information.

#### In Progress Tab

The In Progress tab displays ongoing transfer information. With Express Transfer, on a single client machine you can have one import (upload) job at a time and up to five concurrent export (download) jobs at a time. For uploads, the jobs will be queued on the client machine.

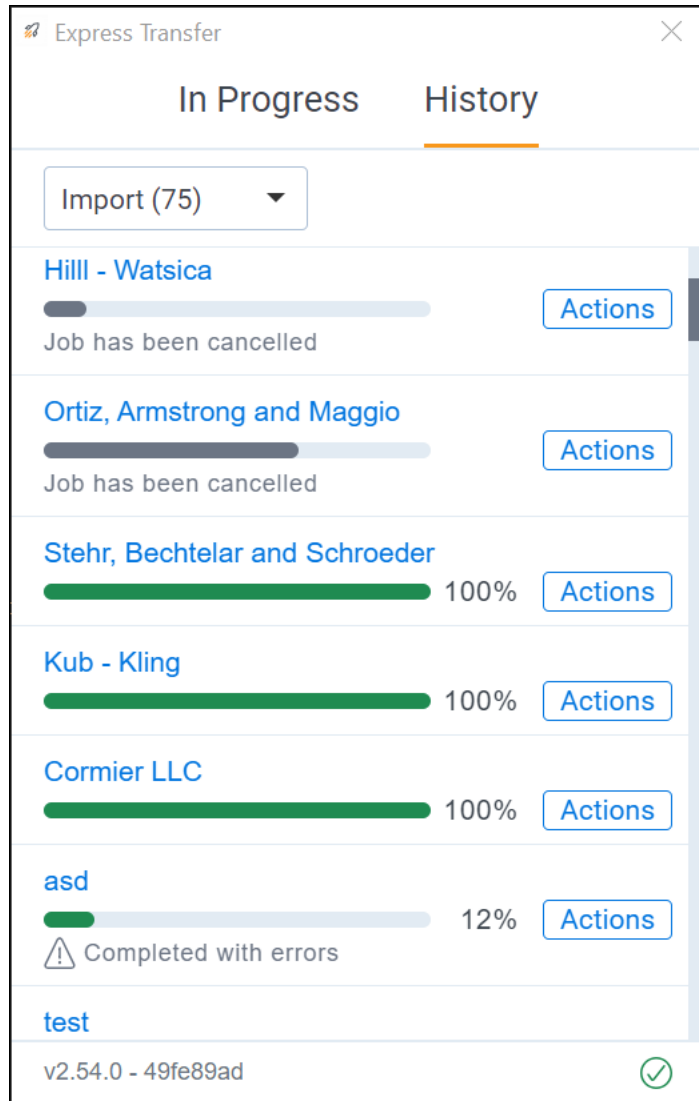


- **Job Name**—displays the name of the job. Click the job name to view more information about the job on the Job Details window. Or, click the **Actions** button next to the transfer line, then click **View details**. See [Viewing and copying details of Express Transfer jobs](#).
- **Transfer progress bar**—displays the percentage of transfer completion.
- **Starting**—this status indicates the job is beginning to transfer data.
- **In Queue**—this status indicates the job is waiting until the first job is complete.
- **Cancel a job**—to cancel a job that's in progress, click the **Actions** button next to the transfer line and then click **Cancel**.
- If no transfers were triggered, the tab displays a message that there are no jobs at the moment and directs you to RelativityOne to start a new job.

To check more details about the job, visit the Import/Export Job page in RelativityOne. Refer to "Import/Export Job tracking and history" for more information.

## History tab

The History tab displays information about the status of previous transfer jobs that were executed.



- **Finished**—a full green bar and 100% indicates that the transfer successfully finished. To view details about the job, click the job name link or click the **Actions** button next to the transfer line and then click **View details**. See [Viewing and copying details of Express Transfer jobs](#).
- **Job Failed (with red exclamation mark icon)**—displays in red and indicates that the transfer has failed and the number of items that failed. The reason for the failure is displayed next to the icon. You can perform a manual retry for a failed transfer by clicking the **Actions** button next to the transfer line and then clicking **Retry failed files**. Jobs older than seven days cannot be restarted. See [Express Transfer reporting jobs failed or completed with errors](#) for more information. To view job details, click the **Actions** button next to the transfer line and then click **View details**.
- **Completed with Errors (with warning symbol icon)**—indicates that the transfer has completed but encountered errors. The number of skipped files is displayed. You can skip failed files by clicking the **Actions** button next to the transfer line and then clicking **Skip failed files**. See [Express Transfer](#)

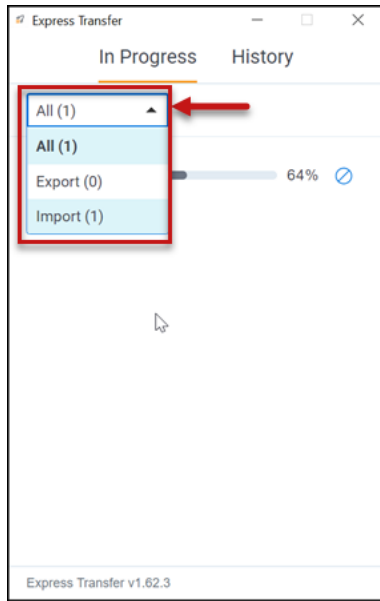
[reporting jobs failed or completed with errors](#) for more information. To view job details, click the **Actions** button next to the transfer line and then click **View details**.

- **Cancelled**—indicates that the transfer has been cancelled from within RelativityOne Import/Export or from within the Express Transfer desktop application. To view more information about the job, click the **Actions** button next to the transfer line and then click **View details**.

To check the full history, visit the Import/Export Job page in RelativityOne. Refer to "Import/Export Job tracking and history" for more information.

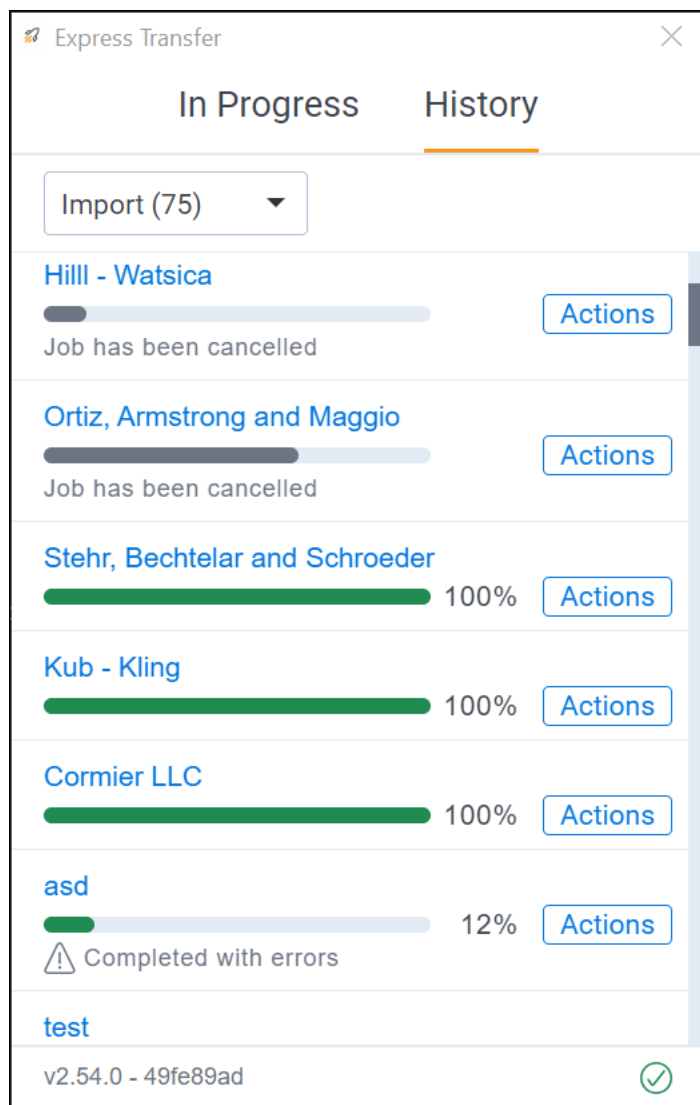
### Filtering Express Transfer jobs

To filter your jobs based on the type of transfer (Import or Export) on the In Progress or History tabs, click the drop-down arrow and select **Import** or **Export**. By default, all transfer types are displayed.



### Viewing and copying details of Express Transfer jobs

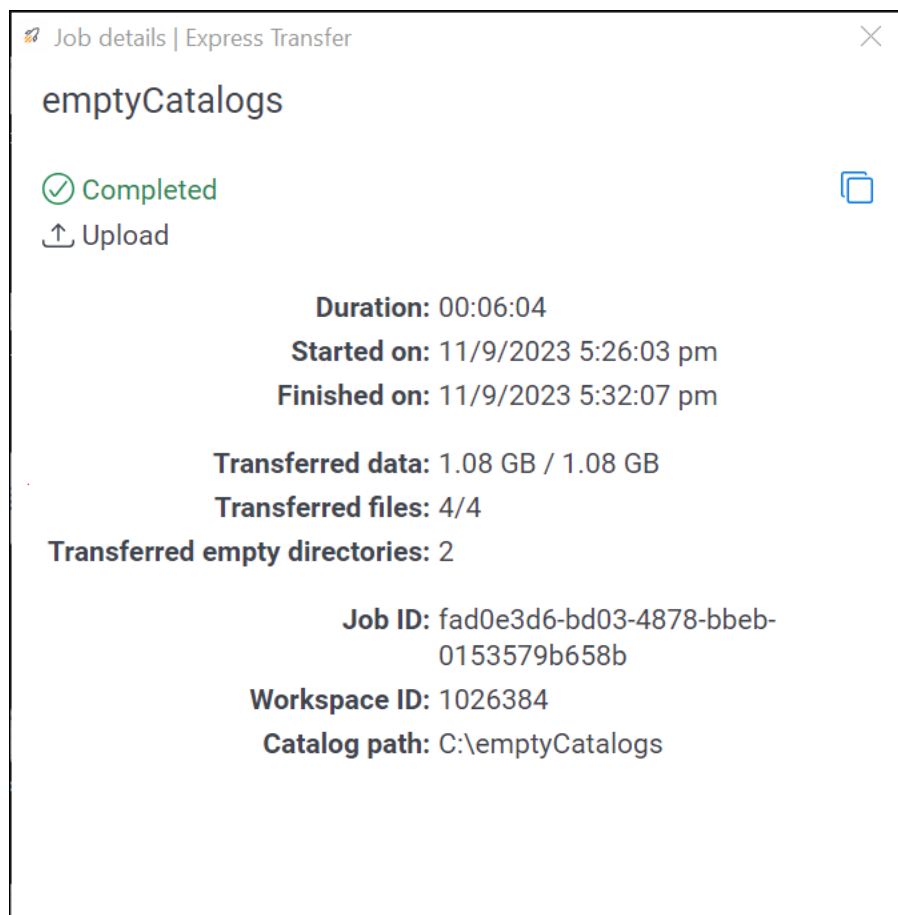
To obtain information about a particular Express Transfer job, click the **Actions** button next to the transfer line and then click **View details**.



The Job details window displays the transfer information. Click the **copy button**



if you need to copy and paste the information to the clipboard to use it elsewhere.



#### 4.13.10 Express Transfer reporting jobs failed or completed with errors

When using Express Transfer with Import/Export, if a job fails to finish or completes with errors, you can generate a report from Express Transfer Job Details that includes information such as the time stamp, file status, file name, error message, and file path. You also have a few options on how to handle the failed or errored jobs, such as retrying or skipping failed files. For more information about job tracking and history, see [Express Transfer Job tracking and history on page 79](#).

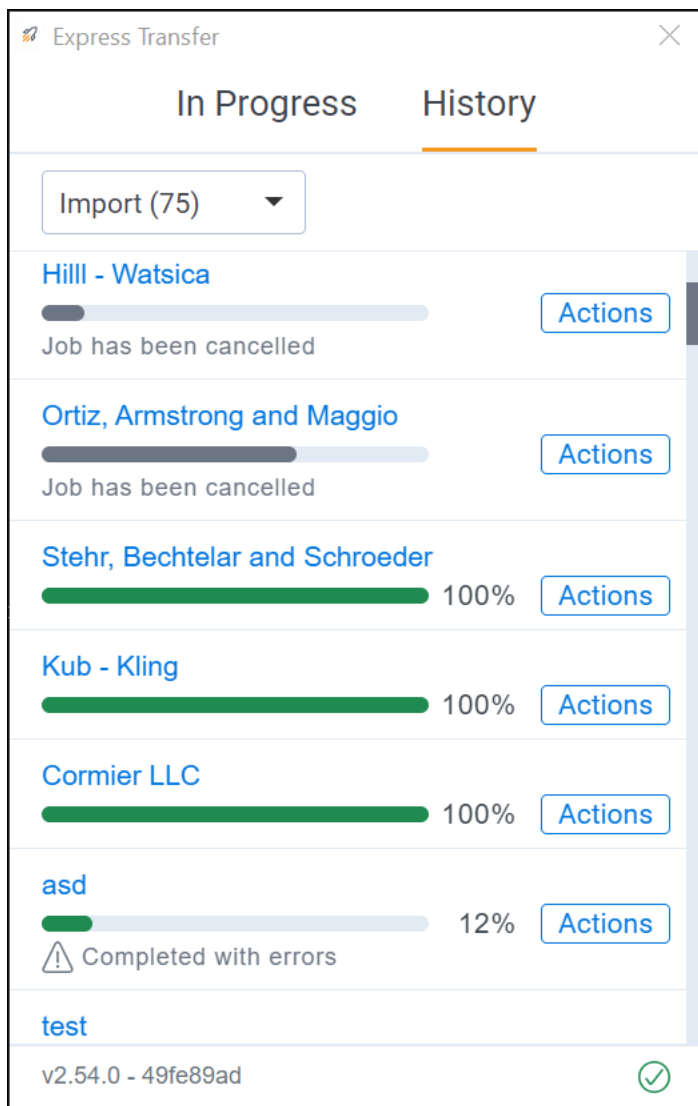
---

**Note:** Available for Express Transfer version 2.21.1 and above. See [Locating the Express Transfer version number on page 54](#) if needed.

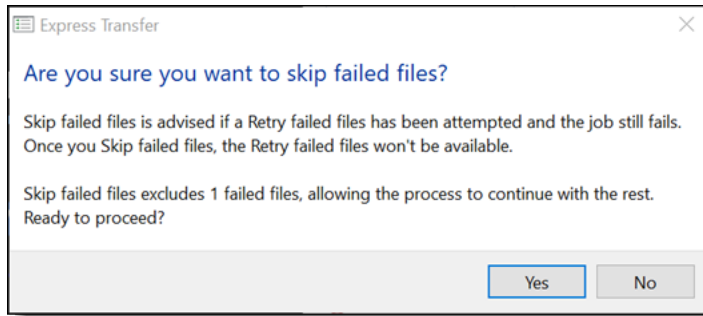
---

1. From the Express Transfer application, click the **History** tab.
2. Click the **Actions** button corresponding with the job that failed or completed with warnings and do any of the following:





- **View details**—click to view job information in another window.
- **Show report**—click to view the saved Excel file (.csv) with the failed jobs or those completed with errors. This link will open File Explorer on your local drive to the Reports folder (such as C:\Users\<username>\AppData\Local\Express Transfer\Reports). You cannot generate a report for jobs that were run prior to upgrading to version 2.21.1.
- **Retry failed files**—click to rerun the failed files. Jobs older than seven days cannot be rerun.
- **Skip failed files**—click to continue running the job excluding the failed files. The job status will be “Completed with errors.” The successful documents will be uploaded and available. You can view information about the failed files by clicking **Show report** to decide how you want to proceed with them. This option is recommended if you attempted to retry the failed files and the job still fails. Once Skip failed files is executed, the Retry failed files option is no longer available.



## 4.14 Importing via Import/Export

You can use Import/Export to import unprocessed raw native files, document load files, image load files, production load files, and Relativity Dynamic Objects. Refer to [Import/Export load file specifications](#) and [Data upload size limitation on page 35](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 47](#).

- Unstructured data workflow with Processing—use this workflow to import raw (unprocessed) native files that require processing in Relativity.
- Document load file import—use this workflow to import load files containing document metadata, native files, or extracted text into Relativity.
- Image load file import—use this workflow to import load files containing images into Relativity.
- Production load file import—use this workflow to import load files containing productions into Relativity.
- Relativity Dynamic Object load file import—use this workflow to import dynamic object (RDO) data into Relativity.

---

**Note:** After documents are imported using Import/Export, you can automate creating a dtSearch index or run a search terms report with those documents using Automated Workflows. To learn more, visit Automated Workflows.

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### 4.14.1 Importing via Import/Export

You can use Import/Export to import unprocessed raw native files, document load files, image load files, production load files, and Relativity Dynamic Objects. Refer to [Import/Export load file specifications](#) and [Data upload size limitation on page 35](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 47](#).

- Unstructured data workflow with Processing—use this workflow to import raw (unprocessed) native files that require processing in Relativity.
- Document load file import—use this workflow to import load files containing document metadata, native files, or extracted text into Relativity.
- Image load file import—use this workflow to import load files containing images into Relativity.
- Production load file import—use this workflow to import load files containing productions into Relativity.

- Relativity Dynamic Object load file import—use this workflow to import dynamic object (RDO) data into Relativity.

**Note:** After documents are imported using Import/Export, you can automate creating a dtSearch index or run a search terms report with those documents using Automated Workflows. To learn more, visit [Automated Workflows](#).

## 4.14.2 Importing a document load file via Import/Export

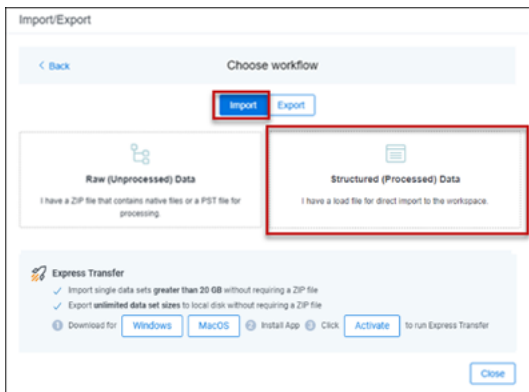
You can use Import/Export to import document load files (.dat, .csv, and .txt) into RelativityOne that contain document metadata, native files, or extracted text. You're also able to use saved job profiles to expedite the configuration process.

If you want to use Import/Export with Express Transfer active, which is the recommended workflow for data transfer, refer to [Express Transfer overview on page 49](#) for more information.

Refer to [Import/Export load file specifications](#) and [Data upload size limitation on page 35](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 47](#).

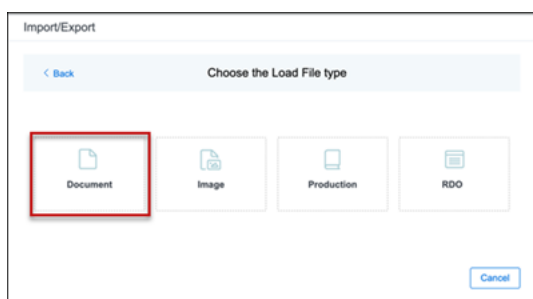
To import a document load file:

1. Use tabs, search, or the quick nav bar to navigate to the **Import/Export Job** page.
2. On the Import/Export Job page, click the **New Import/Export Job** button to start a new job.
3. On the Choose Workflow dialog, the **Import** button is selected by default. Next, click the **Structured (Processed) Data** workflow box to import a document load file to your workspace.

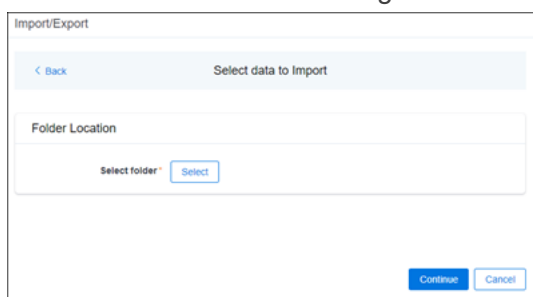


**Note:** If Express Transfer has been activated, the Express Transfer section will display a status of **Active**. See [Activating and deactivating Express Transfer on page 60](#) for more information.

4. On the Choose the Load File type dialog, click the **Document** box to import a document load file to your workspace.



5. If Express Transfer is not Active, skip this step. If it is Active, click **Select** on the Select data to Import dialog to browse to your local drive and select the folder with the files that you want to upload. In the case of universal naming convention (UNC) paths (for example, \\ServerName\SharedResourceName\FilePath), you can copy and paste the path into the Select Folder address bar in the dialog box to access the desired folder.




---

#### Notes:

- You can choose only one folder with files to transfer.
  - File names must be 200 characters or less, including the extension.
  - We recommend using a local drive instead of a mapped or external drive to avoid potential slowness and connection issues with the file import process. Also see [Data transfer performance considerations on page 63](#).
  - When Express Transfer is active, you should not zip data for importing.
  - When Express Transfer is active, all the data from the selected folder, including sub-folders, will be transferred to the staging area, regardless of the specific job configuration.
- 

6. On the Choose Load File and Location dialog, complete the following fields, then click **Continue**. Refer to [Import/Export load file specifications](#) for more information regarding load files.

Import/Export

< Back Choose Load File And Location

Job Name \*

Destination Folder \* [Select](#)

Profile \* ☒ None ☐ From Local Disk

Regional Settings (Date And Time) \* English (United States) | en-US  
12/25/2000 12:00:00 AM

Load File \*  
Drop your .dat, .csv or .txt file here or [browse for a file.](#)

Include Native & Text ☐

Notification Addresses email@domain.com, other@domain.com

Continue Cancel

- **Job Name**—provide a descriptive job name so that you can quickly identify and track that job on the Import/Export Job Page. The Job name field accepts up to 50 characters.
- **Destination folder**—click the **Select** button, and do one of the following:
  - Choose an existing folder.
  - Create a new workspace folder by right-clicking on an existing folder, click **Create**, enter a new folder name, click out of the new folder to save it, then click **Select**.
- **Profile**—are job configuration settings that were previously saved to a profile file (.ie or .kw\*) so they can be reused when creating future jobs with the same or similar settings in RelativityOne, which saves time and effort as well as helps prevent data entry errors when you're mapping fields, for example. Profiles with the ".ie" extension can only be used in Import/Export.
  - **None**—select this option if you do not desire to use a profile for this import or if you intend to create a new profile based on the settings entered in the upcoming steps. You will be able to save the profile settings later on the “Import settings” dialog. The file extension for the new profile created will be “.ie”.
  - **From Local Disk Profiles**—use this option to select a previously saved Import/Export profile (.ie file) or an existing .kw\* profile (created via the former Relativity Desktop Client application) to reuse the job settings for this workflow. Use the drag and drop feature or browse for a file to choose it. All job settings provided within the selected profile file will be automatically entered where applicable in the succeeding workflow dialogs.
- **Regional Settings (Date and Time)**—select the desired format for imported date and time data. A preview of the chosen format will appear below the selection. The setting selected will remain for all future jobs until you choose another one from the list or until you clear your

browser cache. When browser cache is cleared, the setting will revert to the US date and time by default.

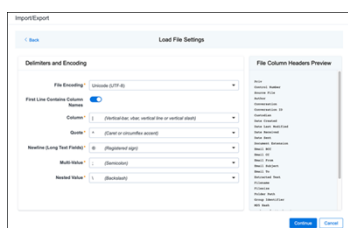
- **Load File**—use the drag and drop feature or click **browse for a file** to select the document load file from your local drive.
- **Include Native & Text**—select this option to include native and text files.

---

**Note:** The Include Native & Text option is not available for [image](#) or [production](#) import workflows as there are no native files included in OPT files.

---

- **Native & Text**—if Include Native & Text was selected, use the drag and drop feature or click **browse for a file** to select the zipped native and text file from your local drive. See [ZIP archive with extracted text and natives on page 44](#)
  - **(Optional) Notification Addresses**—enable email notifications by providing the email addresses of those who should get notified once the job completed, failed, or canceled.
7. On the Load File Settings dialog, select the delimiters and encoding values of the document load file for the import, then click **Continue**. The File Column Headers Preview pane will help you to choose the proper settings.



- **File Encoding**—select an encoding format for the document load file. Consult your processing vendor or department to determine the correct encoding option, if necessary.

The File Column Headers Preview pane automatically updates when you select the File Encoding type. Since the load file is parsed based on the delimiter set, you may need to check delimiters used in the load file if the column headers are not lined up correctly. Determine the delimiters used in the file, and then select them in the delimiters section of this dialog.

- **First Line Contains Column Names** toggle—select this option if the first line contains column names.
- Select the delimiters and encoding values used by your load file as needed:
  - **Column**—select the character used to separate columns.
  - **Quote**—select the character used as the text qualifier.
  - **Newline (Long Text Fields)**—select the character used to indicate the end of a line in any extracted text or long text field.
  - **Multi-Value**—select the character used to separate choices within a field.
  - **Nested Value**—select the character used to separate the different levels of a multi-choice hierarchy.

- On the Fields Mapping dialog, select the load file fields to import and map them to the workspace fields, then click **Continue**.

Import/Export

< Back Fields Mapping

Load Fields Mapping

Auto Map Fields Create Field Export to CSV

Mapped Fields 1/100 Mapped To The Top

Load File Sample	Load File Fields	Workspace Fields	Additional Field Settings
82718214	Control Number	Control Number	+ Choose
Beck Sally	Custodian - Single Choice	Choose	+ Choose
Atwood Michelle <Michelle.Atwood@ENRON.com>	Email From	Choose	+ Choose
Beck Sally <Sally.Beck@ENRON.com>	Email To	Choose	+ Choose
5/9/2001 3:57 PM	Date Created	Choose	+ Choose
5/9/2001 3:57 PM	Date Sent	Choose	+ Choose
	Document Extension	Choose	+ Choose
VOL001\NATIVES\NATIVE001\SBECK_0048460.docx	Extracted text	Example   Long text	+ Choose
VOL001\NATIVES\NATIVE001\	Message	Choose	+ Choose
	Email BCC	Choose	+ Choose
Martin, Lawrence	Email CC	Choose	+ Choose

Continue Cancel

To automatically map fields, click **Auto Map Fields**, and the fields from the load file will be mapped to any existing fields of the exact same name in the workspace. Any fields without a match will display "Choose..." in the Workspace Fields column and you will need to select one from the drop-down list. To search for a field in the list, begin typing the desired field name and matching search results display for selection.

Consider the following when auto-mapping fields:

- Case is not taken into account for the mapping. For example, a field named "email" in the load file would map to a field named "Email" in the workspace.
- Spacing is taken into account. For example, in a two-word field name, if there is one space between words in the workspace field, and two spaces between words in the load file field, the fields will not be mapped.
- Characters are mapped only to themselves. For example, an underscore is only mapped to another underscore, not to a space.

Only fields matched or those with additional settings selected are loaded into the workspace. Other fields in the Load File Fields and Workspace Fields are ignored. You must always match the identifier field for the load file.

Other options and fields on this dialog:

- Auto Map Fields** button—click this button to automatically map fields. The fields from the load file are mapped to any existing fields of the same name in the workspace.
- Mapped to the top** toggle—when toggled on, this option groups all mapped fields on the top of the listing.
- Create Field** button—click this button if you want to create a new workspace field.

- **Export to CSV**—click this button to save the field mapping configuration to a .csv file on your local drive. Be aware that this option cannot be accessed after the job has run and can only be selected prior to executing the job.
- **Load File Sample** column—presents read-only example data from the load file fields.
- **Load File Fields** column—displays the field names from the load file. Use the Filter box to search for field names.
- **Workspace Fields** column—allows you to manually map the load file fields to the existing workspace fields. Use the Filter box to search for field names.
- **Additional Field Settings** column—to enable additional field settings, click the **Choose** down arrow in this column to select the additional field as follows:
  - **Text File**—select this option if the mapped Long Text field contains a relative or absolute path to a text file, and then select the **File Encoding** type for the file. If using absolute paths, Express Transfer must be activated.

---

**Note:** This field was renamed from Extracted Text since it now applies to any Long Text field.

---

- **Folder Information Column**—select this option if you want to use a metadata field to build the folder structure for the workspace.
  - **Native File**—select this option if the field from your load file contains a relative or absolute path to the native files. If using absolute paths, you must activate Express Transfer prior to starting the import job.
9. On the Import Settings dialog, configure your import job by selecting from which line number you want the load file to begin importing and how you want the records to be imported.

- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is set to 0, which results in loading the entire load file.



- **Import mode**—Choose an import mode.
  - **Append Only**—loads only new records.
  - **Overlay Only**—updates existing records only. If selected, then you must include an **Overlay Identifier** in an overlay load. This field acts as a link indicating to RelativityOne where to import the data.
  - **Append/Overlay**—adds new records and overlays data on existing records.

---

**Note:** For Append/Overlay and Overlay Only, if a blank metadata field exists in the load file (.dat, .csv), the blank value will overlay (remove) any existing value that may reside in the corresponding mapped field.

---

- **Multi-Select Field Overlay Behavior**—this field displays if you selected Overlay Only or Append/Overlay as the Import Mode and have mapped at least one Multiple Choice or Multiple Object field. Choose one of the following options:
  - **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the load file with corresponding multi-choice and multi-option fields in the workspace. The fields are merged according to the overlay behavior settings in the environment.
  - **Merge Values**—merges all values for multi-choice and multi-object fields in the load file with corresponding multi-choice and multi-option fields in the workspace. The fields are merged regardless of the overlay behavior settings in the environment.
  - **Replace Values**—replaces all values for multi-choice and multi-object fields in the load file with corresponding multi-choice and multi-option fields in the workspace. The fields are merged regardless of the overlay behavior settings in the environment.

10. (Optional) Click **Save Settings** on the Import settings dialog to save the job configuration settings entered thus far to its own profile file (.ie file extension) and save it on your computer so that you can reuse these settings when creating a new import job with Import/Export in the future.

---

**Note:** Import/Export saves job configuration settings to its own profile file format (.ie file extension). Comparing to the legacy .kw\* standard, it brings more flexibility as you now can apply saved job settings across various workspaces. The .ie profile file format is not supported in other RelativityOne data transfer tools.

---

11. (Optional) Click **Precheck Load File** on the Import settings dialog to run a validation process on the load file to check for errors prior to importing it. All detected errors are displayed in the Precheck window.

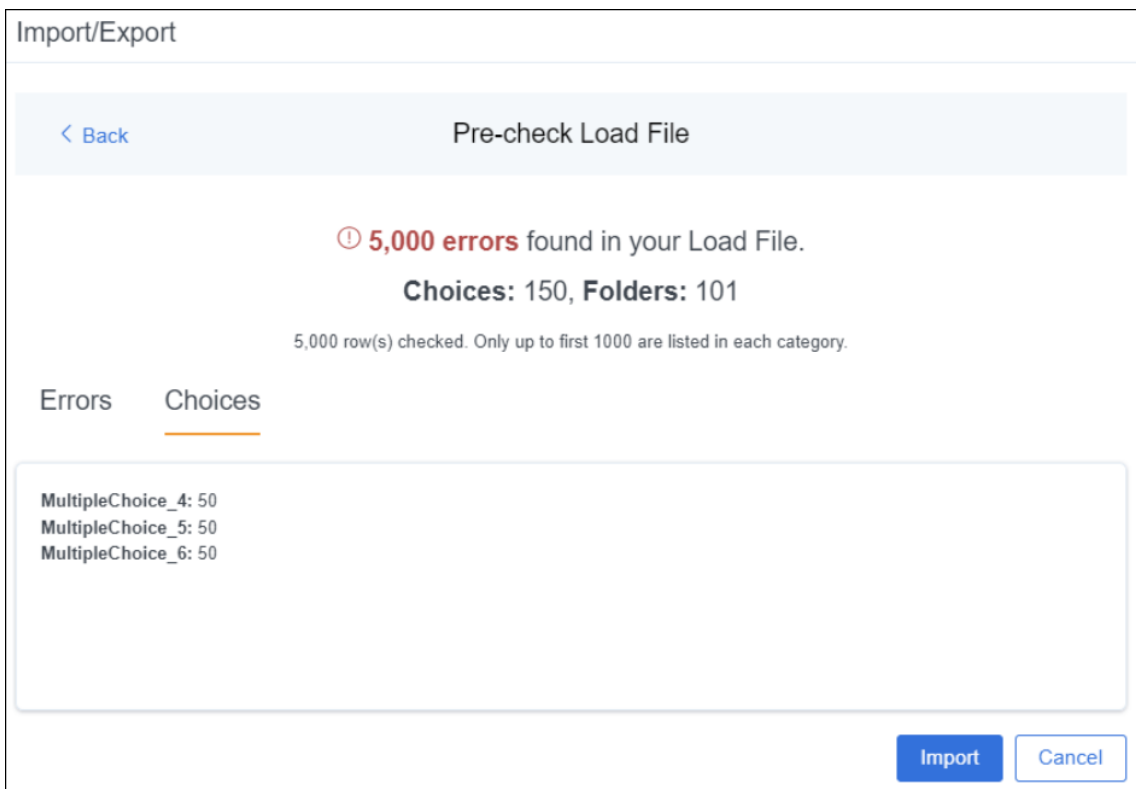
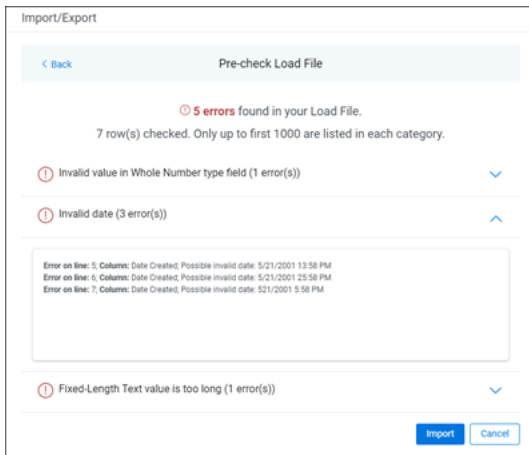
Click the down arrow next to any error message to view its details. If you want to correct the errors in the source file(s) and repeat the importing steps, click **Cancel** to discontinue importing the file at this time. Otherwise, go to the next step to import the load file with errors and correct them later.

The following validations are performed during precheck:

- Date format
- Field type
- Field length
- Number of load file cells

- Number of folders and choice fields
- File paths for natives and extracted text (checks 1,000 random lines across the whole load file)

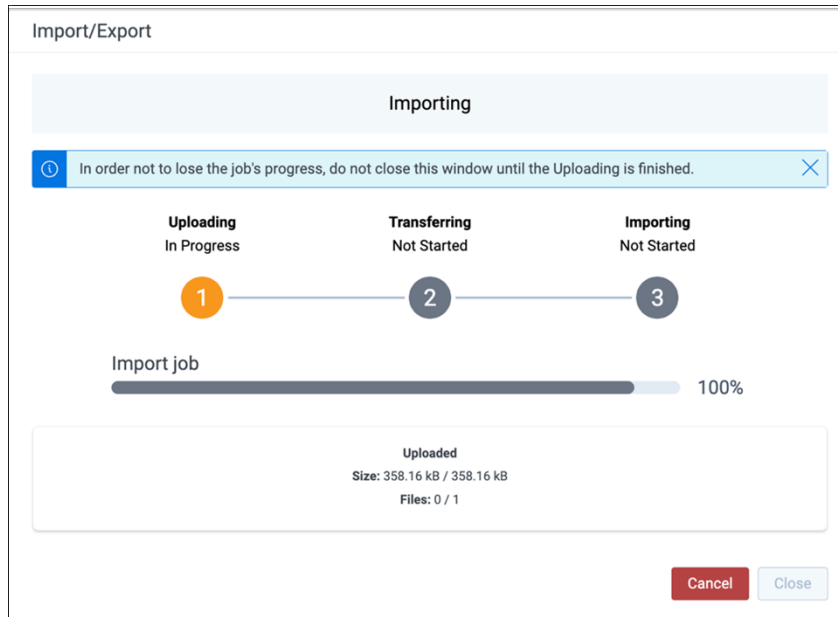
**Note:** The Precheck Load File summary dialog displays a maximum of 1,000 errors for each error category. For example, if an error category has 2,000 errors, only the first 1,000 will display in the drop-down list.



- Click the **Import** button to start the importing process.
- Review the importing progress on the Importing dialog. Real-time details regarding the number of transferred files and data size being processed displays during the Uploading and Extracting steps. If

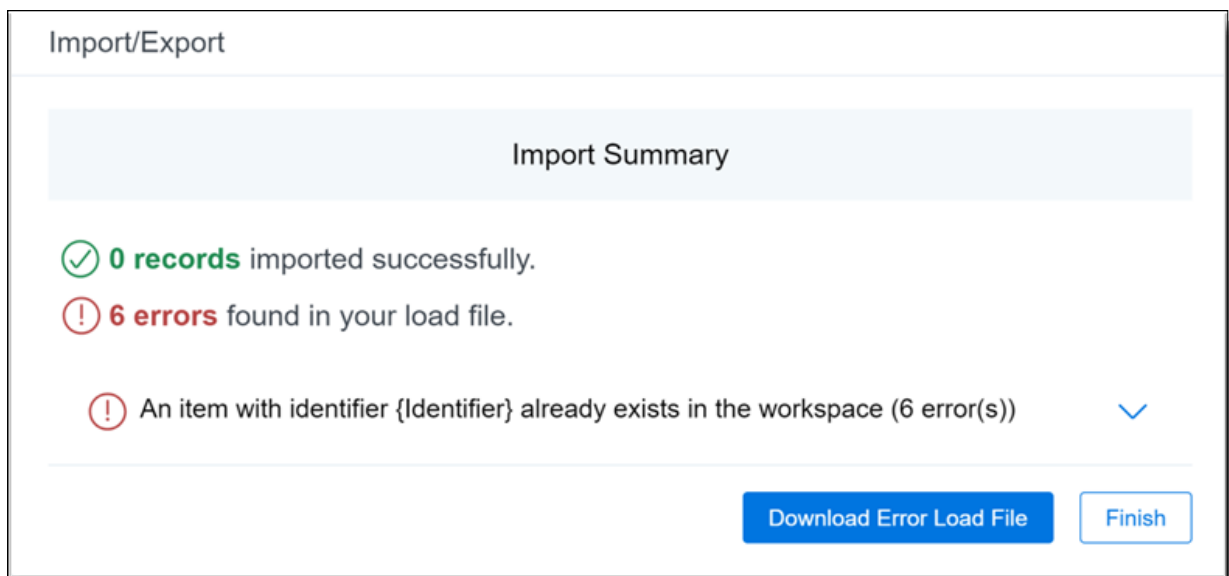
needed, click **Cancel** to stop the import job before it completes. Otherwise, click **Close** when the importing process is complete.

**Caution:** If you used Import/Export in web only mode (meaning Express Transfer was not active), do **not** close the Importing dialog until *after* the Uploading step has successfully completed. Closing the dialog prior to the Uploading step completing will terminate the data transfer (upload) process.



14. When the import is complete, the Import Summary displays. If no errors were found in the load file, go to the next step. If errors were found, the number and other information will be listed. You can do either of the following:

**Note:** Only records that imported without errors will appear in the workspace.



- To proceed without correcting the errors, go to the next step.
- To manually correct them now, click the **Download Error Load File** button. Review the errors and correct them as needed. When done, upload the file with the corrected data by clicking the **Select** button on the Import Summary screen next to New Load File and navigating to the load file on your local drive. Once selected, click **Import** to import the job with corrected data.

15. Click **Finish** to close the dialog.

You can review the Import/Export Job page to see more information about the job. Refer to Import/Export Job tracking and history for details.

For more information on where Import/Export saves files, see the Community article, [Import/Export: Where Files Are Saved By The Import/Export Application](#).

---

**Note:** If you ran the job with Express Transfer active, you are able to close the Import/Export application while the job is running, if desired, and the transfer job will continue and not be affected. You can monitor the progress and history of jobs within Express Transfer (see "Express Transfer Job tracking and history"). You do not have to be logged into RelativityOne to view information within the Express Transfer application.

---

### 4.14.3 Importing an image load file via Import/Export

You can use Import/Export to import image and PDF load files that are Opticon-formatted (.opt) page-level files. When you import images, they are added to a workspace as documents. You can view imported PDFs in the PDF Viewer and Extracted Text view, if you included text files. See Community articles [How to import multipage PDF files with Express Transfer Active](#) and [How to import multipage PDF files using Import/Export](#) for more information.

RelativityOne only accepts the following types of files:

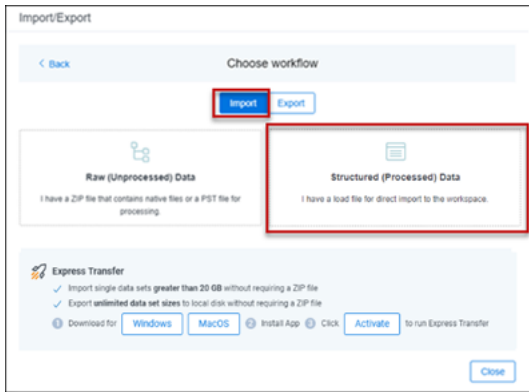
- Single page TIFF (Group IV)
- Single page JPG
- Single and multiple PDF (files must have a .pdf extension)

If you want to use Import/Export with Express Transfer active, which is the recommended workflow for data transfer, refer to [Express Transfer overview on page 49](#) for more information.

Refer to [Import/Export load file specifications](#) and [Data upload size limitation on page 35](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 47](#).

To import an image load file:

1. Use tabs, search, or the quick nav bar to navigate to the **Import/Export Job** page.
2. On the Import/Export Job page, click the **New Import/Export Job** button to start a new job.
3. On the Choose Workflow dialog, the **Import** button is selected by default. Next, click the **Structured (Processed) Data** workflow box to import an image load file to your workspace.

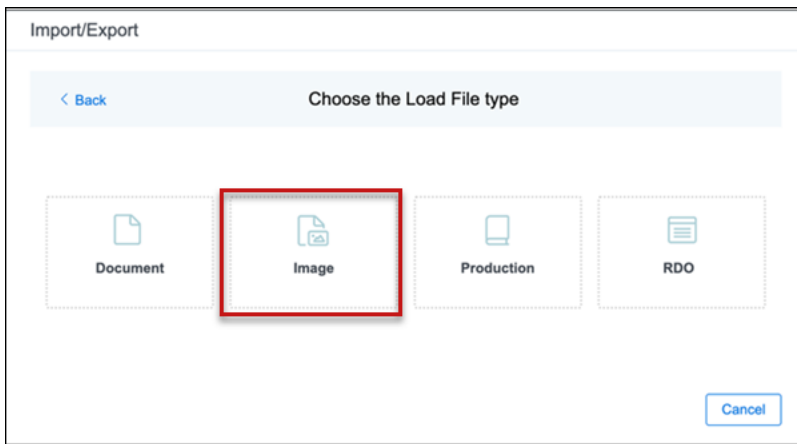


---

**Note:** If Express Transfer has been activated, the Express Transfer section will display a status of **Active**. See [Activating and deactivating Express Transfer on page 60](#) for more information.

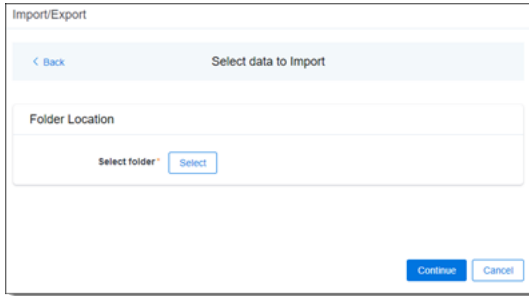
---

4. On the Choose the Load File type dialog, click the **Image** box to import an image load file to your workspace.



5. If Express Transfer is not Active, skip this step. If it is Active, click **Select** on the Select data to Import dialog to browse to your local drive and select the folder with the files that you want to upload. In the case of universal naming convention (UNC) paths (for example,

\\ServerName\SharedResourceName\FilePath), you can copy and paste the path into the Select Folder address bar in the dialog box to access the desired folder.



---

**Notes:**

- You can choose only one folder with files to transfer.
  - File names must be 200 characters or less, including the extension.
  - We recommend using a local drive instead of a mapped or external drive to avoid potential slowness and connection issues with the file import process. Also see [Data transfer performance considerations on page 63](#).
  - When Express Transfer is active, you should not zip data for importing.
  - When Express Transfer is active, all the data from the selected folder, including sub-folders, will be transferred to the staging area, regardless of the specific job configuration.
- 
6. On the Choose Load File and Location dialog, complete the following fields, then click **Continue**. Refer to [Import/Export load file specifications](#) for more information regarding load files.

Import/Export

< Back

Choose Load File And Location

Job Name\*

Destination Folder\*

Select

Profile\*

☒ None

☐ From Local Disk

Load File\*

Drop your .opt, .txt or .log file here or [browse for a file.](#)

Images\*

Drop your .zip file here or [browse for a file.](#)

Notification Addresses

email@domain.com, other@domain.com

Continue

Cancel

- **Job name**—provide a descriptive job name so that you can quickly identify and track that job on the Import/Export Job page. The Job name field accepts up to 50 characters.
- **Destination folder**—click the **Select** button, and do one of the following:
  - Choose an existing folder.
  - Create a new workspace folder by right-clicking on an existing folder, click **Create**, enter a new folder name, click out of the new folder to save it, then click **Select**.
- **Profile**—are job configuration settings that were previously saved to a profile file (.ie or .kw\*) so they can be reused when creating future jobs with the same or similar settings in RelativityOne, which saves time and effort as well as helps prevent data entry errors when you're mapping fields, for example. Profiles with the ".ie" extension can only be used in Import/Export.
  - **None**—select this option if you do not desire to use a profile for this import or if you intend to create a new profile based on the settings entered in the upcoming steps. You will be able to save the profile settings later on the "Import settings" dialog. The file extension for the new profile created will be ".ie".
  - **From Local Disk Profiles**—use this option to select a previously saved Import/Export profile (.ie file) or an existing .kw\* profile (created via the former Relativity Desktop Client application) to reuse the job settings for this workflow.

Use the drag and drop feature or browse for a file to choose it. All job settings provided within the selected profile file will be automatically entered where applicable in the succeeding workflow dialogs.

- **Load file**—drag and drop or use **browse for a file** to select the load file from your local drive.
  - **Images**—drag and drop or use **browse for a file** to select a zipped image file from your local drive. See [Image and extracted text files on page 45](#).
  - **(Optional) Notification Addresses**—enable email notifications by providing the email addresses of those who should get notified once the job completed, failed, or canceled.
7. On the Import Settings dialog, configure your import job by selecting the numbering and choosing the import mode.

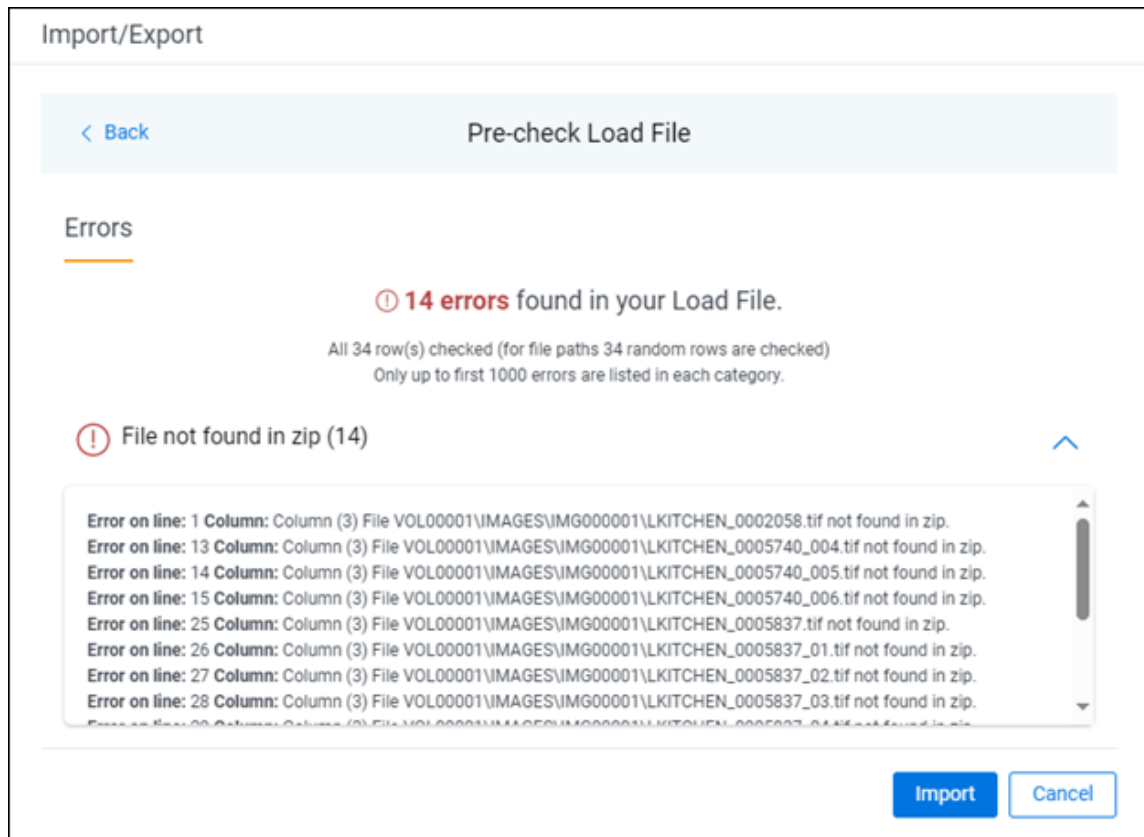
- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is set to 0, which results in loading the entire load file.
- **Numbering**—select one of the following options:
  - **Use load file page IDs**—default setting.
  - **Auto-number pages**—select this option if page IDs in the production are not unique. For example, you might import a set of .tiff files that share a page identifier for each record. The page identifiers are shared per document and are not unique. The Auto-number pages option appends the 01, 02, and so on to the page-level identifier, creating a unique number per page.



- **Import Mode**—choose how you want the records to be imported:
    - **Append Only**—load only new records.
    - **Overlay Only**—update existing records only. If selected, then you must assign a unique identifier in the **Overlay Identifier** that will be used to overlay data in the workspace. This field acts as a link indicating to RelativityOne where to import the data.
    - **Append/Overlay**—adds new records and overlays data on existing records.
  - (Optional) **Load Extracted Text** toggle—select this option to load new text for Production documents that may be revised based on redactions. The Files encoding field will display once this toggle is selected. The text files must meet these requirements:
    - Have .txt extensions
    - Stored in the same directory as image files
    - Named in the same way as the image files
  - **Files encoding**—this field displays if the Load Extracted Text option is selected. Choose the encoding format for the text file:
    - **Western European (Windows)**—indicates the Windows standard encoding for English.
    - **Unicode**—utilizes more than 107,000 characters covering 90 scripts.
    - **Unicode (Big-Endian)**—is the same as Unicode, except that the byte order is reversed.
    - **Unicode (UTF-7)**—represents Unicode text using a stream of ASCII characters to guarantee that the high bit will always be zero.
    - **Unicode (UTF-8)**—represents all characters in the Unicode character set using 8-bit bytes.
8. (Optional) Click **Save Settings** on the Import settings dialog to save the job configuration settings entered thus far to its own profile file (.ie file extension) on your computer so that you can reuse these settings when creating a new import job with Import/Export in the future.
- 
- Note:** Import/Export saves job configuration settings to its own profile file format (.ie file extension). Comparing to the legacy .kw\* standard, it brings more flexibility as you now can apply saved job settings across various workspaces. The .ie profile file format is not supported in other RelativityOne data transfer tools.
- 
9. (Optional) Click **Precheck Load File** on the Import settings dialog to run a validation process on the load file to check for errors prior to importing it. The following validation is performed during precheck: Image file paths (checks 1,000 random lines across the whole load file). All detected errors are displayed in the Precheck window.

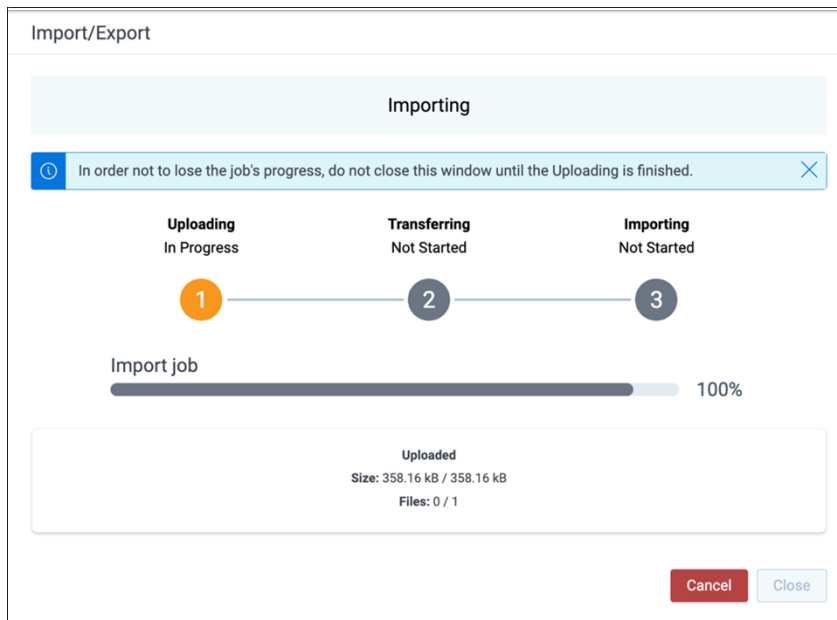
Click the down arrow next to any error message to view its details. If you want to correct the errors in the source file(s) and repeat the importing steps, click **Cancel** to discontinue importing the file at this time. Otherwise, go to the next step to import the load file with errors and correct them later.

**Note:** The Precheck Load File summary dialog displays a maximum of 1,000 errors for each error category. For example, if an error category has 2,000 errors, only the first 1,000 will display in the drop-down list.



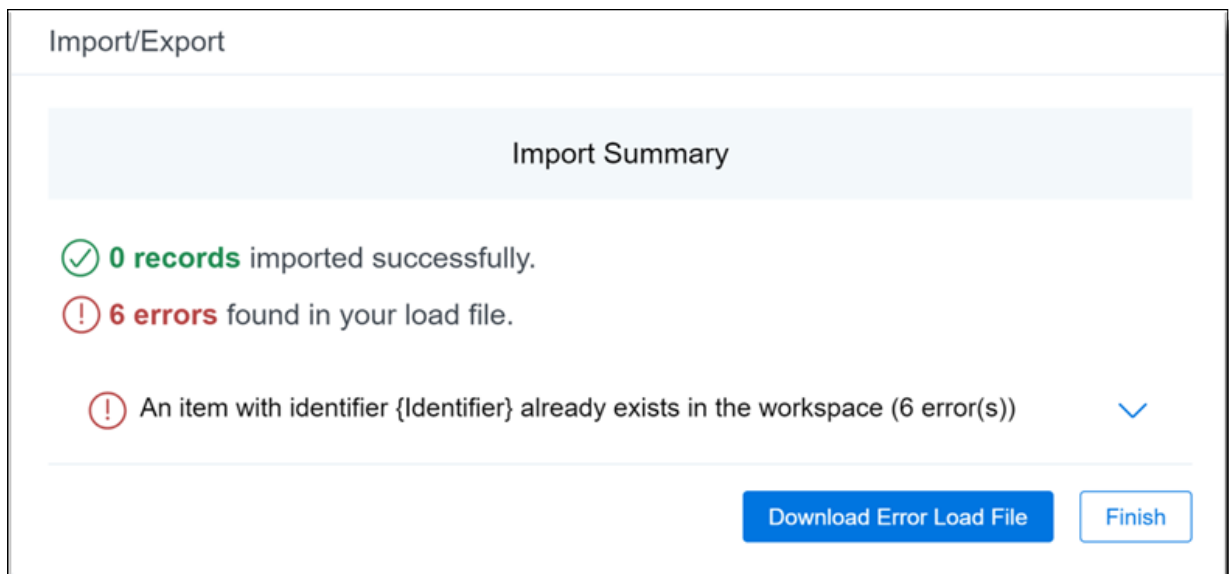
10. Click the **Import** button to start the importing process.
11. Review the importing progress on the Importing dialog. Real-time details regarding the number of transferred files and data size being processed displays during the Uploading and Extracting steps. If needed, click **Cancel** to stop the import job before it completes. Otherwise, click **Close** when the importing process is complete.

**Caution:** If you used Import/Export in web only mode (meaning Express Transfer was not active), do **not** close the Importing dialog until *after* the Uploading step has successfully completed. Closing the dialog prior to the Uploading step completing will terminate the data transfer (upload) process.



12. When the import is complete, the Import Summary displays. If no errors were found in the load file, go to the next step. If errors were found, the number and other information will be listed. You can do either of the following:

**Note:** Only records that imported without errors will appear in the workspace.



- To proceed without correcting the errors, go to the next step.
- To manually correct them now, click the **Download Error Load File** button. Review the errors and correct them as needed. When done, upload the file with the corrected data by clicking the **Select** button on the Import Summary screen next to New Load File and navigating to the load

file on your local drive. Once selected, click **Import** to import the job with corrected data.

13. Click **Finish** to close the dialog.

You can review the Import/Export Job page to see more information about the job. Refer to Import/Export Job tracking and history for details.

For more information on where Import/Export saves files, see the Community article, [Import/Export: Where Files Are Saved By The Import/Export Application](#).

---

**Note:** If you ran the job with Express Transfer active, you are able to close the Import/Export application while the job is running, if desired, and the transfer job will continue and not be affected. You can monitor the progress and history of jobs within Express Transfer (see "Express Transfer Job tracking and history"). You do not have to be logged into RelativityOne to view information within the Express Transfer application.

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#### 4.14.4 Importing a production load file via Import/Export

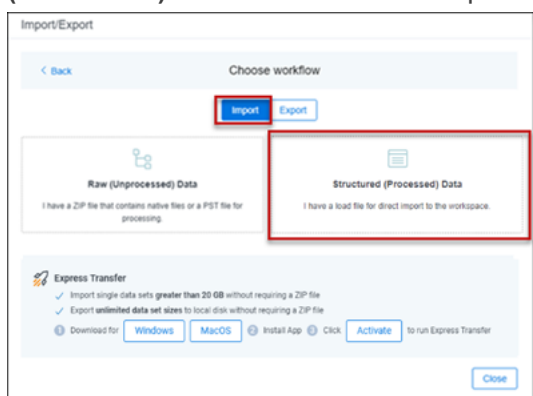
You can use Import/Export to import external productions, including single and multiple PDF files, into RelativityOne with Import/Export. This is useful after a production goes out the door in the event a case team needs access to documents as they were in the production and needs them available for searching.

If you want to use Import/Export with Express Transfer active, which is the recommended workflow for data transfer, refer to [Express Transfer overview on page 49](#) for more information.

Refer to [Import/Export load file specifications](#) and [Data upload size limitation on page 35](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 47](#).

To import a production load file:

1. Use tabs, search, or the quick nav bar to navigate to the **Import/Export Job** page.
2. On the Import/Export Job page, click the **New Import/Export Job** button to start a new job.
3. On the Choose Workflow dialog, the **Import** button is selected by default. Next, click the **Structured (Processed) Data** workflow box to import a production load file into your workspace.

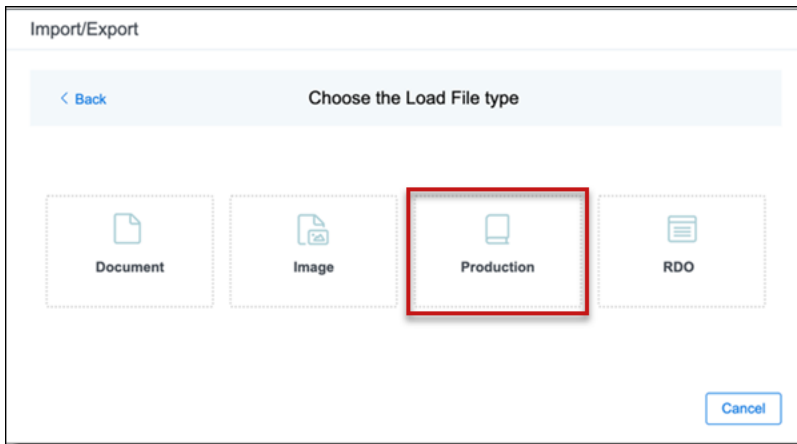


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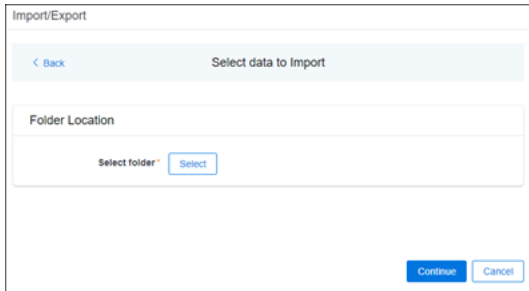
**Note:** If Express Transfer has been activated, the Express Transfer section will display a status of **Active**. See [Activating and deactivating Express Transfer on page 60](#) for more information.

---

4. On the Choose the Load File type dialog, click the **Production** box to import a production load file to your workstation.



5. If Express Transfer is not Active, skip this step. If it is Active, click **Select** on the Select data to Import dialog to browse to your local drive and select the folder with the files that you want to upload. In the case of universal naming convention (UNC) paths (for example, \\ServerName\SharedResourceName\FilePath), you can copy and paste the path into the Select Folder address bar in the dialog box to access the desired folder.



---

**Notes:**

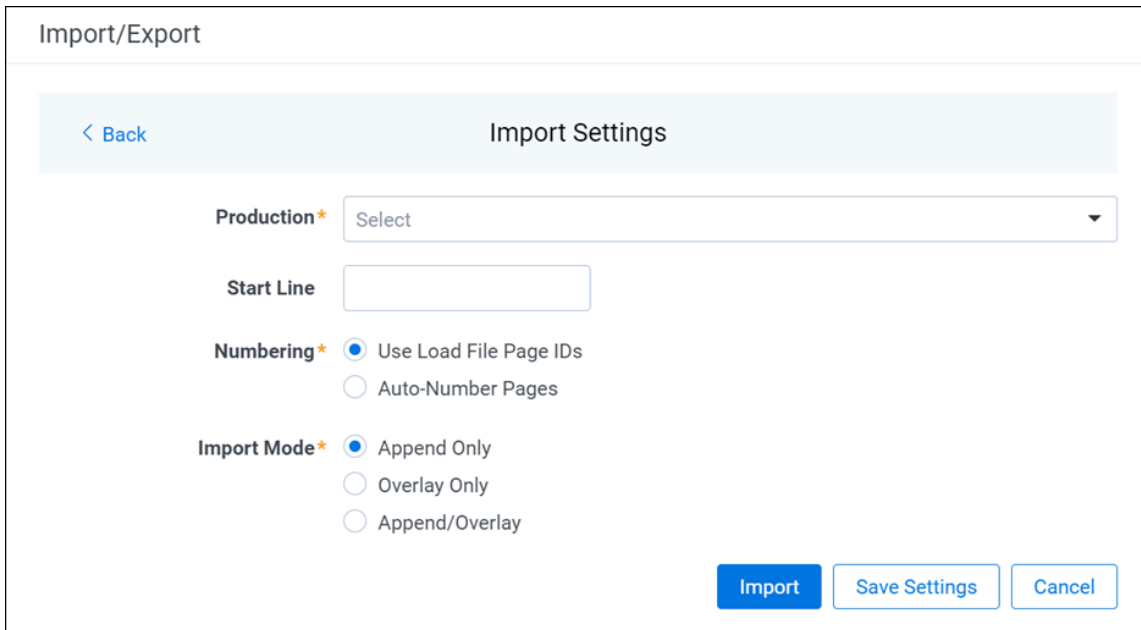
- You can choose only one folder with files to transfer.
  - File names must be 200 characters or less, including the extension.
  - We recommend using a local drive instead of a mapped or external drive to avoid potential slowness and connection issues with the file import process. Also see [Data transfer performance considerations on page 63](#).
  - When Express Transfer is active, you should not zip data for importing.
  - When Express Transfer is active, all the data from the selected folder, including sub-folders, will be transferred to the staging area, regardless of the specific job configuration.
-

6. On the Choose Load File and Location dialog, complete the following fields, then click **Continue**. Refer to [Import/Export load file specifications](#) for more information regarding load files.

The screenshot shows a web-based dialog box titled 'Import/Export' with a sub-header 'Choose Load File And Location'. It contains several input fields and buttons. At the top left is a '< Back' button. The 'Job Name' field is a text input. The 'Destination Folder' field has a 'Select' button. The 'Profile' section has two radio buttons: 'None' (selected) and 'From Local Disk'. The 'Load File' and 'Images' sections each have a dashed box with an upload icon and the text 'Drop your .opt, .txt or .log file here or browse for a file.' and 'Drop your .zip file here or browse for a file.' respectively. The 'Notification Addresses' field contains the text 'email@domain.com, other@domain.com'. At the bottom right are 'Continue' and 'Cancel' buttons.

- **Job name**—provide a descriptive job name so that you can quickly identify and track that job on the Import/Export Job page. The Job name field accepts up to 50 characters.
- **Destination folder**—click the **Select** button, and do one of the following:
  - Choose an existing folder.
  - Create a new workspace folder by right-clicking on an existing folder, click **Create**, enter a new folder name, click out of the new folder to save it, then click **Select**.
- **Profile**—are job configuration settings that were previously saved to a profile file (.ie or .kw\*) so they can be reused when creating future jobs with the same or similar settings in RelativityOne, which saves time and effort as well as helps prevent data entry errors when you're mapping fields, for example. Profiles with the ".ie" extension can only be used in Import/Export.
  - **None**—select this option if you do not desire to use a profile for this import or if you intend to create a new profile based on the settings entered in the upcoming steps. You will be able to save the profile settings later on the "Import settings" dialog. The file extension for the new profile created will be ".ie".

- **From Local Disk Profiles**—use this option to select a previously saved Import/Export profile (.ie file) or an existing .kw\* profile (created via the former Relativity Desktop Client application) to reuse the job settings for this workflow. Use the drag and drop feature or browse for a file to choose it. All job settings provided within the selected profile file will be automatically entered where applicable in the succeeding workflow dialogs.
  - **Load file**—drag and drop or use **browse for a file** to select the load file from your local drive.
  - **Images**—drag and drop or use **browse for a file** to select a zipped image file from your local drive. See [Image and extracted text files on page 45](#).
  - **(Optional) Notification Addresses**—enable email notifications by providing the email addresses of those who should get notified once the job completed, failed, or canceled.
7. On the Import Settings dialog, you can select the production to import and choose the numbering and import mode settings.



- **Production**—select the Production set to import.
- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is set to 0, which results in loading the entire load file.
- **Numbering**—choose the numbering option:
  - **Use load file page IDs**—default setting.
  - **Auto-number pages**—select this option if page IDs in the production are not unique.

- **Import mode**—choose how you want the records to be imported:
  - **Append Only**—loads only new records.
  - **Overlay Only**—updates existing records only. If selected, then you must assign a unique identifier in the **Overlay Identifier** that will be used to overlay data in the workspace. This field acts as a link indicating to RelativityOne where to import the data.
  - **Append/Overlay**—adds new records and overlays data on existing records. If selected, then you must assign a unique identifier in the **Overlay Identifier** that will be used to overlay data in the workspace. This field acts as a link indicating to RelativityOne where to import the data.
- 8. If you selected Overlay Only or Append/Overlay in the previous step, select an **Overlay Identifier** to specify the field that links your overlay load file to the workspace.
  - **Merge Values**—merges all values for multi-choice and multi-object fields in the load file with corresponding multi-choice and multi-option fields in the workspace. The fields are merged regardless of the overlay behavior settings in the environment.
  - **Replace Values**—replaces all values for multi-choice and multi-object fields in the load file with corresponding multi-choice and multi-option fields in the workspace. The fields are merged regardless of the overlay behavior settings in the environment.
  - **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the load file with corresponding multi-choice and multi-option fields in the workspace. The fields are merged according to the overlay behavior settings in the environment.
- 9. (Optional) Click **Save Settings** on the Import settings dialog to save the job configuration settings entered thus far to its own profile file (.ie file extension) on your computer so that you can reuse these settings when creating a new import job with Import/Export in the future.

---

**Note:** Import/Export saves job configuration settings to its own profile file format (.ie file extension). Comparing to the legacy .kw\* standard, it brings more flexibility as you now can apply saved job settings across various workspaces. The .ie profile file format is not supported in other RelativityOne data transfer tools.

---
- 10. (Optional) Click **Precheck Load File** on the Import settings dialog to run a validation process on the load file to check for errors prior to importing it. The following validation is performed during precheck: Image file paths (checks 1,000 random lines across the whole load file). All detected errors are displayed in the Precheck window.

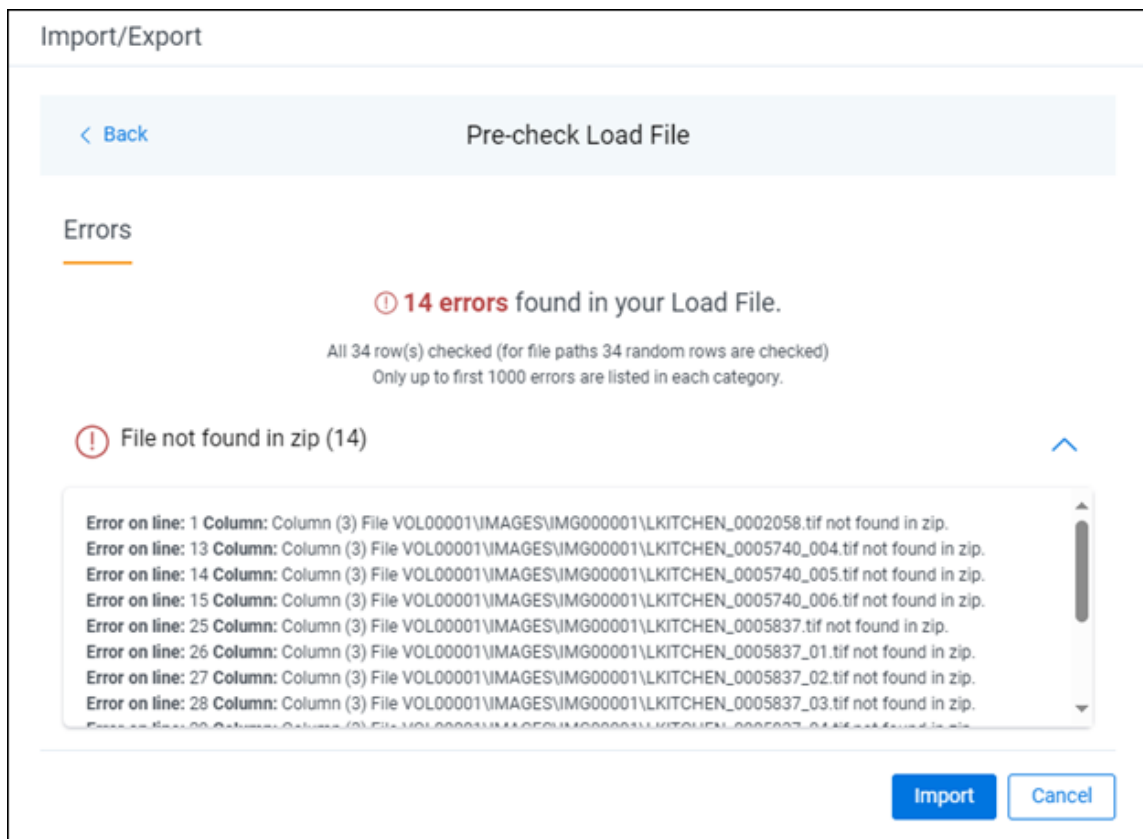
Click the down arrow next to any error message to view its details. If you want to correct the errors in the source file(s) and repeat the importing steps, click **Cancel** to discontinue importing the file at this time. Otherwise, go to the next step to import the load file with errors and correct them later.

---

**Note:** The Precheck Load File summary dialog displays a maximum of 1,000 errors for each error category. For example, if an error category has 2,000 errors, only the first 1,000 will display in the drop-down list.

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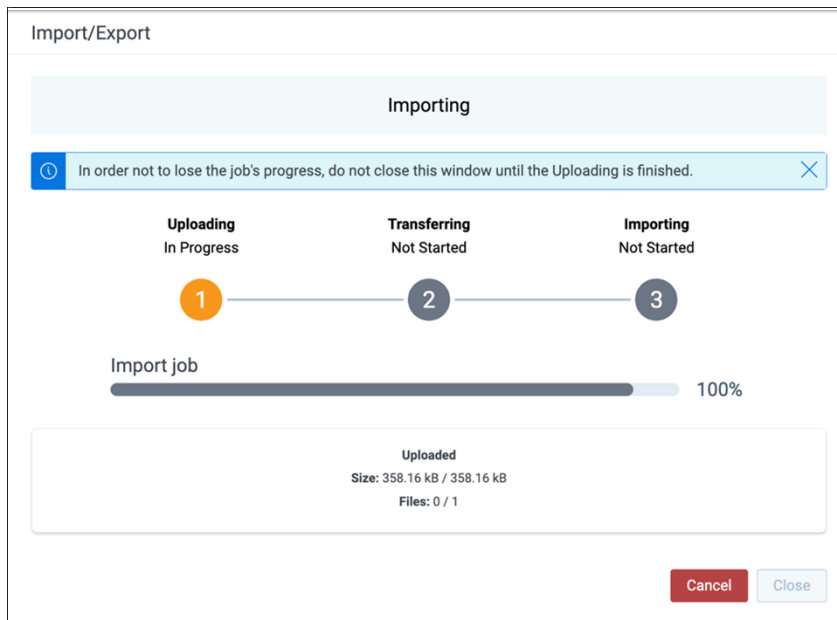


11. Click the **Import** button to start the importing process.
12. Review the importing progress on the Importing dialog. Real-time details regarding the number of transferred files and data size being processed displays during the Uploading and Extracting steps. If needed, click **Cancel** to stop the import job before it completes. Otherwise, click **Close** when the importing process is complete.

---

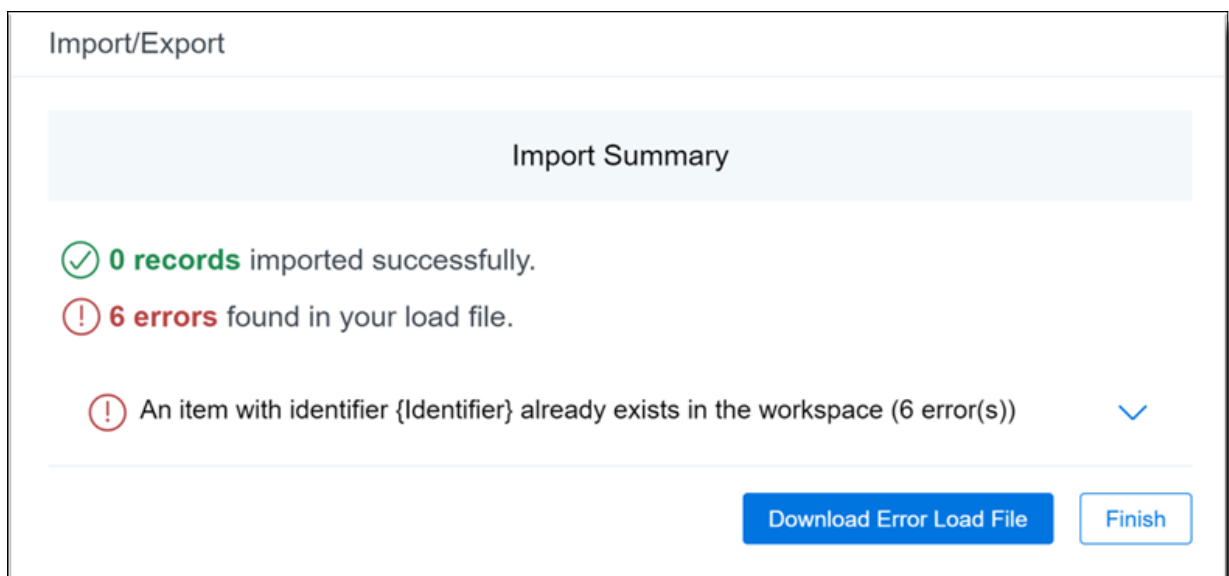
**Caution:** If you used Import/Export in web only mode (meaning Express Transfer was not active), do **not** close the Importing dialog until *after* the Uploading step has successfully completed. Closing the dialog prior to the Uploading step completing will terminate the data transfer (upload) process.

---



13. When the import is complete, the Import Summary displays. If no errors were found in the load file, go to the next step. If errors were found, the number and other information will be listed. You can do either of the following:

**Note:** Only records that imported without errors will appear in the workspace.



- To proceed without correcting the errors, go to the next step.
- To manually correct them now, click the **Download Error Load File** button. Review the errors and correct them as needed. When done, upload the file with the corrected data by clicking the **Select** button on the Import Summary screen next to New Load File and navigating to the load

file on your local drive. Once selected, click **Import** to import the job with corrected data.

14. Click **Finish** to close the dialog.

You can review the Import/Export Job page to see more information about the job. Refer to Import/Export Job tracking and history for details.

For more information on where Import/Export saves files, see the Community article, [Import/Export: Where Files Are Saved By The Import/Export Application](#).

---

**Note:** If you ran the job with Express Transfer active, you are able to close the Import/Export application while the job is running, if desired, and the transfer job will continue and not be affected. You can monitor the progress and history of jobs within Express Transfer (see "Express Transfer Job tracking and history"). You do not have to be logged into RelativityOne to view information within the Express Transfer application.

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#### 4.14.5 Importing Relativity Dynamic Object data via Import/Export

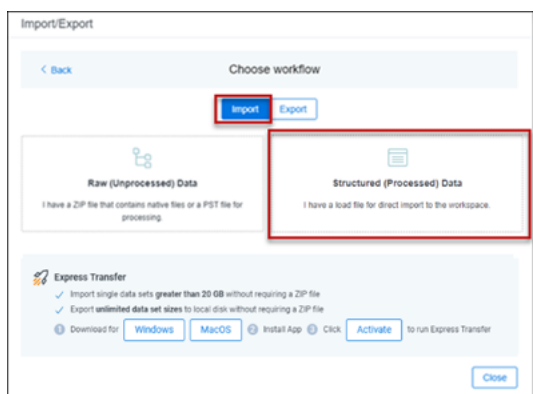
You can import data into Relativity Dynamic Objects (RDO) for use in Relativity applications. The workflow for RDO data import follows the same general guidelines as those for document load file imports.

If you want to use Import/Export with Express Transfer active, which is the recommended workflow for data transfer, refer to [Express Transfer overview on page 49](#) for more information.

Refer to [Import/Export load file specifications](#) and [Data upload size limitation on page 35](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 47](#).

To import RDO data:

1. Use tabs, search, or the quick nav bar to navigate to the **Import/Export Job** page.
2. On the Import/Export Job page, click the **New Import/Export Job** button to start a new job.
3. On the Choose Workflow dialog, the **Import** button is selected by default. Next, click the **Structured (Processed) Data** workflow box to import a document load file to your workspace.

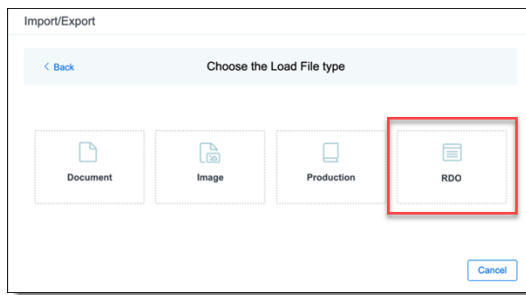


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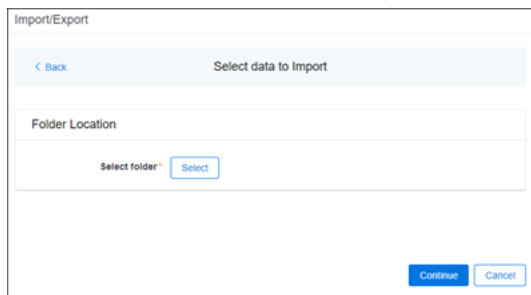
**Note:** If Express Transfer has been activated, the Express Transfer section will display a status of **Active**. See [Activating and deactivating Express Transfer on page 60](#) for more information.

---

4. On the Choose the Load File type dialog, click the **RDO** box to import a load file to your workspace.



5. If Express Transfer is not Active, skip this step. If it is Active, click **Select** on the Select data to Import dialog to browse to your local drive and select the folder with the files that you want to upload. In the case of universal naming convention (UNC) paths (for example, \\ServerName\SharedResourceName\FilePath), you can copy and paste the path into the Select Folder address bar in the dialog box to access the desired folder.




---

#### Notes:

- You can choose only one folder with files to transfer.
  - File names must be 200 characters or less, including the extension.
  - We recommend using a local drive instead of a mapped or external drive to avoid potential slowness and connection issues with the file import process. Also see [Data transfer performance considerations on page 63](#).
  - When Express Transfer is active, you should not zip data for importing.
  - When Express Transfer is active, all the data from the selected folder, including sub-folders, will be transferred to the staging area, regardless of the specific job configuration.
- 
6. On the Choose Load File and Location dialog, complete the following fields, then click **Continue**. Refer to [Import/Export load file specifications](#) for more information regarding load files.

Import/Export

< Back Choose Load File And Location

Job Name \*

Relativity Object Type \* Select

Profile \* ☒ None ☐ From Local Disk

Regional Settings (Date And Time) \* English (United States) | en-US  
12/25/2000 12:00:00 AM

Load File \*  
Drop your .dat, .csv or .txt file here or [browse for a file](#).

Include Native & Text ☐

Notification Addresses email@domain.com, other@domain.com

Continue Cancel

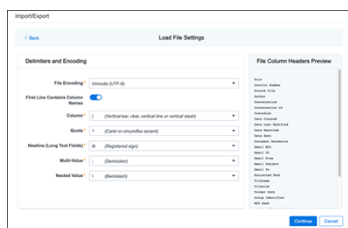
- **Job Name**—provide a descriptive job name so that you can quickly identify and track that job on the Import/Export Job Page. The Job name field accepts up to 50 characters.
- **Relativity Object Type**—select the Relativity object type from the drop-down list that you want to import data.
- **Profile**—are job configuration settings that were previously saved to a profile file (.ie or .kw\*) so they can be reused when creating future jobs with the same or similar settings in RelativityOne, which saves time and effort as well as helps prevent data entry errors when you're mapping fields, for example. Profiles with the ".ie" extension can only be used in Import/Export.
  - **None**—select this option if you do not desire to use a profile for this import or if you intend to create a new profile based on the settings entered in the upcoming steps. You will be able to save the profile settings later on the “Import settings” dialog. The file extension for the new profile created will be “.ie”.
  - **From Local Disk Profiles**—use this option to select a previously saved Import/Export profile (.ie file) or an existing .kw\* profile (created via the former Relativity Desktop Client application) to reuse the job settings for this workflow. Use the drag and drop feature or browse for a file to choose it. All job settings provided within the selected profile file will be automatically entered where applicable in the succeeding workflow dialogs.
- **Regional Settings (Date and Time)**—select the desired format for imported date and time data. A preview of the chosen format will appear below the selection. The setting selected will remain for all future jobs until you choose another one from the list or until you clear your browser cache. When browser cache is cleared, the setting will revert to the US date and time by default.
- **Load File**—use the drag and drop feature or click **browse for a file** to select load file with RDO data from your local drive.
- **Include Native & Text**—select this option to include native and text files.

---

**Note:** The Include Native & Text option is not available for [image](#) or [production](#) import workflows as there are no native files included in OPT files.

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- **Native & Text**—if Include Native & Text was selected, use the drag and drop feature or click **browse for a file** to select the zipped native and text file from your local drive. See [ZIP archive with extracted text and natives on page 44](#)
  - **(Optional) Notification Addresses**—enable email notifications by providing the email addresses of those who should get notified once the job completed, failed, or canceled.
7. On the Load File Settings dialog, select the delimiters and encoding values of the load file for the import, then click **Continue**. The File Column Headers Preview pane will help you to choose the proper settings.



- **File Encoding**—select an encoding format for the load file. Consult your processing vendor or department to determine the correct encoding option, if necessary. The File Column Headers Preview pane automatically updates when you select the File Encoding type. Since the load file is parsed based on the delimiter set, you may need to check delimiters used in the load file if the column headers are not lined up correctly. Determine the delimiters used in the file, and then select them in the delimiters section of this tab.
  - **First Line Contains Column Names** toggle—select this option if the first line contains column names.
  - Select the delimiters and encoding values used by your load file:
    - **Column**—select the character used to separate columns.
    - **Quote**—select the character used as the text qualifier.
    - **Newline (Long Text Fields)**—select the character used to indicate the end of a line in any extracted text or long text field.
    - **Multi-Value**—select the character used to separate choices within a field.
    - **Nested Value**—select the character used to separate the different levels of a multi-choice hierarchy.
8. On the Fields Mapping dialog, select the load file fields to import and map them to the workspace fields, then click **Continue**.

Import/Export

< Back Fields Mapping

Load Fields Mapping

Auto Map Fields Create Field Export to CSV

Mapped Fields 1/100 Mapped To The Top ☐

Load File Sample	Load File Fields	Workspace Fields	Additional Field Settings
82718214	Control Number	Control Number	Choose
Beck Sally	Custodian - Single Choice	Choose	Choose
Atwood Mechelle <Mechelle.Atwood@ENRON.com>	Email From	Choose	Choose
Beck Sally <Sally.Beck@ENRON.com>	Email To	Choose	Choose
5/9/2001 3:57 PM	Date Created	Choose	Choose
5/9/2001 3:57 PM	Date Sent	Choose	Choose
	Document Extension	Choose	Choose
VOL001\NATIVES\NATIVE001\USBECK_0048460.docx	Extracted text	Example   Long text	Choose
VOL001\NATIVES\NATIVE001\	Message	Choose	Choose
	Email BCC	Choose	Choose
Martin, Lawrence	Email CC	Choose	Choose

Continue Cancel

To automatically map fields, click **Auto Map Fields**, and the fields from the load file will be mapped to any existing fields of the exact same name in the workspace. Any fields without a match will display "Choose..." in the Workspace Fields column and you will need to select one from the drop-down list. To search for a field in the list, begin typing the desired field name and matching search results display for selection.

Consider the following when auto-mapping fields:

- Case is not taken into account for the mapping. For example, a field named "email" in the load file would map to a field named "Email" in the workspace.
- Spacing is taken into account. For example, in a two-word field name, if there is one space between words in the workspace field, and two spaces between words in the load file field, the fields will not be mapped.
- Characters are mapped only to themselves. For example, an underscore is only mapped to another underscore, not to a space.

Only fields matched or those with additional settings selected are loaded into the workspace. Other fields in the Load File Fields and Workspace Fields are ignored. You must always match the identifier field for the load file.

**Note:** To import RDO data into a workspace, you must map the document identifier, whether it be Name, Control Number, or another field. If you do not, the import mode options will be limited and you will be unable to proceed with the import.

- **Create Field** button—click this button if you want to create a new workspace field.
- **Export to CSV**—click this button to save the field mapping configuration to a .csv file on your local drive.
- **Mapped to the top** toggle—when turned on, this option groups all mapped fields on the top.
- **Load File Sample** column—presents exemplary data from the load file fields.

- **Load File Fields** column—provides the load file field names. Use the Filter box to search for field names.
- **Workspace Fields** column—allows you to manually map the load file fields to the existing workspace fields. Use the Filter box to search for field names.
- **Additional Field Settings** column—to enable additional field settings, go to the Additional Field Settings column and click the **Choose** down arrow to select the additional field as follows:

- **Text File**—select this option if the mapped Long Text field contains a relative or absolute path to a text file, and then select the **File Encoding** type for the file. If using absolute paths, Express Transfer must be activated.

---

**Note:** This field was renamed from Extracted Text since it now applies to any Long Text field.

---

- **Folder Information Column**—select this option if you want to use a metadata field to build the folder structure for the workspace.
- **Native File**—select this option if the field from your load file contains a relative or absolute (full) path to the native files. If using absolute paths, you must activate Express Transfer.

9. On the Import Settings dialog, configure your import job by selecting from which line number you want the load file to begin importing and how you want the records to be imported.

- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is set to 0, which results in loading the entire load file.
- **Import mode**—Choose how you want the records to be imported.
  - **Append Only**—loads only new records.
  - **Append/Overlay**—adds new records and overlays data on existing records. If selected, then you must include an **Overlay Identifier** next.



---

**Note:** For Append/Overlay and Overlay Only, if a blank metadata field exists in the load file (.dat, .csv), the blank value will overlay (remove) any existing value that may reside in the corresponding mapped field.

---

- **Overlay Only**—updates existing records only. If selected, then you must include an **Overlay Identifier** next.
- **Overlay Identifier**—if either “Overlay Only” or “Append/Overlay” mode is selected, then assign the unique identifier that will be used to overlay data in the workspace. This field acts as a link indicating to RelativityOne where to import the data.

10. (Optional) Click **Save Settings** on the Import settings dialog to save the job configuration settings entered thus far to its own profile file (.ie file extension) on your computer so that you can reuse these settings when creating a new import job with Import/Export in the future

---

**Note:** Import/Export saves job configuration settings to its own profile file format (.ie file extension). Comparing to the legacy .kw\* standard, it brings more flexibility as you now can apply saved job settings across various workspaces. The .ie profile file format is not supported in other RelativityOne data transfer tools.

---

11. (Optional) Click **Precheck Load File** on the Import settings dialog to run a validation process on the load file to check for errors prior to importing it. All detected errors display in the Precheck window.

Click the down arrow next to any error message to view its details. If you want to correct the errors in the source file(s) and repeat the importing steps, click **Cancel** to discontinue importing the file at this time. Otherwise, go to the next step to import the load file with errors and correct them later.

The following validations occur during Precheck:

- Date format
- Field type
- Field length
- Number of load file cells
- Number of folders and choice fields
- File paths for natives and extracted text (checks 1,000 random lines across the whole load file)

---

**Note:** The Precheck Load File summary dialog displays a maximum of 1,000 errors for each error category and will display a message indicating the total number of errors found. For example, if an error category has 2,000 errors, only the first 1,000 will display in the drop-down list.

---

Import/Export

< Back Pre-check Load File

❗ 5 errors found in your Load File.  
7 row(s) checked. Only up to first 1000 are listed in each category.

❗ Invalid value in Whole Number type field (1 error(s))

❗ Invalid date (3 error(s))

Error on line: 5, Column: Date Created, Possible invalid date: 5/21/2001 13:58 PM  
Error on line: 6, Column: Date Created, Possible invalid date: 5/21/2001 25:58 PM  
Error on line: 7, Column: Date Created, Possible invalid date: 5/21/2001 5:58 PM

❗ Fixed-Length Text value is too long (1 error(s))

Import Cancel

Import/Export

< Back Pre-check Load File

❗ 5,000 errors found in your Load File.  
**Choices: 150, Folders: 101**  
5,000 row(s) checked. Only up to first 1000 are listed in each category.

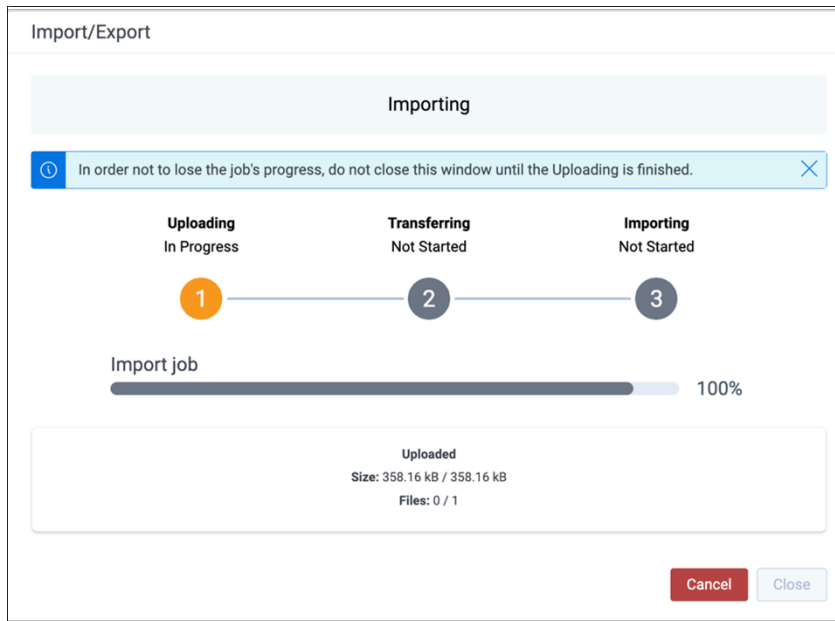
Errors Choices

MultipleChoice\_4: 50  
MultipleChoice\_5: 50  
MultipleChoice\_6: 50

Import Cancel

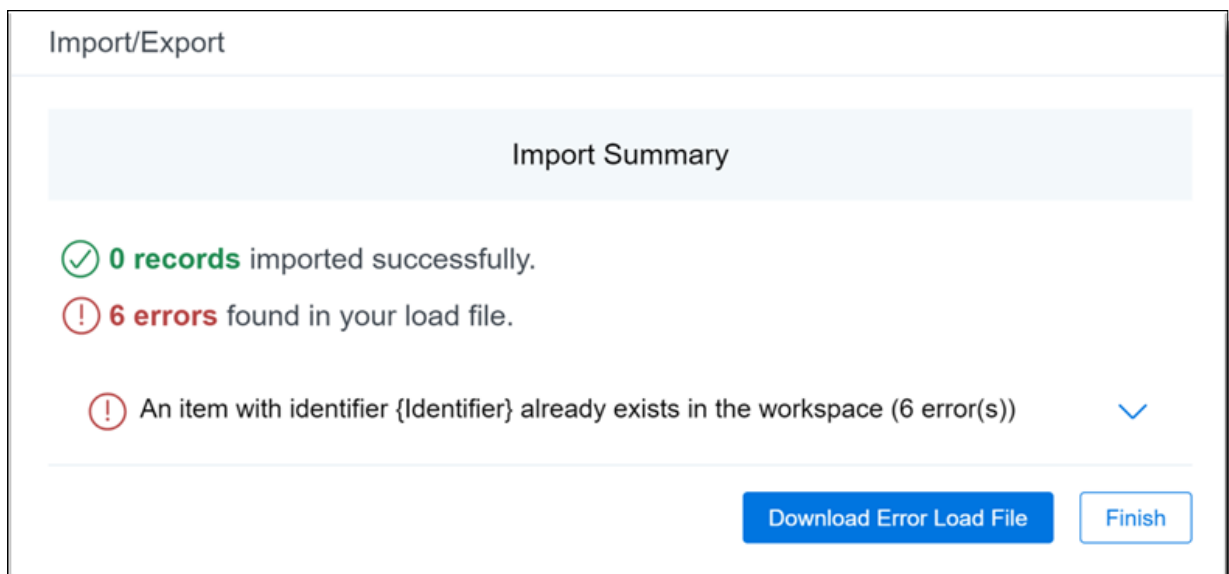
12. Click the **Import** button to start the importing process.
13. Review the importing progress on the Importing dialog. Real-time details regarding the number of transferred files and data size being processed displays during the Uploading and Extracting steps. If needed, click **Cancel** to stop the import job before it completes. Otherwise, click **Close** when the importing process is complete.

**Caution:** If you used Import/Export in web only mode (meaning Express Transfer was not active), do **not** close the Importing dialog until *after* the Uploading step has successfully completed. Closing the dialog prior to the Uploading step completing will terminate the data transfer (upload) process.



- When the import is complete, the Import Summary displays. If no errors were found in the load file, go to the next step. If errors were found, the number and other information will be listed. You can do either of the following:

**Note:** Only records that imported without errors will appear in the workspace.



- To proceed without correcting the errors, go to the next step.
- To manually correct them now, click the **Download Error Load File** button. Review the errors and correct them as needed. When done, upload the file with the corrected data by clicking the **Select** button on the Import Summary screen next to New Load File and navigating to the load file on your local drive. Once selected, click **Import** to import the job with corrected data.

15. Click **Finish** to close the dialog.

You can review the Import/Export Job page to see more information about the job. Refer to Import/Export Job tracking and history for details.

For more information on where Import/Export saves files, see the Community article, [Import/Export: Where Files Are Saved By The Import/Export Application](#).

---

**Note:** If you ran the job with Express Transfer active, you are able to close the Import/Export application while the job is running, if desired, and the transfer job will continue and not be affected. You can monitor the progress and history of jobs within Express Transfer (see "Express Transfer Job tracking and history"). You do not have to be logged into RelativityOne to view information within the Express Transfer application.

---

#### 4.14.6 Importing raw unprocessed data for Processing via Import/Export

You can use Import/Export to import native, unprocessed/unstructured files, including [Slack data](#), into RelativityOne that require processing and it will automatically trigger a Processing job in one operation.

---

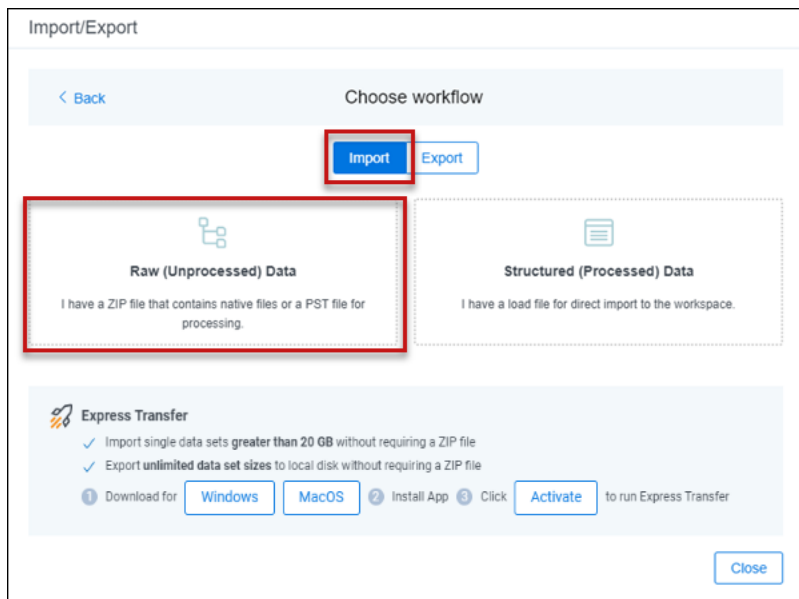
##### Notes:

- Import/Export is **not** a replacement for the Processing application; however it is a simplified workflow when setting up a processing set. Using the Processing application is recommended when setting up large, complex processing jobs. Also, within the Processing application, you can use Quick Create Sets, Inventory, check and update Processing Profiles, and customize data source options.
  - Processing profiles must already exist in RelativityOne before using them in the steps below.
- 

If you want to use Import/Export with Express Transfer active, which is the recommended workflow for data transfer, refer to [Express Transfer overview on page 49](#) for more information.

To import raw unprocessed/unstructured files for Processing:

1. Use tabs, search, or the quick nav bar to navigate to the **Import/Export Job** page.
2. On the Import/Export Job page, click the **New Import/Export Job** button to start a new job.
3. On the Choose workflow dialog, the **Import** button is selected by default. Next, click the **Raw (Unprocessed) Data** workflow box to import native (raw) files into your workspace.



---

**Note:** If Express Transfer has been activated, the Express Transfer section will display a status of **Active**. See [Activating and deactivating Express Transfer on page 60](#) for more information.

---

4. Select the data files to import as follows depending on the activation status of Express Transfer:
  - **With Express Transfer Active:** Click **Select** on the Select data to Import dialog to browse to your local drive and select the folder with the files that you want to upload. In the case of universal naming convention (UNC) paths (for example, \\Server-Name\\SharedResourceName\\FilePath), you can copy and paste the path into the Select Folder address bar at the top of the dialog box in order to access the desired folder. You also have the option on the dialog to choose from file share by clicking **Choose from File Share**, selecting the import source folder, and clicking **Select Folder**. Once the folder has been selected, click **Continue**.

---

**Note:** When you select a folder to upload, Express Transfer will transfer **all** the data from the selected folder, including sub-folders, to the staging area, regardless of the specific job configuration, like the custodian mapping settings. This also applies to the load file import workflows.

---

Import/Export

< Back Select data to Import

Folder Location

Select folder <sup>\*</sup>  or

- **With Express Transfer not Active:** On the Select file dialog, do one of the following below to upload a file. Data files must be zipped when using the first two options mentioned below. Single PST files do not require zipping.

Import/Export

< Back Select file

Drop your .zip or .pst file here or browse for a file.

or Choose from File Share

Import Source

Collapse All

- WebImportExport
  - ImportSource
    - ProcessingSource

- Drag and drop the zipped data file or single PST file into the upload area.
- Click **browse for a file** to select a zipped data or single PST file from your local drive.
- Click **Choose from File Share** to upload files directly from the file share. Then, select the import source folder and click **Select**. You do not need to zip files when importing them with this option.

5. On the Create Processing Job dialog, complete the following fields:

Import/Export

< Back Create Processing Job

Job Name\*

Profile\* Select

Destination Folder\* Select

Notification Addresses email@domain.com, other@domain.com

Select Data Sources\*

Limit of selected data sources: 0/70 1 - 3 of 3 100 per page

Name	Custodian
<input type="checkbox"/> Atkins, Roman	
<input type="checkbox"/> McDonald, Roland	
<input type="checkbox"/> Zipper, Adam	

All 3 Custodian Assign Auto Map Custodians Add Custodian

Run Job Cancel

- **Job name**—provide a descriptive job name so that you can quickly identify and track that job on the Import/Export Job page. The Job name field accepts up to 50 characters.
  - **Profile**—select the desired Processing profile. The Processing profile must already exist in Relativity.
- 
- Note:** If you are importing Slack data, please refer to [Importing Slack short message data for Processing via Import/Export on page 127](#) below.
- 
- **Destination folder**—click the **Select** button, and do one of the following:
    - Choose an existing folder.
    - Create a new workspace folder by right-clicking on an existing folder, click **Create**, enter a new folder name, click out of the new folder to save it, and then click **Select**.
  - **(Optional) Notification Addresses**—enable email notifications by providing the email addresses of those who should get notified once the job completed, failed, or canceled.
6. Next, use the Select Data Sources section to select the **Data Sources** and assign **Custodians**. A maximum of 70 data sources (folders with data, loose files) can be selected and assigned custodians. See recommendations below for preparing data sources.

---

**Notes:** Recommendations for preparing data sources.

- Each elected file is treated as a separate data source. Consider organizing loose files into folders per custodian.
- If you import data for a single custodian, you may want to create a top-level folder and place all the data into that folder to speed up the configuration and execution of the Processing job.
- To exclude Microsoft Office temporary files, which are those file names starting with a ~ (tilde) sign, see [Exclude temporary Microsoft Office files from data import on page 71](#) for more information.
- Be sure your data sources have unique names. Data sources are **not** case sensitive. If you have data sources with duplicate names, you may see processing errors. For example, \\[file.share]\\Processing Source[SOURCE.NAME] and \\[file.share]\\Processing Source [Source.Name] would be considered duplicate names since the system does not differentiate between capital and lower case letters. To make them unique, you could rename the folders [SOURCE.NAME1] and [Source.Name2].

---

Choose the **Data Source** by selecting the checkbox next to the folder name. Then, assign the **Custodian** using any method below:

- **Manually assign custodians:** Select the proper custodian from the **Custodian** drop-down list and click the **Assign** button.
- **Automatically assign custodians:** Click the **Auto Map Custodians** button to automatically assign custodians to data source folders and files based on the naming pattern. Only the **Last name, First name** naming pattern is supported at this time. If you want to modify the automatic assignment, click **Clear** next to the custodian's name.  
The application reads data source names and checks if matching custodians have already been added to the Entity object. Depending on the result, one of the following occurs:
  - **Custodian(s) already exists in the Entity:** If the custodian(s) already exists in the Entity, the application automatically assigns corresponding custodians to folders and files.
  - **New custodian automatically created:** If the application cannot find the corresponding custodian in the Entity object, it creates a new one based on the data source name. Newly created custodians are marked with a blue dot in the Select Data Sources pane. New custodians will be added to the Entity object after you click Run Job in the next step. However, if you click Cancel instead of running the job, the new custodians will not be created.
- **Add a new custodian now:** If you want to add a new custodian to the drop-down list from here instead of through the Entity object, click the **Add Custodian** link, and do the following on the Add Custodian dialog:



a. Select the custodian **Type**:

- **Person**—select this option to enter a First Name and Last Name of the individual acting as custodian of the data to be processed.
- **Other**—select this option if the custodian of the data to be processed is not an individual but is, for example, an entity or company name, and then enter the name in the Full Name field. You can also select this option if you wish to enter an individual's full name without having that name include a comma once you export the data associated with it.

b. Click the **Add Custodian** button. The newly created custodian will be added to the Custodian drop-down list for you to select and assign to the data source.

7. Click **Run Job** to start importing data.

---

**Note:** Import/Export will upload all the zipped data to the Staging area, extract it, and create a new Processing job based on the data source selection. Only data sources assigned to custodians will be processed and imported to your workspace.

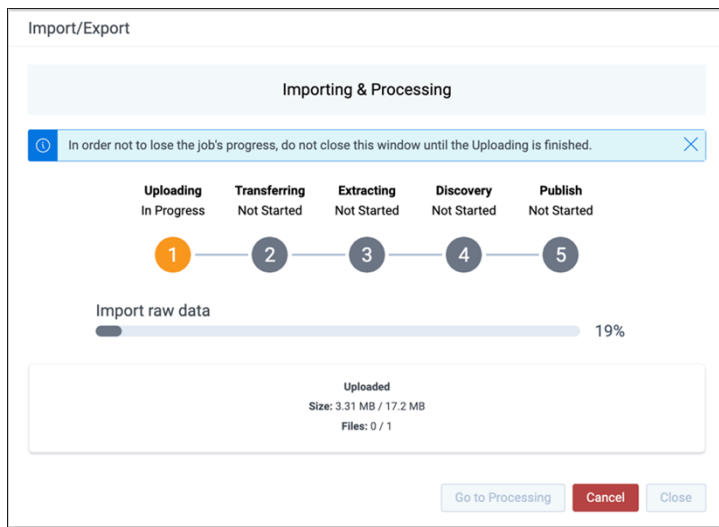
---

8. Review the importing progress on the Importing & Processing dialog. Real-time details regarding the number of transferred files and data size being processed displays during the Uploading and Extracting steps. Do any of the following:

---

**Note:** Only records that imported without errors will appear in the workspace.

---



- Click **Cancel** to stop the importing process before it completes.
- Click **Close** when the importing process is complete.

---

**Caution:** If you imported data without activating Express Transfer, you can close the dialog before the import process finishes without causing an interruption in data flow as long as it's closed *after* the Uploading step is completed. Closing the dialog earlier will terminate the data transfer (upload) process.

---

- Click **Go to Processing** when the Discovery step begins to go to the Processing Sets page of the Processing application.

Import/Export utilizes the Processing application to process native files, extract metadata, and create documents. Depending on the processing profile configuration, the following processing phases will be triggered:

- Discovery
- Discovery and publish (if the auto-publish option is enabled in your processing profile)

---

**Notes:**

- We recommend using the Processing application directly to determine global dedupe order creating processing sets.
  - The Inventory phase of processing is always skipped when you import unstructured data. If Inventory is needed, use Staging Explorer to import data into RelativityOne, and then run Processing directly.
- 

Please refer to Processing in Relativity documentation for more information about using the Processing application to ingest raw data directly into your workspace.

For more information on where Import/Export saves files, see the Community article, [Import/Export: Where Files Are Saved By The Import/Export Application](#).

---

**Note:** If you ran the job with Express Transfer active, you are able to close the Import/Export application while the job is running, if desired, and the transfer job will continue and not be affected. You can monitor the progress and history of jobs within Express Transfer (see "Express Transfer Job tracking and history"). You do not have to be logged into RelativityOne to view information within the Express Transfer application.

---

### Importing Slack short message data for Processing via Import/Export

All commercial customers can now leverage Import/Export to upload Slack data for Processing.

To import Slack short messages for Processing via Import/Export:

1. Copy the zip file containing the Slack data into a folder on your drive.
2. Use tabs, search, or the quick nav bar to navigate to the **Import/Export Job** page.
3. On the Import/Export Job page, click the **New Import/Export Job** button to start a new job.
4. Activate **Express Transfer**. See [Activating and deactivating Express Transfer on page 60](#) for more information.

---

**Note:** If your organization is not permitted to use Express Transfer and you need to leverage the web mode of Import/Export to import Slack data, you must zip the folder in which the zip file is located from Step 1. Be aware that this will create an additional zip level (the zip file from Step 1 within a zipped folder file) for transport purposes only. For this reason, we recommend using Express Transfer for all your imports and exports.

---

5. On the Choose workflow dialog, the **Import** button is selected by default.
6. Click the **Raw (Unprocessed) Data** workflow box.
7. Provide the **Job Name**, select a **Destination Folder**, and select the **Processing Profile**.

---

**Note:** The following settings must already be enabled in the Processing Profile: **Convert Slack to RSMF** and **Download Attachments**. See Processing profiles documentation for more information.

---

8. For **Data Source**, select the folder that contains the zipped Slack data, then assign a **Custodian**.
9. Click **Run Job**. Import/Export uploads the data and passes the job configuration to the Processing application. Please refer to Processing in Relativity documentation for more information about using Processing to ingest raw data directly into your workspace.

---

**Note:** All the RSMF conversion is done in Processing automatically. See Processing documentation on RSMF files for more information.

---

## 4.15 Exporting via Import/Export

You can use Import/Export to export the following:

- Exporting a folder—use this workflow to export a folder.
- Exporting a production set—use this workflow to export a production set.
- Exporting a saved search—use this workflow to export a saved search load file.
- Exporting RDO data—use this workflow to export a Relativity Dynamic Object (RDO) data load file.

Also see [General recommendations for structured data import and export jobs on page 47](#).

### 4.15.1 Exporting via Import/Export

You can use Import/Export to export the following:

- Exporting a folder—use this workflow to export a folder.
- Exporting a production set—use this workflow to export a production set.
- Exporting a saved search—use this workflow to export a saved search load file.
- Exporting RDO data—use this workflow to export a Relativity Dynamic Object (RDO) data load file.

Also see [General recommendations for structured data import and export jobs on page 47](#).

### 4.15.2 Exporting a folder via Import/Export

You can use Import/Export to export folders and sub-folders out of RelativityOne.

If you want to use Import/Export with Express Transfer, which is the recommended method for data transfer, refer to [Express Transfer overview on page 49](#) for more information. With Express Transfer activated, you can run up to five concurrent export jobs on a single client machine. For more information, see [Concurrent and consecutive jobs on page 35](#).

Refer to [Import/Export load file specifications](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 47](#).

To export folders:

1. Use tabs, search, or the quick nav bar to navigate to the **Import/Export Job** page.
2. On the Import/Export Job page, click the **New Import/Export Job** button to start a new job.

---

**Note:** If Express Transfer has been activated, the Express Transfer section will display a status of **Active**. See [Activating and deactivating Express Transfer on page 60](#) for more information.

---

3. On the Choose workflow dialog, click the **Export** button, then click **Folder**.

Import/Export

< Back Choose Workflow

Import Export

**Production Set**  
Export a production set with ease

**Saved Search**  
Export your saved searches

**Folder**  
Export a folder with its content

**RDO**  
Export RDOs in a few clicks

- On the Export Settings, complete the following fields and click **Continue**:

Import/Export

< Back Export Settings

**Data Source**

Job Name\*

Profile\* ☒ None  
☐ From Local Disk

Folders\*

Export Sub-Folders ☐

Views\* Choose... ▼

**Location And Files**

Export Location Type\* ☐ Download to Local Disk  
☒ Export to Staging Area

**Notifications**

Notification Addresses

**Data Source:**

- **Job Name**—provide a descriptive job name so that you can quickly identify and track that job on the Import/Export Job page. The Job name field accepts up to 50 characters.
- **Folders**—choose which workspace folder to export.
- **Export Sub-folders** toggle—select this option to export sub-folders of the previously selected folder.
- **Views**—select the workspace view that you would like to use to export metadata.
- **Profile**—are job configuration settings that were previously saved to a profile file (.ie or .kw\*) so they can be reused when creating future jobs with the same or similar settings in RelativityOne, which saves time and effort as well as helps prevent data entry errors when you're mapping fields, for example.
  - **None**—select this option if you do not desire to use a profile for this export or if you intend to create a new profile based on the settings entered in the upcoming steps. You will be able to save the profile settings later on the “Export Job Configuration Summary” dialog. The file extension for the new profile created will be “.ie”.
  - **From Local Disk Profiles**—use this option to select a previously saved Import/Export profile (.ie file) or an existing .kw\* profile to reuse the job settings for this workflow. Use the drag and drop feature or browse for a file to choose it. All job settings provided within the selected profile file will be automatically entered where applicable in the succeeding workflow dialogs.

#### Location and Files:

- **Export Location Type**—select one of these options:
  - **Download to Local Disk**—select this option to export the selected production set data to the Staging area and compress it to a single zip file. Once complete, you can download the zip file with your web browser directly to a local disk by clicking the **Download** button. This is the recommended option when Express Transfer is activated.
  - **Export to Staging Area**—select this option to create a copy of the data in a dedicated folder in the Staging area. You will need to use RelativityOne Staging Explorer later to download data. The exported data will not be compressed.

---

**Note:** When you export data from RelativityOne with Import/Export, the exported files are stored in the location indicated in the Exporting dialog. After downloading data to your local computer, you may want to consider manually deleting exported files from that location.

---

#### Notifications:

- **(Optional) Notification Addresses**—enable email notifications by providing the email addresses of those who should get notified once the job completed, failed, or canceled.
5. On the Load File Settings dialog, select the data file format and data file encoding, then click **Continue**.

Import/Export

Back
Load File Settings

Data File Settings

Data File Format \*
☒ .dat (Concordance)
☐ .csv (Comma separated)
☐ .html (HTML)
☐ .txt (Custom)

Start Line \*

Data File Encoding \*

Unicode (UTF-8)

Regional Settings (Date And Time) \*

English (United States) | en-US

Long time (with seconds)
☒

12/25/2000 12:00:00 AM

Export Multiple Choice Fields as Nested
☐

Continue
Cancel

- **Data File Format**—select one of the formats below for the load file you are exporting:
  - **.dat (Concordance)**—load file exports with the standard Concordance delimiters.
  - **.csv (Comma separated)**—load file exports with comma separated delimiters
  - **.html (HTML)**—load file is in HTML format and contains hyperlinks to launch any exported files.
  - **.txt (Custom)**—load file exports with the custom delimiters that you select in the **Load File Characters** section that displays when this option is selected.

Load File Characters

Column \* 

DC4 (Device control 4)

Quote \* 

" (Latin Small Letter Two)

Newline (Long Text Field) \* 

␣ (Registered sign)

Multi-Value \* 

:

Nested Value \* 

\ (Backslash)

- **Start Line**—select a line (record number) that identifies the initial document for export. The application begins by exporting the document with this number and continues by exporting documents with subsequent record numbers.
  - **Data File Encoding**—select the encoding type for the document-level load file from the drop-down.
  - **Regional Settings (Date and Time)**—select the desired format for the exported date and time data. A preview of the chosen format will appear below the next field. Your selection for this field will remain for future export jobs until you change it or clear the browser cache. Clearing the browser cache will default the format to "English (United States)."
  - **Long Time (with seconds)**—by default, this option is toggled off. Toggle it on if you want to include seconds with the exported date and time information. For example, the time will export as 12:10 AM (HH:MM AM/PM) when the toggle is off, and it will export as 12:10:25 AM (HH:MM:SS AM/PM) when the toggle is on.
  - **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of RelativityOne multiple-choice lists, when applicable. The Nested Value delimiter, a backslash, separates child choices.
6. On the Select Fields dialog, choose the Workspace Fields that you want to export by moving them to the Selected Fields box, then click **Continue**. The Workspace Fields box displays all available fields, but only the fields in the Selected Fields box will be exported.

---

**Note:** The Production::Begin Bates and Production::End Bates fields automatically populate in the Selected Fields column.

---

You can do the following to move fields:

- Highlight a field and click one of the directional arrow buttons in the center to move it between boxes
- Double-click on a field to move it left and right between boxes
- Use CTRL+ left mouse click to select multiple fields, then choose the desired directional arrow to move between boxes
- In Selected Fields column, set the load file column order by dragging the fields to their proper ordering position.



Import/Export

[< Back](#) **Select Fields**

**Workspace Fields**

Filter

- Alert
- Batch::Assigned To
- Batch::Batch Set**
- Batch::Status
- Bates Beg
- Bates Beg Attach
- Bates End
- Bates End Attach

**Selected Fields**

Filter

- Artifact ID
- Production::Begin Bates
- Production::End Bates
- Attachment Name
- Attorney Review Comments
- Batch

[Continue](#) [Cancel](#)

- On the Production Image Type dialog, select the images you want to export.

- **Original Images**—select to export only the original, non-produced images or select.
  - **Produced Images**—select to export a produced version of the images.
  - **Include original images** toggle—select to export original images for the documents that are not in a specified production.
8. Move the productions that you want to export from the Available Productions box to the **Selected Productions** box.

---

**Note:** Any produced native files will be exported as a native instead of an image. Only one produced image is exported based on precedence in the list. If the document is in the topmost production, that version is exported. If not, Relativity checks for the document in the second production and so on. If the document is not a part of any of the selected productions, and "Include original images" toggle is enabled, then the original document is produced.

---

9. To include native files and/or images in the exported data, select the corresponding options on the File Settings dialog, then click **Continue**.

Import/Export

< Back File Settings

Natives

Export Native Files ☐

Images

Export Images ☐

PDFs

Export PDFs ☐

Continue Cancel

- **Export Native Files** toggle—select this option to export native files.
  - **Export Images** toggle—select this option to include images in the export. If this option is toggled on, then you must set the **Data File Format** for image-level load file (Opticon, IPRO, or IPRO (FullText)) and the **File Type** for export images (Single-page TIFF/JPG, Multi-page TIFF/JPG, or Rendered PDF).
  - **Export PDF** toggle—select this option to include PDFs in the export. If this option is toggled on, then you must set the **Data File Format** for PDF-level load file (Opticon, IPRO, or IPRO (FullText)).
10. On the File And Folders dialog, choose the desired naming convention and folder structure for the exported files, then click **Continue**.

Import/Export

< Back Files And Folders

Text and Native File Names

Named after ☒ Control Number ☐ Custom name

Append original filename ☐

Folder Structure

Group files by ☒ File Type ☐ Workspace Structure

Continue Cancel

#### Text and Native File Names:

- **Named after**—select one of the following naming conventions for exported files:
  - **Control Number**—select this option to name the files using the document identifier/control number.
  - **Custom name**—select this option to customize the file names. If this option is selected, enter data in the following fields that display:
    - **Prefix**—choose whether to have the prefix be the **Control Number** or **Production Begin Bates**.
    - **Select spacing**—select the desired spacing option from the drop-down list.
    - **Select field**—choose a field from your workspace or choose **Custom Text** and provide your text.
    - **Preview**—you will be able to view a Preview of the custom file name to see if it's what you want and make changes in the fields as needed.
- **Append original filename** toggle—select this option to append the original file name, which is defined as the file name as it was on disk, to the end of the exported file name.

#### Folder Structure:

- **Group files by**—select one of the options below for how to group the exported files:

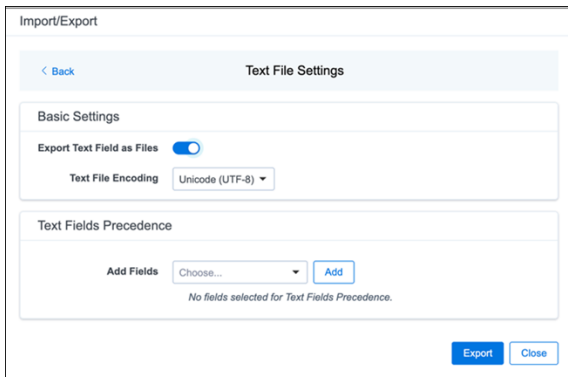
---

**Note:** Depending on the structure of your exported data, export job performance degradation may result and be several times longer when using **Workspace Structure** compared with using **File Type**. Unless it is necessary to use Workspace Structure, we recommend using the **File Type** option for the export job.

---

- **File Type**—select this option to group files by their type and place them in separate folders based on type (such as in Natives, Images, Text, and PDFs folders).
- **Workspace Structure**—select this option to preserve the workspace folder structure. This option may reduce the time of preparing production data since the files will not need to be manually realigned later to replicate the folder structure in the workspace.

11. On the Text File Settings dialog, you can select to export text field as files and then choose the text file encoding as follows.



- **Export Text Field as Files** toggle—determines the export method of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Deselect it to include text as part of the load file.
- **Text File Encoding**—if Export Text Field as Files is toggled on, then select the encoding format for the document-level text files.
- **Text Fields Precedence**—select and assign an order to long text fields that Relativity checks for text when performing an export. Relativity adds the Text Fields Precedence column as the last column in the load file. You must select at least one long text field to use this functionality. Choose the fields from the **Add Fields** drop-down, then click **Add**. To delete a selected field, click its trashcan icon.

Import/Export

Back

Text File Settings

Basic Settings

Export Text Field as Files
☒

Text File Encoding
Unicode (UTF-8)

Text Fields Precedence

Add Fields \*
Production OCR
Add

Extracted Text

Production OCR

Continue
Cancel

To order the precedence of the fields, click the six-dot handle left of the field name and drag it to the proper ordering position. During an export, the system checks the topmost (first) field in the list for text, and if the field is null, it checks the next field in order of precedence for text, and so on. When it finds a field that contains text, Relativity adds the contents of that field to the Text Fields Precedence column in the document load file, and then continues checking the fields for the next document and so on. For example, if you listed the Extracted Text field first and the Production OCR field second, the system would first check the Extracted Text field for content, and if it was null, it would move on to the Production OCR field, and so on.

The Text Fields Precedence column displays the file path to the exported files if you select the **Export Text Field as Files** checkbox above.

12. Click **Continue**.
13. (Optional) In the Advanced Settings dialog, toggle on **Set Custom Information** if you want to customize the volume and folder information. Otherwise, leave the toggle off.

Import/Export

[< Back](#)
Advanced Settings

Volume and Subdirectory Information

Set Custom Information ☒

Volume Information

Prefix \* VOL

Start \* 1

# of digits \* 2

Max Size (MB) \* 650

Subdirectory Information

Image Prefix \* IMG

Native Prefix \* NATIVE

Text Prefix \* TEXT

PDF Prefix \* PDF

Start \* 1

# of digits \* 3

Max Files \* 500

Continue Cancel

**Volume Information**—this section controls the naming and size of the volume identifier. Set the following options in this section:

- **Prefix**—enter the alpha prefix for the volume identifier.
- **Start**—enter the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
- **# of digits**—enter the number of digits attached to the prefix. For example, if you enter 3, the output is VOL001, VOL002, and so on.
- **Max Size (MB)**—enter the maximum size allowed for each volume.

**Subdirectory Information**—this section controls the naming and size of volume sub-folders. Set the following options in this section:

- **Image Prefix**—enter the alpha prefix for the sub-directory that stores exported images.
- **Native Prefix**—enter the alpha prefix for the sub-directory that stores exported native files.
- **Text Prefix**—enter the alpha prefix for the sub-directory that stores exported extracted text files.

- **PDF Prefix**—enter the alpha prefix for the sub-directory that stores exported extracted PDF files.
  - **Start**—enter the starting number for the sub-directories.
  - **# of digits**—select the number of digits of the sub-directory prefix. For example, if you enter 3, the output is IMG001, IMG002, and so on.
  - **Max Files**—select the number of files to store in each sub-directory.
14. Click **Continue**.
  15. On the Export Job Configuration Summary, review the export job settings and go back to make any corrections as needed.

Import/Export

< Back      Export Job Configuration Summary

Data Source

Job Name	Folders
Folder with subfolders	Import Export Test/Case_00001
View	Documents
Profile	No

Location And Files

Export Location Type	Download to local disk
----------------------	------------------------

Data File Settings

Data File Format	.dat (Concordance)
Data File Encoding	Unicode (UTF-8)

Export   Save Settings   Cancel

16. (Optional) Click **Save Settings** on the Export Job Configuration Summary dialog to export the job configuration settings entered thus far to its own profile file (.ie file extension) and save it on your computer so you can reuse these settings when creating a new export job with Import/Export.

---

**Note:** Import/Export saves job configuration settings to its own profile file format (.ie file extension). Comparing to the legacy .kw\* standard, it brings more flexibility as you now can apply saved job settings across various workspaces. The .ie profile file format is not supported in other RelativityOne data transfer tools.

---

17. Click the **Export** button to start the exporting process.
18. When it's complete, the job summary lists the records exported successfully (including Load files containing .dat, opt, etc.), errors found, and path to your exported files.
  - If Express Transfer is active, the exported files automatically start to download. You can track the download's progress in the Exporting dialog or in Express Transfer (see [Express Transfer Job tracking and history](#)).

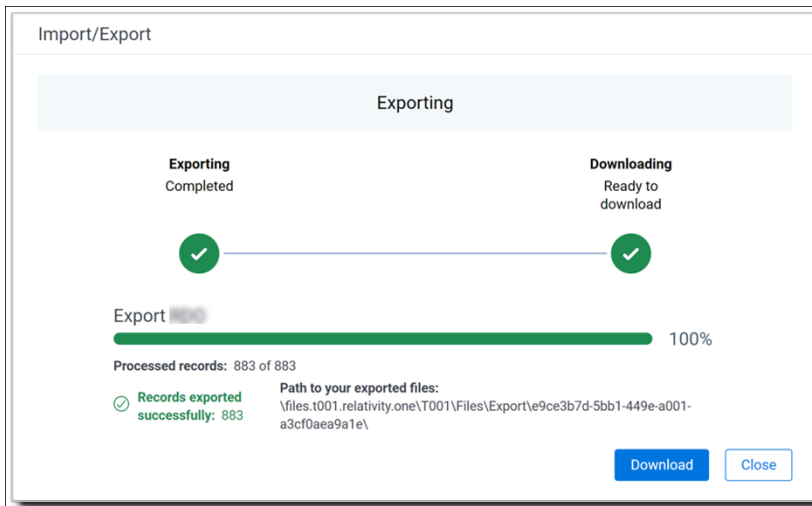


---

**Note:** If you ran the job with Express Transfer active, you can close the Import/Export application while the job is running, if desired, and the transfer job will continue uninterrupted. You can monitor the progress and history of the job within [Express Transfer](#). You do not have to be logged into RelativityOne to view information within the Express Transfer application.

---

- If Express Transfer is not active, the application generates a zip file containing the exported data that can be download. Click the **Download** button to save the exported data zip file to your computer, or click the **Close** button to close the dialog without downloading the file.



---

**Note:** When downloading zip files to your computer, you can configure your browser to allow you save the zip file to a custom file name of your choosing as well as to a specific folder destination instead of using the default file name and destination. In the Settings menu of your browser, select Downloads. Toggle on the option to ask where to save or what to do with each file before downloading. Now, when you click the Download button in the Exporting dialog, your browser will display a dialog that allows you to change the default zip file name and select a destination other than the default one. If needed, you can also create a new folder in the chosen destination for the exported data.

---

- If you chose to **Export to Staging Area** when setting up your export job on the Export Settings dialog, the application automatically exports data to your RelativityOne file share and skips the downloading process. Go the path listed on the dialog to access the exported data files.

For more information on where Import/Export saves files, see the Community article, [Import/Export: Where Files Are Saved By The Import/Export Application](#).

You can always view the job's Exporting dialog information after it's closed by going to the [Import/Export Job page](#) and clicking the **job name link**. The Job page also contains more details about all jobs.

### 4.15.3 Exporting a production set load file via Import/Export

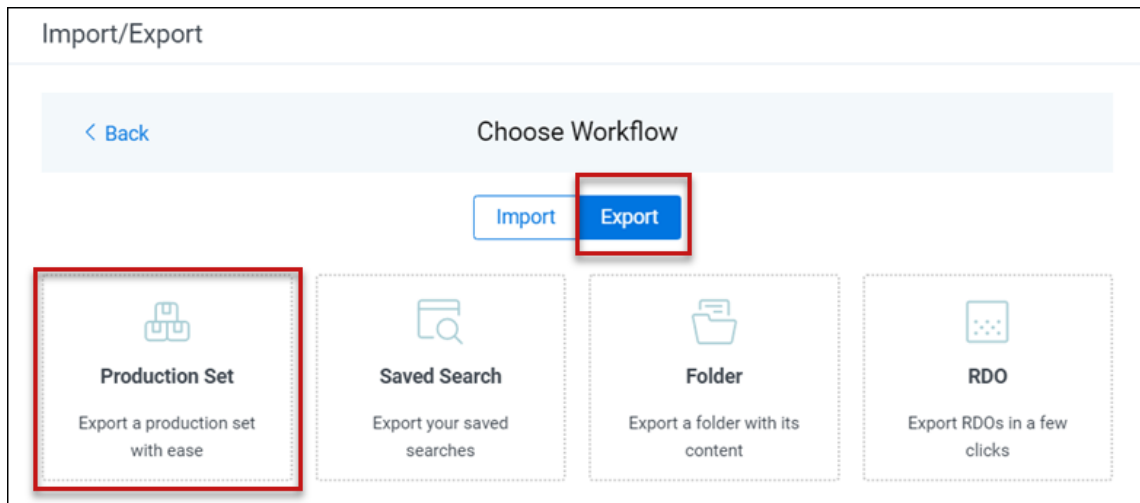
You can use Import/Export to export a production set load file out of RelativityOne.

If you want to use Import/Export with Express Transfer, which is the recommended method for data transfer, refer to [Express Transfer overview on page 49](#) for more information. With Express Transfer activated, you can run up to five concurrent export jobs on a single client machine. For more information, see [Concurrent and consecutive jobs on page 35](#).

Refer to [Import/Export load file specifications](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 47](#).

To export a production load file:

1. Use tabs, search, or the quick nav bar to navigate to the **Import/Export Job** page.
2. On the Import/Export Job page, click the **New Import/Export Job** button to start a new job.
3. On the Choose workflow dialog, click the **Export** button, then click **Production Set**.



---

**Note:** If Express Transfer has been activated, the Express Transfer section will display a status of **Active**. See [Activating and deactivating Express Transfer on page 60](#) for more information.

---

4. On the Export Settings, complete the following fields and click **Continue**.

Import/Export

< Back Export Settings

Data Source

Job Name \*

Profile \* ☒ None ☐ From Local Disk

Production \* Choose...

Location And Files

Export Location Type \* ☐ Download to Local Disk ☒ Export to Staging Area

Notifications

Notification Addresses email@domain.com, other@domain.com

Continue Cancel

#### Data Source:

- **Job Name**—provide a descriptive job name so that you can quickly identify and track that job on the Import/Export Job page. The Job name field accepts up to 50 characters.
- **Profile**—are job configuration settings that were previously saved to a profile file (.ie or .kw\*) so they can be reused when creating future jobs with the same or similar settings in RelativityOne, which saves time and effort as well as helps prevent data entry errors when you're mapping fields, for example.
  - **None**—select this option if you do not desire to use a profile for this export or if you intend to create a new profile based on the settings entered in the upcoming steps. You will be able to save the profile settings later on the “Export Job Configuration Summary” dialog. The file extension for the new profile created will be “.ie”.
  - **From Local Disk Profiles**—use this option to select a previously saved Import/Export profile (.ie file) or an existing .kw\* profile to reuse the job settings for this workflow. Use the drag and drop feature or browse for a file to choose it. All job settings provided within the selected profile file will be automatically entered where applicable in the succeeding workflow dialogs.
- **Production**—choose the desired production set to export.

#### Location and Files:

- **Export Location Type**—select one of these options:
  - **Download to Local Disk**—select this option to export the selected production set data to the Staging area and compress it to a single zip file. Once complete, you can download the zip file with your web browser directly to a local disk by clicking the **Download** button. This is the recommended option when Express Transfer is activated.
  - **Export to Staging Area**—select this option to create a copy of the data in a dedicated folder in the Staging area. You will need to use RelativityOne Staging Explorer later to download data. The exported data will not be compressed.

---

**Note:** When you export data from RelativityOne with Import/Export, the exported files are stored in the location indicated in the Exporting dialog. After downloading data to your local computer, you may want to consider manually deleting exported files from that location.

---

**Notifications:**

- **(Optional) Notification Addresses**—enable email notifications by providing the email addresses of those who should get notified once the job completed, failed, or canceled.
5. On the Load File Settings dialog, select the data file format and data file encoding, then click **Continue**.

Import/Export

[< Back](#)

Load File Settings

Data File Settings

**Data File Format \***
☒ .dat (Concordance)
   
☐ .csv (Comma separated)
   
☐ .html (HTML)
   
☐ .txt (Custom)

**Start Line \***

**Data File Encoding \***

**Regional Settings (Date And Time) \***

**Long time (with seconds)**
☒
  
 12/25/2000 12:00:00 AM

**Export Multiple Choice Fields as Nested**
☐

Continue

Cancel

- **Data File Format**—select one of the formats below for the load file you are exporting:
  - **.dat (Concordance)**—load file exports with the standard Concordance delimiters.
  - **.csv (Comma separated)**—load file exports with comma separated delimiters
  - **.html (HTML)**—load file is in HTML format and contains hyperlinks to launch any exported files.
  - **.txt (Custom)**—load file exports with the custom delimiters that you select in the Load File Characters section that displays.

Load File Characters

Column \*

DC4 (Device control 4)

Quote \*

> (Latin Small Letter Thorn)

Newline (Long Text Fields) \*

@ (Registered sign)

Multi-Value \*

: (Semicolon)

Nested Value \*

\ (Backslash)

- **Start Line**—select a line (record number) that identifies the initial document for export. The application begins by exporting the document with this number and continues by exporting documents with subsequent record numbers.

- **Data File Encoding**—select the encoding type for the document-level load file from the drop-down.
  - **Regional Settings (Date and Time)**—select the desired format for the exported date and time data. A preview of the chosen format will appear below the next field. Your selection for this field will remain for future export jobs until you change it or clear the browser cache. Clearing the browser cache will default the format to "English (United States)."
  - **Long Time (with seconds)**—by default, this option is toggled off. Toggle it on if you want to include seconds with the exported date and time information. For example, the time will export as 12:10 AM (HH:MM AM/PM) when the toggle is off, and it will export as 12:10:25 AM (HH:MM:SS AM/PM) when the toggle is on.
  - **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of RelativityOne multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.
6. On the Select Fields dialog, choose the Workspace Fields that you want to export by moving them to the Selected Fields box, then click **Continue**. The Workspace Fields box displays all available fields, but only the fields in the Selected Fields box will be exported.

---

**Note:** The Production::Begin Bates and Production::End Bates fields automatically populate in the Selected Fields column.

---

You can do the following to move fields:

- Highlight a field and click one of the directional arrow buttons in the center to move it between boxes
- Double-click on a field to move it between boxes
- Use CTRL+ left mouse click to select multiple fields, then choose the desired directional arrow to move between boxes
- In Selected Fields column, set the load file column order by dragging the fields to their proper ordering position.

7. In order to include native files and/or images in the exported data, select the corresponding options on the File Settings dialog, then click **Continue**.

#### Natives:

- **Export Native Files** toggle—select this option to export native files.

#### Images:

- **Export Images** toggle—select this option to include images in the export. If this option is toggled on, then you must set the Data File Format and the File Type for export images.
- **Data File Format**—select one of the formats for image-level load file: Opticon, IPRO, or IPRO (FullText).

- **File Type**—select one of the file types: Single-page TIFF/JPG, Multi-page TIFF/JPG, or Rendered PDF.
8. On the File And Folders dialog, choose the desired naming convention and folder structure for the exported files, then click **Continue**.

Import/Export

[< Back](#) Files And Folders

Text and Native File Names

Named after ☒ Control Number  
☐ Production Begin Bates  
☐ Custom name

Append original filename ☐

Folder Structure

Group files by ☒ File Type  
☐ Workspace Structure

**Continue** **Cancel**

**Text and Native File Names:**

- **Named after**—select one of the following naming conventions for exported files:
  - **Control Number**—select this option to name the files after the control number.
  - **Production Begin Bates**—select this option to name the files after the production number.
  - **Custom name**—select this option to customize native and text file names. If this option is selected, enter data in the following fields that display:
    - **Prefix**—choose whether to have the prefix be the **Control Number** or **Production Begin Bates**.
    - **Select spacing**—select the desired spacing option from the drop-down list.
    - **Select field**—choose a field from your workspace or choose **Custom Text** and provide your text.



- **Preview**—you will be able to view a Preview of the custom file name to see if it's what you want and make changes in the fields as needed.
- **Append original filename** toggle—select this option to append the original file name, which is defined as the file name as it was on disk, to the end of the exported file name.

#### Folder Structure:

- **Group files by**—select one of the options below for how to group the exported file:

**Note:** Depending on the structure of your exported data, export job performance degradation may result and be several times longer when using **Workspace Structure** compared with using **File Type**. Unless it is necessary to use Workspace Structure, we recommend using the **File Type** option for the export job.

- **File Type**—select this option to group files by their type and place them in separate folders based on type (such as in Natives, Images, Text, and PDFs folders).
- **Workspace Structure**—select this option to preserve the workspace folder structure. This option may reduce the time of preparing production data since the files will not need to be manually realigned later to replicate the folder structure in the workspace.

9. On the Text File Settings dialog, you can select to export text field as files and then choose the text file encoding as follows.

- **Export Text Field as Files** toggle—determines the export method of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Deselect it to include text as part of your load file.
- **Text File Encoding**—if Export Text Field as Files is toggled on, then select the encoding format for the document-level text files.
- **Text Fields Precedence**—select and assign an order to long text fields that Relativity checks for text when performing an export. Relativity adds the Text Fields Precedence column as the last column in the load file. You must select at least one long text field to use this functionality. Choose the fields from the **Add Fields** drop-down, then click **Add**.

To delete a selected field, click its trashcan icon.

Import/Export

< Back Text File Settings

Basic Settings

Export Text Field as Files ☒

Text File Encoding Unicode (UTF-8)

Text Fields Precedence

Add Fields \* Production OCR Add

Extracted Text

Production OCR

Continue Cancel

To order the precedence of the fields, click the six-dot handle next to the field name and drag it to the proper ordering position. During an export, the system checks the topmost (first) field in the list for text, and if the field is null, it checks the next field in order of precedence for text, and so on. When it finds a field that contains text, Relativity adds the contents of that field to the Text Fields Precedence column in the document load file, and then continues checking the fields for the next document and so on. For example, if you listed the Extracted Text field first and the Production OCR field second, the system would first check the Extracted Text field for content, and if it was null, it would move on to the Production OCR field, and so on.

The Text Fields Precedence column displays the file path to the exported files if you select the **Export Text Field as Files** checkbox above.

10. Click **Continue**.
11. (Optional) In the Advanced Settings dialog, toggle on **Set Custom Information** if you want to customize the volume and folder information using the fields below. Otherwise, leave the toggle off.

Import/Export

[< Back](#)
Advanced Settings

Volume and Subdirectory Information

Set Custom Information ☒

Volume Information

Prefix \* VOL

Start \* 1
# of digits \* 2

Max Size (MB) \* 650

Subdirectory Information

Image Prefix \* IMG

Native Prefix \* NATIVE

Text Prefix \* TEXT

PDF Prefix \* PDF

Start \* 1
# of digits \* 3

Max Files \* 500

Continue Cancel

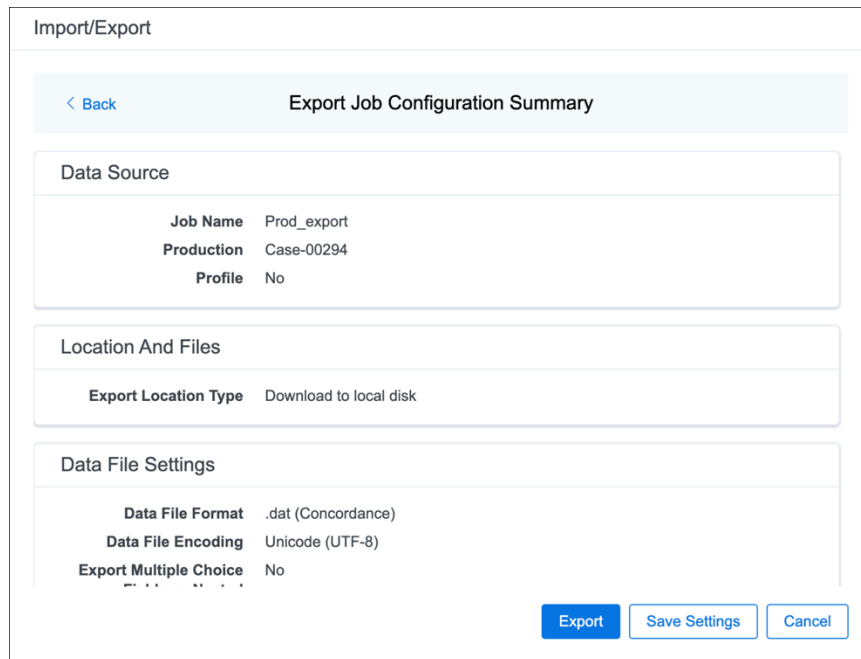
**Volume Information**—this section controls the naming and size of the volume identifier. Set the following options in this section:

- **Prefix**—enter the alpha prefix for the volume identifier.
- **Start**—enter the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
- **# of digits**—enter the number of digits attached to the prefix. For example, if you enter 3, the output is VOL001, VOL002, and so on.
- **Max Size (MB)**—enter the maximum size allowed for each volume.

**Subdirectory Information**—this section controls the naming and size of volume sub-folders. Set the following options in this section:

- **Image Prefix**—enter the alpha prefix for the sub-directory that stores exported images.
- **Native Prefix**—enter the alpha prefix for the sub-directory that stores exported native files.

- **Text Prefix**—enter the alpha prefix for the sub-directory that stores exported extracted text files.
  - **PDF Prefix**—enter the alpha prefix for the sub-directory that stores exported extracted PDF files.
  - **Start**—enter the starting number for the sub-directories.
  - **# of digits**—select the number of digits of the sub-directory prefix. For example, if you enter 3, the output is IMG001, IMG002, and so on.
  - **Max Files**—select the number of files to store in each subdirectory.
12. Click **Continue**.
  13. On the Export Job Configuration Summary, review the export job settings and go back to make any corrections as needed.



Import/Export

< Back      Export Job Configuration Summary

Data Source

Job Name	Prod_export
Production	Case-00294
Profile	No

Location And Files

Export Location Type	Download to local disk
----------------------	------------------------

Data File Settings

Data File Format	.dat (Concordance)
Data File Encoding	Unicode (UTF-8)
Export Multiple Choice	No

Export    Save Settings    Cancel

14. (Optional) Click **Save Settings** on the Export Job Configuration Summary dialog to export the job configuration settings entered thus far to its own profile file (.ie file extension) and save it on your computer so you can reuse these settings when creating a new export job with Import/Export.

---

**Note:** Import/Export saves job configuration settings to its own profile file format (.ie file extension). Comparing to the legacy .kw\* standard, it brings more flexibility as you now can apply saved job settings across various workspaces. The .ie profile file format is not supported in other RelativityOne data transfer tools.

---

15. Click the **Export** button to start the exporting process.
16. When it's complete, the job summary lists the records exported successfully (including Load files containing .dat, opt, etc.), errors found, and path to your exported files.

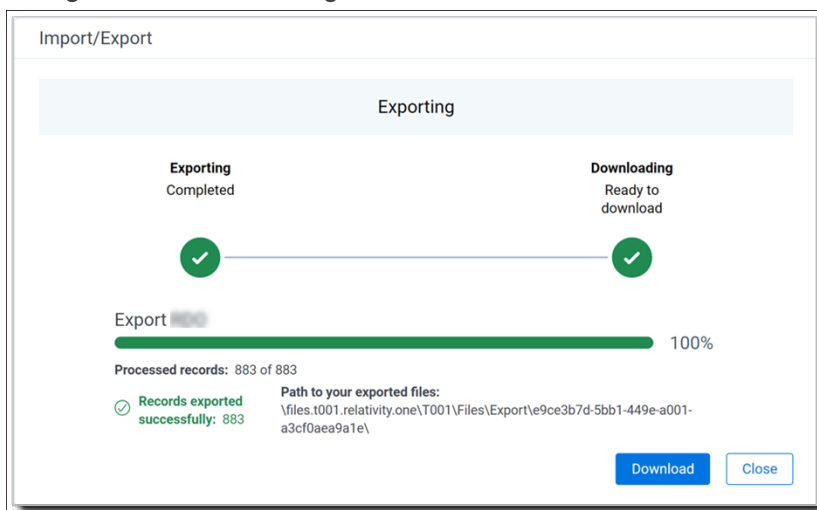
- If Express Transfer is active, the exported files automatically start to download. You can track the download's progress in the Exporting dialog or in Express Transfer (see [Express Transfer Job tracking and history](#)).

---

**Note:** If you ran the job with Express Transfer active, you can close the Import/Export application while the job is running, if desired, and the transfer job will continue uninterrupted. You can monitor the progress and history of the job within [Express Transfer](#). You do not have to be logged into RelativityOne to view information within the Express Transfer application.

---

- If Express Transfer is not active, the application generates a zip file containing the exported data that can be download. Click the **Download** button to save the exported data zip file to your computer, or click the **Close** button to close the dialog without downloading the file.



---

**Note:** When downloading zip files to your computer, you can configure your browser to allow you save the zip file to a custom file name of your choosing as well as to a specific folder destination instead of using the default file name and destination. In the Settings menu of your browser, select Downloads. Toggle on the option to ask where to save or what to do with each file before downloading. Now, when you click the Download button in the Exporting dialog, your browser will display a dialog that allows you to change the default zip file name and select a destination other than the default one. If needed, you can also create a new folder in the chosen destination for the exported data.

---

- If you chose to **Export to Staging Area** when setting up your export job on the Export Settings dialog, the application automatically exports data to your RelativityOne file share and skips the downloading process. Go the path listed on the dialog to access the exported data files.

For more information on where Import/Export saves files, see the Community article, [Import/Export: Where Files Are Saved By The Import/Export Application](#).

You can always view the job's Exporting dialog information after it's closed by going to the [Import/Export Job page](#) and clicking the **job name link**. The Job page also contains more details about all jobs.

#### 4.15.4 Exporting RDO data load file via Import/Export

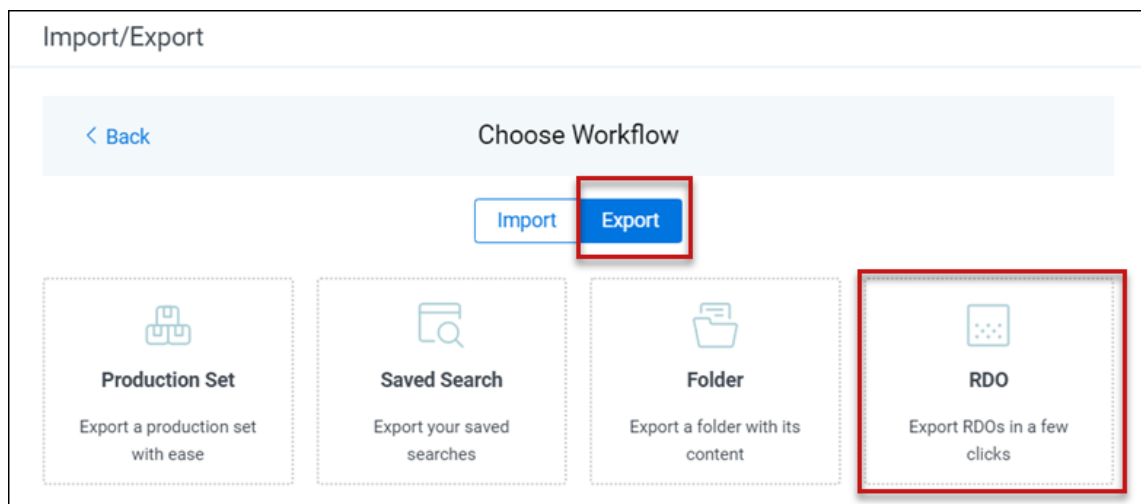
You can use Import/Export to export a Relativity Dynamic Object (RDO) data load file out of RelativityOne.

If you want to use Import/Export with Express Transfer, which is the recommended method for data transfer, refer to [Express Transfer overview on page 49](#) for more information. With Express Transfer activated, you can run up to five concurrent export jobs on a single client machine. For more information, see [Concurrent and consecutive jobs on page 35](#).

Refer to [Import/Export load file specifications](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 47](#).

To export an RDO data load file:

1. Use tabs, search, or the quick nav bar to navigate to the **Import/Export Job** page.
2. On the Import/Export Job page, click the **New Import/Export Job** button to start a new job.
3. On the Choose workflow dialog, click the **Export** button, then click **RDO**.



**Note:** If Express Transfer has been activated, the Express Transfer section will display a status of **Active**. See [Activating and deactivating Express Transfer on page 60](#) for more information.

4. On the Export Settings, complete the following fields, then click **Continue**:

Import/Export

[< Back](#)
Export Settings

Data Source

Job Name\*

Profile\* ☒ None  
☐ From Local Disk

Relativity Object Type\* Choose...

View\* Choose...

Location And Files

Export Location Type\* ☐ Download to Local Disk  
☒ Export to Staging Area

Notifications

Notification Addresses

Continue Cancel

### Data Source:

- **Job Name**—provide a descriptive job name so that you can quickly identify and track that job on the Import/Export Job page. The Job name field accepts up to 50 characters.
- **Relativity Object Type**—select the Object Type you want to export.

---

**Note:** If you need to perform a mass export of native translated files, see Mass exporting translated documents and the Community article [Mass Export Native Translated files via Import/Export](#).

---

- **View**—select the Object View for the selected Object Type.
- **Profile**—are job configuration settings that were previously saved to a profile file (.ie or .kw\*) so they can be reused when creating future jobs with the same or similar settings in RelativityOne, which saves time and effort as well as helps prevent data entry errors when you're mapping fields, for example.
  - **None**—select this option if you do not desire to use a profile for this export or if you intend to create a new profile based on the settings entered in the upcoming steps. You will be able to save the profile settings later on the “Export Job Configuration Summary” dialog. The file extension for the new profile created will be “.ie”.

- **From Local Disk Profiles**—use this option to select a previously saved Import/Export profile (.ie file) or an existing .kw\* profile to reuse the job settings for this workflow. Use the drag and drop feature or browse for a file to choose it. All job settings provided within the selected profile file will be automatically entered where applicable in the succeeding workflow dialogs.

#### Location and Files:

- **Export Location Type**—select one of these options:
  - **Download to Local Disk**—select this option to export the selected production set data to the Staging area and compress it to a single zip file. Once complete, you can download the zip file with your web browser directly to a local disk by clicking the **Download** button. This is the recommended option when Express Transfer is activated.
  - **Export to Staging Area**—select this option to create a copy of the data in a dedicated folder in the Staging area. You will need to use RelativityOne Staging Explorer later to download data. The exported data will not be compressed.

---

**Note:** When you export data from RelativityOne with Import/Export, the exported files are stored in the location indicated in the Exporting dialog. After downloading data to your local computer, you may want to consider manually deleting exported files from that location.

---

#### Notifications:

- **(Optional) Notification Addresses**—enable email notifications by providing the email addresses of those who should get notified once the job completed, failed, or canceled.
5. On the Load File Settings dialog, select the data file format and data file encoding, then click **Continue**.



Import/Export

< Back

Load File Settings

Data File Settings

Data File Format\*

☒ .dat (Concordance)
 ☐ .csv (Comma separated)
 ☐ .html (HTML)
 ☐ .txt (Custom)

Start Line\*

1

Data File Encoding\*

Unicode (UTF-8)

Regional Settings (Date And Time)\*

English (United States) | en-US

Long time (with seconds)

☒

12/25/2000 12:00:00 AM

Export Multiple Choice Fields as Nested

☐

Continue

Cancel

- **Data File Format**—select one of the formats below for the load file you are exporting:
  - **.dat (Concordance)**—load file exports with the standard Concordance delimiters.
  - **.csv (Comma separated)**—load file exports with comma separated delimiters
  - **.html (HTML)**—load file is in HTML format and contains hyperlinks to launch any exported files.
  - **.txt (Custom)**—load file exports with the custom delimiters that you select in the **Load File Characters** section that displays when this option is selected.

Load File Characters

Column\*

DCR (Device control 4)

Quote\*

" (Latin Small Letter Thorn)

Newline (Long Text Fields)\*

␣ (Registered sign)

Multi Value\*

| (Semicolon)

Nested Value\*

\ (Backslash)

- **Start Line**—select a line (record number) that identifies the initial document for export. The application begins by exporting the document with this number and continues by exporting documents with subsequent record numbers.

- **Data File Encoding**—select the encoding type for the document-level load file from the drop-down.
  - **Regional Settings (Date and Time)**—select the desired format for the exported date and time data. A preview of the chosen format will appear below the next field. Your selection for this field will remain for future export jobs until you change it or clear the browser cache. Clearing the browser cache will default the format to "English (United States)."
  - **Long Time (with seconds)**—by default, this option is toggled off. Toggle it on if you want to include seconds with the exported date and time information. For example, the time will export as 12:10 AM (HH:MM AM/PM) when the toggle is off, and it will export as 12:10:25 AM (HH:MM:SS AM/PM) when the toggle is on.
  - **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of RelativityOne multiple-choice lists, when applicable. The Nested Value delimiter, a backslash, separates child choices.
6. On the Select Fields dialog, choose the Workspace Fields that you want to export by moving them to the Selected Fields box, then click **Continue**. The Workspace Fields box displays all available fields, but only the fields in the Selected Fields box will be exported.

---

**Note:** The Production::Begin Bates and Production::End Bates fields automatically populate in the Selected Fields column.

---

You can do the following to move fields:

- Highlight a field and click one of the directional arrow buttons in the center to move it between boxes
- Double-click on a field to move it between boxes
- Use CTRL+ left mouse click to select multiple fields, then choose the desired directional arrow to move between boxes
- In Selected Fields column, drag fields up and down to set the load file column order

Import/Export

< Back Select Fields

Workspace Fields

Filter

Alert

Batch::Assigned To

Batch::Batch Set

Batch::Status

Bates Beg

Bates Beg Attach

Bates End

Bates End Attach

Selected Fields

Filter

Artifact ID

Production::Begin Bates

Production::End Bates

Attachment Name

Attorney Review Comments

Batch

Continue Cancel

- To include native files in the exported data, toggle on **Export Native Files** on the File Settings dialog, and click **Continue**.

Import/Export

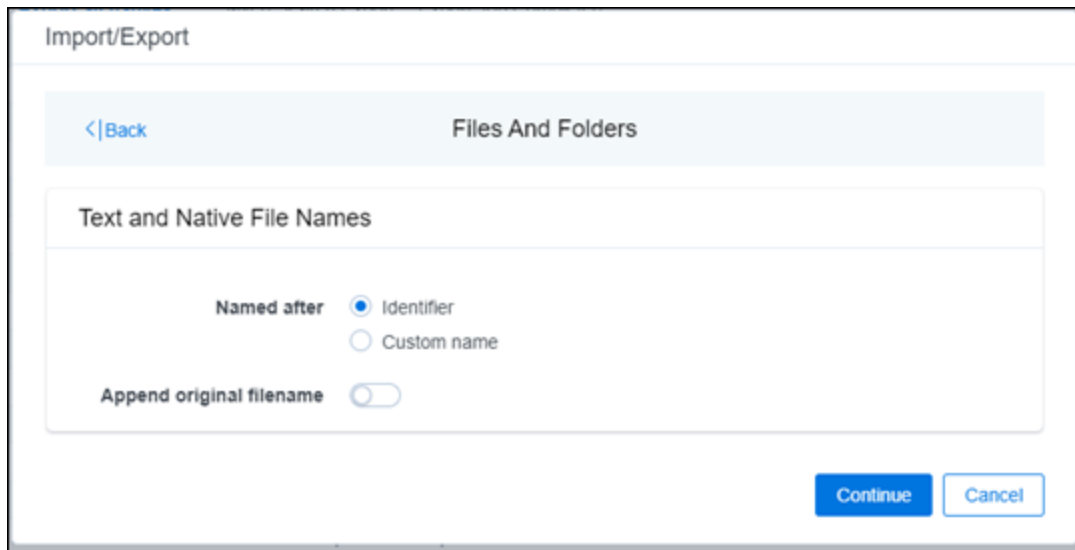
<| Back File Settings

Natives

Export Native Files

Continue Cancel

- On the File And Folders dialog, choose the desired naming convention and folder structure for the exported files, then click **Continue**.



### Text and Native File Names:

- **Named after**—select one of the following naming conventions for exported files:
    - **Identifier**—select this option to name the files using the document identifier/control number.
    - **Custom name**—select this option to customize the file names. If this option is selected, enter data in the following fields that display:
      - **Prefix**—choose whether to have the prefix be the **Control Number** or **Production Begin Bates**.
      - **Select spacing**—select the desired spacing option from the drop-down list.
      - **Select field**—choose a field from your workspace or choose **Custom Text** and provide your text.
      - **Preview**—you will be able to view a Preview of the custom file name to see if it's what you want and make changes in the fields as needed.
  - **Append original filename** toggle—select this option to append the original file name, which is defined as the file name as it was on disk, to the end of the exported file name.
9. On the Text File Settings dialog, you can select to export text field as files and then choose the text file encoding as follows.

Import/Export

< Back Text File Settings

Basic Settings

Export Text Field as Files ☒

Text File Encoding Unicode (UTF-8)

Text Fields Precedence

Add Fields Choose... Add

No fields selected for Text Fields Precedence.

Export Close

- **Export Text Field as Files** toggle—determines the export method of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Deselect it to include text as part of the load file.
- **Text File Encoding**—if Export Text Field as Files is toggled on, then select the encoding format for the document-level text files.
- **Text Fields Precedence**—select and assign an order to long text fields that Relativity checks for text when performing an export. Relativity adds the Text Fields Precedence column as the last column in the load file. You must select at least one long text field to use this functionality. Choose the fields from the **Add Fields** drop-down, then click **Add**. To delete a selected field, click its trashcan icon.

Import/Export

< Back Text File Settings

Basic Settings

Export Text Field as Files ☒

Text File Encoding Unicode (UTF-8)

Text Fields Precedence

Add Fields \* Production OCR Add

Extracted Text

Production OCR

Continue Cancel

To order the precedence of the fields, click the six-dot handle next to the field name and drag it up or down to the proper ordering position. During an export, the system checks the topmost (first) field in the list for text, and if the field is null, it checks the next field in order of precedence for text, and so on. When it finds a field that contains text, Relativity adds the contents of that field to the Text Fields Precedence column in the document load file, and then continues checking the fields for the next document and so on. For example, if you listed the Extracted Text field first and the Production OCR field second, the system would first check the Extracted Text field for content, and if it was null, it would move on to the Production OCR field, and so on.

The Text Fields Precedence column displays the file path to the exported files if you select the **Export Text Field as Files** checkbox above.

10. Click **Continue**.
11. (Optional) In the Advanced Settings dialog, toggle on **Set Custom Information** if you want to customize the volume and folder information. Otherwise, leave the toggle off.

Import/Export

[< Back](#) Advanced Settings

Volume and Subdirectory Information

Set Custom Information ☒

Volume Information

Prefix \* VOL

Start \* 1# of digits \* 2

Max Size (MB) \* 650

Subdirectory Information

Native Prefix \* NATIVE

Start \* 1# of digits \* 3

Max Files \* 500

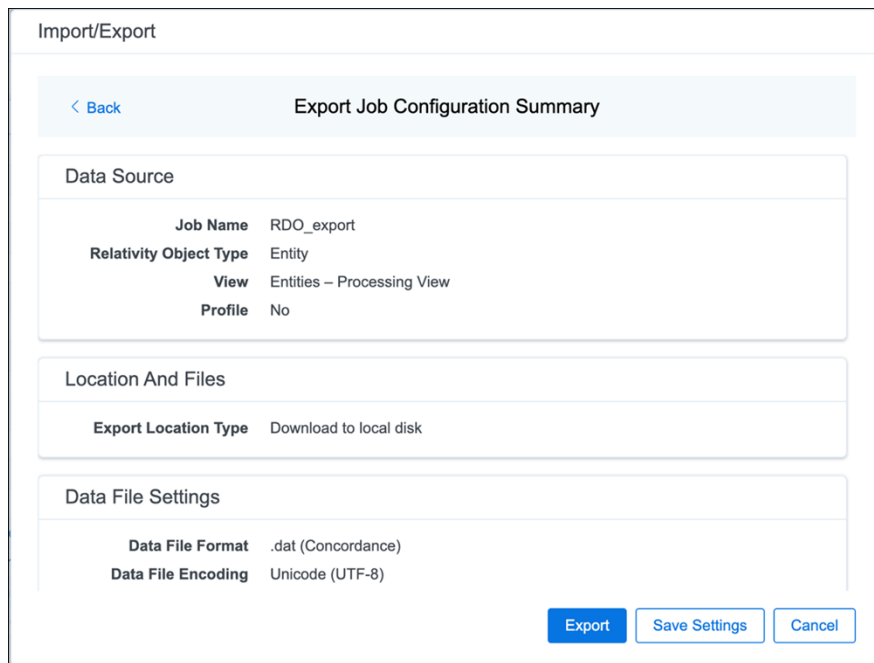
ContinueCancel

**Volume Information**—this section controls the naming and size of the volume identifier. Set the following options in this section:

- **Prefix**—enter the alpha prefix for the volume identifier.
- **Start**—enter the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
- **# of digits**—enter the number of digits attached to the prefix. For example, if you enter 3, the output is VOL001, VOL002, and so on.
- **Max Size (MB)**—enter the maximum size allowed for each volume.

**Subdirectory Information**—this section controls the naming and size of volume sub-folders. Set the following options in this section:

- **Native Prefix**—enter the alpha prefix for the sub-directory that stores exported native files.
  - **Start**—enter the starting number for the sub-directories.
  - **# of digits**—select the number of digits of the sub-directory prefix. For example, if you enter 3, the output is IMG001, IMG002, and so on.
  - **Max Files**—select the number of files to store in each sub-directory.
12. Click **Continue**.
  13. On the Export Job Configuration Summary, review the export job settings and go back to make any corrections as needed.



Import/Export

< Back      Export Job Configuration Summary

Data Source

Job Name	RDO_export
Relativity Object Type	Entity
View	Entities - Processing View
Profile	No

Location And Files

Export Location Type	Download to local disk
----------------------	------------------------

Data File Settings

Data File Format	.dat (Concordance)
Data File Encoding	Unicode (UTF-8)

Export    Save Settings    Cancel

14. (Optional) Click **Save Settings** on the Export Job Configuration Summary dialog to export the job configuration settings entered thus far to its own profile file (.ie file extension) and save it on your computer so you can reuse these settings when creating a new export job with Import/Export.

---

**Note:** Import/Export saves job configuration settings to its own profile file format (.ie file extension). Comparing to the legacy .kw\* standard, it brings more flexibility as you now can apply saved job settings across various workspaces. The .ie profile file format is not supported in other data transfer tools.

---

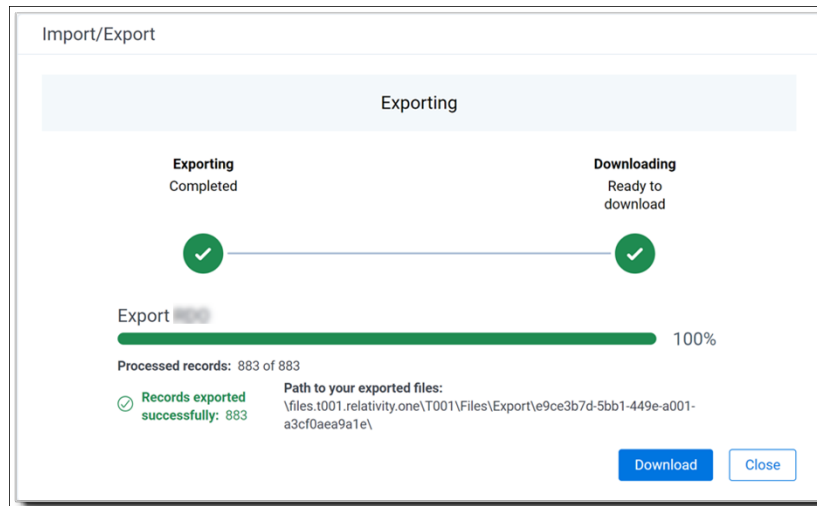
15. Click the **Export** button to start the exporting process.
16. When it's complete, the job summary lists the records exported successfully (including Load files containing .dat, opt, etc.), errors found, and path to your exported files.
  - If Express Transfer is active, the exported files automatically start to download. You can monitor the download's progress in the Exporting dialog or in Express Transfer (see [Express](#)



## [Transfer Job tracking and history](#)).

**Note:** If you ran the job with Express Transfer active, you can close the Import/Export application while the job is running, if desired, and the transfer job will continue uninterrupted. You can monitor the progress and history of the job within [Express Transfer](#). You do not have to be logged into RelativityOne to view information within the Express Transfer application.

- If Express Transfer is not active, the application generates a zip file containing the exported data that can be download. Click the **Download** button to save the exported data zip file to your computer, or click the **Close** button to close the dialog without downloading the file.



**Note:** When downloading zip files to your computer, you can configure your browser to allow you save the zip file to a custom file name of your choosing as well as to a specific folder destination instead of using the default file name and destination. In the Settings menu of your browser, select Downloads. Toggle on the option to ask where to save or what to do with each file before downloading. Now, when you click the Download button in the Exporting dialog, your browser will display a dialog that allows you to change the default zip file name and select a destination other than the default one. If needed, you can also create a new folder in the chosen destination for the exported data.

- If you chose to **Export to Staging Area** when setting up your export job on the Export Settings dialog, the application automatically exports data to your RelativityOne file share and skips the downloading process. Go the path listed on the dialog to access the exported data files.

For more information on where Import/Export saves files, see the Community article, [Import/Export: Where Files Are Saved By The Import/Export Application](#).

You can always view the job's Exporting dialog information after it's closed by going to the [Import/Export Job page](#) and clicking the **job name link**. The Job page also contains more details about all jobs.

## 4.15.5 Exporting a saved search load file via Import/Export

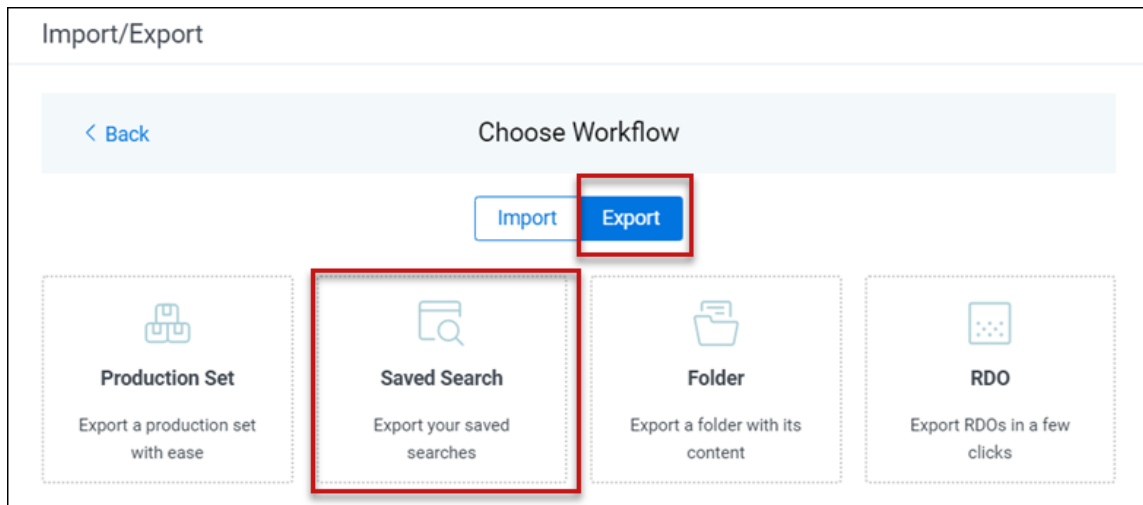
You can use Import/Export to export a saved search load file out of RelativityOne.

If you want to use Import/Export with Express Transfer, which is the recommended method for data transfer, refer to [Express Transfer overview on page 49](#) for more information. With Express Transfer activated, you can run up to five concurrent export jobs on a single client machine. For more information, see [Concurrent and consecutive jobs on page 35](#).

Refer to [Import/Export load file specifications](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 47](#).

To export a saved search load file:

1. Use tabs, search, or the quick nav bar to navigate to the **Import/Export Job** page.
2. On the Import/Export Job page, click the **New Import/Export Job** button to start a new job.
3. On the Choose workflow dialog, click the **Export** button, then click **Saved Search**.



---

**Note:** If Express Transfer has been activated, the Express Transfer section will display a status of **Active**. See [Activating and deactivating Express Transfer on page 60](#) for more information.

---

4. On the Export Settings, complete the following fields, then click **Continue**:

Import/Export

< Back Export Settings

**Data Source**

Job Name \*

Profile \* ☒ None ☐ From Local Disk

Saved Search \* Choose...

**Location And Files**

Export Location Type \* ☐ Download to Local Disk ☒ Export to Staging Area

**Notifications**

Notification Addresses email@domain.com, other@domain.com

Continue Cancel

### Data Source:

- **Job Name**—provide a descriptive job name so that you can quickly identify and track that job on the Import/Export Job page. The Job name field accepts up to 50 characters.
- **Profile**—are job configuration settings that were previously saved to a profile file (.ie or .kw\*) so they can be reused when creating future jobs with the same or similar settings in RelativityOne, which saves time and effort as well as helps prevent data entry errors when you're mapping fields, for example.
  - **None**—select this option if you do not desire to use a profile for this export or if you intend to create a new profile based on the settings entered in the upcoming steps. You will be able to save the profile settings later on the “Export Job Configuration Summary” dialog. The file extension for the new profile created will be “.ie”.
  - **From Local Disk Profiles**—use this option to select a previously saved Import/Export profile (.ie file) or an existing .kw\* profile to reuse the job settings for this workflow. Use the drag and drop feature or browse for a file to choose it. All job settings provided within the selected profile file will be automatically entered where applicable in the succeeding workflow dialogs.
- **Saved Search**—choose the desired saved search to export.

### Location and Files:

- **Export Location Type**—select one of these options:
  - **Download to Local Disk**—select this option to export the selected production set data to the Staging area and compress it to a single zip file. Once complete, you can download the zip file with your web browser directly to a local disk by clicking the **Download** button. This is the recommended option when Express Transfer is activated.
  - **Export to Staging Area**—select this option to create a copy of the data in a dedicated folder in the Staging area. You will need to use RelativityOne Staging Explorer later to download data. The exported data will not be compressed.

---

**Note:** When you export data from RelativityOne with Import/Export, the exported files are stored in the location indicated in the Exporting dialog. After downloading data to your local computer, you may want to consider manually deleting exported files from that location.

---

**Notifications:**

- **(Optional) Notification Addresses**—enable email notifications by providing the email addresses of those who should get notified once the job completed, failed, or canceled.
5. On the Load File Settings dialog, select the data file format and data file encoding, then click **Continue**.

Import/Export

Back
Load File Settings

Data File Settings

Data File Format\*
☒ .dat (Concordance)
☐ .csv (Comma separated)
☐ .html (HTML)
☐ .txt (Custom)

Start Line\*

Data File Encoding\*
Unicode (UTF-8)

Regional Settings (Date And Time)\*
English (United States) | en-US

Long time (with seconds)
☒

12/25/2000 12:00:00 AM

Export Multiple Choice Fields as Nested
☐

Continue
Cancel

- Data File Format**—select one of the formats below for the load file you are exporting:
  - .dat (Concordance)**—load file exports with the standard Concordance delimiters.
  - .csv (Comma separated)**—load file exports with comma separated delimiters
  - .html (HTML)**—load file is in HTML format and contains hyperlinks to launch any exported files.
  - .txt (Custom)**—load file exports with the custom delimiters that you select in the **Load File Characters** section that displays when this option is selected.

Load File Characters

Column\* (Device control 4)


Quote\* (Latin Small Letter Thorn)

Newline (Long Text Fields)\* (Registered sign)

Multi Value\* (Semicolon)

Nested Value\* (Backslash)

- Start Line**—select a line (record number) that identifies the initial document for export. The application begins by exporting the document with this number and continues by exporting documents with subsequent record numbers.


Relativity one

Data Transfer Guide

169

- **Data File Encoding**—select the encoding type for the document-level load file from the drop-down.
  - **Regional Settings (Date and Time)**—select the desired format for the exported date and time data. A preview of the chosen format will appear below the next field. Your selection for this field will remain for future export jobs until you change it or clear the browser cache. Clearing the browser cache will default the format to "English (United States)."
  - **Long Time (with seconds)**—by default, this option is toggled off. Toggle it on if you want to include seconds with the exported date and time information. For example, the time will export as 12:10 AM (HH:MM AM/PM) when the toggle is off, and it will export as 12:10:25 AM (HH:MM:SS AM/PM) when the toggle is on.
  - **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of RelativityOne multiple-choice lists, when applicable. The Nested Value delimiter, a backslash, separates child choices.
6. On the Select Fields dialog, choose the Workspace Fields that you want to export by moving them to the Selected Fields box, then click **Continue**. The Workspace Fields box displays all available fields, but only the fields in the Selected Fields box will be exported.

---

**Note:** The Production::Begin Bates and Production::End Bates fields automatically populate in the Selected Fields column.

---

You can do the following to move fields:

- Highlight a field and click one of the directional arrow buttons in the center to move it between boxes
- Double-click on a field to move it between boxes
- Use CTRL+ left mouse click to select multiple fields, then choose the desired directional arrow to move between boxes
- In Selected Fields column, set the load file column order by dragging the fields to their proper ordering position.

Import/Export

[< Back](#)

Select Fields

Workspace Fields

Filter

Alert

Batch::Assigned To

Batch::Batch Set

Batch::Status

Bates Beg

Bates Beg Attach

Bates End

Bates End Attach

>>

>

<

<<

Selected Fields

Filter

Artifact ID

Production::Begin Bates

Production::End Bates

Attachment Name

Attorney Review Comments

Batch

Continue

Cancel

7. On the Production Image Type dialog, select the images you want to export.

Import/Export

< Back Production Image Type

Production Image Type

Production Images Type\* ☐ Original Images ☒ Produced Images

Select Productions

Include original images ☐ For documents that haven't been produced.

Available Productions Selected Productions

Filter Filter

Continue Cancel

**Production Image Type:**

- **Original Images**—select to export only the original, non-produced images.
- **Produced Images**—select to export a produced version of the images.

**Select Productions:**

- **Include original images** toggle—select to export original images for the documents that are not in a specified production.
- Move the productions that you want to export from the Available Productions box to the **Selected Productions** box.

---

**Note:** Any produced native files will be exported as a native instead of an image. Only one produced image is exported based on precedence in the list. If the document is in the topmost production, that version is exported. If not, Relativity checks for the document in the second production and so on. If the document is not a part of any of the selected productions, and "Include original images" toggle is enabled, then the original document is produced.

---



- On the File Settings dialog, select the options to include native files, images, and/or PDFs in the exported data, then click **Continue**.

The screenshot shows a software dialog box titled "Import/Export". Inside, there is a section titled "File Settings" with a back button. Below this, there are three distinct sections for configuring export options:

- Natives:** A section containing a toggle switch for "Export Native Files", which is currently turned off.
- Images:** A section containing a toggle switch for "Export Images", which is currently turned off.
- PDFs:** A section containing a toggle switch for "Export PDFs", which is currently turned off.

At the bottom right of the dialog, there are two buttons: "Continue" (highlighted in blue) and "Cancel".

- **Export Native Files** toggle—select this option to export native files.
  - **Export Images** toggle—select this option to include images in the export. If toggled on, then you must set the **Data File Format** for image-level load file (Opticon, IPRO, or IPRO (FullText)) and the **File Type** for export images (Single-page TIFF/JPG, Multi-page TIFF/JPG, or Rendered PDF).
  - **Export PDFs** toggle—select this option to include PDFs in the export. If toggled on, then you must set the **Data File Format** for PDF-level load file (Opticon, IPRO, or IPRO (FullText)).
- On the File And Folders dialog, choose the desired naming convention and folder structure for the exported files, then click **Continue**.

Import/Export

< Back Files And Folders

Text and Native File Names

Named after ☒ Control Number ☐ Custom name

Append original filename ☐

Folder Structure

Group files by ☒ File Type ☐ Workspace Structure

Continue Cancel

#### Text and Native File Names:

- **Named after**—select one of the following naming conventions for exported files:
  - **Control Number**—select this option to name the files using the document identifier/control number.
  - **Custom name**—select this option to customize the file names. If selected, enter data in the following fields that display:
    - **Prefix**—choose whether to have the prefix be the **Control Number** or **Production Begin Bates**.
    - **Select spacing**—select the desired spacing option from the drop-down list.
    - **Select field**—choose a field from your workspace or choose **Custom Text** and enter your text.
    - **Preview**—you will be able to view a Preview of the custom file name to see if it's what you want and make changes in the fields as needed.
- **Append original filename** toggle—select this option to append the original file name, which is defined as the file name as it was on disk, to the end of the exported file name.

#### Folder Structure:

- **Group files by**—select one of the options below for how to group the exported files:

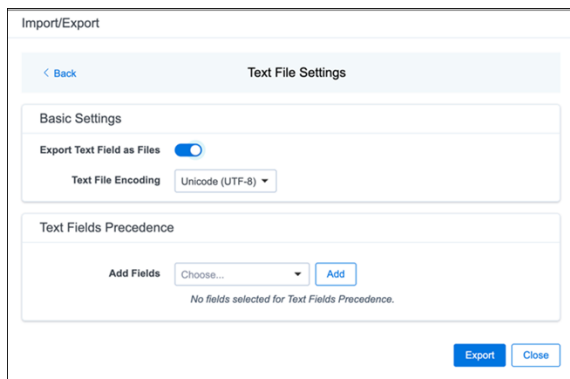
---

**Note:** Depending on the structure of your exported data, export job performance degradation may result and be several times longer when using **Workspace Structure** compared with using **File Type**. Unless it is necessary to use Workspace Structure, we recommend using the **File Type** option for the export job.

---

- **File Type**—select this option to group files by their type and place them in separate folders based on type (such as in Natives, Images, Text, and PDFs folders).
- **Workspace Structure**—select this option to preserve the workspace folder structure. This option may reduce the time of preparing production data since the files will not need to be manually realigned later to replicate the folder structure in the workspace.

10. On the Text File Settings dialog, you can select to export text field as files and then choose the text file encoding as follows.



The screenshot shows the 'Text File Settings' dialog box. At the top, there is a 'Back' button and the title 'Text File Settings'. Below this is a 'Basic Settings' section containing a toggle for 'Export Text Field as Files' (which is turned on) and a dropdown for 'Text File Encoding' set to 'Unicode (UTF-8)'. Below that is a 'Text Fields Precedence' section with an 'Add Fields' button and a 'Choose...' dropdown. A message below the dropdown states 'No fields selected for Text Fields Precedence.' At the bottom right are 'Export' and 'Close' buttons.

- **Export Text Field as Files** toggle—determines the export method of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Deselect it to include text as part of the load file.
- **Text File Encoding**—if Export Text Field as Files is toggled on, then select the encoding format for the document-level text files.
- **Text Fields Precedence**—select and assign an order to long text fields that Relativity checks for text when performing an export. Relativity adds the Text Fields Precedence column as the last column in the load file. You must select at least one long text field to use this functionality. Choose the fields from the **Add Fields** drop-down, then click **Add**. To delete a selected field, click its trashcan icon.

Import/Export

< Back

Text File Settings

Basic Settings

Export Text Field as Files

Unicode (UTF-8)

Text Fields Precedence

Add Fields \*

Production OCR

Add

Extracted Text

Production OCR

Continue

Cancel

To order the precedence of the fields, click the six-dot handle next to the field name and drag it to the proper ordering position. During an export, the system checks the topmost (first) field in the list for text, and if the field is null, it checks the next field in order of precedence for text, and so on. When it finds a field that contains text, Relativity adds the contents of that field to the Text Fields Precedence column in the document load file, and then continues checking the fields for the next document and so on. For example, if you listed the Extracted Text field first and the Production OCR field second, the system would first check the Extracted Text field for content, and if it was null, it would move on to the Production OCR field, and so on.

The Text Fields Precedence column displays the file path to the exported files if you select the **Export Text Field as Files** checkbox above.

11. Click **Continue**.
12. (Optional) In the Advanced Settings dialog, toggle on **Set Custom Information** if you want to customize the volume and folder information. Otherwise, leave the toggle off.

Import/Export

[< Back](#)
Advanced Settings

Volume and Subdirectory Information

Set Custom Information ☒

Volume Information

Prefix \* VOL

Start \* 1

# of digits \* 2

Max Size (MB) \* 650

Subdirectory Information

Image Prefix \* IMG

Native Prefix \* NATIVE

Text Prefix \* TEXT

PDF Prefix \* PDF

Start \* 1

# of digits \* 3

Max Files \* 500

Continue Cancel

**Volume Information**—this section controls the naming and size of the volume identifier. Set the following options in this section:

- **Prefix**—enter the alpha prefix for the volume identifier.
- **Start**—enter the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
- **# of digits**—enter the number of digits attached to the prefix. For example, if you enter 3, the output is VOL001, VOL002, and so on.
- **Max Size (MB)**—enter the maximum size allowed for each volume.

**Subdirectory Information**—this section controls the naming and size of volume sub-folders. Set the following options in this section:

- **Image Prefix**—enter the alpha prefix for the sub-directory that stores exported images.
- **Native Prefix**—enter the alpha prefix for the sub-directory that stores exported native files.
- **Text Prefix**—enter the alpha prefix for the sub-directory that stores exported extracted text files.

- **PDF Prefix**—enter the alpha prefix for the sub-directory that stores exported extracted PDF files.
  - **Start**—enter the starting number for the sub-directories.
  - **# of digits**—select the number of digits of the sub-directory prefix. For example, if you enter 3, the output is IMG001, IMG002, and so on.
  - **Max Files**—select the number of files to store in each sub-directory.
13. Click **Continue**.
  14. On the Export Job Configuration Summary, review the export job settings and go back to make any corrections as needed.

Import/Export

< Back      Export Job Configuration Summary

**Data Source**

Job Name	SavedSearchExport_001
Saved Search	Case-00294
Profile	No

**Location And Files**

Export Location Type	Download to local disk
----------------------	------------------------

**Data File Settings**

Data File Format	.dat (Concordance)
Data File Encoding	Unicode (UTF-8)
Export Multiple Choice	No

Export   Save Settings   Cancel

15. (Optional) Click **Save Settings** on the Export Job Configuration Summary dialog to export the job configuration settings entered thus far to its own profile file (.ie file extension) and save it on your computer so you can reuse these settings when creating a new import job with Import/Export.

---

**Note:** Import/Export saves job configuration settings to its own profile file format (.ie file extension). Comparing to the legacy .kw\* standard, it brings more flexibility as you now can apply saved job settings across various workspaces. The .ie profile file format is not supported in other RelativityOne data transfer tools.

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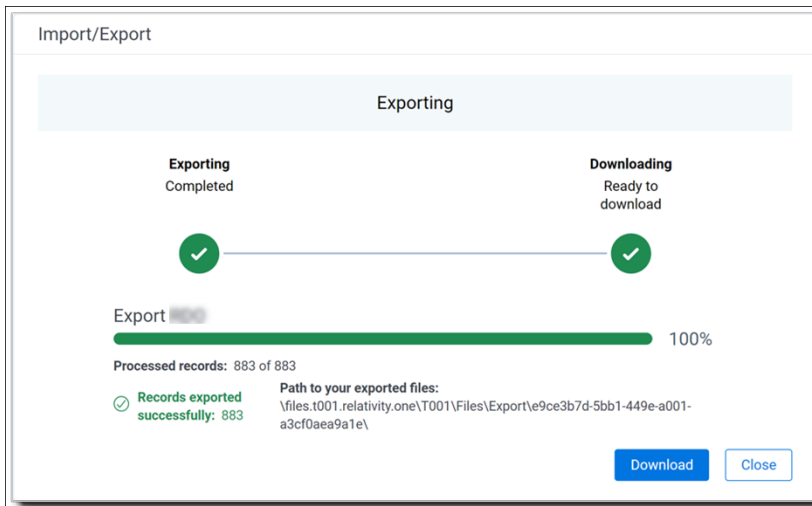
16. Click **Export** to begin the exporting process.
17. When it's complete, the job summary lists the records exported successfully (including Load files containing .dat, opt, etc.), errors found, and path to your exported files.
  - If Express Transfer is active, the exported files automatically start to download. You can track the download's progress in the Exporting dialog or in Express Transfer (see [Express Transfer Job tracking and history](#)).

---

**Note:** If you ran the job with Express Transfer active, you can close the Import/Export application while the job is running, if desired, and the transfer job will continue uninterrupted. You can monitor the progress and history of the job within [Express Transfer](#). You do not have to be logged into RelativityOne to view information within the Express Transfer application.

---

- If Express Transfer is not active, the application generates a zip file containing the exported data that can be download. Click the **Download** button to save the exported data zip file to your computer, or click the **Close** button to close the dialog without downloading the file.



---

**Note:** When downloading zip files to your computer, you can configure your browser to allow you save the zip file to a custom file name of your choosing as well as to a specific folder destination instead of using the default file name and destination. In the Settings menu of your browser, select Downloads. Toggle on the option to ask where to save or what to do with each file before downloading. Now, when you click the Download button in the Exporting dialog, your browser will display a dialog that allows you to change the default zip file name and select a destination other than the default one. If needed, you can also create a new folder in the chosen destination for the exported data.

---

- If you chose to **Export to Staging Area** when setting up your export job on the Export Settings dialog, the application automatically exports data to your RelativityOne file share and skips the downloading process. Go to the path listed on the dialog to access the exported data files.

For more information on where Import/Export saves files, see the Community article, [Import/Export: Where Files Are Saved By The Import/Export Application](#).

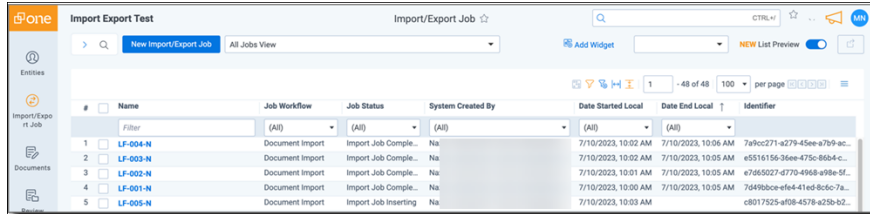
You can always view the job's Exporting dialog information after it's closed by going to the [Import/Export Job page](#) and clicking the **job name link**. The Job page also contains more details about all jobs.

## 4.16 Import/Export Job tracking and history

The Import/Export Job page enables you to monitor the progress of jobs currently running, review previous jobs that were executed, and view other pertinent job details at the workspace level.

**Note:** To monitor jobs at the instance level, see [Import/Export queue on the next page](#).

To access the page, use tabs, search, or the quick nav bar to navigate to the **Import/Export Job** page.



The screenshot shows the 'Import/Export Test' page in RelativityOne. It features a table with columns: #, Name, Job Workflow, Job Status, System Created By, Date Started Local, Date End Local, and Identifier. The table lists five jobs, all with a status of 'Import Job Comple...' and a date of 7/10/2023, 10:02 AM. The jobs are named LF-004-N, LF-003-N, LF-002-N, LF-001-N, and LF-005-N. The table also includes filters for Name, Job Workflow, Job Status, System Created By, Date Started Local, and Date End Local. The page has a sidebar with 'Entities', 'Import/Export Job', and 'Documents' sections. The top bar shows 'Import/Export Job' and 'All Jobs View'.

#	Name	Job Workflow	Job Status	System Created By	Date Started Local	Date End Local	Identifier
1	LF-004-N	Document Import	Import Job Comple...	Na	7/10/2023, 10:02 AM	7/10/2023, 10:06 AM	7a9cc271-e279-45ee-a799-ac...
2	LF-003-N	Document Import	Import Job Comple...	Na	7/10/2023, 10:02 AM	7/10/2023, 10:05 AM	e5516156-36ee-475c-84b4-c...
3	LF-002-N	Document Import	Import Job Comple...	Na	7/10/2023, 10:01 AM	7/10/2023, 10:05 AM	e7665027-4770-4968-a98e-5f...
4	LF-001-N	Document Import	Import Job Comple...	Na	7/10/2023, 10:00 AM	7/10/2023, 10:05 AM	7d49b0cc-ef64-41ed-8c6c-7a...
5	LF-005-N	Document Import	Import Job Inserting	Na	7/10/2023, 10:03 AM		e8017525-a058-4578-a25b-62...

The following columns display on the Import/Export Job page:

- **Name**—the name of the job. You can click this link to:
  - Return to the data transfer progress dialog if the job is still in progress.
  - View the data transfer summary if the job has completed.

**Note:** You may need to refresh the Import/Export Job page to see the job's current progress.

- **Job Workflow**
  - **Unprocessed**—for imports of raw native files that require file processing.
  - **Document Import**—for imports of document load files.
  - **Image Import**—for imports of image load files.
  - **Production Import**—for imports of production load files.
  - **Production Export**—for exports of production load files.

- **Job Status**—the current job status.

*General job statuses:*

- **New**—a new job has been configured but has not been started.
- **Uploading phase**—data is being uploaded to RelativityOne. Statuses include: Uploading, Upload Completed, Upload Failed, and Upload Canceled.
- **Extracting phase**—uploaded data is being extracted. Statuses include: Extraction Requested, Extraction Request Failed, Extracting, Extraction Failed, and Extraction Canceled.
- **Transferring phase**—Statuses include: Transfer Requested, Transfer Request Failed, Transferring, Transfer Failed, and Transfer Canceled



- **Processing phase (only for unprocessed data import)**—Statuses include: Processing Request Failed and Processing Requested.

*Detailed job statuses:*

- **Import job statuses (for structured data import)**—Import Job Canceled, Import Job Completed, Import Job Completed with Errors, Import Job Failed, Import Job Inserting, Import Job Scheduled, Import Job Started, and Import Request Failed
  - **Processing job statuses (for unprocessed data import)**—Discovery Not Started, Discovery in Progress, Discovery Completed, Discovery Completed with Errors, Discovery Failed, Discovery Canceled, Publish Not Started, Publish in Progress, Publish Completed, Publish Completed with Errors, Publish Failed, and Publish Canceled.
  - **Export job statuses**—Export Job Started, Export Job Request Failed, Export Job Scheduled, Export Job in Progress, Export Job Completed, Export Job Completed with Errors, Export Job Failed, Export Job Canceled, Download Read, Download Requested, Download in Progress, Download Completed, Download Completed with Errors, Download Failed, and Download Canceled.
- **System Created by**—the name of the user who started the job.
  - **Date Started Local**—the local date and time when the job started.
  - **Date End Local**—the local date and time when the job was completed.
  - **Identifier**—displays the ID of the job.

You can extend the Import/Export Job view by creating your own view. Please refer to [Creating a view](#) for more information.

## 4.17 Import/Export queue

Import/Export Queue lists the current Import/Export jobs in progress and their status throughout the RelativityOne instance. You can find the Import/Export Queue under the Queue Management tab.

---

### Notes:

- Users who have been granted permissions to the Queue Management tab in the Tab Visibility section of the Admin Security console automatically have access to the Import/Export Queue tab.
  - To monitor jobs at the workspace level, see [Import/Export Job tracking and history on the previous page](#).
-

Job Name	Job status	Workspace	Workflow Type	Start Date	Created By
<a href="#">lk2</a>	DiscoveryCompleted	Web Import Export - Aero CD	Unprocessed	9/5/2023, 1:29:20 PM	K
<a href="#">lk3</a>	DiscoveryCompleted	Web Import Export - Aero CD	Unprocessed	9/5/2023, 4:35:20 PM	K
<a href="#">lk4</a>	DiscoveryCompleted	Web Import Export - Aero CD	Unprocessed	9/5/2023, 4:36:40 PM	K
<a href="#">lk-azcopy1</a>	DiscoveryCompleted WithErrors	Web Import Export - Aero CD	Unprocessed	9/22/2023, 12:07:18 PM	K
<a href="#">lk-azcopy-vs-dmilib</a>	DiscoveryCompleted WithErrors	Web Import Export - Aero CD	Unprocessed	9/22/2023, 12:21:37 PM	K

The Import/Export Queue provides job information for the following fields:

- **Job Name**—the name of the job, as entered during creation. Click on the link to navigate to the Import/Export job details.
- **Job Status**—the current state of the job, as represented by the following status values:
  - Extraction Requested
  - Extraction In Progress
  - Extraction Completed
  - Upload Requested
  - Upload In Progress
  - Upload Retried
  - Upload Completed
  - Import Job Requested
  - Import Job Idle
  - Import Job Scheduled
  - Import Job Inserting
  - Processing Requested
  - Discovery Not Started
  - Discovery In Progress
  - Discovery Completed
  - Publish Not Started
  - Publish In Progress
  - Transfer Requested
  - Transfer In Progress
  - Transfer Completed

- Export Job Requested
- Export Job Scheduled
- Export Job In Progress
- **Workspace**—the workspace in which the job was created and run.
- **Workflow Type**—the type of import/export job, as represented by the following values:
  - Unprocessed—job was initiated using the Raw (Unprocessed) Data workflow option within the Import tab.
  - Document Import—job was initiated using the Structured (Processed) Data workflow>Document option within the Import tab.
  - Image Import—job was initiated using the Structured (Processed) Data workflow>Image option within the Import tab.
  - Production Import—job was initiated using the Structured (Processed) Data workflow>Production option within the Import tab.
  - RDO Import—job was initiated using the Structured (Processed) Data workflow>RDO option within the Import tab.
  - Production Export—job was initiated using the Structured (Processed) Data workflow>Production Set option within the Export tab.
  - Saved Search Export—job was initiated using the Structured (Processed) Data workflow>Saved Search option within the Export tab.
  - Folder Export—job was initiated using the Structured (Processed) Data workflow>Folder option within the Export tab.
  - RDO Export—job was initiated using the Structured (Processed) Data workflow>RDO option within the Export tab.
- **Start Date**—the date on which the job was started.
- **Created By**—the user who started the job.

## 5 Integration Points

Integration Points offers a solution to configure integrations from third party systems to Relativity objects and between Relativity workspaces. For more information, see [Promoting data between workspaces through Integration Points on page 271](#).

Interested developers can create a separate ADS application to pull data from a third party system source provider. Integration Points ingests that application to handle the scheduling, setup, field mapping, and actual import into Relativity. By using the Integration Points platform, developers can reduce the amount of time needed to create these custom integrations while end users receive a consistent and easy setup approach.

In addition to supporting developer-built custom integrations, Integration Points also provides a built-in integration to Lightweight Directory Access Protocol (LDAP) enabled HR servers such as Microsoft Active Directory. Built on the Integration Points platform, the LDAP integration can filter and schedule imports from Active Directory data into a Relativity workspace. For example, the workstations, employee names, and data shares, among others.

Since the Integration Points does not offer Full Name field calculation for Custodian/Entity object, the field is not available as an option for mapping. If you need to update the Entity object, please use the LDAP provider, which allows new records to be added with a field other than Full Name as the identifier. Alternatively, you may consider using Relativity Desktop Client for Custodians/Entities updates.

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**Note:** You can locate an application's version number by navigating to Applications & Scripts > Application Library tab. You must be a system admin to access this tab.

---

### 5.1 Using Integration Points scenarios

#### Using Integration Points as a developer

You are the lead developer of an organization responsible for building Relativity customizations. One of your clients started tracking all of their litigation-related information outside of Relativity in a new product called Whazootie. They mention to you that they would love to have this same information available in their Relativity workspaces to tie their document review to specific case information.

You use Whazootie's APIs to build a simple Relativity application to connect to a Whazootie website without building any import or setup steps. You give the application to your client along with Integration Points for them to install in a workspace. They can use all the security, scheduling, setup, and import options available in Integration Points along with the Whazootie connection to set up multiple imports that bring Whazootie data into their Relativity workspace.

#### Using Integration Points as an end user

You are the litigation support professional responsible for setting up workflows and templates to help manage your company's legal hold procedure using Relativity Legal Hold. You want to ensure that all custodian information is kept up-to-date so that holds always go to the correct email address and that the litigation team is aware of custodians who have changed departments

or left the company. Unfortunately, all of the custodian information is scattered across multiple company HR servers containing unnecessary computer and network data.

To solve this problem, you use the Integration Points setup wizard to configure new integrations to each HR server, mapping items to specific Relativity fields. You work with your team to configure a filter in each setup so that only the appropriate employees are brought in as Custodians and schedule the import to occur automatically each night during off-hours. As a result, your custodian address book is always up-to-date, ensuring that proper litigation workflows are followed with every custodian.

## 5.2 Installing Integration Points

To successfully use Integration Points, you need to install the Integration Points application to at least one workspace.

### 5.2.1 Installing Integration Points

Since Integration Points uses the ADS framework, you have the following options available for installing Integration Points in your environment.

- **Install Integration Points from the Application Library** - If you add the Integration Points application to the Application Library, you can install it to the current workspace, or to multiple workspaces at once, from the Application Library.
- **Install Integration Points from an external file** - You can import the Integration Points application into your workspace from an external file if it has not been added to the Application Library.

Once you install Integration Points application, the necessary Integration Points agents will be deployed automatically.

### 5.2.2 Security permissions

The following tables provide detailed breakdowns of the security permissions required to use Integration Points.

To submit a job for a non-Relativity source provider (FTP, LDAP, or Load File) and display console errors for that job, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Workspace	View, Edit, Add
Source	Integration point	View
Source	Job History	View, Edit, Add
Source	Destination Provider	View
Source	Source Provider	View
Source	Integration Point Type	View
Destination	Destination RDO	View, Edit, Add
Destination	Allow Import	Admin operation

To submit a job with Relativity as the source provider and display console errors for that job, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Workspace	View, Edit, Add
Source	Integration point	View
Source	Job History	View, Edit, Add
Source	Destination Provider	View
Source	Source Provider	View
Source	Integration Point Type	View
Source	Document	View, Edit
Source	Search	View, Edit, Add
Source	Advanced & Saved Searches <ul style="list-style-type: none"> <li>▪ The saved search that you use for the integration point must have an owner of Public.</li> </ul>	Browser
Source	Tab Visibility	Workspace Details
Destination	Destination Workspace	View, Edit, Add
Destination	Allow Export	Admin operation
Destination	Tab Visibility	Workspace Details

If you are creating an integration point for a non-Relativity source provider (FTP, LDAP, or Load File), Relativity assumes you have the following system admin permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration point	View, Edit <ul style="list-style-type: none"> <li>▪ Edit is required for adding Job History RDO's.</li> </ul>
Source	Job History	View, Edit, Add
Source	Job History Error	View, Edit, Add <ul style="list-style-type: none"> <li>▪ Edit is required to mark errors as new and expired</li> </ul>

If you are creating an integration point with Relativity as the source provider, Relativity assumes you have the following system admin permissions:

Workspace	Object/operation/tab	Permission type
Source	Destination workspace	View, Edit, Add

Workspace	Object/operation/tab	Permission type
		<ul style="list-style-type: none"> <li>Edit is required to rename destination workspaces.</li> </ul>
Destination	Manage Object Types <ul style="list-style-type: none"> <li>This is required to create new object types.</li> </ul>	Admin operation
Destination	Source workspace	Add, Edit <ul style="list-style-type: none"> <li>Edit is required for situations when Relativity renames the destination workspace upon a source workspace name change.</li> </ul>
Destination	Source job	Add

To view an integration point with any source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Job History	View
Source	Integration point	View
Source	Integration point type	View

To create and edit an integration point with any source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration point	View, Edit, Add <ul style="list-style-type: none"> <li>Edit is only required if you're editing the integration point.</li> <li>Add is only required if you're creating the integration point.</li> </ul>
Source	Integration point type	View
Destination	Allow Import	Admin operation

To create an integration point with a Relativity source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Allow Import	Admin operation

To create an integration point with any source provider from an integration point profile, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration point profile	View

To view any integration point profile, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration point profile	View
Source	Source provider	View
Source	Destination provider	View
Source	Integration point type	View

To create and edit an integration points profile with any source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration Point Profile	View, Edit, Add <ul style="list-style-type: none"> <li>Edit is only required if you're editing the integration point profile.</li> <li>Add is only required is you're creating the integration point profile.</li> </ul>
Source	Integration Point Type	View
Source	Source Provider	View
Source	Destination Provider	View
Destination	Allow Import	Admin operation

To create and edit an integration points profile with a Relativity source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Allow Import	Admin operation

If you do not have sufficient permissions and you attempt to perform either of the following actions, you will see an error message stating "You do not have sufficient permissions. Please contact your system administrator." In each case, Relativity creates an error listing all missing permissions.

- Loading the integration points console or clicking Run Now or Retry:
  - If the error occurs after a button click, the message is prefixed with, "Failed to submit integration job."
  - If the job is a retry job, the prefix reads, "Failed to submit the retry job."
- Saving an integration point after creating a new one or editing an existing one.

---

**Note:** Integration points is tenant-aware. This means that workspace admins within a tenancy receive an error if they attempt to push to a workspace they do not have permissions to. This error occurs when they click Run Now on the integration point that they create to push documents to review.

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## 5.3 Integration Points profiles

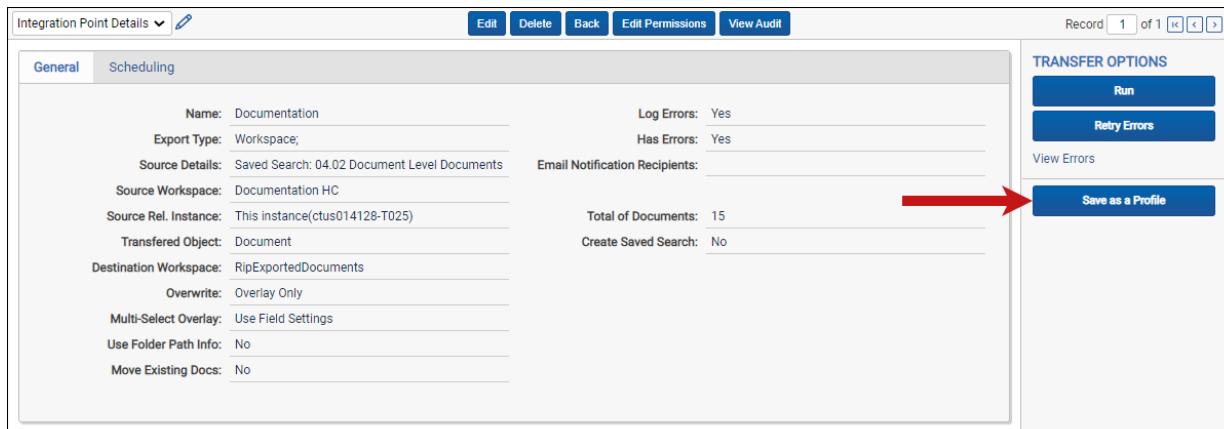
You have the option of creating and saving Integration Points profiles, which can be used to run future common import or export jobs through Integration Points without having to recreate them each time. The profiles can be specific to each data source so that you can reuse the settings and avoid having to remap fields multiple times.

### 5.3.1 Creating Integration Point profiles

You can create in Integration Point profile through the Integration Point Profile tab. Or, if you are in the process of creating or editing an Integration Point job, you can save it as a profile for future use from the Transfer Options console. Both methods are described below.

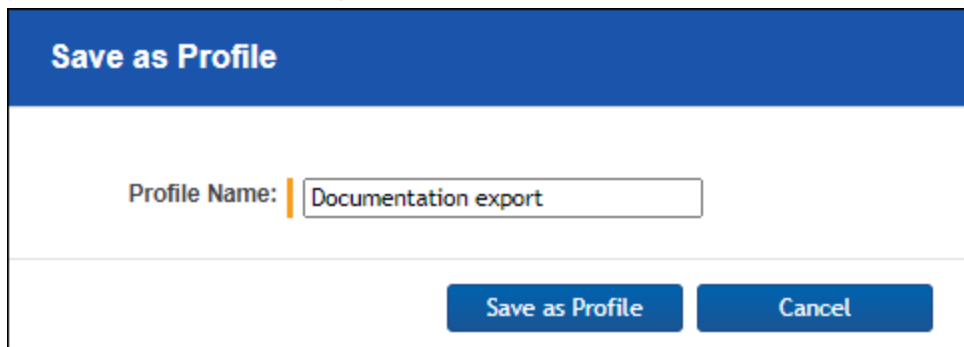
To save a newly created or edited integration point as a profile, follow the steps below:

1. While on the create or edit Integration Points window, click the **Save as a Profile** button on the Transfer Options console.



The screenshot shows the 'Integration Point Details' window. On the right side, there is a 'TRANSFER OPTIONS' panel. It contains buttons for 'Run', 'Retry Errors', and 'Save as a Profile'. A red arrow points to the 'Save as a Profile' button. The main area of the window shows various configuration fields for the integration point, such as Name, Export Type, Source Details, and Destination Workspace.

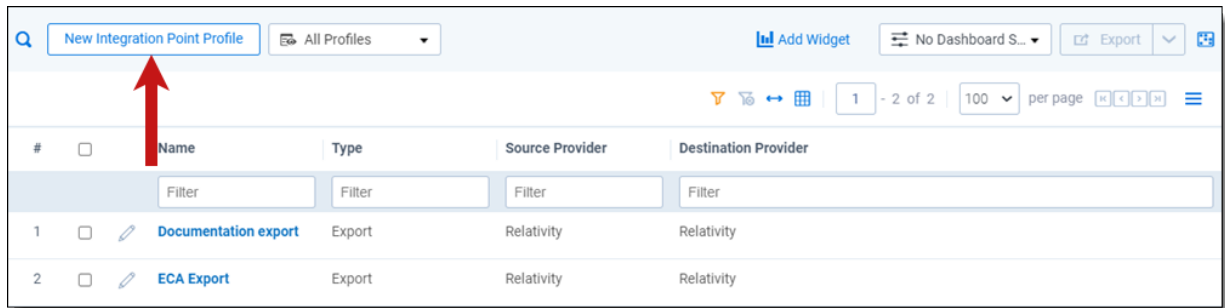
2. Enter a descriptive name to help identify the profile in the **Profile Name** field and click **Save as Profile**. Note that the Profile Name field defaults to the name you originally gave the integration point you created. You can change it, if desired, or keep it as is.



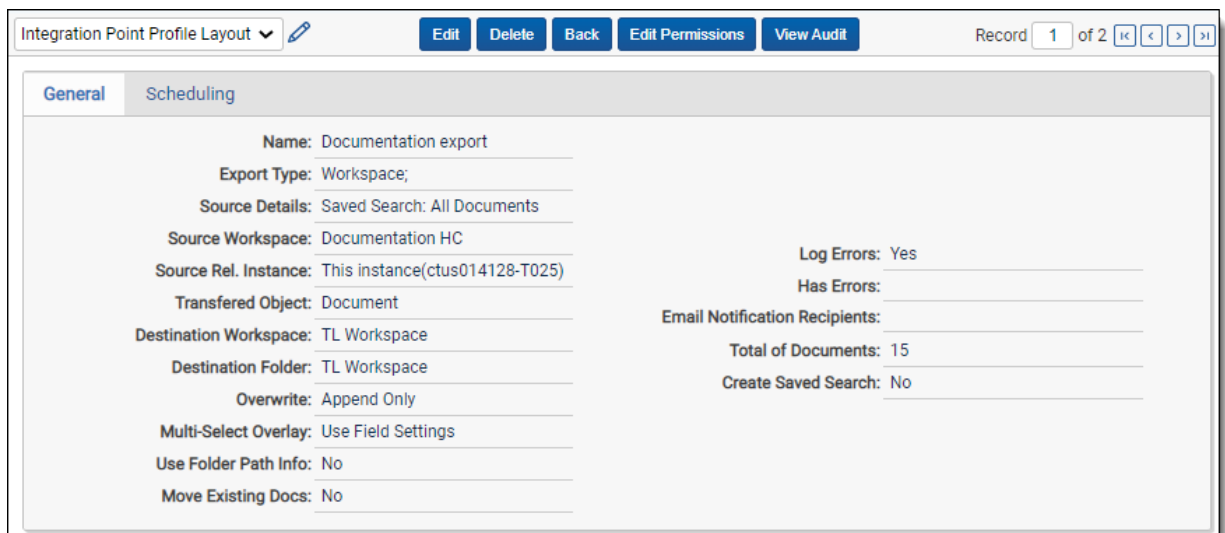
The screenshot shows a 'Save as Profile' dialog box. It has a blue header with the text 'Save as Profile'. Below the header, there is a 'Profile Name' label followed by a text input field containing the text 'Documentation export'. At the bottom of the dialog, there are two buttons: 'Save as Profile' and 'Cancel'.

To create a profile through the Integration Point Profile tab, follow the steps below:

1. Select the **Integration Point Profile** tab.
2. Click **New Integration Point Profile**.



3. Complete the required fields as you would for any integration point you are creating. For more information, see [Importing data through Integration Points on page 193](#) or [Exporting data through Integration Points on page 229](#). The fields and layouts for creating a profile here are identical to those for creating any integration point that you intend to run, except that after you save the profile, you do not have the option to run it. Instead, you see a detailed layout of the profile you just created. To configure an Integration Point profile that can be copied to another workspace, see [Configuring an Integration Point Profile for copying on the next page](#).



Once a profile is saved, it's visible in the Integration Point Profiles tab.

You have the option of applying it to a new Integration Point by selecting it in the Profile field on the Setup layout.

Create Integration Point

Setup

Complete the Setup

1

2

General

Name:

New export

Type:

☐ Import
 ☒ Export

Source:

Relativity

Destination:

Relativity

Transferred Object:

Document

Profile:

Select...

If the Destination workspace is changed after the fields have been mapped, the fields will automatically be remapped. The artifacts are mapped based on their names only if the ArtifactIDs are different in the new destination workspace. This mapping occurs so that the integration points job will not fail. Therefore, if the source workspace fields cannot match to the new destination workspace fields, those unmatched fields are presented at the end of the mappings list for easy identification. Relativity also displays a message to inform you that the original source fields from the profile were mapped with corresponding fields from the destination workspace.

### 5.3.2 Copying Integration Point profiles

You can copy the configuration of a Relativity Integration Point profile from a template workspace to a new workspace as long as the profile's Type field is set to **Export** and the Source and Destination fields are set to **Relativity**. This profile configuration is considered a non-document object. For a list of non-document objects that can be copied, see the Admin Guide. Once copied to the new workspace, the profile's fields are mapped and are editable.

---

**Note:** If the Integration Point Profile configuration has the Type field set to Import or Export and the Destination field set to Loadfile, it will not be copied to the new workspace.

---

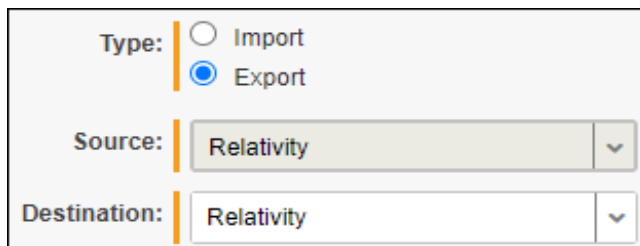
#### 5.3.2.1 Configuring an Integration Point Profile for copying

In order to copy a profile to another Relativity workspace, it has to be configured a certain way.

To properly configure an Integration Point profile so that can be copied to another Relativity workspace, set the fields as shown below.

### 5.3.2.2 For Setup

- **Name** - enter a profile name of your choice.
- **Type** - select **Export**. This field must be set to Export for the profile to be copied.
- **Source** - select **Relativity**. This field must be set to Relativity for the profile to be copied.
- **Destination** - select **Relativity**. This field must be set to Relativity for the profile to be copied.
- **Transferred Object** - select the Document or non-document object meta data you want to sync to the destination workspace. The non-document object must already exist in the destination workspace.
- **Profile** - select a profile of your choice.
- **Include in ECA Promote List** - select Yes or No.

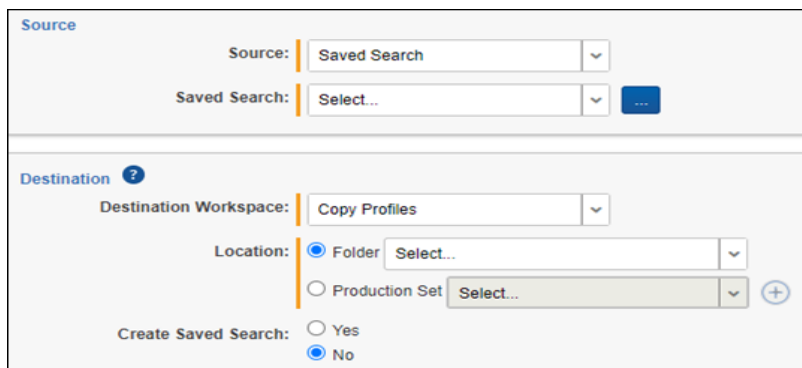


The screenshot shows a configuration window with three sections. The first section, labeled 'Type:', has two radio buttons: 'Import' and 'Export', with 'Export' selected. The second section, labeled 'Source:', has a dropdown menu with 'Relativity' selected. The third section, labeled 'Destination:', also has a dropdown menu with 'Relativity' selected.

### 5.3.2.3 For Connect to Source

**Notes:** When updating the connection to source for the copied profile, the Source field defaults to Saved Search. The Saved Search field is empty and you need to select the saved search of your choice whether it's the same saved search as the original profile or a different saved search.

- **Source** - defaults to saved search.
- **Saved Search** - select saved search of your choice.
- **Destination Workspace** - select **Relativity**
- **Location** - select a location of your choice.
- **Create Saved Search** - select Yes or No.



The screenshot shows a configuration window with two main sections. The first section, labeled 'Source', has a 'Source:' dropdown set to 'Saved Search' and a 'Saved Search:' dropdown set to 'Select...'. The second section, labeled 'Destination' with a question mark icon, has a 'Destination Workspace:' dropdown set to 'Copy Profiles'. Below this, the 'Location:' section has two radio buttons: 'Folder' (selected) and 'Production Set'. The 'Folder' option has a 'Select...' dropdown, and the 'Production Set' option has a 'Select...' dropdown with a plus icon to its right. At the bottom, the 'Create Saved Search:' section has two radio buttons: 'Yes' and 'No' (selected).

Once the above fields are configured, the profile is ready to use for copying.

When you are ready to create a new workspace using the profile, go to Workspaces and click the **New Workspace** button. Then, click **Select** next to Template Workspace and select the workspace in the list with the Integration Points profile that you want to use. For more information on creating a workspace template, see the Admin Guide.

## 5.4 Importing data through Integration Points

Integration Points provides you with the ability to import a CSV file, LDAP, or load file directly into your workspace, and schedule future or recurrent import jobs.

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**Note:** Although importing and exporting a load file is possible in Integration Points, Import/Export is the main application recommended for a stable and efficient load file import and export.

---

All Integration Points jobs are fully editable after run.

---

**Note:** Changing root folder permissions during import is not a supported workflow.

---

### 5.4.1 Creating an import Integration Point

The general workflow for creating Integration Points to import data are listed below. For specific details and parameters surrounding each type of integration point you need to create, refer to the other sections in this topic:

1. Navigate to **Integration Points** in your workspace.
2. On the Integration Points tab, click **New Integration Point**.
3. Set up the new integration point parameters.
4. Connect to the data source by setting up the connection parameters.
5. Map the import fields.
6. Click **Save**.

Once you save the integration point, you can run the import job. For more information, see [Manually running the import job on page 224](#).

### 5.4.2 Importing a CSV file

See the steps for importing a CSV file

---

**Note:** Opening a new port for your RelativityOne instance will require a Security assessment.

---

#### 5.4.2.1 Setup

To create an integration point for importing an FTP (CSV file), begin by configuring the Setup parameters.

1. Complete the fields in the **Setup** layout:

Create Integration Point

Cancel ⓘ

Setup Complete the Setup

1 2

← Back Next →

**General**

Name:

Type: ☒ Import  
☐ Export

Source:

Destination:

Transferred Object:

Profile:

**Advanced**

Email Notification Recipients:  
Separate by semi-colon

Log Errors: ☒ Yes  
☐ No

**Scheduling**

Enable Scheduler: ☐ Yes  
☒ No

#### General:

- **Name**—the name of your integration for reference purposes.
- **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
- **Source**—select **FTP (CSV File)** to sync to a Custodian list on an FTP Server to automatically update custodian information in your workspace. We strongly recommend using a secured FTP server and not using anonymous authentication.
- **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type, since you have already designated that you want to import into a Relativity workspace. You will select the specific workspace on a subsequent layout.
- **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. If you are importing the entity object, select **Entity** here.
- **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you have already created, select it from the drop-down list. For more information, see the Integration Points guide.

#### Advanced:

- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
  - If you select **Yes**, each job also logs any item level errors.
  - If you select **No**, Relativity doesn't log these item level errors.
  - Regardless of your selection, job-level errors are always recorded in Relativity.

#### Scheduling:

- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available:
  - **Frequency** —the interval at which Relativity syncs this integration point. Select one of the options below:
    - **Daily**—select this option to sync once every day.
    - **Weekly**—select this option to sync on a weekly basis. Then, enter data in the following fields:
      - **Reoccur**—enter a numeric value in the **Every # week(s)** field for how often you want it to occur weekly.
      - **Send On**—specify on which day of the week (Monday through Sunday) the sync will take place by selecting any of the days of the week listed.
    - **Monthly**—select this option to sync on a monthly basis. Then, enter data in the following fields:
      - **Reoccur**—enter a numeric value in the **Every # month(s)** field for how often you want it to occur monthly.
      - **Send On**—select the **Day # of the month** that you want this integration point to sync.
  - **Start Date**—the date that you want Integration Points to start syncing the data.
  - **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
  - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.
  - **Time Zone**—select the appropriate time zone.

2. Click **Next** to advance to the Connect to Source layout.

#### 5.4.2.2 Connect to source

Continue to create your import integration point by connecting Relativity to the data source by following the steps below.

1. In the **Connect to Source** layout, complete the following fields:

The screenshot shows the 'Create Integration Point' window with the 'Connect to Source' tab selected. The progress bar at the top indicates three steps: Setup (completed), Connect to Source (current), and Map Fields. The 'Connection Information' section includes fields for Host, Protocol (set to FTP), Port (set to 21), Username, and Password. The 'File Information' section includes a CSV Filepath field with the example path: e.g. /export/nightlyexport/\*yyyy\*-\*MM\*-\*dd\*\_HRIS\_export. Navigation buttons 'Back' and 'Next' are located at the top right of the dialog.

### Connection Information:

- **Host**—the FTP (File Transfer Protocol) or SFTP (SSH File Transfer Protocol) server address. For example, *filetransfer.example.com*. If Relativity cannot locate this address, you will receive an error stating that the remote could not be resolved, and you will not be able to proceed.
- **Protocol**—select the FTP or SFTP protocol.
- **Port**—the server port to which you want to connect. The FTP protocol default Port number is 21. The SFTP protocol default Port number is 22. The standard network ports 21 or 22 should be open on both RelativityOne and FTP server for outgoing connections from RelativityOne's Web and Agent servers and for listening (FTP server). Some firewall solutions may impact the connectivity between RelativityOne and the FTP server.

**Note:** If you need to open any port, please contact [Relativity Support](#) and allow at least three days to respond. Opening a new port for your RelativityOne instance requires a Security assessment. To successfully import an FTP (CSV file), the standard network ports should be open on both RelativityOne and FTP server for outgoing connections from RelativityOne's Web and Agent servers and for listening (FTP server). Note that the firewall solutions may impact the connectivity between RelativityOne and the FTP server.

- **Username**—(Optional) the username to use for authentication. If left blank, Integration Points will use "anonymous."
- **Password**—(Optional) the associated password to use for authentication. If left blank, Integration Points will use "anonymous."

### File Information:

- **CSV Filepath**—the location of the CSV file that Integration Points imports from the FTP/SFTP server. If you set the generated CSV file to always include the date, you can specify this file path value to use date wildcards so that Integration Points always imports the latest file. For example, the following file path will import the most recently dated file:  
`/export/nightlyexport/*yyyy*-*MM*-*dd*_HRIS_export.csv`



- Wildcards are case sensitive.
  - The wildcard feature only pulls data from a file name with the current date.
  - You can also use hh:MM:ss for hours, minutes, and seconds, with capital M's for minutes. When using times, only file names within the last hour are found.
2. Click **Next** to advance to the Map Fields layout, which contains a list of Relativity fields from their destination RDO as well as attributes that the source provider pulled back.

#### 5.4.2.3 Map fields

Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields.

1. In the **Map Fields** wizard, you have the following options for mapping fields:
  - Click the **Map All Fields** button to automatically map all Source fields with matching Destination field names, except single/multiple object fields.
  - Use the Shift+click and Ctrl+click method to select multiple fields at a time.
  - Use the single and double arrow buttons or double-click a field to move the selected fields between columns.
  - If you have Destination Fields that are mapped to fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.
  - The field names in the Destination columns include the type of each field listed.

When mapping fields, here are some issues to note:

- If the WebAPIPath instance setting in the kCura.IntegrationPoints section is not configured correctly after upgrade or installation, the Source field list is empty because it cannot return any attributes, and you are not able to map fields.
- When importing Entities, you need to map the **First Name** and **Last Name** fields. In case the Full Name field is not being mapped, those two fields are combined for the Full Name value which is then written to Entity object.

2. Complete the following import Settings on the **Map Fields** layout:

- **Overwrite**—determines how the system overwrites records once you promote data to the review workspace. This field provides the following choices:
  - **Append Only**—promote only new records into the review workspace.
  - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. This field acts as a link indicating to Relativity where to import the data. When you select this or Append/Overlay, you must complete the Multi-Select Field Overlay Behavior field described below.
  - **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this or Overlay Only, you must complete the Multi-Select Field Overlay Behavior field described below.
- **Multi-Select Field Overlay Behavior**—determines how the system overlays records when you promote documents to the review workspace. This field is only available if you have selected either Overlay Only or Append/Overlay above. This field provides the following choices:
  - **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
  - **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.

- **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.
- **Unique Identifier**—Enter a value that no other item in the workspace contains. For example, use the UniqueID or Full Name attribute.

---

**Note:** If the entered Unique Identifier's value is not unique in the workspace, it may lead to unintentional overwriting of the existing data.

---

- **Entity Manager Contains Link**—this Yes/No field is visible for all import sources when the Entity RDO is selected as the destination of the imported data. Some import sources populate the manager field with a link to the manager's profile on their internal system. Set this field to **No** if the FTP (CSV File) source is selected.

3. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see [Manually running the import job on page 224](#).

### 5.4.3 Importing LDAP

Before importing LDAP (Lightweight Directory Access Protocol), the Integration Points LDAP Provider needs to be connected to the LDAP server. To connect successfully, open the standard network ports for both RelativityOne and the LDAP Server for outgoing connections from RelativityOne's Web and Agent servers and for listening (LDAP Server). To connect these ports, contact [Relativity Support](#).

---

**Note:** To successfully connect Integration Points LDAP Provider to the LDAP server, the standard network ports should be open on both RelativityOne and the LDAP Server for outgoing connections from RelativityOne's Web and Agent servers and for listening (LDAP Server). LDAP connection requires using 636 (Secure Socket Layer) network ports. Custom ports are not supported and may not work correctly. Please be aware that firewall solutions may impact the connectivity between RelativityOne and LDAP server.

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#### 5.4.3.1 Setup

To create an integration point for importing LDAP:

1. In the **Setup** layout, complete the following fields:

The screenshot shows the 'Create Integration Point' dialog box. At the top, there's a title bar with 'Create Integration Point', a 'Cancel' button, and an information icon. Below the title bar is a progress bar with two steps: '1' (active, in a blue circle) and '2' (inactive, in a grey circle). The 'General' section contains the following fields: 'Name' (text input), 'Type' (radio buttons for 'Import' and 'Export', with 'Import' selected), 'Source' (dropdown menu with 'LDAP' selected), 'Destination' (dropdown menu with 'Relativity' selected), 'Transferred Object' (dropdown menu with 'Entity' selected), and 'Profile' (dropdown menu with 'Select...' selected). The 'Advanced' section contains 'Email Notification Recipients' (text area with 'Separate by semi-colon' hint), 'Log Errors' (radio buttons for 'Yes' and 'No', with 'Yes' selected), and the 'Scheduling' section contains 'Enable Scheduler' (radio buttons for 'Yes' and 'No', with 'No' selected). Navigation buttons 'Back' and 'Next' are on the right side of the dialog.

#### General:

- **Name**—the name of your integration for reference purposes.
- **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
- **Source**—select **LDAP** here, since you want to import data from a Lightweight Directory Access Protocol source. For example, use this source provider to import an organization's people directory.
- **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type.
- **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. It is typical to use the LDAP source to sync the Entity object.
- **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you have already created, select it from the drop-down list. For more information on profiles, see the Integration Points guide.

#### Advanced:

- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
  - If you select **Yes**, each job also logs any item level errors.
  - If you select **No**, Relativity doesn't log these item level errors.
  - Regardless of your selection, job-level errors are always recorded in Relativity.

#### Scheduling:

- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available:
  - **Frequency** —the interval at which Relativity syncs this integration point. Select one of the options below:
    - **Daily**—select this option to sync once every day.
    - **Weekly**—select this option to sync on a weekly basis. Then, enter data in the following fields:
      - **Reoccur**—enter a numeric value in the **Every # week(s)** field for how often you want it to occur weekly.
      - **Send On**—specify on which day of the week (Monday through Sunday) the sync will take place by selecting any of the days of the week listed.
    - **Monthly**—select this option to sync on a monthly basis. Then, enter data in the following fields:
      - **Reoccur**—enter a numeric value in the **Every # month(s)** field for how often you want it to occur monthly.
      - **Send On**—select the **Day # of the month** that you want this integration point to sync.
  - **Start Date**—the date that you want Integration Points to start syncing the data.
  - **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
  - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.
  - **Time Zone**—select the appropriate time zone.

2. Click **Next** to advance to the Connect to Source layout.

#### 5.4.3.2 Connect to source

Continue create your import integration point by connecting Relativity to the data source. Follow the steps below.

1. In the **Connect to Source** layout complete the following fields:

The screenshot shows the 'Create Integration Point' window with the 'Connect to Source' step active. The progress bar at the top shows three steps: Setup (completed), Connect to Source (current), and Map Fields (next). The 'Connect to Source' section includes the following fields:

- Connection Path:** A text input field.
- Object Filter String:** A text input field with the placeholder text 'Leave blank to filter (objectClass=\*)'.
- Authentication:** A dropdown menu with 'Select...' as the current selection.
- Username:** A text input field.
- Password:** A text input field.
- Import Nested Items:** Two radio buttons, 'Yes' and 'No'. The 'No' button is selected.

- **Connection Path**—the URL used to locate the directory. For example, “Relativity.com.” You will need to add **636** to the URL to access that port. Also, note that you can optionally include specific organizational unit references by adding a forward slash (/) after the server. The following example looks up items in the Relativity.com domain within the Employees organizational unit:  
`ldap.Relativity.com:636/OU=Employees,OU=Accounts,OU=Relativity,DC=Relativity,DC=corp`

**Note:** Contact [Relativity Support](#) to open port 636.

- **Object Filter String**—this string specifies certain attributes that the requested LDAP entries must contain that Integration Points considers for import. For example, if you want to import users, you would use an object filter string such as *(objectClass=user)*. For more information on search filter syntax, refer to this Microsoft article: [Search Filter Syntax](#).
- **Authentication**—Secure Socket Layer is the only applicable authentication type for port 636.
- **Username**—if required by the server’s authentication, enter a username to connect to the server (connection path). For external SaaS LDAP instances, the username may need to include user ID (UID), organization unit (ou), organization's distinguished name (o) and the connection path:  
`uid=johndoe,ou=Users,o=6065d44947314c4eb10ca904,dc=somesaasldap,dc=com`
- **Password**—if required by the server’s authentication, you can enter a password to connect to the server (connection path).
- **Import Nested Items**—select **Yes** for the import to include all sub directories in the specified connection path. Select **No** for the import to include only the first level items brought back in the connection path.

2. Click **Next** to advance to the Map Fields layout, which contains a list of Relativity fields from their destination RDO as well as attributes that the source provider pulled back.

#### 5.4.3.3 Map fields

Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields.

1. In the **Map Fields** wizard, you have the following options for mapping fields:

- Click the **Map All Fields** button to automatically map all Source fields with matching Destination field names, except single/multiple object fields.
- Use the Shift+click and Ctrl+click method to select multiple fields at a time.
- Use the single and double arrow buttons or double-click a field to move the selected fields between columns.
- If you have Destination Fields that are mapped to fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.
- The field names in the Destination columns include the type of each field listed.

When mapping fields, here are some issues to note:

- If the WebAPIPath instance setting in the kCura.IntegrationPoints section is not configured correctly after upgrade or installation, the Source field list is empty because it cannot return any attributes, and you are not able to map fields.
- When importing Entities, you need to map the **First Name** and **Last Name** fields. In case the Full Name field is not being mapped, those two fields are combined for the Full Name value which is then written to Entity object.

The screenshot displays the 'Map Fields' wizard, which is the third step in a three-step process (Setup, Connect to Source, Map Fields). The interface is divided into two main sections: 'Field Mappings' and 'Settings'.

**Field Mappings:**

- Source Fields (6):** A list of fields available for mapping, including 'Current Title', 'Email', 'Employment Start Date', 'Manager', 'Manager:Email', and 'System Last Modified On'.
- Selected Source Fields (4):** A list of fields that have been selected for mapping, including 'Full Name', 'Employee Number [Object Identifier]', 'First Name', and 'Last Name'.
- Selected Destination Fields (4):** A list of fields that have been mapped to the selected source fields, including 'Full Name [Fixed-Length Text]', 'UniqueID [Object Identifier]', 'First Name [Fixed-Length Text]', and 'Last Name [Fixed-Length Text]'.
- Destination Fields (36):** A list of all available destination fields, including 'Address 1 [Fixed-Length Text]', 'Address 2 [Fixed-Length Text]', 'BCC People [Multiple Object]', 'CC Recipients [Multiple Object]', 'City [Fixed-Length Text]', 'Company [Fixed-Length Text]', 'Country [Fixed-Length Text]', 'Current Title [Fixed-Length Text]', 'Custodian Interaction [Single Choice]', 'Custodians [Multiple Object]', 'Department [Fixed-Length Text]', 'Document numbering prefix [Fixed-Length Text]', 'Domain [Fixed-Length Text]', 'Email [Fixed-Length Text]', 'Employee Number [Fixed-Length Text]', 'Employee Status [Fixed-Length Text]', 'Employment End Date [Date]', 'Employment Start Date [Date]', 'Location [Fixed-Length Text]', 'Manager [Single Object]', 'Middle Name [Fixed-Length Text]', 'Notes [Long Text]', 'Past Department [Fixed-Length Text]', 'Past Manager [Fixed-Length Text]', and 'Past Title [Fixed-Length Text]'.

**Settings:**

- Overwrite:** A dropdown menu set to 'Append/Overlay'.
- Multi-Select Field Overlay Behavior:** A dropdown menu set to 'Use Field Settings'.
- Unique Identifier:** A dropdown menu set to 'UniqueID'.
- Entity Manager Contains Link:** A radio button group with 'Yes' and 'No' options, where 'No' is selected.

2. Complete the following import Settings on the **Map Fields** layout:

- **Overwrite**—determines how the system overwrites records once you promote data to the review workspace. This field provides the following choices:

- **Append Only**—promote only new records into the review workspace.
  - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. This field acts as a link indicating to Relativity where to import the data. When you select this or Append/Overlay, you must complete the Multi-Select Field Overlay Behavior field described below.
  - **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this or Overlay Only, you must complete the Multi-Select Field Overlay Behavior field described below. You are able to create folders or re-folder documents when you select Append/Overlay.
- **Multi-Select Field Overlay Behavior**—determines how the system will overlay records when you push documents to the review workspace. This field is only available if you have selected either Overlay Only or Append/Overlay above. This field provides the following choices:
    - **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
    - **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
    - **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.
  - **Unique Identifier**—this option is only available when the Overwrite mode is set to Overlay Only. Enter a value that no other item in the workspace contains. For example, use the GUID or distinguishedName attribute.
  - **Entity Manager Contains Link**—this Yes/No field is visible for all import sources when the Entity RDO is selected as the destination of the imported data. Some import sources populate the manager field with a link to the manager's profile on their internal system. When using LDAP as the import source, be sure to confirm and match (map) how this data is formatted in your system.

3. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see [Manually running the import job on page 224](#).

## 5.4.4 Importing a document load file

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**Note:** Before creating an integration point to import a load file, note that you must first place the load data in the `\\files\<TenantNumber>\Files\EDDS\<WorkspaceArtifactID>\DataTransfer\Import` folder, or you won't be able to select that data for the Import Source field.

---

### 5.4.4.1 Setup

To create an integration point for importing a document load file, follow the steps below.



1. In the **Setup** layout, complete the following fields:

#### General:

- **Name**—the name of your integration for reference purposes
- **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
- **Source**—select **Load File** here, since you want to import a load file into a workspace. On the Connect to Source layout, you'll have the option of specifying whether you're importing a document, image, or production load file.
- **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type, since you've already designated that you want to import into a Relativity workspace. You'll select the specific workspace on a subsequent layout.
- **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. Since you're importing the document object, select **Document** here.
- **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 189](#).

#### Advanced:

- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
  - If you select **Yes**, each job also logs any item level errors.
  - If you select **No**, Relativity doesn't log these item level errors.
  - Regardless of your selection, job-level errors are always recorded in Relativity.

#### Scheduling:

- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available:
  - **Frequency** —the interval at which Relativity syncs this integration point. Select one of the options below:
    - **Daily**—select this option to sync once every day.
    - **Weekly**—select this option to sync on a weekly basis. Then, enter data in the following fields:
      - **Reoccur**—enter a numeric value in the **Every # week(s)** field for how often you want it to occur weekly.
      - **Send On**—specify on which day of the week (Monday through Sunday) the sync will take place by selecting any of the days of the week listed.
    - **Monthly**—select this option to sync on a monthly basis. Then, enter data in the following fields:
      - **Reoccur**—enter a numeric value in the **Every # month(s)** field for how often you want it to occur monthly.
      - **Send On**—select the **Day # of the month** that you want this integration point to sync.
  - **Start Date**—the date that you want Integration Points to start syncing the data.
  - **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
  - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.
  - **Time Zone**—select the appropriate time zone.

2. Click **Next** to advance to the Connect to Source layout.

#### 5.4.4.2 Connect to source

Continue to create your import integration point by connecting Relativity to the data source. Follow the steps below.

1. In the **Connect to Source** layout complete the following fields.

**Create Integration Point**

Setup      **Connect to Source**      Map Fields

1      **2**      3

← Back      Next →      Preview On

**Load File Settings**

Import Type: Document Load File

Workspace Destination Folder: Select...

Import Source: Select...

Start Line: 0

**File Encoding**

File Encoding: Unicode (UTF-8)

Column: ASCII:020

Quote: ASCII:254

Newline: ASCII:174

Multi-Value: ASCII:059

Nested Value: ASCII:092

File Column Headers:

#### Load File Settings:

- **Import Type**—select the type of load file you'd like to import to the workspace. Select **Document Load File** from the drop-down list.
- **Workspace Destination Folder**—select the specific folder within the destination workspace in which you want to place the documents you are importing. The folder tree you see when you click this drop-down menu is identical to the folder structure in the destination workspace.
- **Import Source**—click the down arrow and select a load file from the workspace's DataTransfer import location in the fileshare.
  - These locations are hard-coded into Relativity and cannot be changed. You cannot load or export data to a different location than is listed here.
  - For reference purposes, the folder(s) displayed in the Import Source field actually reside in the following generic path: *Network\Server\Fileshare\EDDS {WorkspaceArtifactID}\DataTransfer\Import*. Accordingly, when an admin adds data to the Import folder inside the DataTransfer folder inside the folder displaying the workspace's artifact ID, that data then becomes available for selection in the Import Source field.
- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is 1, which results in loading the entire file.

#### File Encoding:

The following fields are only available if you selected Document Load File for the Import Type field above.

- **File Encoding**—select an encoding for the document load file. (Consult your processing vendor or department to determine the correct encoding option, if necessary.) If your file contains a language other than English, choose a Unicode option. Note the following details about encoding:
    - Relativity immediately applies any changes that you make to the encoding of a load file, and displays these changes in the column header preview.
    - Relativity provides you with the ability to audit the encoding of a load file.
  - **Column**—select the character used to separate columns.
  - **Quote**—select the character used as the text qualifier.
  - **Newline**—select the character used to indicate the end of a line in any extracted text or long text field.
  - **Multi-Value**—select the character used to separate choices within a field.
  - **Nested Value**—select the character used to separate the different levels of a multi-choice hierarchy. For example, you might import a field with following values: “Hot\Really Hot\Super Hot; Look at Later”. Using a semi-colon (;) as a multi-value delimiter, and a backslash (\) as a nested value delimiter, Relativity displays the choices
  - **File Column Headers**—displays the load file's column headers. Relativity automatically updates this section of the Load File tab when you select the file encoding. Note the following details about file column headers:
    - After you select an encoding, this section displays the fields in the load file. The column headers in the file display as vertical list. The fields display in alphanumeric order. The numeric value in parentheses indicates the position of the field within the file.
2. Click **Next** to advance to the Map Fields layout, which contains a list of Relativity fields from their destination RDO as well as attributes that the source provider pulled back.

#### 5.4.4.3 Map fields

Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields.

1. In the **Map Fields** wizard, you have the following options for mapping fields:
  - Click the **Map All Fields** button to automatically map all Source fields with matching Destination field names, except single/multiple object fields.
  - Use the Shift+click and Ctrl+click method to select multiple fields at a time.
  - Use the single and double arrow buttons or double-click a field to move the selected fields between columns.
  - If you have Destination Fields that are mapped to fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.
  - The field names in the Destination columns include the type of each field listed.

When mapping fields, here are some issues to note:

- If the WebAPIPath instance setting in the kCura.IntegrationPoints section is not configured correctly after upgrade or installation, the Source field list is empty because it cannot return any

attributes, and you are not able to map fields.

- When the load file data is being imported to Entity RDO, then **Full Name**, **First Name** and **Last Name** fields in the destination workspace must be mapped.

The screenshot displays the 'Field Mappings' and 'Settings' sections of the Relativity One interface. The 'Field Mappings' section is divided into four panes: 'Source Fields (12)', 'Selected Source Fields (16)', 'Selected Destination Fields (15)', and 'Destination Fields (74)'. The 'Source Fields' pane lists fields like Author, Conversation, and Conversation ID. The 'Selected Source Fields' pane shows fields like Control Number, Date Created, and Date Last Modified. The 'Selected Destination Fields' pane shows fields like Control Number, Date Created, and Date Last Modified. The 'Destination Fields' pane lists fields like Control Number, Date Created, and Date Last Modified. The 'Settings' section below contains various configuration options: 'Overwrite' is set to 'Append/Overlay'; 'Multi-Select Field Overlay Behavior' is set to 'Use Field Settings'; 'Copy Native Files' has 'Physical files' selected; 'Native File Path' is set to 'FILE\_PATH'; 'Use Folder Path Information' is set to 'Yes'; 'Folder Path Information' is set to 'Conversation'; 'Move Existing Documents' is set to 'Yes'; 'EXTRACTED TEXT' has 'Cell Contains File Location' set to 'Yes'; and 'Encoding for undetectable files' is set to 'Unicode'.

2. Complete the following import Settings on the **Map Fields** layout:

- **Overwrite**—determines how the system overwrites records once you promote data to the review workspace. This field provides the following choices:
  - **Append Only**—promote only new records into the review workspace.
  - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. This field acts as a link indicating to Relativity where to import the data. When you select this or Append/Overlay, you must complete the Multi-Select Field Overlay Behavior field described below.
  - **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this or Overlay Only, you must complete the Multi-Select Field Overlay Behavior field described below. You are able to create folders or re-folder documents when you select Append/Overlay.
- **Multi-Select Field Overlay Behavior**—determines how the system will overlay records when you push documents to the review workspace. This field is only available if you've selected either Overlay Only or Append/Overlay above. This field provides the following choices:

- **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
- **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
- **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.
- **Copy Native Files**—this Yes/No field is only visible when you select the Documents RDO, and lets you indicate whether Integration Points should import any native files in the sync.
  - **Native File Path**—this field appears if you select Yes to import the native files. From the drop-down menu, select the source provider attribute containing the file path links to the natives that you want to import.
- **Use Folder Path Information**—use a metadata field to build the folder structure for the documents that you promote to the review workspace.
  - Select **Yes** to use a metadata field to build the folder structure for the documents that you promote to the review workspace. Selecting Yes makes the Folder Path Information field required below.
  - Select **No** if you do not want to build a folder structure based on metadata. In this case, Relativity loads all documents directly into the folder indicated by the promote destination, and you create no new folders in the destination workspace.
  - You have the option of creating folders or re-folding documents when you select Append/Overlay for the Overwrite field.
  - You have the option of re-folding documents for the Overwrite field through the Move Existing Documents field below.
- **Folder Path Information**—specify a metadata field to build the folder structure for the documents that you promote to the review workspace. For the purposes of ECA and Investigation, select the **Processing Folder Path** option.
- **Move Existing Documents**—re-folder documents that were previously imported into the destination workspace, but were only placed in the root case folder and not to any subfolders. This field is useful for situations in which you want to add new data to the destination workspace while overlaying existing data.
  - Select **Yes** to move existing documents into the folders provided in the previous **Folder Path Information** field. For example, you previously imported custodian Sally Smith's files into the destination workspace's root folder. Now, in addition to placing the documents from the saved search specified in this integration point in their subfolder, you also want to move those previously migrated documents into Sally Smith's subfolder, so you would select Yes.
  - Select **No** if you do not want to re-folder existing documents.

- **Extracted Text**—select the destination field that is mapped to a path to Extracted Text files. The content of these files will be read into the selected field. Note that only Long Text destination fields that are mapped will show up as options in the Extracted Text drop-down. You can select an encoding type for the extracted text files as well.
- **Cell contains file location**—select this option if your extracted text is in document-level text files, and your load file contains a path to those text files.
- **Encoding for undetectable files**—select an encoding for the text file.
- **Entity Manager Contains Link**—this Yes/No field is visible for all import sources when the Entity RDO is selected as the destination of the imported data. Some import sources populate the manager field with a link to the manager's profile on their internal system. Set this field to **No** if the Document Load File source is selected.

3. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see [Manually running the import job on page 224](#).

## 5.4.5 Importing an image load file

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**Note:** Before creating an integration point to import a load file, note that you must first place the load data in the \\files\<TenantNumber>\Files\EDDS<WorkspaceArtifactID>\DataTransfer\Import folder, or you won't be able to select that data for the Import Source field.

---

### 5.4.5.1 Setup

To create an integration point for importing an image load file, perform the following steps:

1. In the **Setup** layout, complete the following fields:

**Create Integration Point**

Setup Complete the Setup

1 2

← Back Next →

Cancel

**General**

Name:

Type: ☒ Import ☐ Export

Source:

Destination:

Transferred Object:

Profile:

**Advanced**

Email Notification Recipients:

Log Errors: ☒ Yes ☐ No

**Scheduling**

Enable Scheduler: ☐ Yes ☒ No

#### General:

- **Name**—the name of your integration for reference purposes
- **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
- **Source**—select **Load File** here, since you want to import a load file into a workspace. On the Connect to Source layout, you'll have the option of specifying whether you're importing a document, image, or production load file.
- **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type, since you've already designated that you want to import into a Relativity workspace. You'll select the specific workspace on a subsequent layout.
- **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. Since you're importing the document object, select **Document** here.
- **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 189](#).

#### Advanced:



- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
  - If you select **Yes**, each job also logs any item level errors.
  - If you select **No**, Relativity doesn't log these item level errors.
  - Regardless of your selection, job-level errors are always recorded in Relativity.

#### Scheduling:

- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available:
  - **Frequency** —the interval at which Relativity syncs this integration point. Select one of the options below:
    - **Daily**—select this option to sync once every day.
    - **Weekly**—select this option to sync on a weekly basis. Then, enter data in the following fields:
      - **Reoccur**—enter a numeric value in the **Every # week(s)** field for how often you want it to occur weekly.
      - **Send On**—specify on which day of the week (Monday through Sunday) the sync will take place by selecting any of the days of the week listed.
    - **Monthly**—select this option to sync on a monthly basis. Then, enter data in the following fields:
      - **Reoccur**—enter a numeric value in the **Every # month(s)** field for how often you want it to occur monthly.
      - **Send On**—select the **Day # of the month** that you want this integration point to sync.
  - **Start Date**—the date that you want Integration Points to start syncing the data.
  - **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
  - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.
  - **Time Zone**—select the appropriate time zone.

2. Click **Next** to advance to the Source Information layout.

#### 5.4.5.2 Source information

Continue create your import integration point by connecting adding the source information. Follow the steps below.

1. In the **Source Information** layout, complete the following fields.

The screenshot shows the 'Create Integration Point' dialog box with the 'Source Information' tab selected. The 'Load File Settings' section is highlighted with a red box. The 'Import Type' dropdown is set to 'Image Load File'. The 'Workspace Destination Folder' is 'ClarityTest'. The 'Import Source' is 'DataTransfer\Import\ClarityTest 2017-03-17\_16-35-14UTC\Error\_Files\Do'. The 'Start Line' is '0'. The 'Import Settings' section shows 'Numbering' set to 'Use load file page IDs', 'Import Mode' set to 'Append Only', 'Copy Files to Document Repository' set to 'Yes', 'File Repository' set to '\\files\T001\Files\'. There are 'Back', 'Save', and 'Preview Options' buttons at the top right.

## Load File Settings

- **Import Type**—select the type of load file you'd like to import to the workspace. Select **Image Load File** from the drop-down list.
- **Workspace Destination Folder**—select the specific folder within the destination workspace in which you want to place the documents you're importing. The folder tree you see when you click this drop-down menu is identical to the folder structure in the destination workspace.
- **Import Source**—click the down arrow and select a load file from the workspace's DataTransfer import location in the fileshare.
  - These locations are hard-coded into Relativity and cannot be changed. You cannot load or export data to a different location than is listed here.
  - For reference purposes, the folder(s) displayed in the Import Source field actually reside in the following generic path: *Network\Server\Fileshare\EDDS {WorkspaceArtifactID}\DataTransfer\Import*. Accordingly, when an admin adds data to the Import folder inside the DataTransfer folder inside the folder displaying the workspace's artifact ID, that data then becomes available for selection in the Import Source field.
- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is 1, which results in loading the entire file.

## Import Settings

The following fields are only available if you selected Image or Production Load File for the Import Type field above.

- **Numbering**—determines the numbering scheme of the images you're importing.
  - **Use load file page IDs**—select this to use the default setting to number the images, which is the control number.

- **Auto-number pages**—select this option if page IDs in the production or image load file are not unique. For example, you might import a set of TIFFs that share a page identifier for each record. The page identifiers are shared per document and are not unique. The Auto-number pages option appends the 01, .02, and so on to the page-level identifier, creating a unique number per page.

---

**Note:** Auto-numbering pages is useful if you are importing productions or image load files that use document-level numbering without page numbers, and include documents that contain multiple pages.

---

■ **Import Mode**

- **Append Only**—select this to load only new records.
- **Overlay Only**—select this to update existing records only. When you select this, the required Overlay Identifier field appears below. This field acts as a link indicating to Relativity where to import the data.
- **Append/Overlay**—select this to add new records and overlay data on existing records.

---

**Note:** Select append to import the extracted text and natives from a .dat file. Select overlay when overlaying production images onto the existing documents.

---

- **Overlay Identifier**—select a field that stores overlaid document-level Bates information on the document. This is only available if you selected Overlay Only for the import mode.

---

**Note:** The fields in the drop-down menu are fixed-length fields with a manually-applied SQL index. Note that this is NOT the same as adding the field to the full-text index. Contact your SQL database administrator to apply an index to a field.

---

- **Copy Files to Document Repository**—determines whether or not Relativity will copy files from the location in the image load file field to a selected document repository.
- **Yes**—select this to copy files to a document repository that you select in the File Repository field below.
  - **No**—select this if the native files already reside in their final location, which is accessible by Relativity.

---

**Note:** The No option is not available for selection in RelativityOne because all files must be copied to a selected File Repository.

---

- **File Repository**—select the file repository to which you want to copy the files in the image load file. This field is only visible if you selected Yes for the Copy Files to Document Repository field above. Click **Default** to switch this value to the default file repository used by the workspace.
- **Load Extracted Text** - determines whether or not Relativity will load new text for Production documents that may be revised based on redactions.
- The text files must have .txt extensions, be stored in the same directory as the TIFF files, and be named in the same as the TIFF files.
  - This field is only available for image load files.
  - When you select this, the required Encoding for undetectable files field appears below.

- **Encoding for undetectable files**—select an encoding for the new text file that Relativity loads, per your enabling of the Load Extracted Text field above.

2. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see [Manually running the import job on page 224](#).

## 5.4.6 Importing a production load file

**Note:** Before creating an integration point to import a load file, note that you must first place the load data in the \\files\<TenantNumber>\Files\EDDS\<WorkspaceArtifactID>\DataTransfer\Import folder, or you won't be able to select that data for the Import Source field.

### 5.4.6.1 Setup

To create an integration point specifically for importing a production load file, follow the steps below.

1. In the **Setup** layout, complete the following fields:

The screenshot shows the 'Create Integration Point' dialog box. At the top, there's a title bar with 'Create Integration Point', a 'Cancel' button, and an information icon. Below the title bar, there's a progress bar with two steps: '1' (Setup) and '2' (Complete the Setup). The 'Setup' step is currently active. The dialog is divided into three main sections: 'General', 'Advanced', and 'Scheduling'. The 'General' section contains the following fields: 'Name' (text input), 'Type' (radio buttons for 'Import' and 'Export', with 'Import' selected), 'Source' (dropdown menu with 'Load File' selected), 'Destination' (dropdown menu with 'Relativity' selected), 'Transferred Object' (dropdown menu with 'Document' selected), and 'Profile' (dropdown menu with 'Select...' selected). The 'Advanced' section contains 'Email Notification Recipients' (text input with a note 'Separate by semi-colon') and 'Log Errors' (radio buttons for 'Yes' and 'No', with 'Yes' selected). The 'Scheduling' section contains 'Enable Scheduler' (radio buttons for 'Yes' and 'No', with 'No' selected). At the bottom right of the dialog, there are 'Back' and 'Next' buttons.

#### General:

- **Name**—the name of your integration for reference purposes
- **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.

- **Source**—select **Load File** here, since you want to import a load file into a workspace. On the Connect to Source layout, you'll have the option of specifying whether you're importing a document, image, or production load file.
- **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type, since you've already designated that you want to import into a Relativity workspace. You'll select the specific workspace on a subsequent layout.
- **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. Since you're importing the document object, select **Document** here.
- **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 189](#).

#### Advanced:

- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
  - If you select **Yes**, each job also logs any item level errors.
  - If you select **No**, Relativity doesn't log these item level errors.
  - Regardless of your selection, job-level errors are always recorded in Relativity.

#### Scheduling:

- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available:
  - **Frequency** —the interval at which Relativity syncs this integration point. Select one of the options below:
    - **Daily**—select this option to sync once every day.
    - **Weekly**—select this option to sync on a weekly basis. Then, enter data in the following fields:
      - **Reoccur**—enter a numeric value in the **Every # week(s)** field for how often you want it to occur weekly.
      - **Send On**—specify on which day of the week (Monday through Sunday) the sync will take place by selecting any of the days of the week listed.
    - **Monthly**—select this option to sync on a monthly basis. Then, enter data in the following fields:
      - **Reoccur**—enter a numeric value in the **Every # month(s)** field for how often you want it to occur monthly.
      - **Send On**—select the **Day # of the month** that you want this integration point to sync.
  - **Start Date**—the date that you want Integration Points to start syncing the data.

- **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
- **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.
- **Time Zone**—select the appropriate time zone.

2. Click **Next** to advance to the Connect to Source layout.

#### 5.4.6.2 Source information

Continue create your import integration point by connecting adding the source information. Follow the steps below.

1. In the **Source Information** layout complete the following fields.

#### Load File Settings:

- **Import Type**—select the type of load file you'd like to import to the workspace. Select **Production Load File** from the drop-down list.
- **Workspace Destination Folder**—select the specific folder within the destination workspace in which you want to place the documents you are importing. The folder tree you see when you click this drop-down menu is identical to the folder structure in the destination workspace.
- **Import Source**—click the down arrow and select a load file from the workspace's DataTransfer import location in the fileshare.
  - These locations are hard-coded into Relativity and cannot be changed. You cannot load or export data to a different location than is listed here.
  - For reference purposes, the folder(s) displayed in the Import Source field actually reside in the following generic path: *Network\Server\Fileshare\EDDS {WorkspaceArtifactID}\DataTransfer\Import*. Accordingly, when an admin adds data to the Import folder inside the DataTransfer folder inside the folder displaying the

workspace's artifact ID, that data then becomes available for selection in the Import Source field.

- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is 1, which results in loading the entire file.

### Import Settings:

The following fields are only available if you selected Image or Production Load File for the Import Type field above.

- **Numbering**—determines the numbering scheme of the production you're importing.
  - **Use load file page IDs**—select this to use the default setting to number the production, which is the control number.
  - **Auto-number pages**—select this option if page IDs in the production or image load file are not unique. For example, you might import a set of TIFFs that share a page identifier for each record. The page identifiers are shared per document and are not unique. The Auto-number pages option appends the 01, .02, and so on to the page-level identifier, creating a unique number per page.

---

**Note:** Auto-numbering pages is useful if you are importing productions or image load files that use document-level numbering without page numbers, and include documents that contain multiple pages.

---

- **Import Mode**
  - **Append Only**—select this to load only new records.
  - **Overlay Only**—select this to update existing records only. When you select this, the required Overlay Identifier field appears below. This field acts as a link indicating to Relativity where to import the data.
  - **Append/Overlay**—select this to add new records and overlay data on existing records.

---

**Note:** Select append to import the extracted text and natives from a .dat file. Select overlay when overlaying production images onto the existing documents.

---

- **Overlay Identifier**—if you selected Overlay Only for the import mode, select a field that stores overlaid document-level Bates information on the document.

---

**Note:** The fields in the drop-down menu are fixed-length fields with a manually-applied SQL index. Note that this is NOT the same as adding the field to the full-text index. Contact your SQL database administrator to apply an index to a field.

---

- **Copy Files to Document Repository**—determines whether or not Relativity will copy files from the location in the image load file field to a selected document repository.
  - **Yes**—select this to copy files to a document repository that you select in the File Repository field below.
  - **No**—select this if the native files already reside in their final location, which is accessible by Relativity.

- **File Repository**—select the file repository to which you want to copy the files in the image load file. This field is only visible if you selected Yes for the Copy Files to Document Repository field above. Click **Default** to switch this value to the default file repository used by the workspace.
- **Production**—select a Relativity production that you want to upload images to. Only new production sets without a production source appear in this list.

2. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see [Manually running the import job on page 224](#).

## 5.4.7 Importing from Microsoft Entra ID

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**Note:** As of October 2023, Microsoft renamed Azure Active Directory (Azure AD) to Microsoft Entra ID. This site has been updated to reflect the name change, where applicable. Refer to [Microsoft documentation](#) for more information.

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See information on importing from Microsoft Entra ID

The Integration Points Microsoft Entra ID Provider is a separate and standalone application that is not in the Relativity Application Library. For assistance in getting the Microsoft Entra ID Provider installed into your workspace, contact [Relativity Support](#). For more information, see the Integration Points guide.

You will need the following to complete the setup in Integration Points:

- Application ID from Microsoft Azure
- Application Secret Value from Microsoft Azure
- Domain address of Microsoft Azure instance
- Any filtering requirements that will be used to filter imported data
- Field Mappings to map fields between Relativity and Microsoft Entra ID.

### 5.4.7.1 Setup

To create an integration point for importing from Microsoft Entra:

1. Complete the following fields in the Setup layout:

**General:**

- **Name**—the name of your integration for reference purposes.

---

**Note:** Name the application in Integration Points the same as you did in Microsoft Entra ID for easy location of application when needing to make updates.

---

- **Type**—select Import to designate the job as a data import. Selecting Import makes all the possible import sources available for selection in the Source field below.
- **Source**—all possible third-party systems that you can import data from. Select Microsoft Entra ID.
- **Destination**—by default, this is set to Relativity and is not editable when you select Import as the type, since you've already designated that you want to import into a Relativity workspace. You'll select the specific workspace on a subsequent layout.



- **Transferred Object**—the Relativity Dynamic Object (RDO) to which you want to import the data. Select the Entity object.
- **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list.

#### Advanced:

- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
  - If you select **Yes**, each job also logs any item level errors.
  - If you select **No**, Relativity doesn't log these item level errors.
  - Regardless of your selection, job-level errors are always recorded in Relativity.

#### Scheduling:

- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available:
  - **Frequency** —the interval at which Relativity syncs this integration point. Select one of the options below:
    - **Daily**—select this option to sync once every day.
    - **Weekly**—select this option to sync on a weekly basis. Then, enter data in the following fields:
      - **Reoccur**—enter a numeric value in the **Every # week(s)** field for how often you want it to occur weekly.
      - **Send On**—specify on which day of the week (Monday through Sunday) the sync will take place by selecting any of the days of the week listed.
    - **Monthly**—select this option to sync on a monthly basis. Then, enter data in the following fields:
      - **Reoccur**—enter a numeric value in the **Every # month(s)** field for how often you want it to occur monthly.
      - **Send On**—select the **Day # of the month** that you want this integration point to sync.
  - **Start Date**—the date that you want Integration Points to start syncing the data.
  - **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
  - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.
  - **Time Zone**—select the appropriate time zone.

2. Click **Next** to continue to the Connect to Source layout.

#### 5.4.7.2 Connect to source

Continue to create your import integration point by connecting Relativity to your Microsoft Entra ID data source. You can select to import from your commercial or government Microsoft Entra ID profile. Follow the steps below.

1. Complete the following fields in the Connect to Source layout:

- **Version**—select either a Commercial or Government Microsoft Entra ID version to import from.
- **Application ID**—the ID of the application was created in the Azure Portal. For more information, see in the Integration Points guide.
- **Password**—The associated Application Secret Value (not the Secret ID) is the password for the application that was created in the Azure Portal. For more information, see in the Integration Points guide.
- **Directory ID**—The Microsoft Entra ID tenant domain the Azure application resides in.
- **Filter By**—You can limit the records imported by limiting import to specific users or groups.
- **Filter**—The filter condition used to identify Users or Groups that should be imported. Filters must be written using the Graph query syntax (for example, department eq 'Engineering'). For more information on using Graph query syntax, see Microsoft's Graph REST API documentation.

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##### Notes:

- A list of filterable User properties can be found in Microsoft's documentation under Support for filter by properties of Microsoft Entra ID (directory) objects - User properties.
- A list of filterable Group properties can be found in Microsoft's documentation under Support for filter by properties of Microsoft Entra ID (directory) objects - Group properties.
- Advanced query parameters are not currently supported by the Relativity Integration Points Microsoft Entra ID (formerly Azure AD) provider.

- 
- **MS-Graph Version**—Determines which version of the Graph API Integration Points will be used when interfacing with Azure AD. Defaults to version 1.0 of the Graph API if left blank. Another available option is Beta.

2. Click **Next** to continue to the Map Fields layout.

---

**Note:** A warning message appears at the top of page if information is not valid, and you will not be able to continue to the next step until the error is resolved.

---

#### 5.4.7.3 Map fields

Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields.

1. In the **Map Fields** wizard, you have the following options for mapping fields:

- Click the **Map All Fields** button to automatically map all Source fields with matching Destination field names, except single/multiple object fields.
- Use the Shift+click and Ctrl+click method to select multiple fields at a time.

- Use the single and double arrow buttons or double-click a field to move the selected fields between columns.
- If you have Destination Fields that are mapped to fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.
- The field names in the Destination columns include the type of each field listed.

When mapping fields, here are some issues to note:

- If the WebAPIPath instance setting in the kCura.IntegrationPoints section is not configured correctly after upgrade or installation, the Source field list is empty because it cannot return any attributes, and you are not able to map fields.
- When importing Entities, you need to map the **First Name** and **Last Name** fields. In case the Full Name field is not being mapped, those two fields are combined for the Full Name value which is then written to Entity object.

2. Complete the following import Settings on the **Map Fields** layout:

- **Overwrite**—determines how the system overwrites records once you promote data to the review workspace. This field provides the following choices:
  - **Append Only**—promote only new records into the review workspace.
  - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. This field acts as a link indicating to Relativity where to import the data. When you select this or Append/Overlay, you must complete the Multi-Select Field Overlay Behavior field described below.
  - **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this or Overlay Only, you must complete the Multi-Select Field Overlay Behavior field described below.
- **Multi-Select Field Overlay Behavior**—determines how the system overlays records when you promote documents to the review workspace. This field is only available if you have selected either Overlay Only or Append/Overlay above. This field provides the following choices:
  - **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
  - **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
  - **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.
- **Unique Identifier**—this option is only available when the Overwrite mode is set to Overlay Only. Enter a value that no other item in the workspace contains. For example, use the GUID or distinguishedName attribute.

- **Entity Manager Contains Link**—this Yes/No field is visible for all import sources when the Entity RDO is selected as the destination of the imported data. Some import sources populate the manager field with a link to the manager's profile on their internal system. Set this field to **No** if the FTP (CSV File) source is selected.

3. Click **Save** to save the Integration Point.

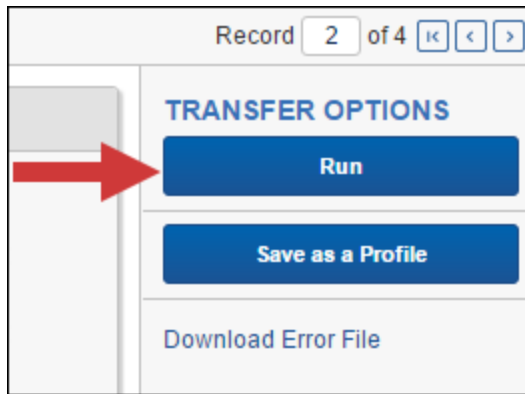
Once all of the settings have been entered the Integration Points job will run according to the schedule that was set. If you would like to run the job ahead of that time. For more information, see [Manually running the import job below](#).

#### 5.4.7.4 Reporting on Azure AD imports

Reporting on Azure AD imports can be done in Integration Points. For more information, see the Integration Points guide.

### 5.4.8 Manually running the import job

Once you have created an Integration Point, you can manually run an integration point by selecting the Integration Point, and clicking **Run** from the console. This lets you run an integration point instantly, as opposed to scheduling an integration point to run.



Click **OK** on the run confirmation message.

The Run button turns to red and gives you the option of stopping the job you just kicked off, as long as that job has a status of Pending or Processing.

If necessary, monitor the progress of the promote job by viewing the **Status** field in the **Status** view at the bottom of the layout. You will see any of the following status values:

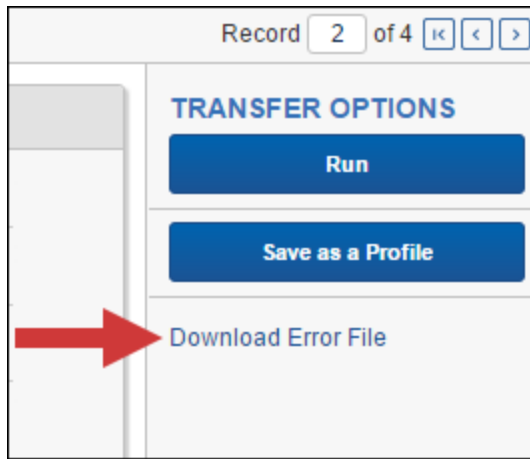
- **Pending**—the job has yet to be picked up by an agent.
- **Validation**—an agent is validating the job to make sure it has the required settings, such as access to the source and destination objects (saved searches, workspaces, etc.). If validation fails, the status changes to "Validation failed," and Relativity logs an error. If the validation succeeds, the job moves on to a status of "Processing."
- **Validation failed**—the job validation has failed, resulting in an error, the details of which are saved in the Job History Errors tab.
- **Processing**—the agent has picked up the job and is in the process of completing it.
- **Completed**—the job is complete, and no errors occurred.

- **Completed with errors**—the job is complete and errors have occurred.
- **Error - job failed**—a job-level error occurred and the job did not complete because it failed.
- **Stopping**—you clicked the Stop button, and the stop job has yet to be picked up by an agent.
- **Stopped**—the job has been stopped.

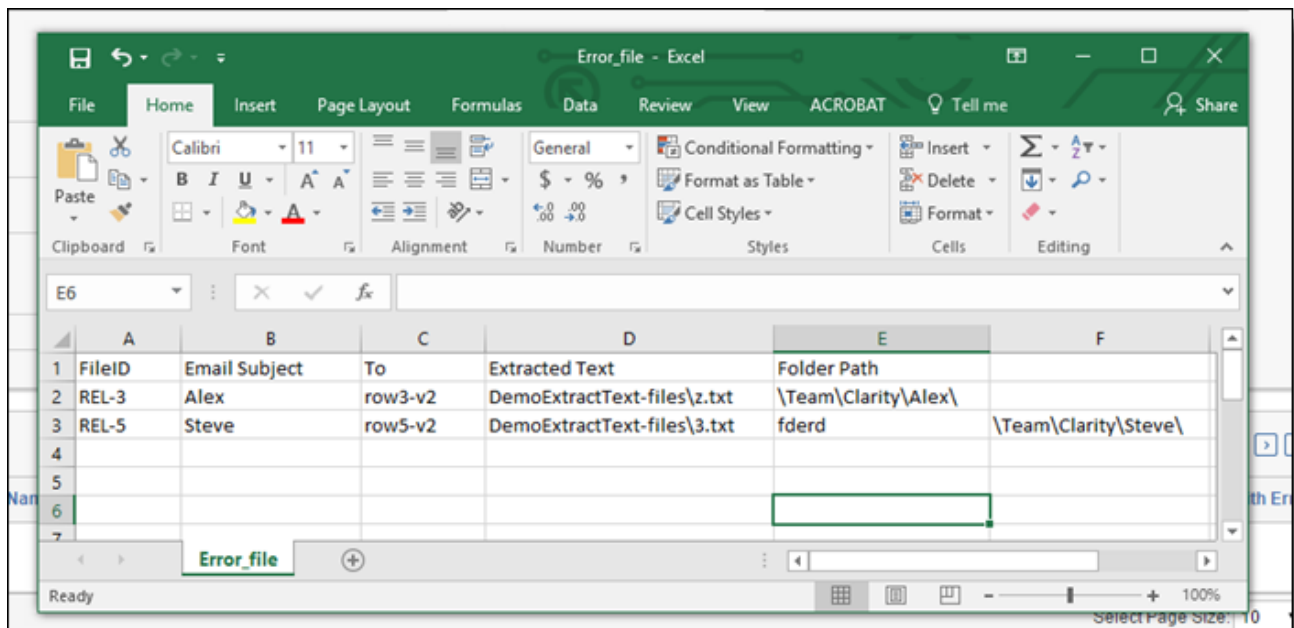
### 5.4.9 Downloading the error file

If your integration point encounters any errors during its run, the Download Error File link on the Transfer Options console is activated. This gives you the option of downloading an Excel file containing all the errors found in the integration point. Note that this option is available for load file imports only and is not visible for other providers.

To download this file, click the **Download Error File** link in the Transfer Options console.



Then open the downloaded file in the bottom left corner of your screen.

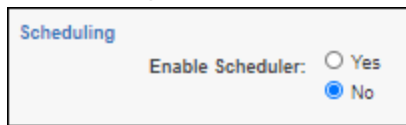


You now have the option of manually fixing the errors, saving the modified file in your DataTransfer\Import folder, and creating a new integration point to import those fixed files, seeing that they did not make it in with the original import. When doing this, simply ensure that the Import Source field of the new integration point refers to the file you just added.

### 5.4.10 Disabling a scheduled Integration Point job

To disable a scheduled integration point , simply turn off the scheduler.

1. From the Integration Points landing page, click the **Integration Point Name** that you wish to disable.
2. Click **Edit**.
3. In the Scheduling section, select **No** for Enable Scheduler. This disables the scheduling mechanism for that integration point.



### 5.4.11 Scheduler date format considerations

The integration points scheduler accepts non-U.S. date formats to further accommodate, for example, users in Australia.

In this case, the default language in your browser settings is set to English (Australian) or any other language that would display a non-U.S. date format of Day/Month/Year instead of Month/Day/Year.

**Languages**

Language  
English (Australia) ^

Order languages based on your preference

English (Australia) Google Chrome is displayed in this language	⋮
English (United States)	⋮
English	⋮

[Add languages](#)

Offer to translate pages that aren't in a language you read ☒

Spell check  
English (United States) v

Relativity then properly displays the date when you select it for the Start and End Date fields in the Scheduling category.

**Scheduling**

Enable Scheduler: ☒ Yes ☐ No

Frequency: Select... v

Start Date:	24/08/2017
End Date:	30/08/2017

Scheduled Time: hh:mm 12hr AM v

Time Zone: (UTC-06:00) Central Time (US ... v

This date format will also appear anywhere else in Relativity where a date is displayed, such as on the saved Integration Point Details layout and the Date Last Modified field on the Document list.

## 5.4.12 Automatically stopping a scheduled job that repeatedly fails

In some cases, a scheduled job may fail each time it is executed, such as when a job needs reconfiguring, and it may take some time before you become aware of these failed attempts. To mitigate this situation, you can configure an instance setting which will specify the maximum number of consecutive failed attempts encountered before the job is automatically stopped. For example, you may want to stop the scheduled job after four consecutive failed attempts at running.

1. Navigate to the **Instance Settings** page.
2. Create a new instance setting with the following settings.
  - **Name**—enter **MaxFailedScheduledJobsCount**.
  - **Section**—enter **kcura.IntegrationPoints**.
  - **Value Type**—select **Integer 32-bit**.
  - **Value**—enter the number of consecutive failed attempts to be executed before the scheduled job is stopped.



The integration point's Scheduling tab will display the failed jobs with a Job Type of "Scheduled Run," Job Status of "Error - job failed," Items Transferred of "0," and Total Items based on the number of items in that job. The system will attempt one more run after the configured maximum number of consecutive failed attempts before it stops the scheduled job and the Total Items column will be blank.

A screenshot of the Scheduling tab showing a list of failed jobs. Red arrows point to the Job Type, Job Status, Items Transferred, and Total Items columns. The 'Total Items' column is highlighted with a red box.

Job ID	Start Time (UTC)	Artifact ID	Name	Job Type	Job Status	Destination Worksp...	Items Transferred	Total Items	Items with Errors	System Created By
8	12/5/2022, 2:21 PM	1040715	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0		0	Service Account, Relativity
7	12/5/2022, 2:21 PM	1040697	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0	7	0	Service Account, Relativity
6	12/5/2022, 2:20 PM	1040679	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0	7	0	Service Account, Relativity
5	12/5/2022, 2:19 PM	1040661	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0	7	0	Service Account, Relativity
1	12/5/2022, 2:19 PM	1040643	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0	7	0	Service Account, Relativity


The "Next Scheduled Runtime (UTC)" field on the Scheduling tab will be blank, letting you know that job is not scheduled to run again. You will need to correct the error(s) before it will run again as scheduled.



When you go to the Job History page to view the job, you will see the system-generated error description explaining why the scheduled job was stopped.



Job History Error						
Name	Source Unique ID	Job History	Error	Error Status	Error Type	System Created On
<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	(All) ▾	(All) ▾	(All)
90710540-d664-4e8d-		Automated Stop for...	Scheduled Job reached maximum number of consecutive fails and therefore was stopped by the system. The schedule won't be restored until Integration Point update.	New	Job	



## 5.5 Exporting data through Integration Points

Integration Points provides you with the ability to export data directly from your workspace. This includes exporting saved searches, case folders, and productions directly from your workspace, and scheduling future or recurrent export jobs.

### Notes:

- Although importing and exporting a load file is possible in Integration Points, Import/Export is the main application recommended for a stable and efficient load file import and export.
- When you export data to a load file through Integration Points, your files are saved to a file share. To access this file share, look at the AppID in the URL of your Relativity environment and locate the EDDS folder on the file share that has the same number.

### 5.5.1 Exporting a folder to load file

To create an integration point specifically for exporting a folder, perform the following steps:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.

3. Complete the following fields in the **Setup** category of the Create Integration Point layout:

Create Integration Point

Cancel ⓘ

Setup Complete the Setup

1 2

← Back Next →

**General**

Name:

Type: ☐ Import ☒ Export

Source:

Destination:

Transferred Object:

Profile:

Include in ECA Promote List: ☐ Yes ☒ No

**Advanced**

Email Notification Recipients:  
Separate by semi-colon

Log Errors: ☒ Yes ☐ No

**Scheduling**

Enable Scheduler: ☐ Yes ☒ No

- **Name**—the name of your integration for reference purposes.
- **Type**—select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.
- **Source**—this is automatically set to **Relativity** since you are exporting data out of a Relativity workspace.
- **Destination**—select **Load File**.
- **Transferred Object**—select **Document**.
- **Profile**—use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you previously created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 189](#).
- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.

- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
  - If you select **Yes**, each job also logs any item level errors.
  - If you select **No**, Relativity does not log these item level errors.
  - Regardless of your selection, job-level errors are always recorded in Relativity.
- **Enable Scheduler**—gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
  - **Frequency**—the interval at which Relativity promotes data using this integration point.
    - **Daily**—select this option to promote data once every day.
    - **Weekly**—select this option to promote data on a weekly basis. You can specify how often in the **Reoccur** field, in which you will provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the data promotion will take place by checking any of the days of the week listed.
    - **Monthly**—select the day of the month that you want this integration point to promote data once every month.
    - **Reoccur**—enter the number of month(s) in which this integration point recurrently promotes data.
    - **Send On**
      - **Day \_\_ the month**—select the day of the month that you want this integration point to promote data.
      - **The \_\_ of the Month**—select this option for this integration point to promote data on the chosen day of every month. For example, "The **Second Friday** of the month."
  - **Start Date**—the date that you want Integration Points to start promoting the data.
  - **End Date**—(Optional) the date that you want Integration Points to stop promoting the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
  - **Scheduled Time**—the time at which this integration point promotes data. This time is local to your PC, not to the server.

4. Click **Next** to advance to the Source Information layout.

5. Complete the following fields on the **Source Information** layout:

The screenshot shows the 'Create Integration Point' dialog box with the 'Source Information' tab selected. The 'Source Detail' section is highlighted with a red box, showing the following values:

- Source: Folder
- Folder: SempergerCara
- Views: Documents

Below the 'Source Detail' section is the 'Start Export at Record' field, which is set to 1.

The 'Columns To Export' section is divided into three columns:

- Source Fields:** A list of available fields including Alert, Analytics Index, Artifact ID, Attachment Name, Attorney Review Comments, Batch, Batch::Assigned To, Batch::Batch Set, Batch::Status, Bates Beg, Bates Beg Attach, Bates End, Bates End Attach, Case Admin - Production Volume, Case Admin Saved Searches, Control Number Beg Attach, Control Number End, Control Number End Attach, Conversation Family, Conversation Index, Data Load Date, Data Load Volume, Date Created, Date Last Printed, Date Received, Date Sent, and Delivered Recaint.
- Selected Fields:** A list of fields selected for export, including Confidential Designation, Control Number, Custodian - Single Choice, Date Last Modified, Document Extension, Email CC, Email From, Email Subject, Email To, Group Identifier, Issue Designation, Privilege Designation, Responsive Designation, Sort Date, and Title.
- Renamed Fields:** A list for renaming fields.

A 'Rename' button is located between the 'Selected Fields' and 'Renamed Fields' columns.

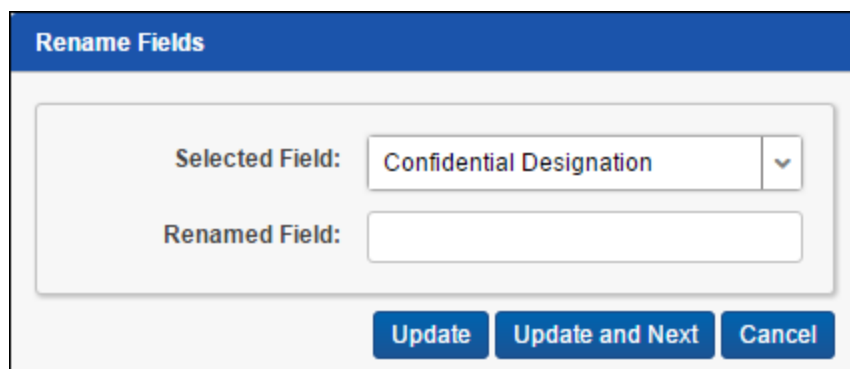
- **Source**—select **Folder** from the drop-down list. Specify that you want to select a folder, from which you want export the data in your load file. You will select this folder below from the folder structure in the Folder field. You will also need to select a View from the Views field.
- **Folder**—click on the down arrow and expand the folder structure, locate the folder from which you want to export the data, and select it. This field is only available if you selected Folder + Subfolders as the source above.

**Note:** When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to create the integration point, these fields are updated to reflect the newly selected source.

- **Views**—click on the down arrow and select a view for the data that you want to export. This is only available if you selected Folder or Folder + Subfolders as the source above.
- **Start Export at Record**—select a record number that identifies the initial document for export. Integration Points exports the document with this record number and continues exporting documents with subsequent record numbers.
- **Source Fields | Selected Fields| Renamed Fields**—choose the fields that you want to export by moving them to the Selected Fields box. The box on the left displays all available

source fields. The fields listed in the Selected Fields column are determined by what you select for the Source field above, as well by the folder, production set, or saved search that you select. Only the fields in the Selected Fields box on the right will be exported when you run the integration point. If you wish to rename the fields in your load file before exporting them, you can do so through the Rename option described below. The fields whose names you change are displayed in the Renamed Fields column.

- **Rename**—gives you the option of renaming the fields in your load file before exporting them. When you click this button, you are presented with the following settings and buttons in the Rename Fields window:



- **Selected Field**—displays the current name of the field that you selected from the Source Fields column. To change its name, use the Renamed Field below.
- **Renamed Field**—enter the new name for the Selected Field. This name will appear in the Renamed Fields column of the layout once you click the Update or Update and Next button below. If you do not change the original name of the selected field, then the Renamed Fields column contains an empty row for that field.
- **Update** button—click this button to update the selected field to the name you entered in the Renamed Field setting. When you do this, the renamed field appears in the Renamed Field column.
- **Update and Next** button—click this button to update the selected field to the name you entered in the Renamed Field setting and then move to the next field in the Selected Field column. When you do this, the renamed field appears in the Renamed Field column and the next field appears in the Selected Field setting.
- **Cancel** button—click this to exit the Rename Fields window without applying any changes to current field names.

6. Click **Next** to advance to the Destination Information layout.

7. Complete the following fields on the **Destination Information** layout:

Create Integration Point

Cancel

Setup

Source Information

Destination Information

✓

✓

3

← Back

Save

Export Detail ?

Export Type:

☒ Load File

☒ Images

☒ Natives

☒ Text Fields As Files

Overwrite Files:

☐

Destination Folder:

EDDS1064096\DataTransfer\Export\Documentation export directory\_(Tim

▼

☒ Create Export Folder

Output Settings

LOAD FILE OPTIONS

Image File Format:

Select...

▼

Data File Format:

Relativity (.dat)

▼

Data File Encoding:

Unicode

▼

File Path:

☒ Relative

☐ Absolute

☐ User Prefix

Include Native Files Path:

☒

Export Multiple Choice Fields As Nested:

☐

FILE NAMING OPTIONS

Name Output Files After:

Identifier

▼

Append Original File Name:

☐

IMAGE

File Type:

Single page TIFF/JPEG

▼

Image Precedence:

Original Images

▼

Subdirectory Prefix:

IMG

001

NATIVE

Subdirectory Prefix:

NATIVE

001

TEXT

Text File Encoding:

Unicode

▼

Text Precedence:

Select...

...

Subdirectory Prefix:

TEXT

001

Volume & Subdirectory Detail

VOLUME

Prefix:

VOL

Start Number:

1

Number Of Digits:

2

Max Size (MB):

4400

SUBDIRECTORY

Start Number:

1

Number Of Digits:

3

Max Files:

500

## Load File Options

 Relativity one

Data Transfer Guide

234

- **Export Type**—this field reflects the type of export job you are running, which you specified on the Setup layout. By default, Load File is selected as the base configuration for your export job. You also have the option of enhancing the load file by selecting **Images**, **Natives**, and **Text Fields as Files**, depending on the makeup of your data. Selecting any of these options makes additional corresponding output settings available, which are described below.
  - The Text Fields as Files option determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Integration Points includes text as part of your load file if you deselect this option and if a long text field is included in the selected fields that you mapped in the Source Information layout.
- **Destination Folder**—specify the folder into which you want to export the data from the load file. This reads the Default File Repository and lets you select a subfolder of that location.
- **Create Export Folder**—check this box to create an export folder named after the existing Relativity Integration Point job and the timestamp in your export folder. This will prevent the overwriting of any previous Relativity Integration Point exports to your export folder. When you check this box, the value displayed in the Destination Folder field is updated to reflect the [JobName]\_[RunTimeStampUTC] information.
- **Image File Format**—select one of these formats for image-level load file:
  - Opticon
  - IPRO
  - IPRO (Full Text)
- **Data File Format**—select the format for the document-level load file you are exporting:
  - **Relativity (.dat)**—load file exports with the standard Concordance delimiters.
  - **HTML (.html)**—load file is in HTML and contains hyperlinks to launch any exported files.
  - **Comma-separated (.csv)**—load file exports as delimited text file that uses a comma to separate values.
  - **promote data**—load file exports with the custom delimiters that you select.
- **Data File Encoding**—select an encoding for the document-level load file from the drop-down box.
- **File Path**—controls how the export path for the files is referenced. Select one of the following options:
  - **Use absolute paths**—paths to exported files are represented as absolute paths. For example, C:\Desktop\VOL001\NATIVE001\AS000001.msg
  - **Use relative paths**—paths to exported files are represented as relative paths. For example, .\VOL001\NATIVE001\AS000001.msg
  - **Use prefix**—a prefix is added to the relative path, such as a CD drive letter. For example, D:\VOL001\NATIVE001\AS000001.msg
- **Include Native Files Path**—check this box if you want to include the native file path in your data once you export it. Note that in the load file, for example a Relativity.dat file, there will be file path information added for every record you are exporting.

- **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.
- **Name Output Files After**—select one of the following naming convention for exported files:
  - **Identifier**—select this option to name the files after the identifier for your workspace.
  - **Begin production number**—select this option to name the files after the production number. (This number may be the Bates number for a production.) Relativity names files after the production number only if you select Produced Images as the Production Precedence below.
- **Append Original File Name**—select this option to append the original name of the file to the end of the exported file name.

**Image**—the following fields are only available if you selected Images for the Export Type field above.

- **File Type**—select one of these file types:
  - Single-page TIF/JPG
  - Multi-page TIF
  - PDF
- **Production Precedence**—select one of the following groups of produced documents for export instead of the original images:
  - **Original Images**—exports only the original, non-produced images.
  - **Produced Images**—exports a produced version of the images. When you select this, the following fields become available:

The screenshot shows a configuration window titled "IMAGE". It contains several settings:
 

- File Type:** A dropdown menu set to "Single page TIFF/JPEG".
- Production Precedence:** A dropdown menu set to "Produced Images".
- Image Productions:** A field showing "November Production" with a blue button containing three dots to its right.
- Include Original Images If Not Produced:** A checkbox that is currently unchecked.
- Subdirectory Prefix:** A text field containing "IMG", followed by a small box containing "001".

 A red rectangular box highlights the "Image Productions" and "Include Original Images If Not Produced" section.

- **Image Productions**—select the produced images that you want to act as the precedence.
- **Include Original Images If Not Produced**—exports only the original images in the event that they have not been produced.
- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported images. By default, this is set to IMG.

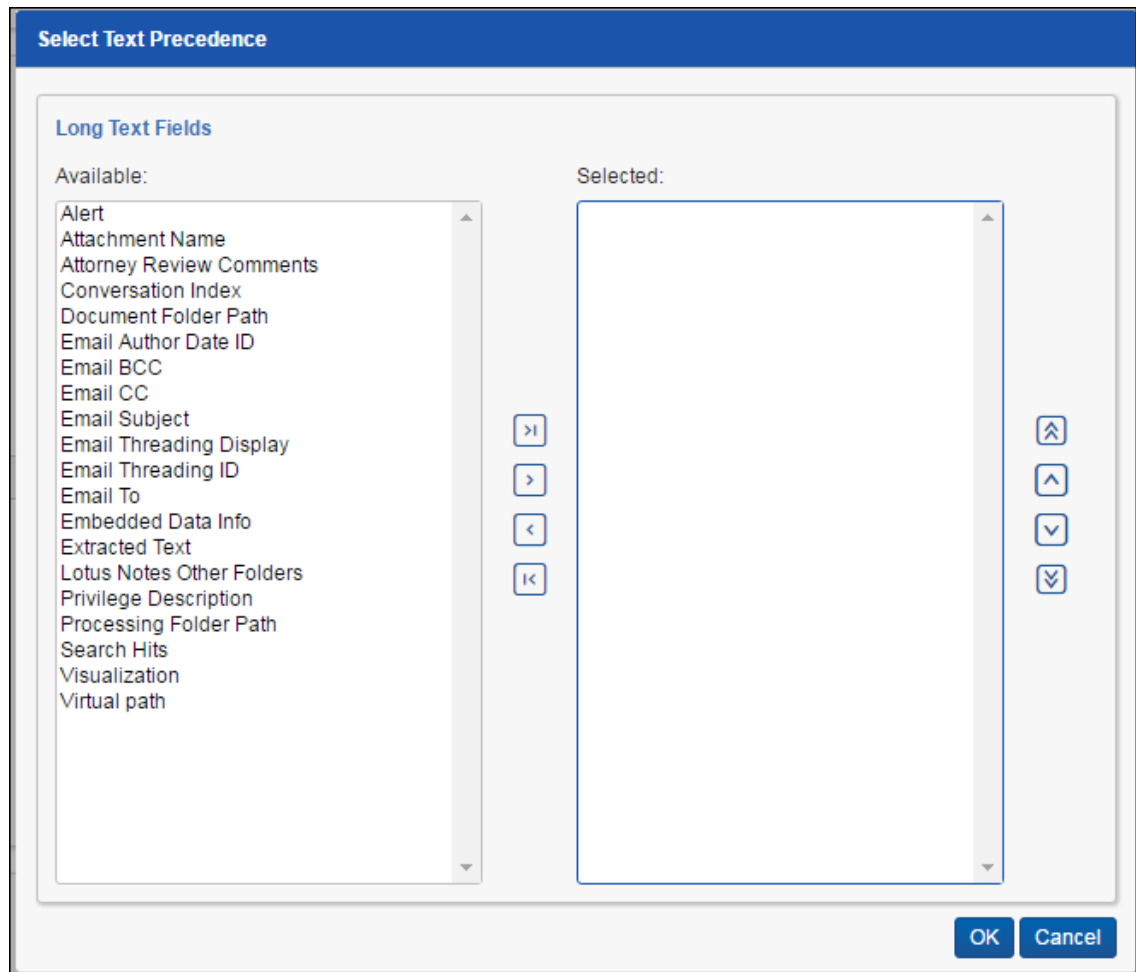
**Native**



- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported native files. By default, this is set to NATIVE. This field is only available if you selected Natives for the Export Type field above.

**Text**—the following fields are only available if you selected text Fields As Files for the Export Type field above.

- **Text File Encoding**—select the encoding for the document-level text files
- **Text Precedence**—select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click the ellipsis to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the Right or Left single or double arrows. Use the Up and Down arrows to order the precedence of the fields.



- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported text files. By default, this is set to TEXT.

## Volume

- **Prefix**—enter the alpha prefix for the volume identifier. By default, this is set to VOL.
- **Start Number**—select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
- **Number of Digits**—select the number of digits attached to the prefix. (For example, if you select 3, the output is VOL001, VOL002, and so on.)
- **Max Size (MB)**—select the maximum size allowed for each volume in MBs.

#### Subdirectory

- **Start Number**—select the starting number for the subdirectories.
- **Number of Digits**—select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
- **Max Files**—select the number of files to store in each subdirectory.

8. Click **Save** to save this integration point with these export settings.

Once Relativity saves the integration point, you will be able to run it and export the data based on the settings you specified. See [Running the export job on page 265](#) for details.

### 5.5.2 Exporting a folder and subfolders to a load file

To create an integration point specifically for exporting a folder and subfolders, perform the following steps:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.

3. Complete the following fields in the **Setup** category of the Create Integration Point layout:

Create Integration Point

Cancel ⓘ

Setup Complete the Setup

1 2

← Back Next →

**General**

Name:

Type: ☐ Import ☒ Export

Source:

Destination:

Transferred Object:

Profile:

Include in ECA Promote List: ☐ Yes ☒ No

**Advanced**

Email Notification Recipients:  
Separate by semi-colon

Log Errors: ☒ Yes ☐ No

**Scheduling**

Enable Scheduler: ☐ Yes ☒ No

- **Name**—the name of your integration for reference purposes.
- **Type**—select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.
- **Source**—this is automatically set to **Relativity** since you are exporting data out of a Relativity workspace.
- **Destination**—select **Load File**.
- **Transferred Object**—select **Document**.
- **Profile**—use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply an existing profile, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 189](#).
- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semicolons between addresses.

- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors. Regardless of your selection, job-level errors are always recorded in Relativity.
  - If you select **Yes**, each job also logs any item level errors.
  - If you select **No**, Relativity does not log these item level errors.
- **Enable Scheduler**—gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
  - **Frequency**—the interval at which Relativity promotes data using this integration point.
    - **Daily**—select this option to promote data once every day.
    - **Weekly**—select this option to promote data on a weekly basis. You can specify how often in the **Reoccur** field, in which you will provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the data promotion will take place by checking any of the days of the week listed.
    - **Monthly**—select the day of the month that you want this integration point to promote data once every month.
    - **Reoccur**—enter the number of month(s) in which this integration point recurrently promote data.
    - **Send On**
      - **Day \_\_ the month**—select the day of the month that you want this integration point to promote data.
      - **The \_\_ of the Month**—select this option for this integration point to promote data on the chosen day of every month. For example, "The **Second Friday** of the month."
  - **Start Date**—the date that you want Integration Points to start promoting the data.
  - **End Date**—(Optional) the date that you want Integration Points to stop promoting the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
  - **Scheduled Time**—the time at which this integration point promotes data. This time is local to your PC, not to the server.

4. Click **Next** to advance to the Source Information layout.

5. Complete the following fields on the **Source Information** layout:

Create Integration Point

Cancel

Setup Source Information Destination Information

← Back Next →

Source Detail

Source: Folder + Subfolders

Folder + Subfolders Select...

Views: Select...

Start Export at Record: 1

Columns To Export

Source Fields:

- Alert
- Analytics Index
- Artifact ID
- Attachment Name
- Attorney Review Comments
- Batch
- Batch::Assigned To
- Batch::Batch Set
- Batch::Status
- Bates Beg
- Bates Beg Attach
- Bates End
- Bates End Attach
- Case Admin - Production Volume
- Case Admin Saved Searches
- Confidential Designation
- Control Number
- Control Number Beg Attach
- Control Number End
- Control Number End Attach
- Conversation Family
- Conversation Index
- Custodian - Single Choice
- Data Load Date
- Data Load Volume
- Date Created
- Date Last Modified

Selected Fields:

Rename

Renamed Fields:

- **Source**—select **Folder + Subfolders** from the drop-down list and specify that you want to select a folder and subfolders from which you want export the data in your load file. You will select this folder below from the folder structure in the Folder + Subfolders field. You will also need to select a View from the Views field.
- **Folder + Subfolders**—click on the down arrow and expand the folder structure, locate the folder and subfolders from which you want to export the data, and select it. This field is only available if you selected Folder + Subfolders as the source above.

**Note:** When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to create the integration point, these fields are updated to reflect the newly selected source.

- **Views**—click on the down arrow and select a view for the data that you want to export. This is only available if you selected Folder or Folder + Subfolders as the source above.

- **Start Export at Record**—select a record number that identifies the initial document for export. Integration Points exports the document with this record number and continues exporting documents with subsequent record numbers.
- **Source Fields | Selected Fields | Renamed Fields**—choose the fields that you want to export by moving them to the Selected Fields box. The box on the left displays all available source fields. The fields listed in the Selected Fields column are determined by what you select for the Source field above, as well by the folder, production set, or saved search that you select. Only the fields in the Selected Fields box on the right will be exported when you run the integration point. If you wish to rename the fields in your load file before exporting them, you can do so through the Rename option described below. The fields whose names you change are displayed in the Renamed Fields column.
- **Rename**—gives you the option of renaming the fields in your load file before exporting them. When you click this button, you are presented with the following settings in the Rename Fields window:

- **Selected Field**—displays the field that you have selected from the Source Fields column, the name of which you can change in the Renamed Field below.
- **Renamed Field**—enter the desired new name for the field. This name will appear in the Renamed Fields column of the layout once you click the Update or Update and Next button below. If you do not change the original name of the selected field, then the Renamed Fields column contains an empty row for that field.
- **Update** button—click this button to update the selected field to the name you entered in the Renamed Field setting. When you do this, the renamed field appears in the Renamed Field column.
- **Update and Next** button—click this button to update the selected field to the name you entered in the Renamed Field setting and then move to the next field in the Selected Field column. When you do this, the renamed field appears in the Renamed Field column and the next field appears in the Selected Field setting.
- **Cancel** button—click this button to exit the Rename Fields window without applying any changes to current field names.

6. Click **Next** to advance to the Destination Information layout.

7. Complete the following fields on the **Destination Information** layout:

Create Integration Point

Cancel

Setup

Source Information

Destination Information

✓

✓

3

← Back

Save

Export Detail ?

Export Type:

☒ Load File

☒ Images

☒ Natives

☒ Text Fields As Files

Overwrite Files: ☐

Destination Folder: EDDS1064096\DataTransfer\Export\Documentation export directory\_(Tim) 

▼

☒ Create Export Folder

Output Settings

LOAD FILE OPTIONS

Image File Format: 

Select... 

▼

Data File Format: 

Relativity (.dat) 

▼

Data File Encoding: 

Unicode 

▼

File Path: 

☒ Relative

☐ Absolute

☐ User Prefix

Include Native Files Path: ☒

Export Multiple Choice Fields As Nested: ☐

FILE NAMING OPTIONS

Name Output Files After: 

Identifier 

▼

Append Original File Name: ☐

IMAGE

File Type: 

Single page TIFF/JPEG 

▼

Image Precedence: 

Original Images 

▼

Subdirectory Prefix: 

IMG

 001

NATIVE

Subdirectory Prefix: 

NATIVE

 001

TEXT

Text File Encoding: 

Unicode 

▼

Text Precedence: 

Select... 

...

Subdirectory Prefix: 

TEXT

 001

Volume & Subdirectory Detail

VOLUME

Prefix: 

VOL

Start Number: 

1

Number Of Digits: 

2

Max Size (MB): 

4400

SUBDIRECTORY

Start Number: 

1

Number Of Digits: 

3

Max Files: 

500

## Load File Options

- **Export Type**—this field reflects the type of export job you are running, which you specified on the Setup layout. By default, Load File is selected as the base configuration for your export job. You also have the option of enhancing the load file by selecting **Images**, **Natives**, and **Text Fields as Files**, depending on the makeup of your data. Selecting any of these makes additional corresponding output settings available, which are described below.
  - The Text Fields as Files option determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Integration Points includes text as part of your load file if you deselect this option and if a long text field is included in the selected fields that you mapped in the Source Information layout.
- **Destination Folder**—specify the folder into which you want to export the data from the load file. This reads the Default File Repository and lets you select a subfolder of that location.
- **Create Export Folder**—check this box to create an export folder named after the existing Relativity Integration Point job and the timestamp in your export folder. This will prevent the overwriting of any previous Relativity Integration Point exports to your export folder. When you check this box, the value displayed in the Destination Folder field is updated to reflect the [JobName]\_[RunTimeStampUTC] information.
- **Image File Format**—select one of these formats for image-level load file:
  - Opticon
  - IPRO
  - IPRO (Full Text)
- **Data File Format**—select a the format for the document-level load file you are exporting:
  - **Relativity (.dat)**—load file exports with the standard Concordance delimiters.
  - **HTML (.html)**—load file is in HTML and contains hyperlinks to launch any exported files.
  - **Comma-separated (.csv)**—load file exports as delimited text file that uses a comma to separate values.
  - **Custom (.txt)**—load file exports with the custom delimiters that you select.
- **Data File Encoding**—select an encoding for the document-level load file from the drop-down box.
- **File Path**—controls how the export path for the files is referenced. Select one of the following options:
  - **Use absolute paths**—paths to exported files are represented as absolute paths. For example, C:\ Desktop\VOL001\NATIVE001\AS000001.msg
  - **Use relative paths**—paths to exported files are represented as relative paths. For example, .\VOL001\NATIVE001\AS000001.msg
  - **Use prefix**—a prefix is added to the relative path, such as a CD drive letter. For example, D:\VOL001\NATIVE001\AS000001.msg
- **Include Native Files Path**—check this box if you want to include the native file path in your data once you export it. Note that in the load file, for example a Relativity.dat file, there will be file path information added for every record you are exporting.



- **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.
- **Name Output Files After**—select one of the following naming convention for exported files:
  - **Identifier**—select this option to name the files after the identifier for your workspace.
  - **Begin production number**—select this option to name the files after the production number. (This number may be the Bates number for a production.) Relativity names files after the production number only if you select Produced Images as the Production Precedence below.
- **Append Original File Name**—select this option to append the original name of the file to the end of the exported file name.

**Image**—the following fields are only available if you selected Images for the Export Type field above.

- **File Type**—select one of these file types:
  - Single-page TIF/JPG
  - Multi-page TIF
  - PDF
- **Production Precedence**—select one of the following groups of produced documents for export instead of the original images:
  - **Original Images**—exports only the original, non-produced images.
  - **Produced Images**—exports a produced version of the images. When you select this, the following fields become available:

The screenshot shows a configuration window titled "IMAGE". It contains several fields:
 

- File Type:** A dropdown menu set to "Single page TIFF/JPEG".
- Production Precedence:** A dropdown menu set to "Produced Images".
- Image Productions:** A field showing "November Production" with a blue button containing three dots to its right.
- Include Original Images If Not Produced:** A checkbox that is currently unchecked.
- Subdirectory Prefix:** A text field containing "IMG", followed by a small "001" label.

 A red rectangular box highlights the "Image Productions" and "Include Original Images If Not Produced" fields.

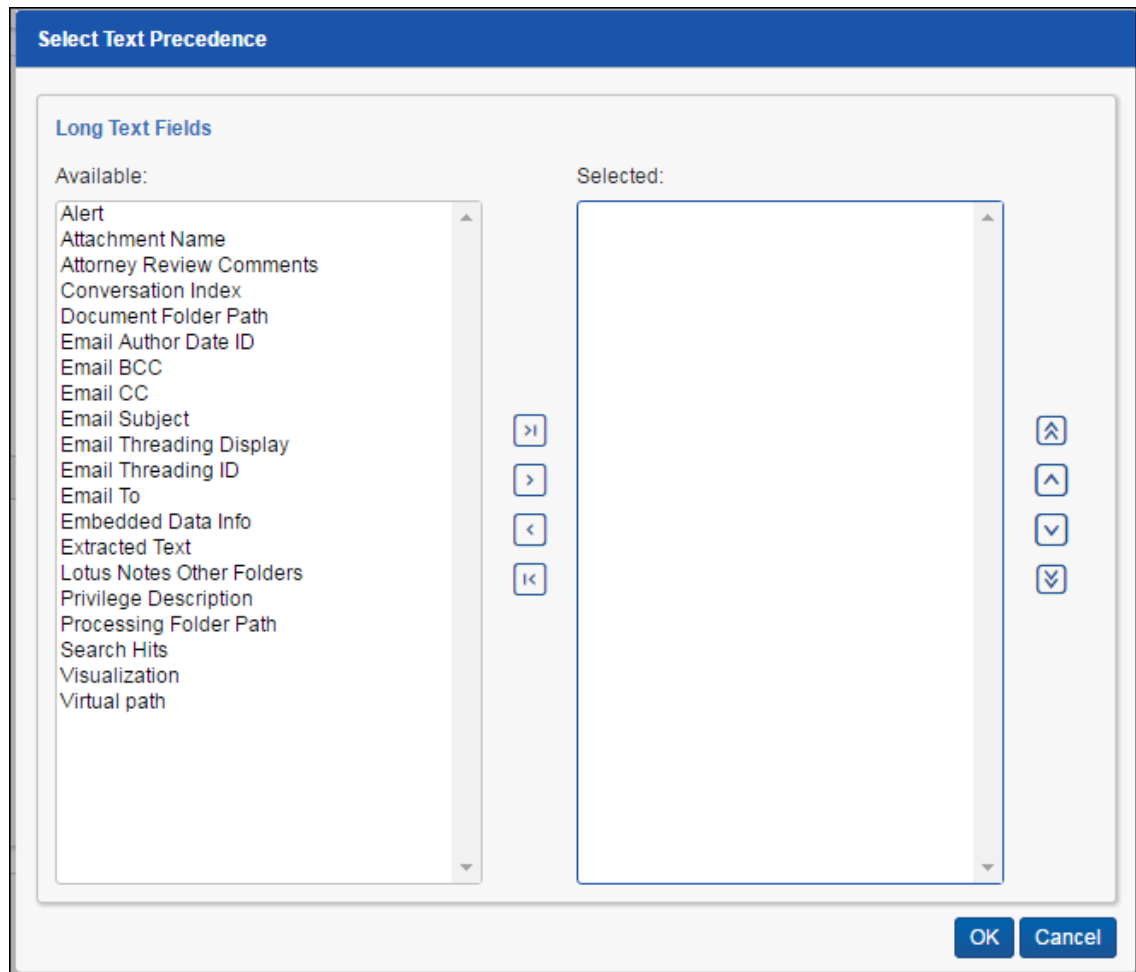
- **Image Productions**—select the produced images that you want to act as the precedence.
- **Include Original Images If Not Produced**—exports only the original images in the event that they have not been produced.
- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported images. By default, this is set to IMG.

**Native**

- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported native files. By default, this is set to NATIVE. This field is only available if you selected Natives for the Export Type field above.

**Text**—the following fields are only available if you selected text Fields As Files for the Export Type field above.

- **Text File Encoding**—select the encoding for the document-level text files
- **Text Precedence**—select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click the ellipsis to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the Right or Left single or double arrows. Use the Up and Down arrows to order the precedence of the fields.



- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported text files. By default, this is set to TEXT.

## Volume

- **Prefix**—enter the alpha prefix for the volume identifier. By default, this is set to VOL.
- **Start Number**—select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
- **Number of Digits**—select the number of digits attached to the prefix. (For example, if you select 2, the output is VOL001, VOL002, and so on.)
- **Max Size (MB)**—select the maximum size allowed for each volume in MBs.

#### Subdirectory

- **Start Number**—select the starting number for the subdirectories.
- **Number of Digits**—select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
- **Max Files**—select the number of files to store in each subdirectory.

8. Click **Save** to save this integration point with these export settings.

Once Relativity saves the integration point, you will be able to run it and export the data based on the settings you specified. See [Running the export job on page 265](#) for details.

### 5.5.3 Exporting a production to a load file

To create an integration point specifically for exporting a production set, perform the following steps:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.

3. Complete the following fields in the **Setup** category of the Create Integration Point layout:

**Create Integration Point** [Cancel] [i]

Setup Complete the Setup

1 2

← Back Next →

**General**

Name:

Type: ☐ Import ☒ Export

Source:

Destination:

Transferred Object:

Profile:

Include in ECA Promote List: ☐ Yes ☒ No

**Advanced**

Email Notification Recipients:  
Separate by semi-colon

Log Errors: ☒ Yes ☐ No

**Scheduling**

Enable Scheduler: ☐ Yes ☒ No

- **Name**—the name of your integration for reference purposes.
- **Type**—select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.
- **Source**—this is automatically set to **Relativity** since you are exporting data out of a Relativity workspace.
- **Destination**—select **Load File**.
- **Transferred Object**—select **Document**.
- **Profile**—use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply an existing profile, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 189](#).
- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.

- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors. Regardless of your selection, job-level errors are always recorded in Relativity.
  - If you select **Yes**, each job also logs any item level errors.
  - If you select **No**, Relativity does not log these item level errors.
- **Enable Scheduler**—gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
  - **Frequency**—the interval at which Relativity promotes data using this integration point.
    - **Daily**—select this option to promote data once every day.
    - **Weekly**—select this option to promote data on a weekly basis. You can specify how often in the **Reoccur** field, in which you will provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the data promotion will take place by checking any of the days of the week listed.
    - **Monthly**—select the day of the month that you want this integration point to promote data once every month.
    - **Reoccur**—enter the number of month(s) in which this integration point recurrently promotes data.
    - **Send On**
      - **Day \_\_ the month**—select the day of the month that you want this integration point to promote data.
      - **The \_\_ of the Month**—select this option for this integration point to promote data on the chosen day of every month. For example, "The **Second Friday** of the month."
  - **Start Date**—the date that you want Integration Points to start promoting the data.
  - **End Date**—(Optional) the date that you want Integration Points to stop promoting the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
  - **Scheduled Time**—the time at which this integration point promotes data. This time is local to your PC, not to the server.

4. Click **Next** to advance to the Source Information layout.

4. Complete the following fields on the **Source Information** layout:

Create Integration Point

Cancel

Setup Source Information Destination Information

1 2 3

← Back Next →

Source Detail

Source: Production

Production Set: Select...

Start Export at Record: 1

Columns To Export

Source Fields:

Alert

Analytics Index

Artifact ID

Attachment Name

Attorney Review Comments

Batch

Batch: Assigned To

Batch: Batch Set

Batch: Status

Bates Beg

Bates Beg Attach

Bates End

Bates End Attach

Case Admin - Production Volume

Case Admin Saved Searches

Confidential Designation

Control Number

Control Number Beg Attach

Control Number End

Control Number End Attach

Conversation Family

Conversation Index

Custodian - Single Choice

Data Load Date

Data Load Volume

Date Created

Date Last Modified

Selected Fields:

Renamed Fields:

Rename

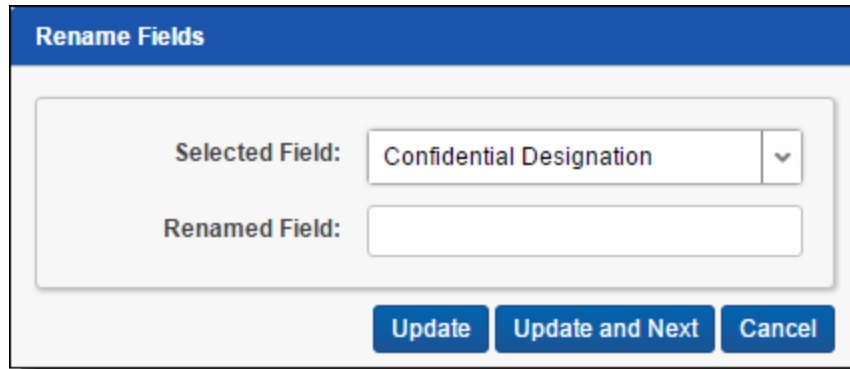
- **Source**—select **Production** from the drop-down list. specify that you want to select a production set, from which you want export the data in your load file. You will select this folder below from the folder structure in the Folder + Subfolders field. You will also need to select a View from the Views field.
- **Production Set**—click on the down arrow and select the production set that you want to act as the source for the load file. This field is only available if you have selected Production as the source above.

**Note:** When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to create the integration point, these fields are updated to reflect the newly selected source.

- **Start Export at Record**—select a record number that identifies the initial document for export. Integration Points exports the document with this record number and continues exporting documents with subsequent record numbers.
- **Source Fields | Selected Fields| Renamed Fields**—choose the fields that you want to export by moving them to the Selected Fields box. The box on the left displays all available source fields. The fields listed in the Selected Fields column are determined by what you select for the Source field above, as well by the folder, production set, or saved search that you select. Only the fields in the Selected Fields box on the right will be exported when you run the

integration point. If you wish to rename the fields in your load file before exporting them, you can do so through the Rename option described below. The fields whose names you change are displayed in the Renamed Fields column.

- **Rename**—gives you the option of renaming the fields in your load file before exporting them. When you click this button, you are presented with the following settings in the Rename Fields window:



- **Selected Field**—displays the field that you have selected from the Source Fields column, the name of which you can change in the Renamed Field below.
- **Renamed Field**—enter the desired new name for the field. This name will appear in the Renamed Fields column of the layout once you click Update or Update and Next below. If you do not change the original name of the selected field, then the Renamed Fields column contains an empty row for that field.
- **Update** button—click this button to update the selected field to the name you entered in the Renamed Field setting. When you do this, the renamed field appears in the Renamed Field column.
- **Update and Next** button—click this button to update the selected field to the name you entered in the Renamed Field setting and then move to the next field in the Selected Field column. When you do this, the renamed field appears in the Renamed Field column and the next field appears in the Selected Field setting.
- **Cancel** button—click this button to exit the Rename Fields window without applying any changes to current field names.

- Click **Next** to advance to the Destination Information layout.
- Complete the following fields on the **Destination Information** layout:

Create Integration Point

Cancel ⓘ

Setup

Source Information

Destination Information 3

← Back Save

Export Detail ⓘ

Export Type:

☒ Load File  
☒ Images  
☒ Natives  
☒ Text Fields As Files

Overwrite Files: ☐

Destination Folder:

EDDS1064096\DataTransfer\ExportDocumentation export directory\_(Tim) ▼

☒ Create Export Folder

Output Settings

LOAD FILE OPTIONS

Image File Format:

Select... ▼

Data File Format:

Relativity (.dat) ▼

Data File Encoding:

Unicode ▼

File Path:

☒ Relative  
☐ Absolute  
☐ User Prefix

Include Native Files Path:

☒

Export Multiple Choice Fields As Nested:

☐

FILE NAMING OPTIONS

Name Output Files After:

Identifier ▼

Append Original File Name:

☐

IMAGE

File Type:

Single page TIFF/JPEG ▼

Image Precedence:

Original Images ▼

Subdirectory Prefix:

IMG 001

NATIVE

Subdirectory Prefix:

NATIVE 001

TEXT

Text File Encoding:

Unicode ▼

Text Precedence:

Select... ⓘ

Subdirectory Prefix:

TEXT 001

Volume & Subdirectory Detail

VOLUME

Prefix:

VOL

Start Number:

1

Number Of Digits:

2

Max Size (MB):

4400

SUBDIRECTORY

Start Number:

1


Number Of Digits:

3

Max Files:

500

## Load File Options

 Relativity one

Data Transfer Guide

252



- **Export Type**—this field reflects the type of export job you are running, which you specified on the Setup layout. By default, Load File is selected as the base configuration for your export job. You also have the option of enhancing the load file by selecting **Images**, **Natives**, and **Text Fields as Files**, depending on the makeup of your data. Selecting any of these makes additional corresponding output settings available, which are described below.
  - The Text Fields as Files option determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Integration Points includes text as part of your load file if you deselect this option and if a long text field is included in the selected fields that you mapped in the Source Information layout.
- **Destination Folder**—specify the folder into which you want to export the data from the load file. This reads the Default File Repository and lets you select a subfolder of that location.
- **Create Export Folder**—check this box to create an export folder named after the existing Relativity Integration Point job and the timestamp in your export folder. This will prevent the overwriting of any previous Relativity Integration Point exports to your export folder. When you check this box, the value displayed in the Destination Folder field is updated to reflect the [JobName]\_[RunTimeStampUTC] information.
- **Image File Format**—select one of these formats for image-level load file:
  - Opticon
  - IPRO
  - IPRO (Full Text)
- **Data File Format**—select a the format for the document-level load file you are exporting:
  - **Relativity (.dat)**—load file exports with the standard Concordance delimiters.
  - **HTML (.html)**—load file is in HTML and contains hyperlinks to launch any exported files.
  - **Comma-separated (.csv)**—load file exports as delimited text file that uses a comma to separate values.
  - **Custom (.txt)**—load file exports with the custom delimiters that you select.
- **Data File Encoding**—select an encoding for the document-level load file from the drop-down box.
- **File Path**—controls how the export path for the files is referenced. Select one of the following options:
  - **Use absolute paths**—paths to exported files are represented as absolute paths. For example, C:\ Desktop\VOL001\NATIVE001\AS000001.msg
  - **Use relative paths**—paths to exported files are represented as relative paths. For example, .\VOL001\NATIVE001\AS000001.msg
  - **Use prefix**—a prefix is added to the relative path, such as a CD drive letter. For example, D:\VOL001\NATIVE001\AS000001.msg
- **Include Native Files Path**—check this box if you want to include the native file path in your data once you export it. Note that in the load file, for example a Relativity.dat file, there will be file path information added for every record you are exporting.

- **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.
- **Name Output Files After**—select one of the following naming convention for exported files:
  - **Identifier**—select this option to name the files after the identifier for your workspace.
  - **Begin production number**—select this option to name the files after the production number. (This number may be the Bates number for a production.) Relativity names files after the production number only if you select Produced Images as the Production Precedence below.
- **Append Original File Name**—select this option to append the original name of the file to the end of the exported file name.

**Image**—the following fields are only available if you selected Images for the Export Type field above.

- **File Type**—select one of these file types:
  - Single-page TIF/JPG
  - Multi-page TIF
  - PDF
- **Production Precedence**—select one of the following groups of produced documents for export instead of the original images:
  - **Original Images**—exports only the original, non-produced images.
  - **Produced Images**—exports a produced version of the images. When you select this, the following fields become available:

The screenshot shows a configuration window titled "IMAGE". It contains several fields:
 

- File Type:** A dropdown menu set to "Single page TIFF/JPEG".
- Production Precedence:** A dropdown menu set to "Produced Images".
- Image Productions:** A field showing "November Production" with a blue button containing three dots to its right.
- Include Original Images If Not Produced:** A checkbox that is currently unchecked.
- Subdirectory Prefix:** A text field containing "IMG", followed by a small "001" label.

 A red rectangular box highlights the "Image Productions" and "Include Original Images If Not Produced" fields.

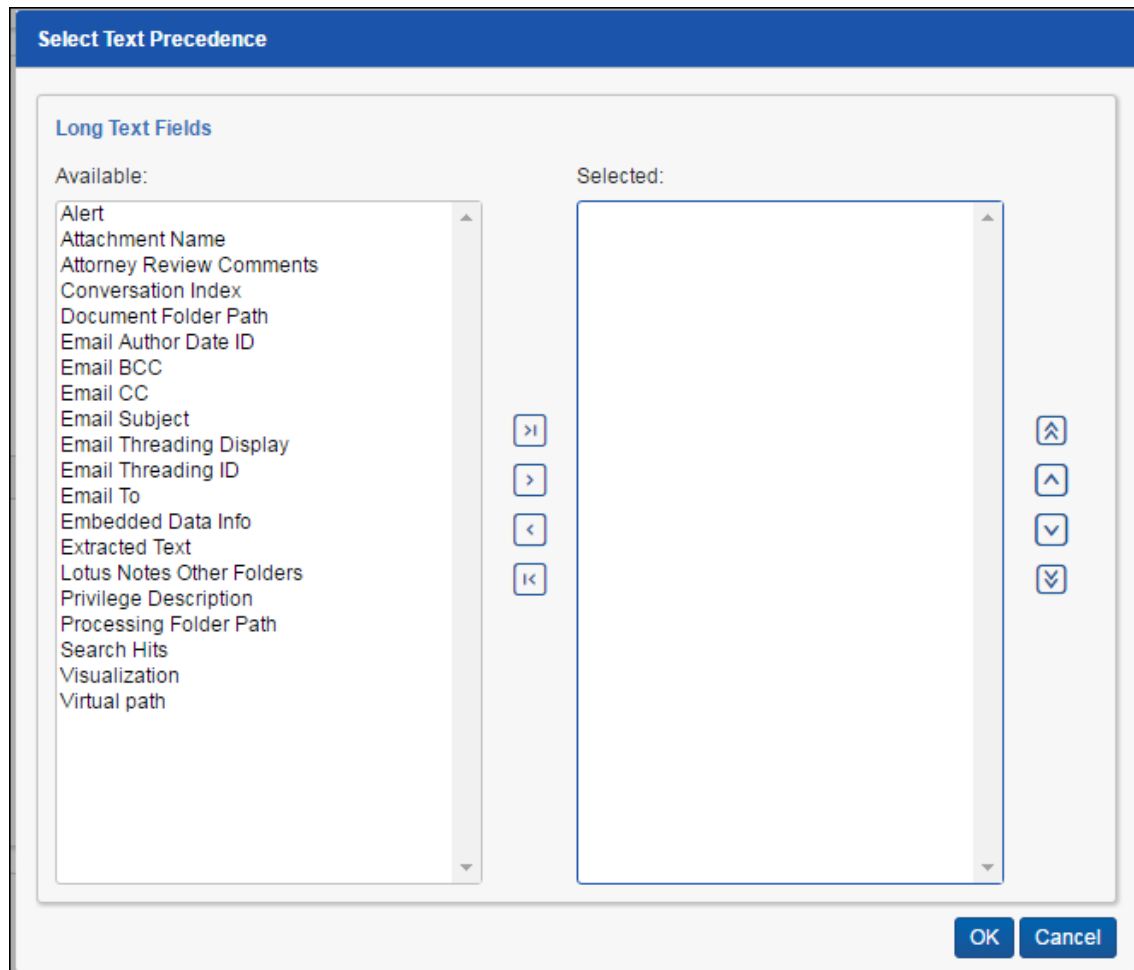
- **Image Productions**—select the produced images that you want to act as the precedence.
- **Include Original Images If Not Produced**—exports only the original images in the event that they have not been produced.
- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported images. By default, this is set to IMG.

**Native**

- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported native files. By default, this is set to NATIVE. This field is only available if you selected Natives for the Export Type field above.

**Text**—the following fields are only available if you selected text Fields As Files for the Export Type field above.

- **Text File Encoding**—select the encoding for the document-level text files
- **Text Precedence**—select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click the ellipsis to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the Right or Left single or double arrows. Use the Up and Down arrows to order the precedence of the fields.



- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported text files. By default, this is set to TEXT.

## Volume

- **Prefix**—enter the alpha prefix for the volume identifier. By default, this is set to VOL.
- **Start Number**—select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
- **Number of Digits**—select the number of digits attached to the prefix. (For example, if you select 2, the output is VOL001, VOL002, and so on.)
- **Max Size (MB)**—select the maximum size allowed for each volume in MBs.

#### Subdirectory

- **Start Number**—select the starting number for the subdirectories.
- **Number of Digits**—select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
- **Max Files**—select the number of files to store in each subdirectory.

7. Click **Save** to save this integration point with these export settings.

Once Relativity saves the integration point, you will be able to run it and export the data based on the settings you specified. See [Running the export job on page 265](#) for details.

### 5.5.4 Exporting a saved search to a load file

To create an integration point specifically for exporting a saved search, perform the following steps:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.

3. Complete the following fields in the **Setup** category of the Create Integration Point layout:

**Create Integration Point**

Cancel ⓘ

Setup Complete the Setup

1 2

← Back Next →

**General**

Name:

Type: ☐ Import ☒ Export

Source:

Destination:

Transferred Object:

Profile:

Include in ECA Promote List: ☐ Yes ☒ No

**Advanced**

Email Notification Recipients:  
Separate by semi-colon

Log Errors: ☒ Yes ☐ No

**Scheduling**

Enable Scheduler: ☐ Yes ☒ No

- **Name**—the name of your integration for reference purposes.
- **Type**—select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.
- **Source**—this is automatically set to **Relativity** since you are exporting data out of a Relativity workspace.
- **Destination**—select **Load File**.
- **Transferred Object**—select **Document**.
- **Profile**—use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you previously created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 189](#).
- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.

- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors. Regardless of your selection, job-level errors are always recorded in Relativity.
    - If you select **Yes**, each job also logs any item level errors.
    - If you select **No**, Relativity does not log these item level errors.
  - **Enable Scheduler**—gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
    - **Frequency**—the interval at which Relativity promotes data using this integration point.
      - **Daily**—select this option to promote data once every day.
      - **Weekly**—select this option to promote data on a weekly basis. You can specify how often in the **Reoccur** field, in which you will provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the data promotion will take place by checking any of the days of the week listed.
      - **Monthly**—select the day of the month that you want this integration point to promote data once every month.
      - **Reoccur**—enter the number of month(s) in which this integration point recurrently promote data.
      - **Send On**
        - **Day \_\_ the month**—select the day of the month that you want this integration point to promote data.
        - **The \_\_ of the Month**—select this option for this integration point to promote data on the chosen day of every month. For example, "The **Second Friday** of the month."
    - **Start Date**—the date that you want Integration Points to start promoting the data.
    - **End Date**—(Optional) the date that you want Integration Points to stop promoting the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
    - **Scheduled Time**—the time at which this integration point promote data. This time is local to your PC, not to the server.
4. Click **Next** to advance to the Source Information layout.
  5. Complete the following fields on the **Source Information** layout:

Create Integration Point

Cancel ⓘ

Setup Source Information Destination Information

← Back Next →

Source Detail

Source: Saved Search

Saved Search: SBeck

Start Export at Record: 1

Columns To Export

Source Fields:

- Alert
- Analytics Index
- Artifact ID
- Attachment Name
- Attorney Review Comments
- Batch
- Batch::Assigned To
- Batch::Batch Set
- Batch::Status
- Bates Beg
- Bates Beg Attach
- Bates End
- Bates End Attach
- Case Admin - Production Volume
- Case Admin Saved Searches
- Confidential Designation
- Control Number
- Control Number Beg Attach
- Control Number End
- Control Number End Attach
- Conversation Family
- Conversation Index
- Custodian - Single Choice
- Data Load Date
- Data Load Volume
- Date Created
- Date Last Modified

Selected Fields:

Renamed Fields:

Rename

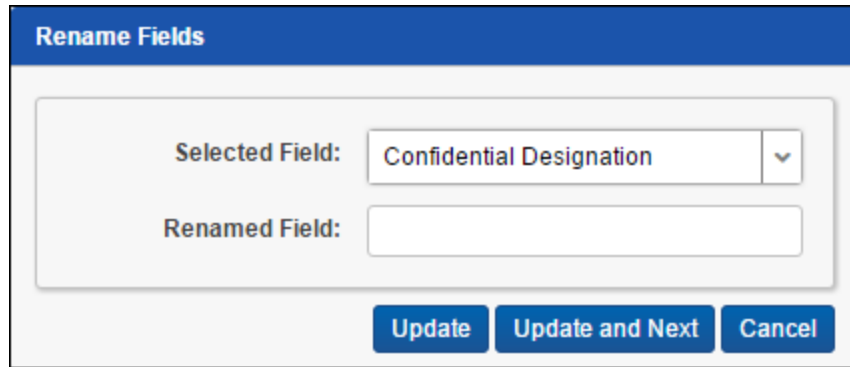
- **Source**—select **Saved Search** from the drop-down list. specify that you want to select a saved search, from which you want export the data in your load file. You will select this folder below from the folder structure in the Folder + Subfolders field. You will also need to select a View from the Views field.
- **Saved Search**—click on the down arrow and select the saved search that you want to act as the source for the load file. This field is only available if you selected Saved Search as the source above.

**Note:** When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to create the integration point, these fields are updated to reflect the newly selected source.

- **Start Export at Record**—select a record number that identifies the initial document for export. Integration Points exports the document with this record number and continues exporting documents with subsequent record numbers.
- **Source Fields | Selected Fields| Renamed Fields**—choose the fields that you want to export by moving them to the Selected Fields box. The box on the left displays all available source fields. The fields listed in the Selected Fields column are determined by what you select for the Source field above, as well by the folder, production set, or saved search that you select. Only the fields in the Selected Fields box on the right will be exported when you run the integration point. If you wish to rename the fields in your load file before exporting them, you

can do so through the Rename option described below. The fields whose names you change are displayed in the Renamed Fields column.

- **Rename**—gives you the option of renaming the fields in your load file before exporting them. When you click this button, you are presented with the following settings in the Rename Fields window:



- **Selected Field**—displays the field that you selected from the Source Fields column, the name of which you can change in the Renamed Field below.
- **Renamed Field**—enter the desired new name for the field. This name will appear in the Renamed Fields column of the layout once you click Update or Update and Next below. If you do not change the original name of the selected field, then the Renamed Fields column contains an empty row for that field.
- **Update** button—click this button to update the selected field to the name you entered in the Renamed Field setting. When you do this, the renamed field appears in the Renamed Field column.
- **Update and Next** button—click this button to update the selected field to the name you entered in the Renamed Field setting and then move to the next field in the Selected Field column. When you do this, the renamed field appears in the Renamed Field column and the next field appears in the Selected Field setting.
- **Cancel** button—click this to exit the Rename Fields window without applying any changes to current field names.



- Click **Next** to advance to the Destination Information layout.
- Complete the following fields on the **Destination Information** layout:

Create Integration Point

Cancel ⓘ

Setup

Source Information

Destination Information 3

← Back

Save

Export Detail ⓘ

Export Type:

☒ Load File

☒ Images

☒ Natives

☒ Text Fields As Files

Overwrite Files: ☐

Destination Folder: EDDS1064096\DataTransfer\ExportDocumentation export directory\_(Tim) ▾

☒ Create Export Folder

Output Settings

LOAD FILE OPTIONS

Image File Format: Select... ▾

Data File Format: Relativity (.dat) ▾

Data File Encoding: Unicode ▾

File Path:

☒ Relative

☐ Absolute

☐ User Prefix

Include Native Files Path: ☒

Export Multiple Choice Fields As Nested: ☐

FILE NAMING OPTIONS

Name Output Files After: Identifier ▾

Append Original File Name: ☐

IMAGE

File Type: Single page TIFF/JPEG ▾

Image Precedence: Original Images ▾

Subdirectory Prefix: IMG 001

NATIVE

Subdirectory Prefix: NATIVE 001

TEXT

Text File Encoding: Unicode ▾

Text Precedence: Select... ⓘ

Subdirectory Prefix: TEXT 001

Volume & Subdirectory Detail

VOLUME

Prefix: VOL

Start Number: 1

Number Of Digits: 2

Max Size (MB): 4400

SUBDIRECTORY

Start Number: 1

Number Of Digits: 3

Max Files: 500

## Load File Options

- **Export Type**—this field reflects the type of export job you are running, which you specified on the Setup layout. By default, Load File is selected as the base configuration for your export job. You also have the option of enhancing the load file by selecting **Images**, **Natives**, and **Text Fields as Files**, depending on the makeup of your data. Selecting any of these makes additional corresponding output settings available, which are described below.
  - The Text Fields as Files option determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Integration Points includes text as part of your load file if you deselect this option and if a long text field is included in the selected fields that you mapped in the Source Information layout.
- **Destination Folder**—specify the folder into which you want to export the data from the load file. This reads the Default File Repository and lets you select a subfolder of that location.
- **Create Export Folder**—check this box to create an export folder named after the existing Relativity Integration Point job and the timestamp in your export folder. This will prevent the overwriting of any previous Relativity Integration Point exports to your export folder. When you check this box, the value displayed in the Destination Folder field is updated to reflect the [JobName]\_[RunTimeStampUTC] information.
- **Image File Format**—select one of these formats for image-level load file:
  - Opticon
  - IPRO
  - IPRO (Full Text)
- **Data File Format**—select a the format for the document-level load file you are exporting:
  - **Relativity (.dat)**—load file exports with the standard Concordance delimiters.
  - **HTML (.html)**—load file is in HTML and contains hyperlinks to launch any exported files.
  - **Comma-separated (.csv)**—load file exports as delimited text file that uses a comma to separate values.
  - **Custom (.txt)**—load file exports with the custom delimiters that you select.
- **Data File Encoding**—select an encoding for the document-level load file from the drop-down box.
- **File Path**—controls how the export path for the files is referenced. Select one of the following options:
  - **Use absolute paths**—paths to exported files are represented as absolute paths. For example, C:\ Desktop\VOL001\NATIVE001\AS000001.msg
  - **Use relative paths**—paths to exported files are represented as relative paths. For example, .\VOL001\NATIVE001\AS000001.msg
  - **Use prefix**—a prefix is added to the relative path, such as a CD drive letter. For example, D:\VOL001\NATIVE001\AS000001.msg
- **Include Native Files Path**—check this box if you want to include the native file path in your data once you export it. Note that in the load file, for example a Relativity.dat file, there will be file path information added for every record you are exporting.

- **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.
- **Name Output Files After**—select one of the following naming convention for exported files:
  - **Identifier**—select this option to name the files after the identifier for your workspace.
  - **Begin production number**—select this option to name the files after the production number. (This number may be the Bates number for a production.) Relativity names files after the production number only if you select Produced Images as the Production Precedence below.
- **Append Original File Name**—select this option to append the original name of the file to the end of the exported file name.

**Image**—the following fields are only available if you selected Images for the Export Type field above.

- **File Type**—select one of these file types:
  - Single-page TIF/JPG
  - Multi-page TIF
  - PDF
- **Production Precedence**—select one of the following groups of produced documents for export instead of the original images:
  - **Original Images**—exports only the original, non-produced images.
  - **Produced Images**—exports a produced version of the images. When you select this, the following fields become available:

The screenshot shows a configuration window titled "IMAGE". It contains several fields:
 

- File Type:** A dropdown menu set to "Single page TIFF/JPEG".
- Production Precedence:** A dropdown menu set to "Produced Images".
- Image Productions:** A field showing "November Production" with a blue button containing three dots to its right.
- Include Original Images If Not Produced:** A checkbox that is currently unchecked.
- Subdirectory Prefix:** A text field containing "IMG", followed by a small box containing "001".

 A red rectangular box highlights the "Image Productions" and "Include Original Images If Not Produced" fields.

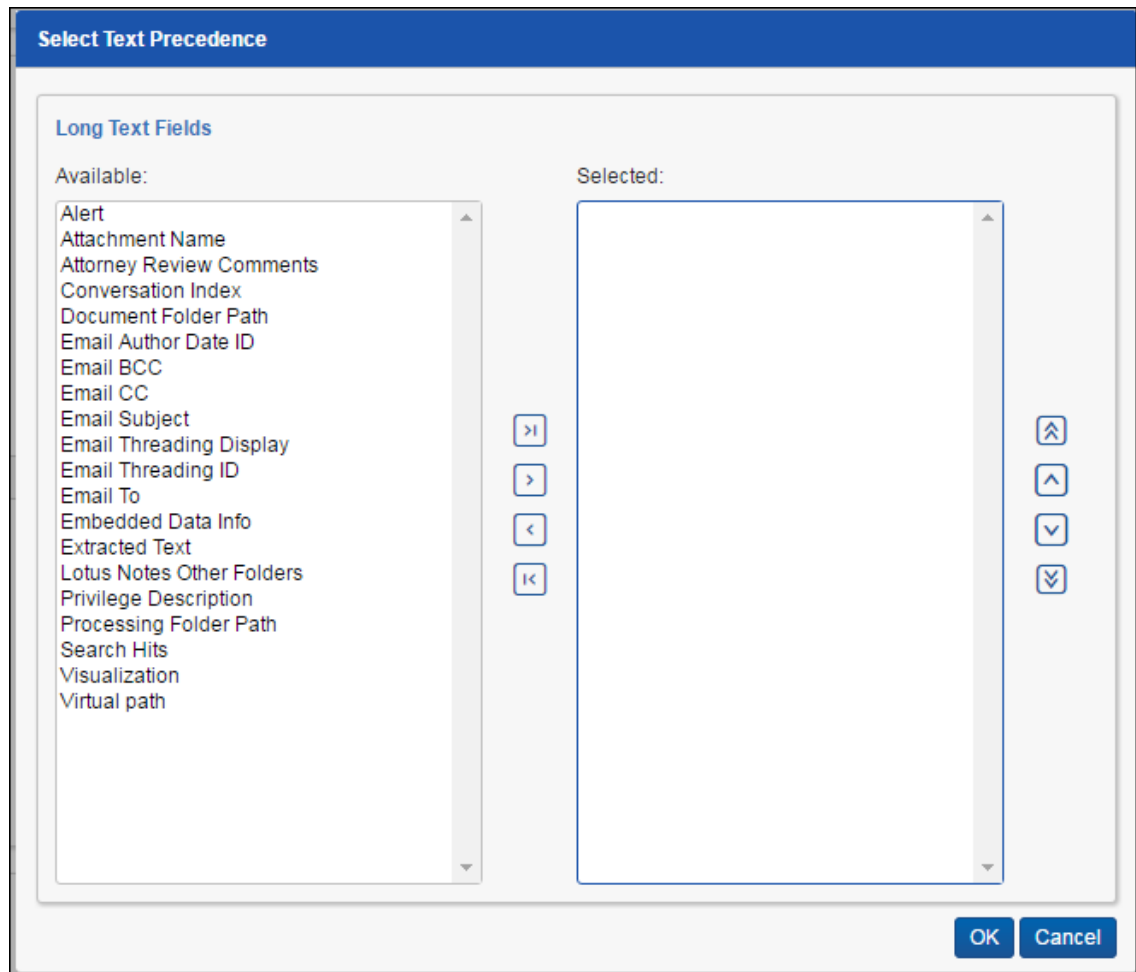
- **Image Productions**—select the produced images that you want to act as the precedence.
- **Include Original Images If Not Produced**—exports only the original images in the event that they have not been produced.
- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported images. By default, this is set to IMG.

**Native**

- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported native files. By default, this is set to NATIVE. This field is only available if you selected Natives for the Export Type field above.

**Text**—the following fields are only available if you selected text Fields As Files for the Export Type field above.

- **Text File Encoding**—select the encoding for the document-level text files
- **Text Precedence**—select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click the ellipsis to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the Right or Left single or double arrows. Use the Up and Down arrows to order the precedence of the fields.



- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported text files. By default, this is set to TEXT.

## Volume

- **Prefix**—enter the alpha prefix for the volume identifier. By default, this is set to VOL.
- **Start Number**—select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
- **Number of Digits**—select the number of digits attached to the prefix. (For example, if you select 2, the output is VOL001, VOL002, and so on.)
- **Max Size (MB)**—select the maximum size allowed for each volume in MBs.

#### Subdirectory

- **Start Number**—select the starting number for the subdirectories.
- **Number of Digits**—select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
- **Max Files**—select the number of files to store in each subdirectory.

6. Click **Save** to save this integration point with these export settings.

Once Relativity saves the integration point, you will be able to run it and export the data based on the settings you specified. See [Running the export job below](#) for details.

### 5.5.5 Exporting to a Relativity workspace

In addition to exporting to a CSV and load file, you have the option of exporting data from one Relativity workspace to another Relativity workspace. For more information on this capability, see [Promoting data between workspaces through Integration Points on page 271](#).

### 5.5.6 Running the export job

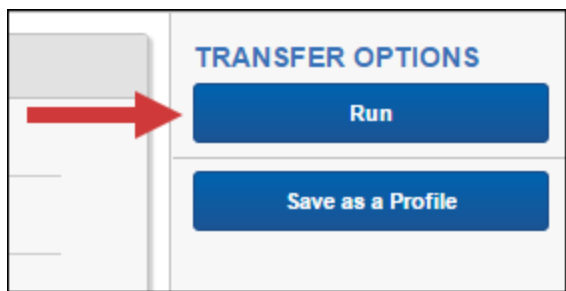
To export your load file based on the export settings you specified above, click **Run** on the Transfer Options console on the saved integration point.

---

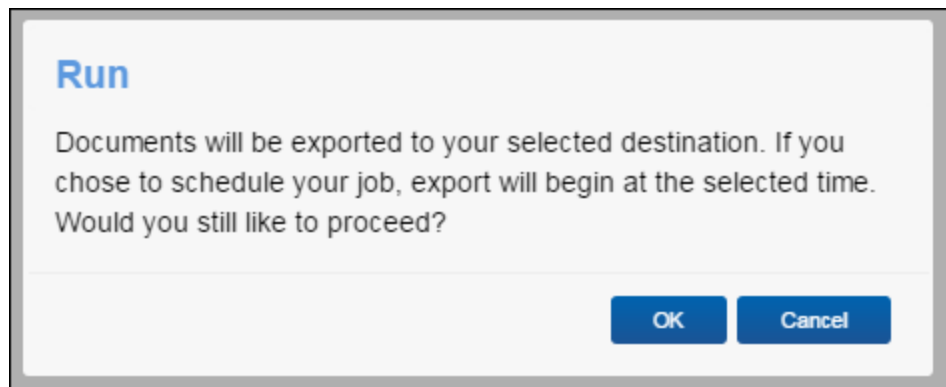
**Note:** All Integration Points jobs are fully editable after run.

---

Note that you also have the option of saving this integration point as a profile through the Save as Profile button on the Transfer Options console. For more information on profiles, see [Integration Points profiles on page 189](#).



Click **OK** on the run confirmation message, which informs you of where your documents will be placed.



The Run button turns to red and gives you the option of stopping the job you just kicked off, as long as that job has a status of Pending or Processing.

If necessary, monitor the progress of the promote job by viewing the **Status** field in the **Status** view at the bottom of the layout. You will see any of the following status values:

- **Pending**—the job has yet to be picked up by an agent.
- **Validation**—an agent is validating the job to make sure it has the required settings, such as access to the source and destination objects (saved searches, workspaces, etc.). If validation fails, the status changes to "Validation failed," and Relativity logs an error. If the validation succeeds, the job moves on to a status of "Processing."
- **Validation failed**—the job validation has failed, resulting in an error, the details of which are saved in the Job History Errors tab.
- **Processing**—the agent has picked up the job and is in the process of completing it.
- **Completed**—the job is complete, and no errors occurred.
- **Completed with errors**—the job is complete and errors have occurred. You can view error details in the Job History Errors tab. See [Monitoring job history and errors on page 284](#) for details.
- **Error—job failed**—a job-level error occurred and the job did not complete because it failed. You can view error details in the Job History Errors tab. See [Monitoring job history and errors on page 284](#) for details.
- **Stopping**—you clicked the Stop button, and the stop job has yet to be picked up by an agent.
- **Stopped**—the job has been stopped.

#### 5.5.6.1 Stopping and restarting an export job

Relativity gives you the option of stopping an export job from proceeding in the event that you need to re-prioritize it or because you made a mistake when creating it. You can only do so when that job has a status of Pending or Processing.

Note the following about stopping an Integration Points job:

- You can also stop a scheduled job if it has a status of Pending or Processing.
- A job is cannot be stopped if it has any status other than Pending or Processing, or the point at which Relativity starts promoting documents with such as information as the user who tagged them and the source workspace.
- When you click Stop, Relativity immediately stops creating new errors for that job.

- When you click Stop on a run-now job, Relativity marks all errors associated with the current job history as Expired.
- When you click Stop on a retry job, Relativity marks all errors associated with the current job history and the previous job as Expired.
- You can start a scheduled job after you have already stopped it.
- The item counts on the Integration Points layout reflect all items promoted before the agent received the signal to stop the job.

To stop an export job, follow the steps below.

1. Click **Stop** on the console.

The screenshot shows the 'Integration Point Details' console. At the top, there's a green bar indicating 'Job started'. Below this, the 'General' tab is active, showing details for an 'Export Load File' job. On the right side, under 'TRANSFER OPTIONS', the 'Stop' button is highlighted with a red arrow. Below the details, there's a 'Status' section with a table of job history.

Start Time (U...)	Artifact ID	Name	Integration Po...	Job Type	Job Status	Destination W...	Destination In...	Items Transfe...	Total Items	Items with Err...
3/22/2017 1:58 P	1042609	Export Load File	Export Load File	Run	Pending	ECA Dashboard - 1017022	This Instance	0	0	0

Relativity then informs you that you will not be removing any data by stopping the transfer and that you should check to make sure that the overwrite setting you previously entered is still appropriate for the re-run.

2. Click **Stop Transfer** to proceed.

The screenshot shows a 'Stop Transfer' dialog box. It contains the text: 'Stopping this transfer will not remove any data that was transferred. When re-running this transfer, make sure that your overwrite settings will return expected results.' At the bottom, there are two buttons: 'Stop Transfer' and 'Cancel'.

Once Relativity stops the job, the Job Status field on the Status view reflects the stopped job.

Status

Items 1 - 2 (of 2)

<input type="checkbox"/>	Start Time (UTC)	Artifact ID	Name	Integration Point	Job Type	Job Status	Destination Worksp...	Items Transferred	Total Items	Items with Errors
<input type="checkbox"/>	9/21/2016 7:33 PM	1043050	ECA integration points	ECA integration points	Run	Stopped	Documentation Destination - 2934933	200	733	0
<input type="checkbox"/>	9/21/2016 7:32 PM	1043048	ECA integration points	ECA integration points	Run	Stopped	Documentation Destination - 2934933	0		0

0 Selected Item(s)

Select Page Size: 10

To re-start a stopped job, click **Run**. When you do this, Relativity begins to transfer data again from the beginning but does not remove any data already transferred.

### 5.5.7 Stopping (disabling) an Integration Point from promoting data

To stop, or disable, an integration point from promoting data, simply disable, or turn off, the scheduler option.

1. From the Integration Points landing page, click the Integration Point **Name** that you wish to disable.
2. Click **Edit**.
3. From the Import Scheduling section under Enable Scheduler, select **No**. This disables the scheduling mechanism for that integration point.

Scheduling

Enable Scheduler: ☐ Yes ☒ No

### 5.5.8 Scheduler date format considerations

The integration points scheduler accepts non-U.S. date formats to further accommodate, for example, users in Australia.

In this case, the default language in your browser settings is set to English (Australian) or any other language that would display a non-U.S. date format of Day/Month/Year instead of Month/Day/Year.



**Languages**

Language  
English (Australia) ^

Order languages based on your preference

English (Australia) Google Chrome is displayed in this language	⋮
English (United States)	⋮
English	⋮

[Add languages](#)

Offer to translate pages that aren't in a language you read ☒

Spell check  
English (United States) v

Relativity then properly displays the date when you select it for the Start and End Date fields in the Scheduling category.

**Scheduling**

Enable Scheduler: ☒ Yes ☐ No

Frequency: Select... v

Start Date:	24/08/2017
End Date:	30/08/2017

Scheduled Time: hh:mm 12hr AM v

Time Zone: (UTC-06:00) Central Time (US ... v

This date format will also appear anywhere else in Relativity where a date is displayed, such as on the saved Integration Point Details layout and the Date Last Modified field on the Document list.
















## 5.5.9 Automatically stopping a scheduled job that repeatedly fails

In some cases, a scheduled job may fail each time it is executed, such as when a job needs reconfiguring, and it may take some time before you become aware of these failed attempts. To mitigate this situation, you can configure an instance setting which will specify the maximum number of consecutive failed attempts encountered before the job is automatically stopped. For example, you may want to stop the scheduled job after four consecutive failed attempts at running.

1. Navigate to the **Instance Settings** page.
2. Create a new instance setting with the following settings.
  - **Name**—enter **MaxFailedScheduledJobsCount**.
  - **Section**—enter **kcura.IntegrationPoints**.
  - **Value Type**—select **Integer 32-bit**.
  - **Value**—enter the number of consecutive failed attempts to be executed before the scheduled job is stopped.

		MaxFailedScheduledJobsCount	4	kcura.IntegrationPoints	No
---	---	-----------------------------	---	-------------------------	----

The integration point's Scheduling tab will display the failed jobs with a Job Type of "Scheduled Run," Job Status of "Error - job failed," Items Transferred of "0," and Total Items based on the number of items in that job. The system will attempt one more run after the configured maximum number of consecutive failed attempts before it stops the scheduled job and the Total Items column will be blank.


Status											   1 -3 of 3 10 per page 	
Job ID	Start Time (UTC)	Artifact ID	Name	Job Type	Job Status	Destination Worksp...	Items Transferred	Total Items	Items with Errors	System Created By		
	(All) 			(All) 	(All) 							
8	12/5/2022, 2:21 PM	1040715	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0	<div></div>	0	Service Account, Relativity		
7	12/5/2022, 2:21 PM	1040697	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0	7	0	Service Account, Relativity		
6	12/5/2022, 2:20 PM	1040679	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0	7	0	Service Account, Relativity		
5	12/5/2022, 2:19 PM	1040661	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0	7	0	Service Account, Relativity		
1	12/5/2022, 2:19 PM	1040643	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0	7	0	Service Account, Relativity		

The "Next Scheduled Runtime (UTC)" field on the Scheduling tab will be blank, letting you know that job is not scheduled to run again. You will need to correct the error(s) before it will run again as scheduled.

General	Scheduling
Enable Scheduler	Yes
Schedule Rule	
Next Scheduled Runtime (UTC)	
Last Runtime (UTC) 12/5/2022 2:21 PM	

When you go to the Job History page to view the job, you will see the system-generated error description explaining why the scheduled job was stopped.

Job History Error						
Name	Source Unique ID	Job History	Error	Error Status	Error Type	System Created On
<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	(All) ▾	(All) ▾	(All)
90710540-d664-4e8d-		Automated Stop for...	Scheduled Job reached maximum number of consecutive fails and therefore was stopped by the system. The schedule won't be restored until Integration Point update.	New	Job	



## 5.6 Promoting data between workspaces through Integration Points

**Note:** The title of this topic used to be "Sync with Integration Points."

You can use Integration Points to promote (move) data from one Relativity workspace to another Relativity workspace. This can be thought of as a one-way sync process from a source workspace to a destination workspace and not a back and forth syncing process between them.

Once you have tagged documents for inclusion in or exclusion from the data you want to promote to review, you can access Integration Points to start the job or jobs that will send those documents to the review workspace.

This topic provides details on Integration Points as it is used to promote data between workspaces. For information, see the Integration Points Guide. [Integration Points on page 184](#)

### 5.6.1 Special considerations for large data promotion workflows

For large data promotion workflows, we recommend configuring integration point jobs into batches. The following suggestions can be used when creating job batches:

- When using Tag Documents with Job Name option, the job document count should be no more than 500,000.
- When Tag Documents with Job Name is not selected, no limit on document count applies.
- The recommended number of fields to be mapped should not exceed 100. Additionally, it is best to map as few long text fields as possible.

### 5.6.2 Promoting (exporting) to a Relativity workspace

In addition to exporting to a CSV and load file, you have the option of promoting (exporting) data from a source workspace to a destination workspace in Relativity. You can do this by selecting **Relativity** as the destination for the data that you intend to transfer and then selecting a specific workspace where you want that data to go. This is the most efficient way to move documents from one workspace to another. Since it's a one-step process, it does not require you to export and re-import your data.

---

**Notes:**

- You can transfer document objects and non-document object metadata to a destination workspace. The non-document object must already exist in the destination workspace for non-document object metadata to be promoted.
- You can move original images and natives or metadata. You are not required to have Integration Points installed on the destination workspace.
- The data promotion process supports transfer of non-document objects linked to the Relativity Applications installed in the destination workspace. For example, if you want to push entities object to another workspace, make sure that the proper application is installed there, for example Legal Hold. You need to have the Relativity Application permission in both the Workspace Security and Object Security sections set to View.
- The export process sorts documents and images by name, which is typically the Control Number. This process takes into account entire names, which means that for names with numbers, it is advised to preserve the number of digits in the names by filling with leading zeros. For example:
  - Test2\_1, Test2\_2, Test2\_10 will be sorted as: Test2\_1, Test2\_10, Test2\_2
  - Test2\_01, Test2\_10, Test2\_02 will be sorted as : Test2\_01, Test2\_02, Test2\_10
- If promoted fields have associative objects, these objects need to be transferred first to ensure successful promotion of fields having references to them.
- The data promotion process will not transfer custom objects created by users in a workspace.
- The data promotion process cannot transfer complex objects that have relationships to other objects, such as Search Terms Report (STR), structured analytic sets, and Integration Points profiles, because related objects' ArtifactIDs may be different in the source and destination workspaces.
- When the Copy Images radio button is selected, the field mapping section is disabled because only the control number is required and available in this scenario. If you want to transfer other field metadata, you must create a new integration point without choosing to copy images.
- Integration Points uses the following delimiters to configure the Import API for the destination workspace. Other delimiters typically configured with the Import API are not utilized:
  - Multi-value delimiter: ASCII 029
  - Nested-value delimiter: ASCII 030

---

**5.6.2.1 Setup**

To create an integration point specifically for exporting a workspace, follow the steps below.

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.
3. Complete the following fields in the **Setup** category of the Create Integration Point layout:
  - **Name**—the name of your integration for reference purposes.
  - **Type**—select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.
  - **Source**—this is automatically set to **Relativity** since you are exporting data out of a Relativity workspace.

- **Destination**—select **Relativity**.
- **Transferred Object**—select the available Document or non-document object meta data you want to promote to the destination workspace. The non-document object must already exist in the destination workspace. The data promotion process will not transfer custom objects created by users in a workspace. Refer to the Notes above for additional information.

---

**Notes:** You will need to create a new integration point for each object type that you want to export to the destination workspace.

---

- **Profile**—use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you have already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 189](#).
- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons to separate email addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
  - If you select **Yes**, each job also logs any item level errors.
  - If you select **No**, Relativity does not log these item level errors.
  - Regardless of your selection, job-level errors are always recorded in Relativity.
- **Enable Scheduler**—gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
  - **Frequency**—the interval at which Relativity runs this integration point.
    - **Daily**—select this option to promote data once every day.
    - **Weekly**—select this option to promote data on a weekly basis. You can specify how often in the **Reoccur** field, in which you will provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the data promotion will take place by checking any of the days of the week listed.
    - **Monthly**—select the day of the month that you want this integration point to promote data once every month.
    - **Reoccur**—enter the number of month(s) in which this integration point repeatedly promote data.
    - **Send On:**
      - **Day \_\_ the month**—select the day of the month that you want this integration point to promote data.
      - **The \_\_ of the Month**—select this option for this integration point to promote data on the chosen day of every month. For example, "The **Second Friday** of the month
- **Start Date**—the date that you want Integration Points to start promoting the data.
- **End Date**—(Optional) the date that you want Integration Points to stop promoting the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.

- **Scheduled Time**—the time at which this integration point promote data. This time is local to your PC, not to the server.

4. Click **Next** to advance to the Source Information layout.

### 5.6.2.2 Connect to Source

Continue to create your import integration point by connecting Relativity to the data source by following the steps below.

1. In the **Connect to Source** layout, complete the following fields:

- **Source**—select **Document** as the transferred object during setup, then select **Saved Search** or **Production** from the drop-down list. If you select any other object as the transferred object during setup, this is automatically set to View.
- **Saved Search/Production/View**—depending on the selected Transferred Object, one of the following fields displays:
  - **Saved Search**—select an existing saved search to use from the drop-down list or click the ellipsis button for an alternative way to select a saved search.
  - **Production Set**—select an existing production set to use from the drop-down list.
  - **View**—select an existing View to use from the drop-down list.
- **Destination Workspace**—select an existing workspace to export your saved search or production to.

---

**Note:** Relativity will validate whether the selected object is available in the destination workspace and transfer only objects linked to Relativity Applications installed in the destination workspace. If the selected object is not available in the destination workspace, an error message will display.

---

- **Location**—select a folder or production set as the destination location.
  - **Folder**—select the drop-down menu to expand the folder structure, locate the folder from which you want to export the data, and select it. This field is only available if you have selected Folder.

---

**Note:** When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to create the integration point, these fields are updated to reflect the newly selected source.

---

- **Production Set**—select a production set to export the data to. Click the plus sign to create a new production set.

---

**Note:** For successful operation, promote Production Set with Append/Overlay mode.

---

- **Create Saved Search**—select **Yes** to create a saved search in the destination workspace. This saved search's name will take the name given to the integration point. This choice is enabled only if Yes is selected for the Tag Documents with Job Name field.
- **Tag Documents with Job Name**—select one of the following options below. See [Special considerations for large data promotion workflows on page 271](#) for document count considerations:

- **Yes (Source and Destination Workspaces)**—to tag all documents in the scope of the job with a unique ID in both the source and destination workspaces, which allows you to easily identify these documents in both workspaces. This is the default option.
- **Yes (Destination Workspace Only)**—to tag all documents in the scope of the job with a unique ID in the destination workspace only, which allows you to easily identify these documents in the target workspace.
- **No**—to not tag documents with a unique ID in either workspace.

---

**Note:** If you intend to use Smart Overwrite during the mapping fields process, you must select **No** or **Yes (Destination Workspace Only)** for document tagging.

---

2. Click **Next** to advance to the Destination Information layout.

### 5.6.2.3 Map Fields

Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields by following the steps below.

1. In the **Fields Mapping** wizard, you have the following options for mapping fields:
  - Use the Shift+click and Ctrl+click method to select multiple fields at a time, similar to field mapping in the Relativity Desktop Client.
  - Use the text search boxes above the Source and Destination lists to find a particular field.
  - Use the single and double arrows or double-click a field to move selected fields between columns.
  - Use the horizontal scroll bar in each column as needed to fully view long field names.
  - Each column displays the total number of fields available in that column. This allows you to quickly compare the number of mapped fields to ensure they match. If they do not match, an error will display when you attempt to save the Integration Point.
  - The field names in the Destination column include the type of each field listed.
  - Click the **Map All Fields** button between the Source and Destination columns to automatically map all fields with matching names, except single/multiple object fields. If you have Destination fields that are mapped to Fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.

---

#### Notes:

- If the WebAPIPath instance setting in the kCur.IntegrationPoints section is not configured correctly after upgrade or installation, the Source field list will not be able to display any attributes and will be empty. As a result, you will not be able to map fields.
  - You do not need to map all attributes or fields. Only the Unique Identifier and Object Identifier are required. The Unique Identifier should contain a value that no other item in the workspace contains. For example, use the GUID or distinguishedName attribute. The Object Identifier is the specific field on the object that holds the displayed identifier, which might not be unique. For example, the Full Name field is the Object Identifier of the Entity RDO but it might not be unique. These two identifier values can be the same.
-

- Click the **Map Saved Search** button between the Source and Destination columns to automatically map fields which are configured in the Saved Search that is selected as a data source on the previous screen. If you have Destination fields that are mapped to Fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.
2. Complete the following Import Settings on the Map Fields layout:
- **Overwrite**—determines how the system overwrites records once you promote data to the review workspace.
    - **Append Only**—promote only new records into the review workspace.
    - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. When you select this option, you must complete the Multi-Select Field Overlay Behavior field described below.
    - **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this option, you must complete the Multi-Select Field Overlay Behavior field described below.
  - **Multi-Select Field Overlay Behavior**—determines how the system will overlay records when you push documents to the review workspace. This field is only available if you've selected either Overlay Only or Append/Overlay above. This field provides the following choices:
    - **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
    - **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
    - **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.
  - **Smart Overwrite** checkbox—select this checkbox if you want to only promote the documents that were modified or added to the saved search since the last time the job was run. The benefit of selecting this option is that it may reduce the job processing time due to the reduction in the number of documents needing to be transferred. If this box is not selected, all documents are promoted regardless of whether they were modified or added.
    - If Smart Overwrite is used with Append Only: only the new documents that have been added to the saved search are promoted.
    - If Smart Overwrite is used with Overlay Only: only documents that have been modified in the source saved search are promoted.
    - If Smart Overwrite is used with Append/Overlay: both new and modified documents are promoted.



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**Notes:**

- Smart Overwrite only works when the Tag Documents with Job Name option under Connect to Source is set to **No** (disabled) or **Yes (Destination Workspace Only)**.
  - Smart Overwrite works for specified conditions of the configured Integration Point, including Saved Search. If the Saved Search conditions are changed, then it is recommended to run the next execution of the Integration Point job with Smart Overwrite disabled in order to create a new baseline for further jobs within this Integration Point.
  - If a Smart Overwrite job results in errors and they are not resolved with the Retry Errors option, then it is recommended to re-run errored documents transfer with Smart Overwrite disabled. Otherwise, the Smart Overwrite job will not pick the errored documents in the next execution.
- 

- **Copy Images**—choose to copy or not copy images to the destination workspace. Select **Yes** to copy images to your destination workspace. When Yes is selected, the Image Precedence field needs to be completed. Select **No** to not copy images to your destination workspace. When No is selected, the Copy Native Files needs to be completed.
  - **Image Precedence**—if Yes was selected for Copy Images, select **Original Images** or **Produced Images** to copy to the destination workspace.
  - **Production Precedence**—if Produced Images was selected for Image Precedence, use the pop-up screen to select and order the productions, and click OK on the screen to save.
  - **Include Original Images If Not Produced**—if Produced Images was selected for Image Precedence, select this checkbox if you want to include the original image.
  - **Copy Native Files**—if No was selected for Copy Images, determine how to copy native files to the destination workspaces by selecting one of these radio buttons:
    - **Physical files**—select to copy any physical native files from the source workspace to the destination workspace.
    - **Links Only**—select to add only reference links in the destination workspace that direct back to the source workspace documents. No physical files will be copied to the destination workspace. Native file will be accessible in the destination workspace Viewer.
- 

**Note:** When choosing this option to promote documents by only using links from repository to review workspace, be aware that the links to the promoted documents will be broken in the review workspace if you delete the native files in the repository workspace or if you delete or archive the repository workspace itself. In this situation, if you wanted to maintain the files in the review workspace, you first need to promote the physical files to that workspace before deleting them from the repository workspace or before deleting or archiving the repository workspace. For details on promoting subsets of data, see the Admin Guide.

---

**Note:** Be aware that when a non-administrator user copies native files by selecting the Links Only option, the System Created by column on the Job History tab will list the system administrator's name instead of the non-administrator user's name.

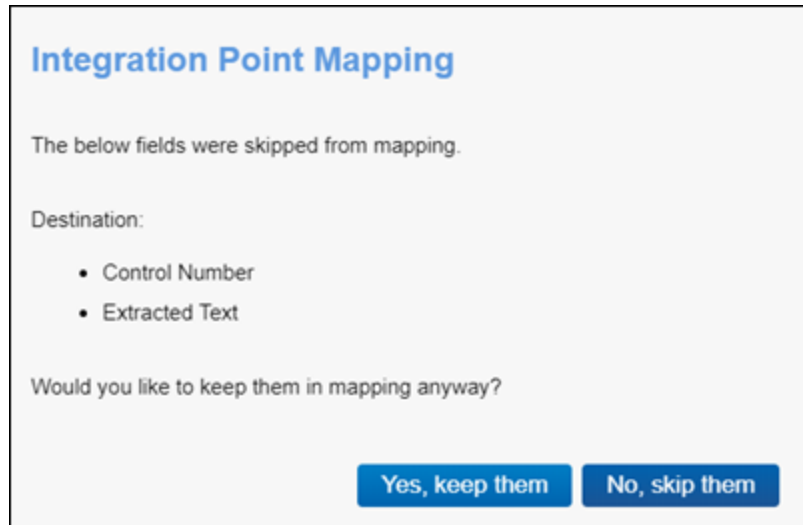
---

- **No**—select to not create additional copies of your native files. No physical native files or links will be pushed to the destination workspace. You will not be able to look at native files in the Viewer. Only metadata, such as extracted text or coding decisions, will be pushed. For example, if you have a document with native files and coding decisions, and you select the No option, only metadata (the coding decisions) will be promoted to the destination workspace. Refer to additional notes below regarding this choice:
  - Doing this maintains a single copy of that data file no matter how many times you use the document in your workspace.
  - You have the option of selecting No for an initial run of an integration point and then Yes for a subsequent run. Doing this saves you time on the initial job while then retaining copies of the native files on the final job.
  - The benefit of selecting No for this field is that you save on storage and speed.
- **Use Folder Path Information**—use a metadata field to build the folder structure for the documents that you promote to the review workspace.
  - **No**—select if you do not want to build a folder structure based on metadata. In this case, Relativity loads all documents directly into the folder indicated by the promote destination, and you create no new folders in the destination workspace.
  - **Read From Field** or **Read From Folder Tree**—select to use a metadata field to build the folder structure for the documents that you promote to the review workspace.
  - **Folder Path Information**—specify a metadata field to build the folder structure for the documents that you promote to the review workspace.
  - You have the option of creating folders or re-folding documents when you select Append/Overlay for the Overwrite field.
  - You have the option of re-folding documents for the Overwrite field through the Move Existing Documents field.
  - **Move Existing Documents**—re-folder documents that were previously imported into the destination workspace, but were only placed in the root case folder and not to any subfolders. This field is useful for situations in which you want to add new data to the destination workspace while overlaying existing data.
    - Select **No** if you don't want to re-folder existing documents.
    - Select **Yes** to move existing documents into the folders provided in the Folder Path Information field. For example, you previously imported custodian Sally Smith's files into the destination workspace's root folder. Now, in addition to placing the documents from the saved search specified in this integration point in their subfolder, you also want to move those previously migrated documents into Sally Smith's subfolder, so you would select Yes.
- **Copy Files to Repository**—determines whether or not Relativity will copy files from the location in the image load file field to a selected document repository.
  - **Yes**—select this option to copy files to a document repository that you select in the File Repository field.

- **No**—select this option if the native files already reside in their final location, which is accessible by Relativity.

3. Click **Save** to save this integration point with these export settings.

During the mapping process, Relativity validates whether the selected objects are available in the destination workspace in the final step of the wizard. When fields cannot be mapped from the Source to the Destination, a pop-up modal displays them. You can either choose to keep the fields in the Source column or skip them and remove them.



Another solution that Integration Points data promotion provides is automatically remapping fields when the destination workspace is changed. When you change the destination workspace in either the integration point or integration point profile, fields can vary between the source and destination workspace. When the destination workspace is changed, the new fields in the workspace are automatically mapped.

The artifacts are mapped based on their names only if the ArtifactIDs are different in the new destination workspace. They are mapped so they the integration points job will not fail. This means that if the source workspace fields cannot match to the new destination workspace fields, those unmatched fields are presented at the end of the mappings list for easy identification. Relativity also informs the you that the original source fields from the profile were mapped with corresponding fields from the destination workspace. The message will be similar to this, "We restored the fields mapping as destination workspace has changed."

### 5.6.3 Mapping saved searches

The Map Saved Searches button automatically maps the fields from the saved search. It also maps the object identifier fields, even when such field is not selected in the saved search. If any unsupported fields are manually mapped, clicking the Save button displays a pop-up modal stating that the job might fail.

Once Relativity saves the integration point, you will be able to run it and export the data based on the settings you specified. See [Running the export job on page 265](#) for details.

### 5.6.4 Working with promoted documents

To view the documents you promoted to the review workspace with Tag Documents with Job Name option enabled:

1. Navigate to the destination workspace.
2. Select the **Saved Search browser** and select the search you created to bring back documents that were promoted from the source workspace.
3. Note the following fields on the saved search view:
  - **Relativity Source Case**—the name of the workspace in which you tagged documents for inclusion and exclusion and from which you promoted your tagged documents to the review workspace.
  - **Relativity Source Job**—the name of the Integration Point that you used to promote tagged documents to the review workspace.

You can now review these documents and apply coding decisions for responsiveness and/or issues designation.

#### 5.6.4.1 Reusing coding decisions

You can re-use the coding decisions you made on reviewed documents and promote them back into the source workspace through another Integration Point. For example, you could run another promote job to conduct a privilege overlay on documents in the source workspace.

To do this, follow the steps below.

1. Select the **saved search** you created to promote documents back to the source workspace.
2. Navigate to the **Integration Points** tab.
3. Create a new integration point that specifies the following values, which differ from those you entered for the promote job you ran previously:
  - **Destination Workspace**—select the original source workspace, specifically the workspace from which you previously promoted documents to the review workspace.
  - **Saved Search**—select the saved search you created to promote documents back to the source workspace.
  - **Field Mappings**—map only **Control Number (Object Identifier)** and **Privilege Designation**.
  - **Overwrite**—select **Overlay Only**.
4. Click **Run**.

#### 5.6.5 Calculating integration point job statistics on-demand

You can calculate the number of documents, as well as images and natives if applicable, to be transferred in the scope of a particular Integration Point.

1. Navigate to the **General** tab of **Integration Points > Integration Points Details** for a particular integration point job.

Integration Points Job History Job History Errors Destination Workspaces Integration Point Profile

Integration Point Details [Edit](#) [Delete](#) [Back](#) [Edit Permissions](#) [View Audit](#)

General **Scheduling**

Name	Stats calculation on demand	Log Errors	Yes
Overwrite	Append/Overlay	Has Errors	No
Export Type	Workspace;	Email Notification Recipients	
Source Details	Saved Search: Extracted Text Only		
Source Workspace	A7 source	Total of Documents	Press 'Calculate statistics' button
Source Relativity Instance	This instance(erttest)	Create Saved Search	No
Transferred Object	Document		
Destination Workspace	A7 destination		
Destination Folder	A7 destination		
Multi Select Overlay	Use Field Settings		
Use Folder Path Info	No		
Move Existing Docs	No		

Status 0 - 0 of 0 10 per page

Job ID	Start Time (UTC)	Artifact ID	Name	Job Type	Job Status	Destination Worksp...	It...
<a href="#">Filter</a>	(All)	<a href="#">Filter</a>	<a href="#">Filter</a>	(All)	(All)	<a href="#">Filter</a>	

Transfer Options

[Run](#)

[Retry Errors](#)

View Errors

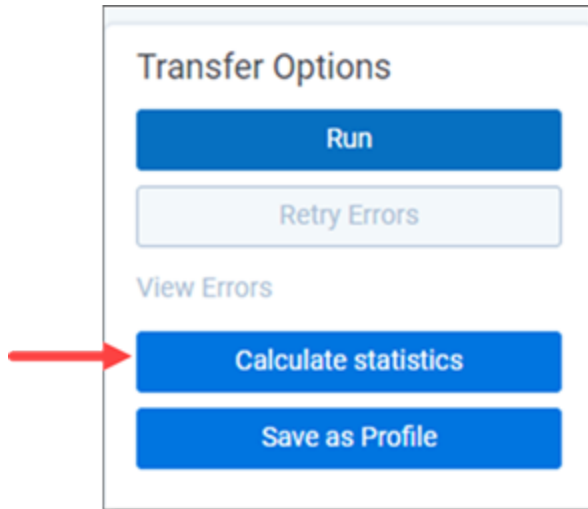
[Calculate statistics](#)

[Save as Profile](#)

**Note:** Only before the first calculation for this integration point, you will see the "Press 'Calculate statistics' button" message in the Total of Documents field.

Log Errors	Yes
Has Errors	No
Email Notification Recipients	
Total of Documents	Press 'Calculate statistics' button
Create Saved Search	No

2. Click the **Calculate statistics** button under Transfer Options in the right-hand panel.



A message box displays indicating that this action will launch the calculation of Saved Search or Production content, depending on the chosen Integration Point, and that this operation can be time consuming, depending on the size of the content. The statistics calculation will run in the background so you can still use other Transfer Options or leave this page and return to it for the results later.

3. Calculation results appear on the details page and depend on Integration Point content. The total number of documents with a date/time mark of the last calculation will display. Depending on the promoted content, the total number and size of images or natives may also display. The sample below displays natives.

<b>Total of Documents</b>	25
	Calculated on: 12/19/2022 16:18 UTC
<b>Total of Natives</b>	25 (2.56 MB)

## 5.7 Viewing destination workspaces

You can go to the Destination Workspace tab to view all of the workspaces that are designated as destinations for documents that you push through integration points.

#	Name	Destination Instance ...	Destination Instance...	Destination Workspac...	Destination Workspac...	Job History
1	<a href="#">This Instance - Docum...</a>	This Instance	-1	Documentation [DO NOT DELETE]	3726327	Documentation

The default All Destination Workspaces view provides the following fields:

- **Name** - the name given to the workspace, plus the artifact ID of the actual destination workspace.
- **Destination Workspace Name** - the name given to the destination workspace.
- **Destination Workspace Artifact ID** - the identifier of the destination workspace.
- **Job History** - a list of all the Job History entries associated with the destination workspace.

An individual destination workspace layout provides the following information in the associated **Document (Relativity Destination Case)** view.

	Artifact ID	Control Number	Relativity Destination Case	Job History
<input type="checkbox"/> Edit	1120328	AZIPPER_0007299	This Instance - Documentation [DO NOT DI Documentation	Documentation
<input type="checkbox"/> Edit	1120329	AZIPPER_0007300	This Instance - Documentation [DO NOT DI Documentation	Documentation
<input type="checkbox"/> Edit	1120333	AZIPPER_0007746	This Instance - Documentation [DO NOT DI Documentation	Documentation
<input type="checkbox"/> Edit	1120334	AZIPPER_0007747	This Instance - Documentation [DO NOT DI Documentation	Documentation
<input type="checkbox"/> Edit	1120335	AZIPPER_0007748	This Instance - Documentation [DO NOT DI Documentation	Documentation
<input type="checkbox"/> Edit	1120336	AZIPPER_0007749	This Instance - Documentation [DO NOT DI Documentation	Documentation
<input type="checkbox"/> Edit	1120337	AZIPPER_0007773	This Instance - Documentation [DO NOT DI Documentation	Documentation
<input type="checkbox"/> Edit	1120338	AZIPPER_0008358	This Instance - Documentation [DO NOT DI Documentation	Documentation
<input type="checkbox"/> Edit	1120339	AZIPPER_0008559	This Instance - Documentation [DO NOT DI Documentation	Documentation
<input type="checkbox"/> Edit	1120340	AZIPPER_0008560	This Instance - Documentation [DO NOT DI Documentation	Documentation

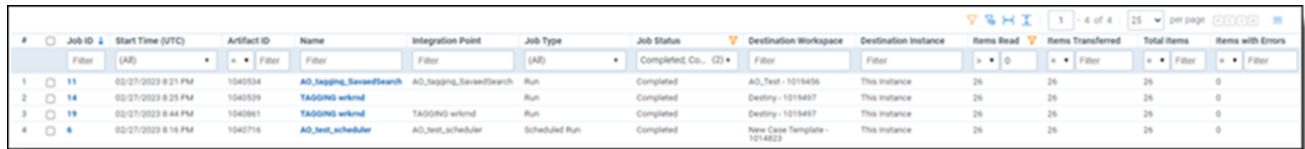
- **ArtifactID** - the identifier of the document.
- **Control Number** - the control number of the document.
- **Relativity Destination Case** - a list of all the destination workspaces in which the document can be found.
- **Job History** - a list of audited actions associated with the document.

## 5.8 Monitoring job history and errors

After you create an integration point and initiate the import process, you can monitor the job status on the Job History tab and resolve errors on the Job History Errors tab.

### 5.8.1 Job History

This tab lists an entry for each integration point job, and also provides you with the ability to view additional details for a specific job.



#	Job ID	Start Time (UTC)	Artifact ID	Name	Integration Point	Job Type	Job Status	Destination Workspace	Destination Instance	Items Read	Items Transferred	Total Items	Items with Errors
1	11	03/27/2023 8:21 PM	1040534	AD_Testing_SavedSearch	AD_Testing_SavedSearch	Run	Completed	AD_Test - 1019456	This Instance	26	26	26	0
2	14	03/27/2023 8:25 PM	1040539	AD_Testing_wknd	AD_Testing_wknd	Run	Completed	Destiny - 1019457	This Instance	26	26	26	0
3	15	03/27/2023 8:44 PM	1040561	AD_Testing_wknd	AD_Testing_wknd	Run	Completed	Destiny - 1019457	This Instance	26	26	26	0
4	6	03/27/2023 8:16 PM	1040716	AD_Testing_scheduler	AD_Testing_scheduler	Scheduled Run	Completed	New Case Template - 1014823	This Instance	26	26	26	0

The Job History tab lists the following information that you can use to monitor the status of an integration point job:

- **Start Time (UTC)**—the date and time that a job started running in Coordinated Universal Time (UTC).
- **Artifact ID**—the artifact ID of the workspace.
- **Name**—the name for a specific job run by the integration point.
- **Integration Point**—the name of the integration point used to run the job.
- **Job Status**—the current status of an integration point job. The following job statuses are available:
  - **[blank]**—the job has not started or was not run.
  - **Pending**—the job has been submitted but an agent hasn't picked it up, so the import process hasn't started.
  - **Suspending**—the system is performing the application update. The job prepares for being suspended, completing the current task.
  - **Suspended**—the system is performing the application update. The job has been suspended, and waits for the Integration Points agent to pick it up.
  - **Validation**—an agent is validating the job to make sure it has the required settings, such as access to the source and destination objects (saved searches, workspaces, etc.). If validation fails, the status changes to "Validation failed," and Relativity logs an error. If the validation succeeds, the job moves on to a status of "Processing."
  - **Validation failed**—the job validation has failed, resulting in an error, the details of which are saved in the Job History Errors tab.
  - **Processing**—the job is currently running.
  - **Error - Job Failed**—a job-level error occurred and the import wasn't completed. The integration point may have been able to import some of the records before the error occurred.



- **Completed with Errors**—the import job completed but at least one item-level error occurred. If you set the Log Errors field to Yes for the integration point, you can view the item-level errors in the section called Job History Errors on the Job Details layout. See [Viewing job history details below](#).

---

**Notes:** When transferring custodians and associating them to managers, errors can occur. If transferring custodians and the manager isn't associated with a manager, the custodian transfer is completed successfully. It will show up as Completed with Errors even though the Items Transferred field and Total Items field will match, while the Items with Errors field states zero errors. This is because the custodian has been imported correctly, but the manager wasn't associated correctly.

---

- **Completed**—the import job completed without any item-level errors.
- **Destination Workspace**—the workspace specified as the destination for the transferred files.
- **Items Read**—the number of records successfully read from the job source and passed for transferring.
- **Items Transferred**—the number of records successfully transferred when the job ran.
- **Total Items**—the total number of items originally designated to be transferred, including those that ended up having errors.
- **Items with Errors**—the number of records that the integration point failed to import due to item-level errors.

#### 5.8.1.1 Viewing job history details

To view additional history information, click the name of a specific job listed on the Job History tab. The Job Details layout displays basic job information, import statistics, and a detailed list of errors.

The Job History Error section always logs job-level errors. If you set the Log Errors field to Yes, then it also logs item-level errors. For more information on setting the Log Errors field, see [Importing data through Integration Points on page 193](#).

Job Details
Edit
Back
Edit Permissions
View Audit
Record 1 of 3

### Job Details

Job ID: 1062  
Name: Operation 3 - Import by RIP  
Integration Point: Operation 3 - Import by RIP  
Job Type: Run  
Status: Error - job failed  
Start Time (UTC): 9/25/2019 11:51 AM  
End Time (UTC): 9/25/2019 12:27 PM

### Import Statistics

Items Transferred: 5  
Items with Errors: 3348

Only the first 1000 of 1501 items displayed.

### Job History Error

Items 1 - 10 (of 1,000)

<input type="checkbox"/>	Name	Source Unique ID	Job History	Error	Error Status	Error Type	System Created On
<input type="checkbox"/>	2b63dce2-1369-44b4-b015		Operation 3 - Import by RIP	I-API Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	242b9561-2ea8-46f0-8a51-		Operation 3 - Import by RIP	I-API Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	4299edfa-9a4f-4138-a699-i		Operation 3 - Import by RIP	I-API Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	b12bcf44-7bbc-4fa1-a86c-i		Operation 3 - Import by RIP	I-API Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	1b57218d-2a4b-4ab1-a278		Operation 3 - Import by RIP	I-API Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	cc5cc432-8b56-4520-a0fa-		Operation 3 - Import by RIP	I-API Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	30cd0793-44bc-4ec9-b5a2		Operation 3 - Import by RIP	I-API Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	b2cce3df-302d-494a-89a2-		Operation 3 - Import by RIP	I-API Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	e89a9af7-4f6b-48d4-a356-i		Operation 3 - Import by RIP	I-API Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	9bc0e410-5680-4f14-85c5-		Operation 3 - Import by RIP	I-API Identity value not set	New	Item	9/25/2019 12:28 PM GMT

0 Selected Item(s)
Select Page Size: 10

The Job Details layout includes many of the same fields displayed on the Job History tab. The following list includes the additional fields displayed in this layout:

- **End Time (UTC)**—the date and time that a job completed in UTC.
- **Source Unique ID**—the unique identifier for the record in the source that caused an error.
- **Error**—a brief description of the error that occurred.
- **Timestamp**—the date and time that a job error occurred in UTC.
- **Error Type**—indicates whether the error occurred at the job or item level.

## 5.8.2 Job History Errors

In the Job History Errors tab, you can use the condition lists at the top of the view to find errors based on any error-related metadata fields, such as Artifact ID, Error, Error Status, Error Type, JobHistory, Name, Source Unique ID, Stack Trace, System Created By, System Created On, System Last Modified On, and Timestamp (UTC).

#	<input type="checkbox"/> Name	Source Unique ID	Job History	Error	Error Status	Error Type	System Created On
1	<input type="checkbox"/> 2b63dce2-1369-44b4-...		Operation 3 - Import by ...	I-API Identity value not set	New	Item	09/25/2019 5:28 AM MST
2	<input type="checkbox"/> 242b9561-2ea8-46f0-...		Operation 3 - Import by ...	I-API Identity value not set	New	Item	09/25/2019 5:28 AM MST
3	<input type="checkbox"/> 4299edfa-9a4f-4138-a...		Operation 3 - Import by ...	I-API Identity value not set	New	Item	09/25/2019 5:28 AM MST
4	<input type="checkbox"/> b12bcf44-7bbc-4fa1-a...		Operation 3 - Import by ...	I-API Identity value not set	New	Item	09/25/2019 5:28 AM MST

Once you specify your conditions, you can search for the targeted errors by clicking **Search** on the right side of the condition lists.

You can then open any of the individuals errors returned in the list by clicking the **Name** value.

Job History Error Layout

Edit

Back

Edit Permissions

View Audit

Record 1 of 1000

Error Details

Name: 2b63dce2-1369-44b4-b015-235c3080bcb4

System Created On: 9/25/2019 12:28 PM

Source Unique ID:

System Created By: Service Account, Relativity

Job History: Operation 3 - Import by RIP

System Last Modified By: Service Account, Relativity

Error: I-API Identity value not set

Error Status: New

Error Type: Item

Full Error: I-API Identity value not set

The Job History Error Layout provides the following fields:

- **Name**—the system-generated name of the error.
- **Source Unique ID**—the identifier of the item in which the error occurred.
- **Job History**—the name of the integration point containing the file in which the error occurred.
- **Error**—the error message.
- **Error Status**—the current state of the error. You'll see any of the following values for the status field:
  - **New**—the error is new and no action has been taken on it yet.
  - **Expired**—the state assigned to an item level error in either of the following scenarios:
    - You received an item-level error on a job, you didn't retry the error, and the job ran on a schedule, meaning the Enable Scheduler field is set to Yes on the integration point.
    - You received an item-level or a job-level error, you didn't retry the error, and you click Run Now on the integration point, or it is a scheduled job.
  - **In Progress**—the error is currently in the process of being retried.
  - **Retried**—the item level error in a job has been retried, meaning you clicked Retry Errors on the integration point and the retry job is complete.

- **Error Type**—an indicator of whether the error is item or job-level.
- **Full Error**—the error message with details, including a stack trace of the error, when available.
- **System Created On**—the date and time at which the error was created by the agent during the integration point job.
- **System Created By**—the agent that created the error during the integration point job.
- **System Last Modified By**—the agent that last updated the status value of the error.

With the information provided in the Job History Errors Layout, you can identify those files on which errors occurred. You can then access those files to manually address the causes of those errors. From there, you can return to the integration points console and retry the errors.

#### 5.8.2.1 Item-level versus job-level errors

Note the following differences in the way Relativity handles item-level and job-level errors.

Relativity handles a mix of item-level and job-level errors in the following way:

- When you click Run Now on an integration point that contains item and job-level errors, the entire job is re-run and all errors are marked as Expired.
- When you click Retry Errors on an integration point that contains item and job-level errors, the entire job is rerun and Relativity assigns a value of Expired to the item-level errors while job-level errors are marked as In Progress and then Retried.

Relativity handles item-level errors in the following way:

- When you click Run Now, the entire job is re-run, and Relativity assigns a value of Expired to the item-level errors.
- When you click Retry Errors, Relativity assigns a value of Retried to the item-level errors and starts a retry job containing only those error documents.

Relativity handles job-level errors in the following way:

- It registers only one job-level error for the integration point.
- When you click Run Now, the entire job is re-run and Relativity assigns a value of Expired to the job-level error.
- The Retry Errors and Run Now buttons are both available.
- The Retry Error button re-runs the whole job, but the job-level error is marked as In progress and then retried.
- The Run Now button re-runs the whole job, but the job-level error is marked as Expired.

Scheduled job is not inserted and an error is thrown that shows up in the errors tab in Admin mode that a scheduled job did not run for this integration because the job was already running.

---

**Note:** When you click Retry Errors, the retry job is automatically set to Append/Overlay mode.

---

### 5.8.3 Troubleshooting job history errors

Relativity provides informative and actionable error messages when you attempt to save and run an integration point in any of the following situations:

The screenshot shows the 'Integration Point Details' page in Relativity. At the top, there's a red error banner that reads: 'Failed to submit integration job. Integration Point validation failed. 20.005 Destination field(s) mapped may no longer be available or has been renamed. Review the mapping for the following field(s): 'Date Last Modified'.' Below the banner, the 'General' tab is selected, showing various configuration fields like Name, Export Type, Source Details, Source Workspace, Transferred Object, Destination Workspace, Destination Folder, Overwrite, Multi-Select Overlay, Use Folder Path Info, and Move Existing Docs. On the right side, there are 'TRANSFER OPTIONS' including 'Run', 'Retry Errors', 'View Errors', and 'Save as a Profile' buttons. A 'Log Errors' section on the right shows 'Log Errors: Yes', 'Has Errors: Yes', and 'Total of Documents: 5'.

- The destination workspace is missing.
- The destination field is missing.
- You do not have permissions to a saved search, production, or destination workspace.
- The destination field has missing child object data.
- The production is missing from the destination workspace.

The following table provides some of the errors you could encounter when attempting to run an Integration Points job, along with information on how to resolve them:

Error	Likely resolution
Destination field(s) mapped has different type. Review the mapping for the following field(s): field_1, field_2	Review the fields listed in the error message, and check if you have the same type as expected. If the reason for changing the type was to delete the file and re-create it, then it will be un-mapped. Correct the mapping saved in the Integration Point job, and run the job again.
Destination field(s) mapped may no longer be available or has been renamed. Review the mapping for the following field(s) [field name].	Review if the failing field(s) still exist in the destination workspace, correct the mapping saved in the Integration Point job, and run the job again.
Destination workspace is not available.	Verify if destination workspace exists.
Failed to copy source field into destination field due to missing child	Review the list of failing fields, create the child/parent relation in the destination workspace as it is in the source workspace and try again.

Error	Likely resolution
object. Review the following destination field (s): [field names]	
Saved search is not available or has been secured from this user. Contact your system administrator.	Verify that you have the required permissions for the saved search, or check to see if the saved search has been deleted. If needed, contact your system administrator to verify the saved search configuration.
User does not have sufficient permissions to access destination workspace. Contact your system administrator.	Confirm that you still have access to the destination workspace. It is also required that a System Admin account is present (used by an Integration Points Agent) and has access to the destination workspace.
Verify if a folder in destination workspace selected in the Integration Point exists or if a user has a proper permission to access it.	Verify that the folder used for the integration point still exists. Also, check the permission settings for the folders in destination workspace to confirm that it's not secured for the user's group.
Verify if a Production Set used as the location in destination workspace exists or if a user has a proper permission to access it.	Verify that the production set used as the location in the destination workspace still exists. Also, check the permission settings for productions in the destination workspace to confirm that it's not secured for the user's group.
Verify if a Production Set used as the location in destination workspace is in New status.	Verify that the production set used as the location in the destination workspace still has a status of New. Only productions with a status of New can be used as a production set in an integration point. If the production set was already staged or run, it isn't eligible to be used for the integration point.
Verify if production, which is the data source of this Integration Point, still exist or if user has required permissions for it.	Check to see if the production used as the data source of the integration point still exists. Also, verify that you have the required permissions for the production used as the data source. If needed, contact your system administrator to verify your production permissions.
Verify if the user still has permission to create saved search on destination workspace.	Verify that you have the required permissions for creating a saved search in the destination workspace for this integrated point job. If needed, contact your system administrator to verify your production permissions. One of missing permissions could be Search in Object Security and Advanced & Saved Searches in Other Settings, both of which are set in the group permission on destination workspace.

## 5.9 Microsoft Entra ID provider

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**Note:** As of October 2023, Microsoft renamed Azure Active Directory (Azure AD) to Microsoft Entra ID. This site has been updated to reflect the name change, where applicable. Refer to [Microsoft documentation](#) for more information.

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Relativity can import Entity (Employee/Custodian) data from Microsoft Entra ID (formerly known as Azure Active Directory) through Integration Points. The following prerequisites must be established:

1. In Relativity:
  - a. You will need to install Integration Points into your workspace. See [Installing Integration Points](#) for details.
  - b. Once Integration Points is installed, you will then need to install the Integration Points AD provider application. To do so, go to the [Files](#) tab in Community, click the **Relativity Applications** library, and locate the appropriate Microsoft Entra ID for Integration Points ZIP file.

Completing these two installations adds Integration Points to your workspace and adds Microsoft Entra ID as a source within Integration Points.

2. In Microsoft Azure:
  - Set up an application in Microsoft Azure which can be used to configure an Integration Point in Relativity. Only an Application Administrator with access can create an application, find credentials, and delete an application. If you do not have permissions, contact your admin. For more information on Application Administrators, see Microsoft's documentation.
3. The final step is to import Microsoft Entra ID into Relativity. For more information, see [Importing from Microsoft Entra ID on page 220](#).

### 5.9.1 Registering an Azure application and credentials

To create your application ID and secret, you must have Application Administrator privileges to log into your Azure Portal and register an app.

Start with registering your app by following the steps below:

---

**Note:** The person completing the application registration process needs to be an Azure Administrator with sufficient privileges.

---

1. Open your [Azure Portal](#).
2. Navigate to the **App registrations** page.
3. Click **New Registration** to display the Register an application page.
4. Enter an application name in the **Name** field.
5. Select **Accounts in this organizational directory only** as the supported account type.
6. Click **Register**.

For more information on registering an application in the Azure portal, refer to documentation on Microsoft's site.

Next, from the app's page, add permissions to the web API by following the steps below:

1. Click **API Permissions**.
2. Click **Add a permission**.
3. Click **Microsoft Graph**.
4. Select **Application Permissions**.
5. Select the following options from the Application Permissions section:
  - Directory – **Directory.Read.All**
  - Group – **Group.Read.All**
  - User – **User.Read.All**

---

**Notes:** This permission is required if Filter by Group functionality is used.

---

6. Click **Add Permission**.
7. Click **Grant Permission**.

Finally, grant Admin consent for the API by following the steps below:

1. Click the **API Permissions** tab.
2. Click **Grant admin consent for [tenant]**.
3. In the pop-up window, click **Accept**.

### 5.9.2 Finding Azure credentials

If an application is already created and you need to find the application information to complete the Source Connection step, follow the steps below in the [Azure Portal](#):

1. Click **Azure Active Directory**.
2. In the left-navigation menu, click **Enterprise applications**.
3. In the list of applications, locate your application by filtering or sorting.
4. Click your application.  
This will open the application page.
5. In the left-navigation menu, click **Properties**.
6. Click the copy icon next to the Application ID.



**Properties**

DT

Name ⓘ  
Documentation Test

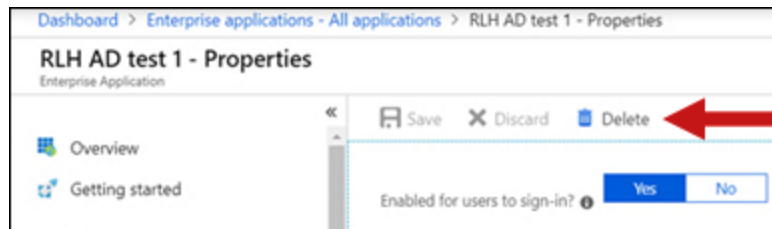
Application ID ⓘ  
3293f8a9-2cfa-48b3-a612-4...

Object ID ⓘ  
a823fd67-0094-4fcc-90d8-1...

### 5.9.3 Removing application access

Removing access to an application can be done outside of Relativity in Microsoft Entra ID. To remove access, follow the steps below:

1. Log into Microsoft Entra ID.
2. Locate and open the application.
3. In the application, click **Delete**.



## 6 Staging Explorer

Staging Explorer enables you to rapidly transfer large amounts of data to and from RelativityOne to jump-start and sustain the data pipeline for critical projects. Use it to upload files to a staging area for RelativityOne or to download files from your RelativityOne storage location to a local computer.

Below are the top-level directories included in the [Staging Area](#) within each tenant or client domain storage area:

- **ARM**—a folder for archiving workspaces and for staging restores via the ARM application.
- **StructuredData**—a folder for importing and exporting workspace data using Import/Export and Integration Points. Refer to [Import/Export](#) and [Integration Points](#) documentation for more information.

---

**Note:** Relativity is deprecating the existing Export folder in September 2024 and is providing a new StructuredData folder in May 2024 to allow you to import and export data from the folder for easier integration with Import/Export and Integration Points. Begin using the StructuredData folder once it's available. This folder will be included in your Staging threshold and will be calculated and billed the same as the existing Staging folders (ProcessingSource, ARM, and TenantVM). The Export folder will be removed in September 2024 and will no longer be billable.

---

- **ProcessingSource**—a folder for storing files you want to process into your RelativityOne workspace.
- **TenantVM**—a folder to temporarily store Utility Server virtual machine (UVM) workflows. Refer to [Utility Server](#) documentation for more information.

---

**Note:** Starting in September 2024, RelativityOne will be streamlining its staging boundaries to bolster platform security and accelerate the delivery of innovation to your environment. With this change, you will no longer be able to write to or access data outside of the defined staging area folders listed above, and the FTA, Temp, Export, and dtSearch folders will be deprecated. It is strongly recommended that you begin utilizing the ProcessingSource, StructuredData, and ARM folders as soon as possible and be sure to transfer any data you would like to retain access to that is currently housed outside of the designated staging area to an appropriate folder by September 1, 2024. After that date, the folders and data will not be accessible. For more information, see the [Staging FAQ](#) article in Community.

---

You can view data for a new matter, quickly load newly discovered data, or quickly download produced documents. This makes accessing data in the cloud as quick and seamless as if it was contained within your own environment.

Read a Staging Explorer scenario

### Using the Staging Explorer

You set up a new case and need to begin review quickly. Opposing counsel gives you a hard disk drive with 10 GB of files you need to add to RelativityOne. You decide to use the Staging Explorer to upload files from the hard disk drive to RelativityOne. After you finish review of the case, you need to create productions for opposing counsel. When you produce these files to your RelativityOne storage location, you use the Staging Explorer to download the production to your local drive. You then ship the productions to opposing counsel.

Refer to these sections to set up Staging Explorer:

- [Permissions on the next page](#)
- [Installing, launching, and updating Staging Explorer on page 306](#)
- [Navigation on page 311](#)
- [Best practices, limitations, and data transfer performance considerations on page 303](#)

## 6.1 Staging Explorer

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---

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---

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---

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Refer to these sections to set up Staging Explorer:

- [Permissions below](#)
- [Installing, launching, and updating Staging Explorer on page 306](#)
- [Navigation on page 311](#)
- [Best practices, limitations, and data transfer performance considerations on page 303](#)

## 6.2 Permissions

The following minimum security permissions are required to use the Staging Explorer. All permissions are set in Instance security

Object security	Tab visibility	Admin operations
Not applicable	<ul style="list-style-type: none"><li>■ Data Transfer</li><li>■ Staging Explorer</li></ul>	<ul style="list-style-type: none"><li>■ Access Staging Explorer</li><li>■ View Admin Repository*</li><li>■ Send Email Notification**</li></ul>

\* this permission is needed for non-admin users only.

\*\* this permission is not required to run Staging Explorer, but is required to send and receive an email notification when a transfer finishes or fails. For more information, see [Updating Transfer Settings on page 330](#).

---

**Note:** If a user has access to multiple client domain workspaces and you only want them to be able to view specific fileshares in the Staging pane of the Staging Explorer, the user must be in a group, other than the System Administrator group, that is added to at least one workspace built on the resource pool with the associated fileshares. Refer to [User access permissions to fileshares below](#) for more information

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## 6.3 User access permissions to fileshares

In the default RelativityOne setup, users can access fileshares if they're in a group that is added to a workspace that's associated with a resource pool with fileshares. In some cases, if a user has access to multiple client domains, you may only want that user to see fileshares for his own client domain in the Staging pane and not any fileshares from other client domains to which he has access. Refer to the following sections for more information on each scenario.

### 6.3.1 Default workflow in RelativityOne for user access to fileshares

The normal workflow in RelativityOne is that a group and its users will inherit access ability to any fileshares within the resource pool that is associated with the workspace to which the group has access, as shown on the Figure 1.

For example, User A is in Group A that is added to Workspace A, which is associated with a Resource Pool containing fileshares. As a result, User A can view and access all fileshares in the Staging pane via the group's access.

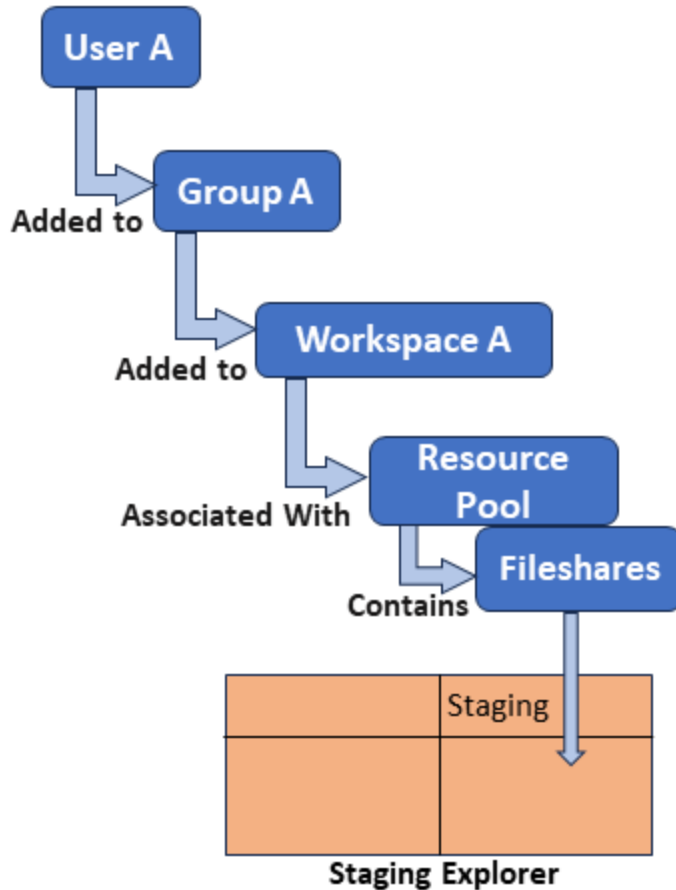
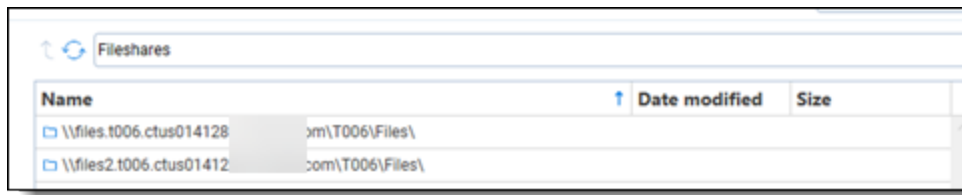


Figure 1: User able to view resource pool fileshares

In this scenario:

- User is in a group, other than 'System Administrators,' that is added to at least one workspace that is associated with the resource pool containing the fileshares. Once the user is assigned to the group, they will have access to any fileshares associated with resource pools in the workspace to which the group is associated. For more information on adding users to groups, see Adding users to groups.



Name	Date modified	Size
\\files.t006.ctus014128.com\T006\Files\		
\\files2.t006.ctus01412.com\T006\Files\		

- Instance Setting of *StagingPaneOnlyPerClientDomain* either does not exist or, if it exists, it's set to False.

### 6.3.2 Granting user access to specific fileshares

If you have a user who has access to multiple client domain workspaces and you only want them to be able to access fileshares for his own client domain in the Staging pane, then you must configure the proper permissions. The process involves setting the *StagingPaneOnlyPerClientDomain* instance setting to **True** and configuring groups with *item-level permissions* to the resource pool that contains the fileshares to be accessed.

Based on the default workflow in RelativityOne, as described above, a group and its users will inherit access ability to any fileshares within the resource pool that is associated with the workspace to which the group has access. Therefore in this workflow, if a user has access to multiple client domain workspaces, then that user will be able to view their fileshares.

For example, User A has access to his own Client A Domain, but he can also access the workspace for Client B Domain if he's added to Group B in Client B Domain, as shown below. As a result of being added to Group B, he'll be able to view the fileshares associated with Workspace B in Client B Domain. In this situation, *StagingPaneOnlyPerClientDomain* instance setting either does not exist or it is set to False, and item-level permissions to the resource pool are not configured.

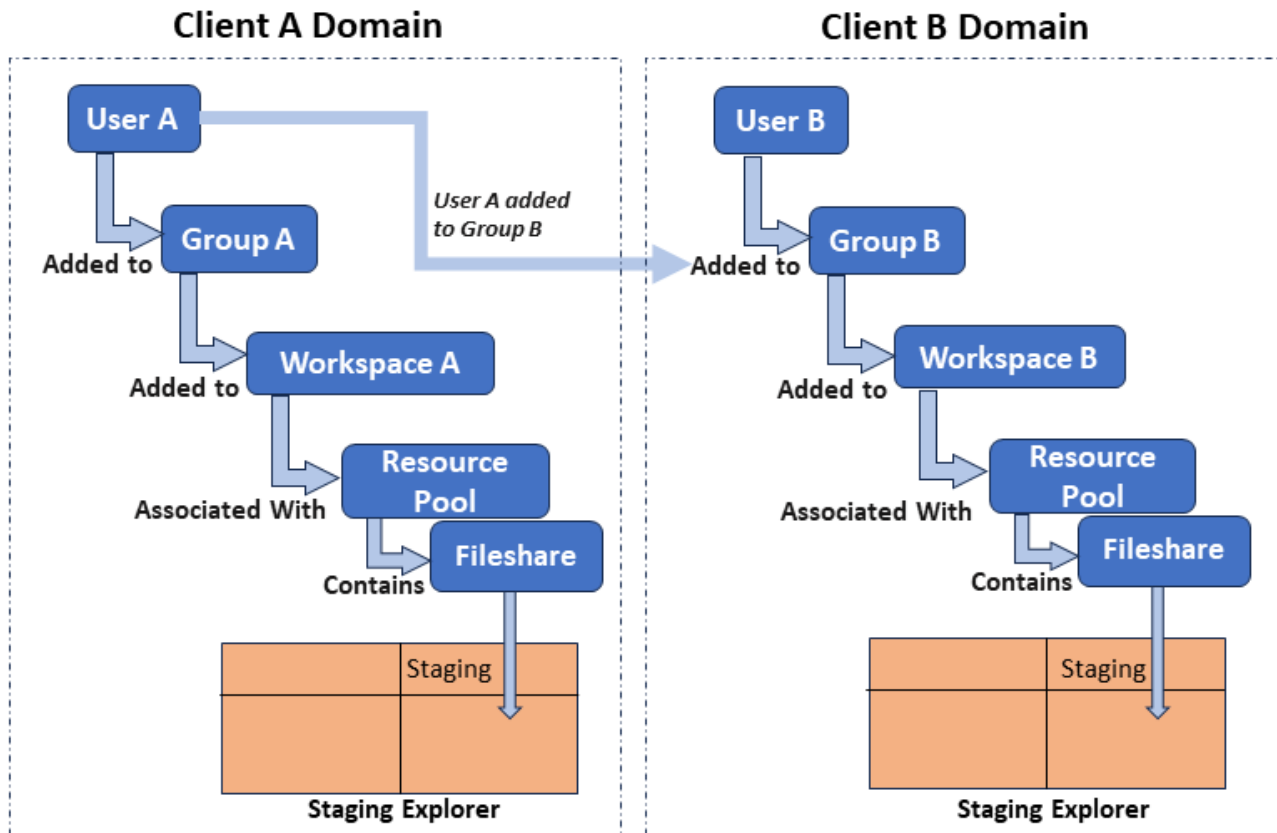


Figure 2: User able to view other client domain fileshares.

To ensure that User A only views and accesses fileshares from his own domain in the Staging pane and still retain access to the workspace for another client domain but not view its fileshares, you must:

1. Set the **StagingPaneOnlyPerClientDomain** Instance Setting to **True**.
2. Add the user to a group that has been given *item-level permissions* to the resource pool and its associated fileshares, as shown in Figure 3.

In this scenario, User A is added to Group A, which has been given item-level permissions to the resource pool and associated fileshares in their Client A Domain. By being added to Group B2, User A is still able to view Workspace B but cannot view its fileshares. For User B to only view her client domain's fileshares, User B is added to Group B1, which has been given item-level permissions to Client B's resource pool so User B can view her domain's fileshares.

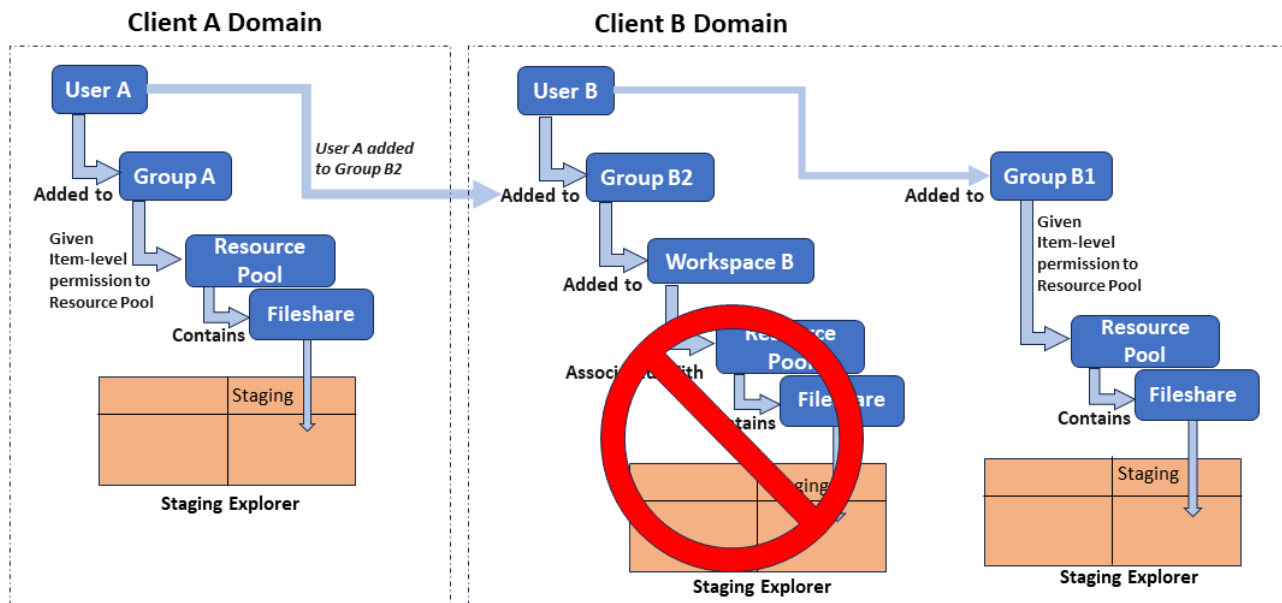


Figure 3: User prevented from viewing other client domain fileshares.

**Note:** Access to the resource pool does not automatically make the Resource Pool object visible to users. In order to see the resource pool, users must have access granted to the Resource Pool object tab in Admin Mode settings.

For more information on how security and permissions operate in RelativityOne, see Security and permissions.

To grant access to specific fileshares, the user must be in a group, other than the System Administrator group, that is given item-level permissions to the resource pool containing the associated fileshares.

### Step 1: Configure the StagingPaneOnlyPerClientDomain Instance Setting

The default RelativityOne set up does not contain the Instance setting StagingPaneOnlyPerClientDomain. Therefore, the application will respond as described in the [Default workflow in RelativityOne for user access to fileshares on page 297](#) section. So, you must add the StagingPaneOnlyPerClientDomain instance setting and configure it as indicated below.

1. Navigate to **Instance Settings**.
2. Click **New Instance Setting**.
3. Enter the following information in the fields specified:



**Relativity** kCura Admin Instance Settings ☆

Authentication Provider Type Workspace Upgrade Queue Choices Agents Errors Instance Details Resource Files Resource Pools

Save Save and New Save and Back Cancel

Instance Setting Information ?

Name\* StagingPaneOnlyPerClientDomain

Section\* Relativity.DataTransfer

Machine

Instance Setting Details ?

Value Type\* True/False

Value\* ☒ True ☐ False

Initial Value ☐ True ☐ False

Description

- **Name**—enter **StagingPaneOnlyPerClientDomain**.
- **Section**—enter **Relativity.DataTransfer**.
- **Value Type**—select **True/False**.
- **Value**—select **True**.

**Note:** This value must be set to True if you want to prevent users from accessing fileshares in other client domain workspaces. If it is set to False, the opposite occurs and users will inherit access to any fileshares associated with workspaces to which they have access, as shown in Figure 2.

4. Click **Save**.

## Step 2: Create the Group

Although you can use any existing group, we recommend creating a new, specific group for these users so you can better manage the fileshare access permissions.

1. Navigate to **Groups**.
2. Click **New Group**.
3. Enter the fields as needed. For more information on creating groups, see [Creating and editing groups](#).
4. Click **Save**. This group will be added to the resource pool in a later step.

### Step 3: Add Users to the Group

Next, add users to the group who need to access the fileshares in the Staging pane of the Staging Explorer.

1. From the **Groups** tab, click **Add**.
2. Select one or more **users** to add to the group as needed and click **Apply**. For more information on adding users, see Adding users to groups.
3. Click **Apply**.

---

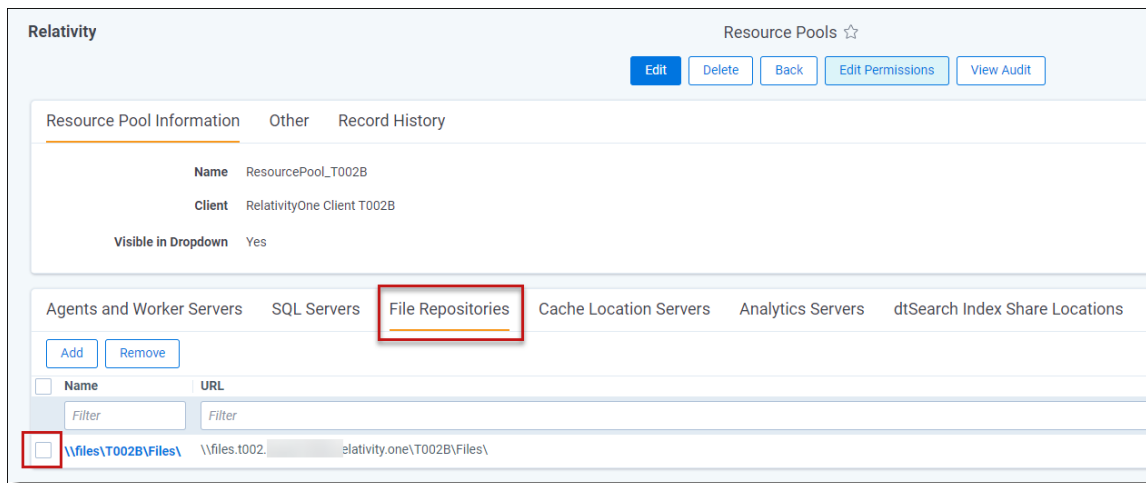
**Note:** If a user belongs to more than one group with item-level access to other resource pools, they will inherit access to all fileshares associated with those resource pools. Review the item-level permissions for each resource pool to ensure only the desired groups have been granted access to the associated fileshares.

---

### Step 4: Add the Group to the Resource Pool with Item-level Permissions

Finally, add the group to the resource pool with item-level permissions.

1. Navigate to **Resource Pools**.
2. Select the **Resource Pool** associated with the client domain that contains the fileshares you want to allow users to access.
3. Click the **File Repositories** tab to review the available fileshares assigned to the selected resource pool and



4. Click the box next to the desired fileshare from the list and click **Edit Permissions**.
5. Click the **Add/Remove Groups** button on the Groups tab of Item Security.

---

**Note:** If the Add/Remove Groups button does not display, toggle the **Override Inherited Security** option ON.

---

Permissions

Item Security

Groups

Object Security

Groups

Selections

Selected Item \\files.t017.esus025192.relativity.one\T017\Files\

Group List

Override Inherited Security ☒

Group Name	
AEI Administrators	View Users Edit Permissions
Everyone	View Users Edit Permissions
First Level Group	View Users Edit Permissions
Level 2	View Users Edit Permissions
ManagementConsoleServiceGroup	View Users Edit Permissions

Add / Remove Groups Close

6. Select the group that you added in the previous section and click the arrow to move it to the **Groups in Workspace** pane.
7. Click **Save**.

The group and the users within it now have item-level permission to the resource pool and its associated fileshares. They will only be able to access the specific fileshares configured and will still retain access to workspaces for another client domain but not be able to view their fileshares. See Security and permissions for Item-level permissions for more information.

#### Notes:

- Access to the resource pool does not automatically make the Resource Pool object visible to the users. To see the resource pool, they will need to also have access granted to the Resource Pool object tab in Admin Mode settings.
- The resource pool will not be assigned to the new workspace if you move the workspace to another client domain or delete the workspace.

## 6.4 Best practices, limitations, and data transfer performance considerations

The following are some good practices, limitations, and performance factors to consider when using Staging Explorer.

### 6.4.1 Best practices

The following are some best practices to consider when using Staging Explorer:

- Depending on your system and network connection, it may be beneficial to separate substantially large data sets into smaller batches for transmission in order to improve speed and processing workflow.
- When downloading huge data sets, be sure to use a local drive as the destination. External drives are not recommended.
- When transferring huge data sets, we recommend using a local drive where the Staging Explorer is installed as the transfer source and destination to avoid additional transfer steps. Transferring to and from a mapped network drive is not recommended as it introduces an extra connection between it, Staging Explorer, and RelativityOne, which may cause slowness and connection issues.
- Relativity does not store any information about file paths due to privacy concerns.

### 6.4.2 Limitations

The following are some limitations to consider when using Staging Explorer:

- Only one Windows user can run an instance of Staging Explorer on a machine at a time.
- The maximum number of active transfers for one instance of the Staging Explorer is 3. See [Updating Transfer Settings on page 330](#).
- The Client Domain Admin group does not have Staging Explorer access by default. A System Admin needs to add the correct permissions.
- Both the Local and Staging panes display only 1000 items. When a directory consists of more than 1000 items, the **Top 1000 items displayed** message appears in the bottom right corner of the Local or Staging panes. To select all the items within the folder, select the main folder instead of sub-folders or using CTRL+A for files within the main folder. Using CTRL+A will only select the first 1000 items displayed instead of all items available.
- Enforced FIPS Policy may block some encryption algorithms which may cause errors in applications. We recommend using validated cryptographic algorithms approved by Windows Platform FIPS.
- Transfers from mounted disk images are not supported.

### 6.4.3 Data transfer performance considerations

There are many variables that can degrade or improve the performance of data transfers for desktop applications, such as Staging Explorer. Transfer rates when using desktop applications are influenced by several variables and results may vary based on factors such as RAM, CPU, local drive specifications, network drive specifications, and available bandwidth at the time of the transfer.

Review the list of performance considerations below before beginning to use Staging Explorer. If you experience issues despite following the information below, please contact Support for assistance. For additional information, refer to the Community article [Performance considerations for data transfers](#).

- **Run on local machine:** Staging Explorer should not be run on a RelativityOne Utility VM. See [Utility Server](#) for more information. It has been designed and tested as a desktop application being run on a user's local machine.

- **Read access:** Ensure that Staging Explorer has read access to all files/folders (remove system / hidden attributes).
- **Port 443:** Ensure that port 443 is open to the public internet and is not blocked or traffic is restricted to it. See the Community article [Performance considerations for data transfers](#) for more information.
- **Internet connection:** Use a strong and stable internet connection for data transmission. Wi-Fi is not recommended.
- **Internet speed:** Transfer speeds are dependent on your internet speeds. Check your internet connection using [Speedtest](#) or any other bandwidth testing website. Make note of the upload speed in megabits per second. Also refer to [Updating Transfer Settings on page 330](#) for the Limit bandwidth setting.
- **Local storage speed:** Transfers to and from network drives or external disks (such as thumb drives/USB drives) will degrade performance and/or cause issues maintaining a connection. It is most effective to copy data to and from a fast local storage.
- **Local machine specs:** Ensure your local machine and browser adheres to the Staging Explorer minimum [system requirements](#) and is operating the latest version of the software.
- **Level of data fragmentation:** Due to bandwidth sharing, avoid performing large and highly fragmented transfers in parallel. The more fragmented the dataset, the lower the transfer performance.
- **Concurrent transfers:** Number of concurrent transfers that are happening at the same time within the network by various tools, services, and users.
- **Concurrent utilization:** Level of concurrent utilization of the user's computer resources (CPU, RAM, I/Os) by other processes on that computer.
- **Compressed datasets:** Avoid compressing datasets (with ZIP, 7z, etc.). The faster transfer time due to fewer multi-part files is negated by the time and effort to compress and decompress data. However, compressing datasets without decompressing in the destination folder (staging directory) can be considered when all the following are true:
  - Dataset consist of fragmented data
  - Destination folder is a Processing source location
  - The dataset uploaded is going to be processed by Relativity Processing
- **VPN usage:** Using a VPN can potentially slow down internet traffic. When workstations use a VPN session, it can interfere with transfers from that workstation. RelativityOne is hosted in a public cloud and does not require VPN to use. See the Community article [Performance considerations for data transfers](#) for more information.
- **Traffic monitoring and data protection software:** These types of software tools influence data transfer. See the Community article [Performance considerations for data transfers](#) for more information on each of these:
  - **Firewall:** Firewall configuration may require special tuning to use the Staging Explorer.

- **Antivirus software:** Antivirus software may disrupt the transfer protocol in Staging Explorer.
- **Anti-malware software:** An exception should be created for Staging Explorer in Windows Defender or in other anti-malware software installed on the user's machine.

## 6.5 Installing, launching, and updating Staging Explorer

Use the information below to learn how to install Staging Explorer as well as how to launch and update it.

### 6.5.1 System requirements

The following minimum system requirements are required to use the Staging Explorer.

Required item	Requirement
Operating system	Windows 8.1 or above
Windows Server operating system	Windows Server 2012 R2, Windows Server 2016, Windows Server 2019, or Windows Server 2022
System memory	4 GB RAM
Software	.NET version 4.7.2
Transport Layer Security	TLS 1.2

#### 6.5.1.1 Recommended browser settings

Ensure the Relativity instance is configured as a trusted site and the following settings are enabled or allowed in the browser on the user's machine running Staging Explorer. Refer to your browser's help documentation or contact your IT department for the specific location of these settings if they differ from these steps.

1. Open the browser's **Control Panel**.
2. Go to **Network and Internet > Internet Options**.
3. For **Security** settings:
  - Enable **File Download**
  - Enable **JavaScript**
  - Add \*.relativity.com as a Trusted site
4. For **Privacy** settings:
  - Allow **First party Cookies**
  - Allow **Third party Cookies**

#### 6.5.1.2 Port requirements

To ensure that transfers can occur, you must make firewall changes to allow outbound connections to the server on the following port:

- **TCP port 443**—required to be opened to the public internet.
- Staging Explorer does not support proxy servers.

The opening of the required port for the Windows firewall is typically handled on the end user's machine. However, if you use any third party firewalls, you must manually open the port referenced above. Improperly configuring the port results in transfer failures. For more information, contact [Customer Support](#).

See RelativityOne network access in the RelativityOne technical overview for detailed information about all of the network considerations for data transfer in RelativityOne, including firewall privacy considerations and a list of FQDN.

## 6.5.2 Installing Staging Explorer

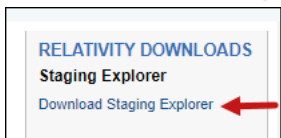
To install Staging Explorer, follow these steps.

---

### Notes:

- You must have the minimum security permissions to launch Staging Explorer. See [Permissions](#) for more details.
  - You must be a local admin on your machine to install Staging Explorer or have the installer pushed via a Group Policy Object (GPO) to install the application. You must also be a local admin on your machine to run Staging Explorer.
- 

1. Launch **RelativityOne**, and log in with your RelativityOne credentials.
2. Navigate to **Staging Explorer**.
3. Click **Download Staging Explorer** in the Relativity Downloads console.



4. Once the download is complete, launch the **Relativity.StagingExplorer.exe** file to run the installation wizard.
5. Click **Install** to begin the installation wizard.
6. Click **Next** on the welcome to the setup wizard dialog.
7. Click **Next** to accept the default installation Destination Folder displayed.
8. You must select (check) the **Enable firewall rules on this computer** check box on Firewall Settings dialog, and then click **Next**.
9. Click **Install** to begin the installation process.
10. Click **Finish** when the setup is complete.

## 6.5.3 Launching Staging Explorer

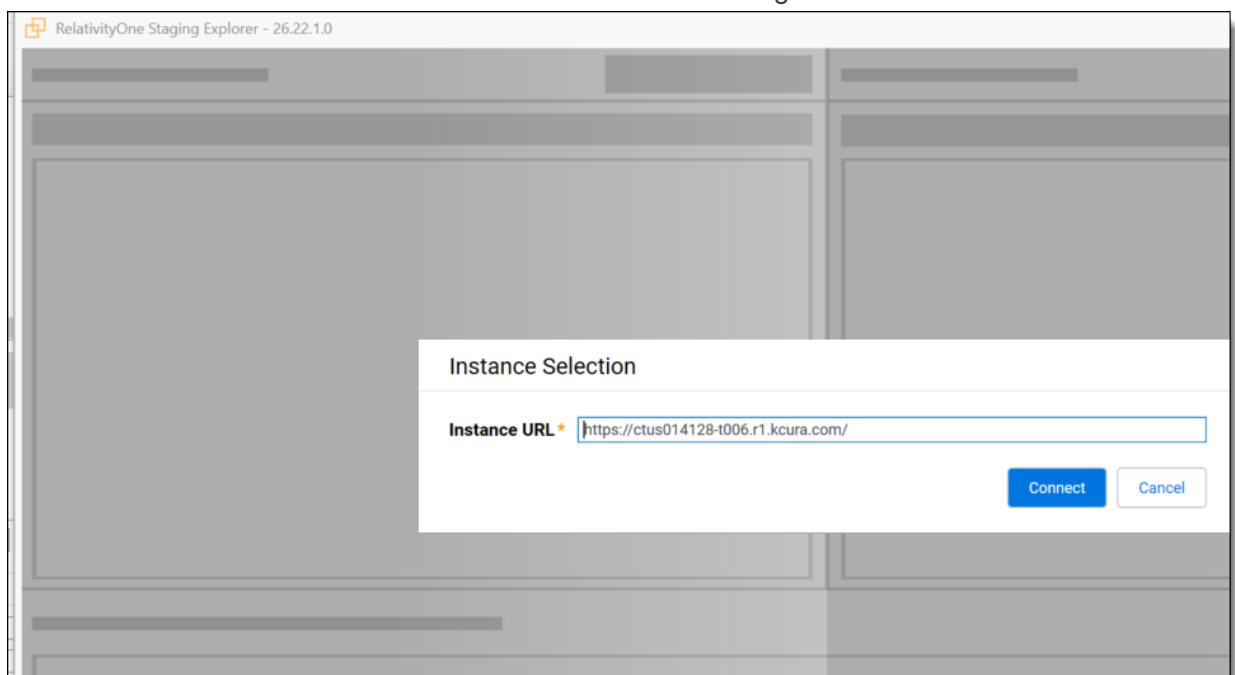
To launch Staging Explorer, follow these steps:

---

**Notes:**

- You must have the minimum security permissions to launch Staging Explorer. See [Permissions](#) for more details. The Client Domain Admin group does not have Staging Explorer access by default. A System Admin needs to add the correct permissions.
  - You must also be a local admin on your machine to run Staging Explorer.
  - Before you begin using Staging Explorer for transferring files, review [Best practices, limitations, and data transfer performance considerations on page 303](#) for information to keep in mind.
  - See [Uploading files or Downloading files](#) to begin transferring files.
  - Only one Windows user can run an instance of Staging Explorer on a machine at a time.
- 

1. Navigate to the installation path and click **RelativityOne Staging Explorer**. If you saved its shortcut to your desktop, then click its icon.
2. Enter the desired **Instance URL** in the Instance Selection dialog box and click **Connect**.



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**Note:** Domain URL is sufficient, for example: **https://kcura.relativity.one** or **https://relativity-uk.relativity.one**.

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3. Log in with your RelativityOne credentials.

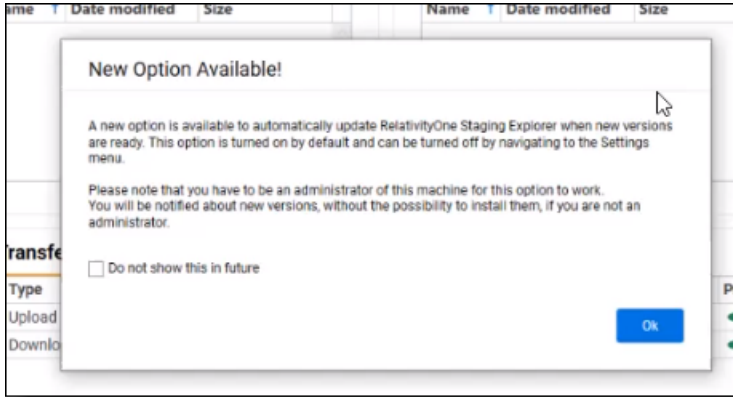
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**Note:** Users log in with the same provider method as they have with Relativity. The Staging Explorer supports most Relativity authentication providers, such as password, Integrated Authentication, and OpenID Connect, by displaying the Relativity login page within the Staging Explorer as a dialog window. The only provider that doesn't work with the Staging Explorer is SAML, because the Relativity's IdP-initiated SAML doesn't display the Relativity login page directly.

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- If applicable, the New Option Available window displays. Select **Do not show this in the future** if you do not want the window to display the next time Staging Explorer is opened.






- When you open Staging Explorer, a connection status icon will indicate if you are connected to Relativity and/or the internet.

---

**Notes:**

- The system checks for connectivity to the fileshare and will display a message if an error is encountered. Follow the information on the message to correct it; otherwise, you will not be able to access the fileshare and its contents.
  - If applicable, Staging Explorer will open to the last Staging fileshare you visited.
  - If the fileshare does not exist, the root folder of that fileshare will open.
- 

	Connected to the internet and Relativity
	Connected to the internet but not Relativity
	Not connected to the internet or Relativity

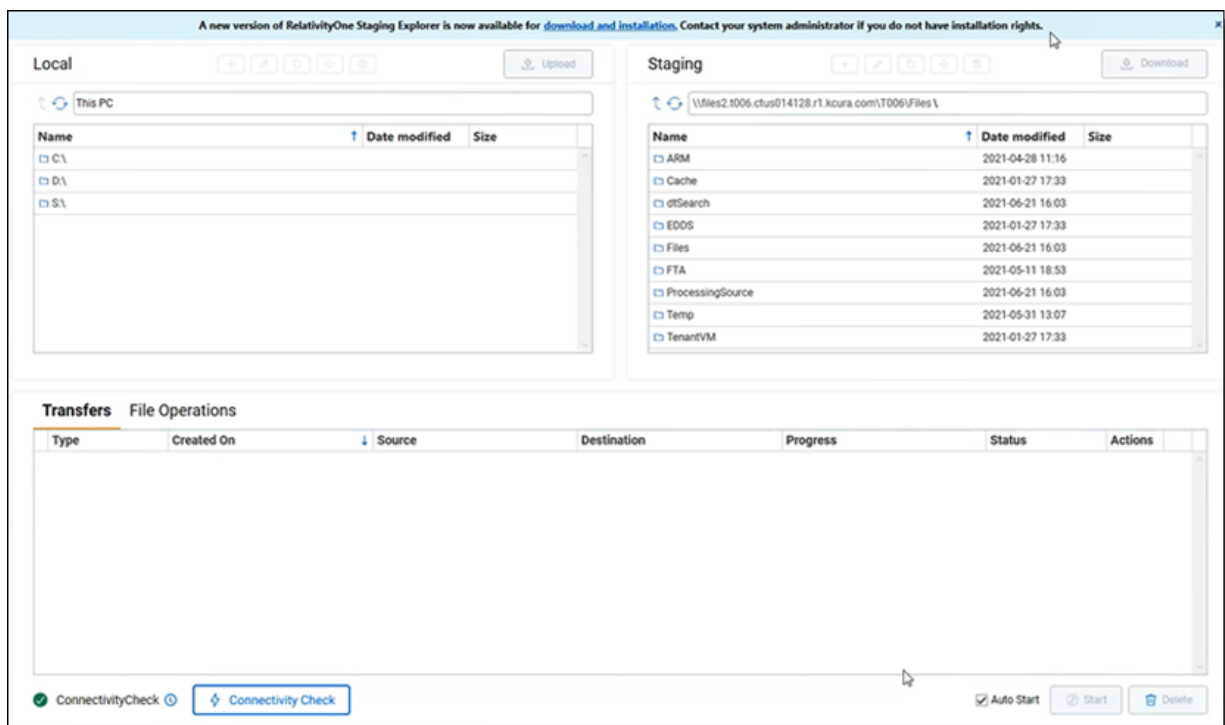
### 6.5.4 Manually updating Staging Explorer

To manually update Staging Explorer:

1. Launch **RelativityOne**, and log in with your RelativityOne credentials.

**Notes:**

- You must have the minimum security permissions to update Staging Explorer. See [Permissions](#) for more details.
- You must be a local admin on your machine to install Staging Explorer or have the installer pushed via a Group Policy Object (GPO) to install the application. You must also be a local admin on your machine to run Staging Explorer.
- If the current version of Staging Explorer you are using is marked critical, it will no longer run and you will be prompted to update to the newest version.
- If a new version of Staging Explorer is available for download, a blue banner will display.
- If you have Automatic Updated enabled in Settings, the update will be completed automatically.



2. If a message displays indicating a new version is available, click the **download and installation** link. The update will be completed automatically.
3. Launch Staging Explorer. See [Launching Staging Explorer on page 307](#) for more details.

### 6.5.5 Automatically updating Staging Explorer

You can configure the application to automatically apply software updates instead of having to update it manually.

1. [Launch the Staging Explorer.](#)
2. Click the **Settings** button in the user drop-down menu next to your name. The Settings window displays.

The screenshot shows the 'Settings' window with two main sections: 'Transfer Settings' and 'Automatic update'. In the 'Transfer Settings' section, there are four options: 'Limit Bandwidth' (unchecked), 'Overwrite Files' (checked), 'Transfer Empty Folders' (checked), and 'Maximum Active Transfers' (set to 3). Below these is a field for 'Transfer Email Notification Recipients' containing one email address. The 'Automatic update' section has an 'Enable Automatic Update' checkbox which is checked. At the bottom right are 'Save' and 'Cancel' buttons.

Transfer Settings	
Limit Bandwidth	<input type="checkbox"/> Better quality of data transmission with lower speed.
Overwrite Files	<input checked="" type="checkbox"/> Overwrite files with the same name that already exist in the destination
Transfer Empty Folders	<input checked="" type="checkbox"/> Recreate empty directories on the destination
Maximum Active Transfers *	3
Transfer Email Notification Recipients	<input type="text" value="r...@relativit..."/>

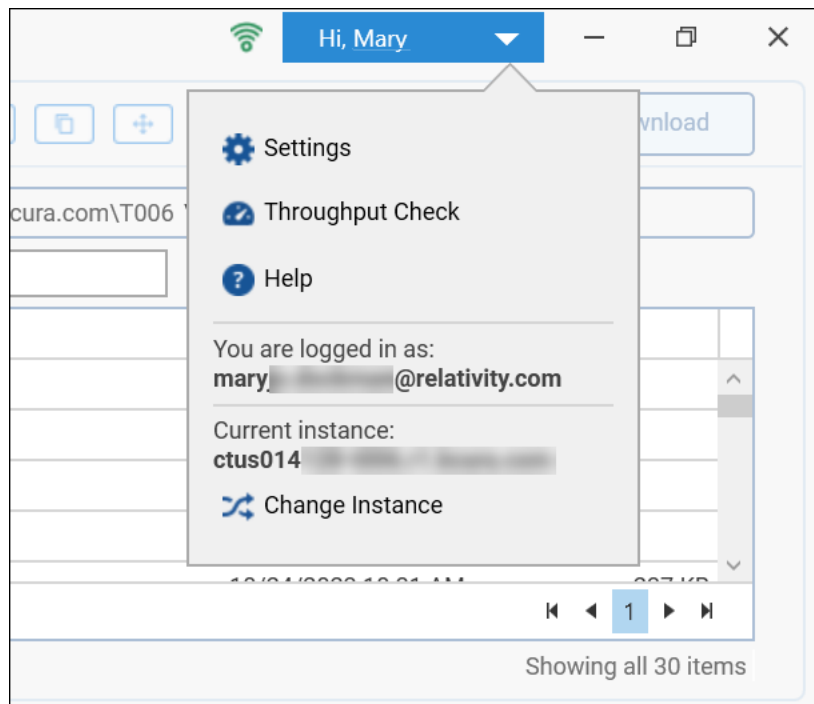
Automatic update	
Enable Automatic Update	<input checked="" type="checkbox"/> New versions of RelativityOne Staging Explorer will have to be installed manually if this option is not enabled.

3. Select **Enable Automatic Update** to automatically have Staging Explorer update to the newest version available. If you change your mind and want to do the updates [manually](#), clear the checkbox.
4. Click **Save**.

## 6.6 Navigation

### 6.6.1 User drop-down menu

When you open Staging Explorer, there is user drop-down menu next to your name.

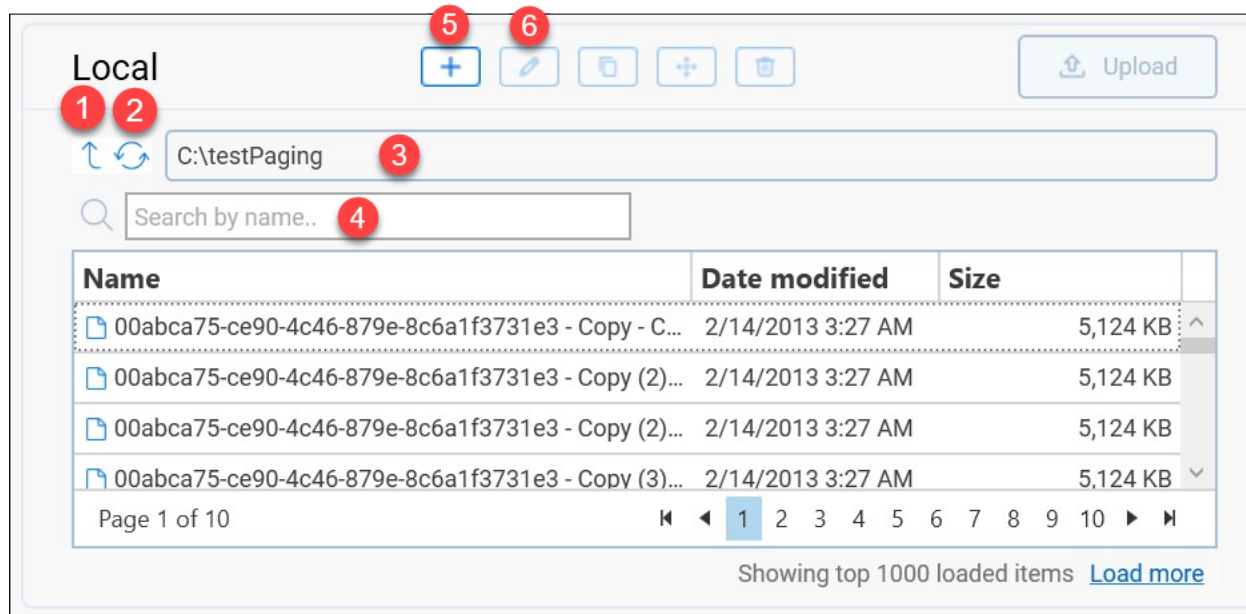


Use the drop-down menu to do the following:

- View the logged in email address.
- View the current Instance's name.
- **Throughput Check**—opens the Throughput Check window.
- **Settings**—opens the Settings window where you can configure the [Transfer Settings](#) and [Automatic update](#) option.
- **Help**—launches the Staging Explorer documentation on the Relativity Documentation website.
- **Change Instance**—opens the Instance Selection dialog box that allows you to enter a new Instance. Changing the Instance will log you out of the current session of the Staging Explorer.

## 6.6.2 General navigation

Use these options in either the Local or Staging panes:



- 1 - Click the up arrow button to go up a folder level in the drive. Repeat as many times as folder levels available.
- 2 - Click the circling arrows to refresh the list.
- 3 - Paste a UNC path directly into the browser field.
- 4 - Use the Search box to locate a particular item in the list by typing all or part of the name and matching files will display.
- 5 - Click the **New Folder** plus button to create a new folder on the selected drive.
- 6 - Click the **Rename** pencil button to rename a folder on the selected drive.

See also:

[File and folder operations \(copy, move, and delete\) on page 322](#)

[Calculating folder size in Local/Staging panes on page 332](#)

### 6.6.3 Sorting file lists

When opening Staging Explorer, file and directory lists for the Local and Staging panes are displayed. By default, the lists are sorted in ascending order by the Name column. Click on any column header to sort its list in ascending (up arrow) or descending (down arrow).

Name	↑	Date modified	Size
ARM		1/27/2021 5:33 PM	
Cache		1/27/2021 5:33 PM	
dtSearch		4/14/2021 6:06 PM	
EDDS		1/27/2021 5:33 PM	
Files		4/14/2021 6:06 PM	
FTA		2/4/2021 9:24 AM	

Name	↓	Date modified	Size
TenantVM		1/27/2021 5:33 PM	
Temp		4/14/2021 5:23 PM	
ProcessingSource		4/14/2021 6:06 PM	
FTA		2/4/2021 9:24 AM	
Files		4/14/2021 6:06 PM	
EDDS		1/27/2021 5:33 PM	

## 6.6.4 Pagination

You can page through a large list of items in a particular folder in the Local or Staging pane. Each page contains 100 items. The system will load up to 10 pages of items (which equates to 1000 items) at a time if available. If there are more items, the **Load more** link displays. By clicking **Load more**, the next 1000 items will load, and so forth, until all pages of items are loaded.

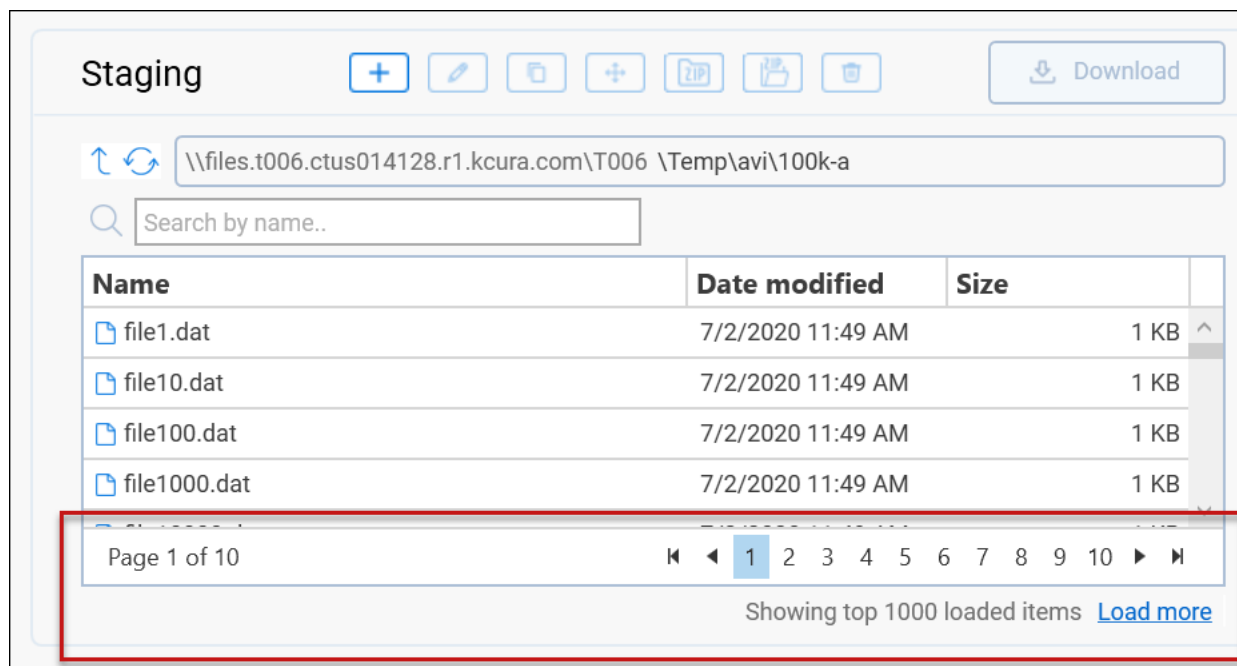
The total page count loaded and current page number you're on displays in the "Page # of #" area.

To advance through the pages, click a particular page number or click the left and right arrows for Next Page, Previous Page, First Page, and Last Page.

---

**Note:** Using the Search by name box to locate a filename will automatically begin loading all items that are available in the selected folder.

---



## 6.7 Transfer workflows

Refer to the sections below for the various transfer workflows available in Staging Explorer. Also, see [Best practices, limitations, and data transfer performance considerations on page 303](#) for additional information to be aware of before transferring files.

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**Note:** The maximum number of active transfers for one instance of the Staging Explorer is three. See [Updating Transfer Settings on page 330](#).

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### 6.7.1 Uploading files

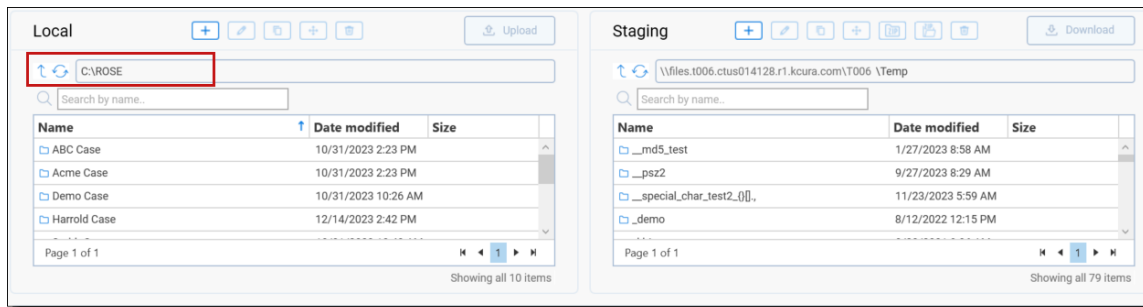
To upload files:

1. [Launch the Staging Explorer](#).
2. In the **Local** pane, navigate to the drive and folder on your local drive that contains the files you want to upload to the Staging Explorer storage location.

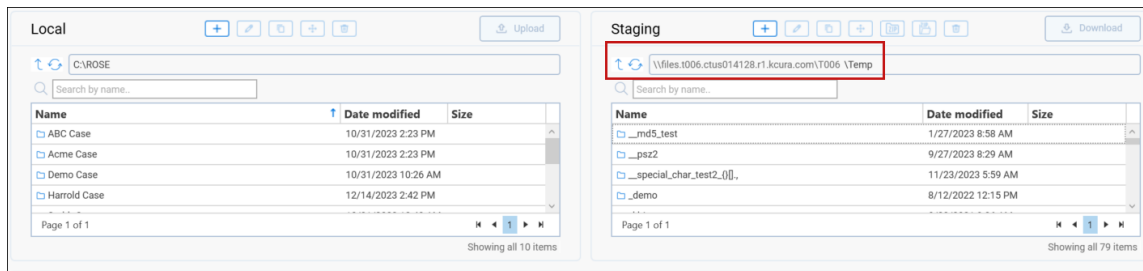
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**Note:** If you plan for this data set to be later processed in Relativity, make sure the dataset folder name is unique. Data sources are not case sensitive. If you have data sources with duplicate names, you may see processing errors. For example, \\[file.share]\\Processing Source[**SOURCE.NAME**] and \\[file.share]\\Processing Source[**Source.Name**] would be considered duplicate names since the system does not differentiate between capital and lower case letters. To make them unique, you could rename the folders [SOURCE.NAME1] and [Source.Name2].

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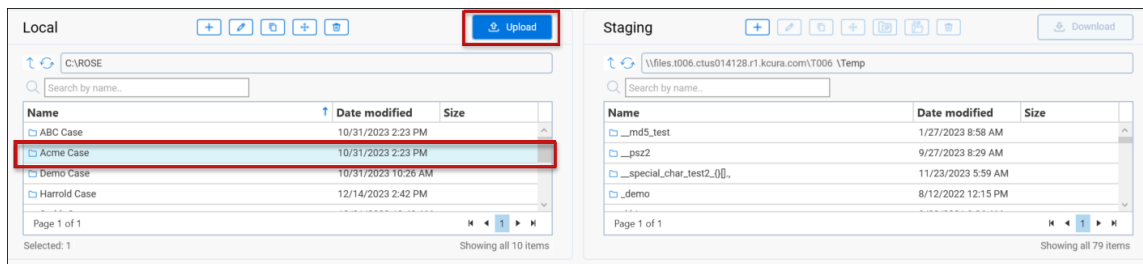




- Next, in the **Staging** pane, navigate to the drive and folder in your Staging Explorer storage location where you want to upload the files from your local drive.



- Back in the **Local** pane, click on the file(s) or folder(s) to be uploaded, and then click the **Upload** button. If the **Auto Start** checkbox is selected, the transfer begins immediately. Otherwise, see [Starting and canceling a transfer on page 318](#). If the system detects a potential issue with the transfer job, a warning window displays. Click **Cancel** to cancel the transfer or click **I want to proceed anyway** to continue with the transfer.

**Note:** You may also hold down **CTRL** to select multiple files or **SHIFT** to select all the files between the first one you selected and the next.



From the **Transfers** tab, monitor upload progress via the **Progress** and **Status** columns displayed for the transfer. When the transfer successfully completes, a circled green check mark  displays. You can click the  button to view the transfer details. See [Transfer workflows on the previous page](#).

**Note:** Uploading overwrites existing files if a file already exists in the destination folder and its metadata and contents differ; otherwise, it will be skipped.



## 6.7.2 Downloading files

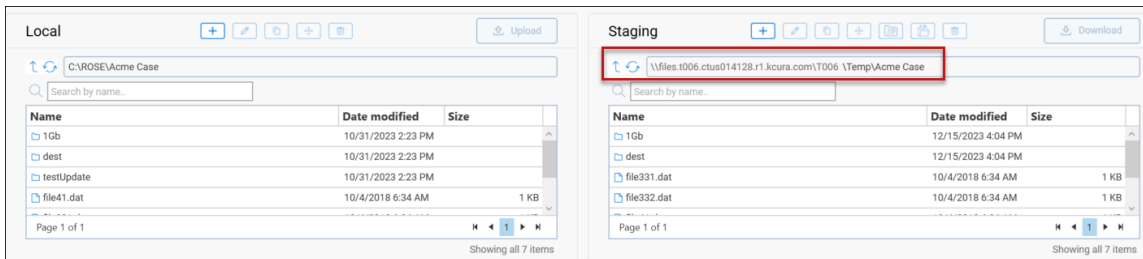
To download files:

1. [Launch the Staging Explorer.](#)
2. In the **Staging** pane, navigate to the drive and folder containing the folder or files that you want to download to your local drive.

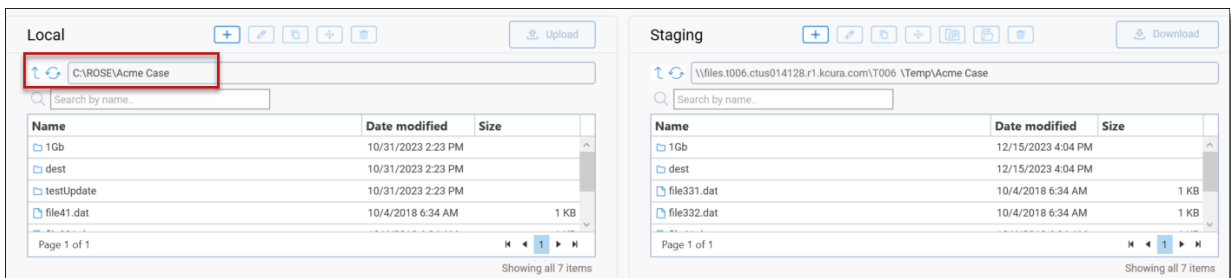
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**Note:** Click on any column header to sort the column in ascending or descending order.

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3. Next, in the **Local** pane, navigate to the drive and folder in which you want to download the files from Staging.

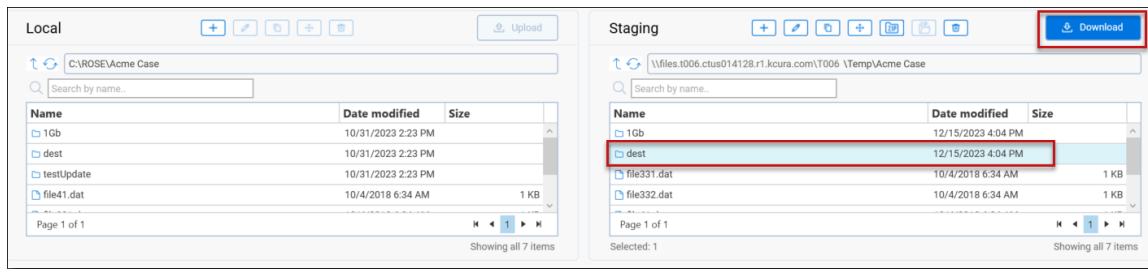




4. Back in the **Staging** pane, click on the file(s) or folder(s) to be downloaded to your local drive, and then click the **Download** button. If the **Auto Start** checkbox is selected, the transfer begins immediately. Otherwise, see [Starting and canceling a transfer on the next page](#). If the system detects a potential issue with the transfer job, such as inadequate space on the destination drive or impact on performance, a warning window displays. Click **Cancel** to cancel the transfer or click **I want to proceed anyway** to continue with the transfer.

---

**Note:** You may also hold down **CTRL** to select multiple files or **SHIFT** to select all the files between the first one you selected and the next.

---




From the **Transfers** tab, monitor upload progress via the **Progress** and **Status** columns displayed for the transfer. When the transfer successfully completes, a circled green check mark  displays. You can click the  button to view the transfer details. See [Transfer workflows on page 315](#).

**Note:** Downloading overwrites existing files if a file already exists in the destination folder and its metadata and contents differ; otherwise, it will be skipped.


### 6.7.3 Starting and canceling a transfer

**Note:** Staging Explorer does not alter metadata while transferring files. All metadata remains untouched.


You can manually start a canceled/failed transfer or cancel a transfer that is being calculated or in progress.

- **Start a transfer:** To start a transfer, highlight the transfer job in the Transfers tab and click the **Start** button or simply click the two-way arrow  icon in the Actions column of the desired job. These options are only available if you do not have the **Auto Start** checkbox selected.

**Note:** To start multiple transfers, you may also hold down **CTRL** to select multiple individual transfers or hold **SHIFT** to select all the transfers between the first one you selected and the next before initiating the start action. The next transfer starts automatically when the previous transfer finishes.



- **Cancel a transfer:** To cancel a transfer, click the circle with the line through it  icon in the Actions column of the Transfers tab. The transfer completes the most recent file in progress and stops immediately after that.

### 6.7.4 Retrying a transfer

The **Retry**  button is enabled if the transfer was stopped (Canceled) or it failed due to an error. When you click this button, the status reverts to "Transferring" once the transfer is starts. Be aware that the transfer will continue from the point it was stopped. Any files that were successfully transferred prior to the cancellation or failure will not be re-transferred, and any incomplete transferred files will be re-transferred in their entirety.

**Note:** Transfer jobs that completed successfully are not eligible for retry.

### 6.7.5 Deleting a transfer

Individual transfers with the status New, In Queue, Canceled, Finished, or Failed can be deleted by clicking the Trash  button under the Actions column. To delete multiple transfers, you may also hold down **CTRL** to select multiple individual transfers or hold **SHIFT** to select all the transfers between the first one you selected and the next and click the Trash  button.

---





**Note:** Once a transfer is deleted, it is removed from both the Transfers tab and the user's machine.

---

### 6.7.6 Viewing transfer history

When opening Staging Explorer, all of the transfers you previously ran displays in the Transfers tab.

1. [Launch the Staging Explorer.](#)
2. Click on the **Created On** column header to sort the transfers by the creation time in the ascending or descending order.

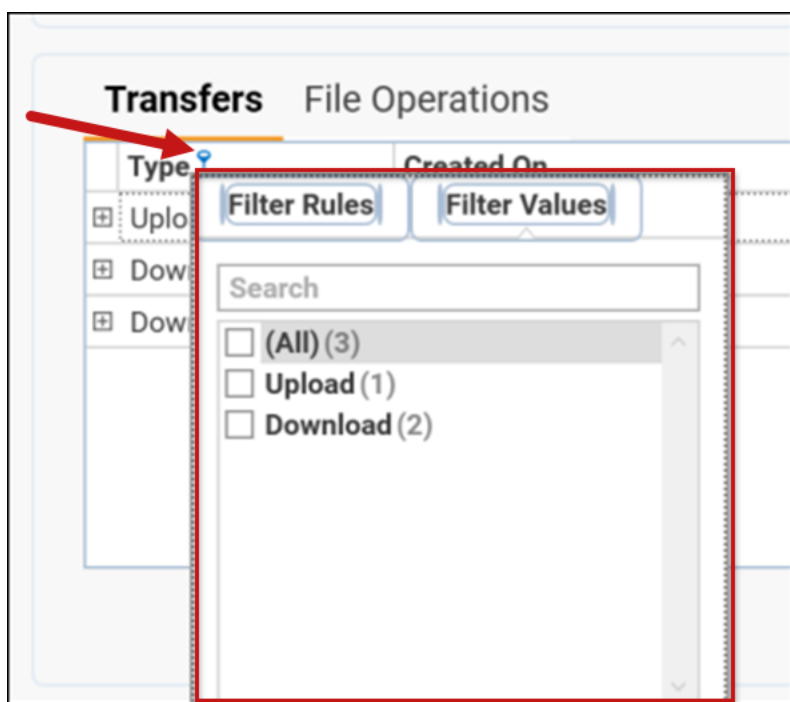
Type	Created On	
 Download	4/14/2021 5:42:32 PM	
 Download	4/14/2021 5:41:44 PM	
 Upload	4/14/2021 5:41:03 PM	
 Upload	4/14/2021 5:40:40 PM	

---

**Note:** When a new transfer is created, the transfer is added at the beginning of the Transfers tab, provided no sorting has been selected.

---

3. Hover over a column heading to view the **Filter** icon and click it. You will be able to filter the column by selected **Filter Rules** and **Filter Values**, which will vary depending on the column selected. The sample displays the filter options for the Type column. To filter on the transfer created date, click the filter icon next to the Created On column heading and use the Filter Values tab to select a date.



4. You can also use CTRL+F to filter the transfers displayed by entering sort criteria in the filter box that displays.

Type	Created On	Source	Destination	Progress	Status	Actions
Download	10/31/2023 10:25:42 AM	\\files.t006.ctus014128.r1.kcura.com\t006\Temp\...	C:\ROSE	100%	Finished	[Icons]
Download	10/31/2023 10:25:59 AM	\\files.t006.ctus014128.r1.kcura.com\t006\Temp\...	C:\ROSE	100%	Finished	[Icons]
Upload	12/15/2023 11:04:30 AM	C:\ROSE\Acme Case	\\files.t006.ctus014128.r1.k...	100%	Finished	[Icons]
Download	12/18/2023 11:35:30 AM	\\files.t006.ctus014128.r1.kcura.com\t006\Temp\...	C:\ROSE\Acme Case	0%	Canceled	[Icons]
Download	12/18/2023 11:42:17 AM	\\files.t006.ctus014128.r1.kcura.com\t006\Temp\...	C:\ROSE\Acme Case	0%	New	[Icons]

(Click the screen below to view short video.)

Type	Created On	Source	Destination	Progress	Status	Actions
Upload	12/8/2020 3:27:34 PM	C:\	\\files\T019\Files\Processing...	100%	Finished	[Icons]
Upload	12/8/2020 3:29:29 PM	C:\	\\files\T019\Files\Processing...	100%	Finished	[Icons]
Upload	12/14/2020 5:06:48 PM	C:\	\\files\T019\Files\Processing...	100%	Finished	[Icons]
Upload	12/14/2020 5:19:36 PM	C:\	\\files\T019\Files\Processing...	100%	Finished	[Icons]
Upload	12/14/2020 5:22:56 PM	C:\	\\files\T019\Files\Processing...	100%	Finished	[Icons]
Upload	12/14/2020 5:30:18 PM	C:\Downloads	\\files\T019\Files\Processing...	100%	Finished	[Icons]
Upload	12/14/2020 5:30:26 PM	C:\Downloads	\\files\T019\Files\Processing...	100%	Finished	[Icons]

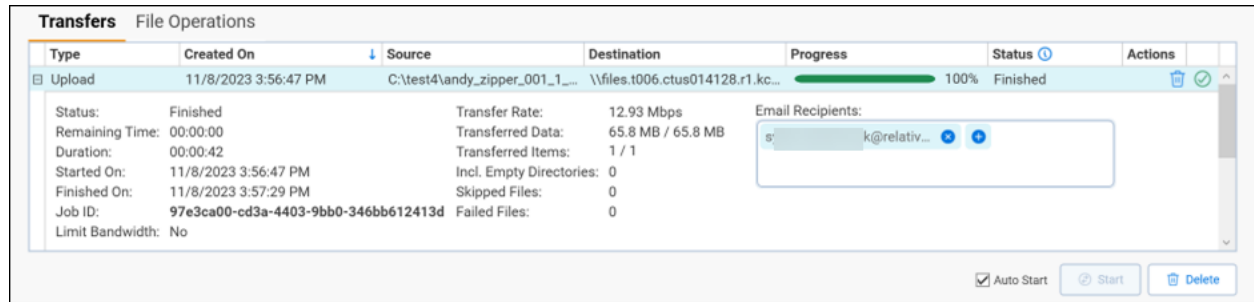
## 6.7.7 Viewing and editing transfer details

Refer to the sections below for how to view and edit transfer details.

### 6.7.7.1 Viewing transfer details

To view details for a transfer, click the expand plus button for the transfer in the Transfers tab. When you extend the details of a transfer, all folders/files that are in scope of that transfer are highlighted in gray in the

source directory in the Local or Staging pane depending on the transfer type (upload or download).



The following information is displayed about the transfer:

- **Status**—status of the transfer (such as, New, In Queue, Calculating, Authorizing, In Progress, Finished, Canceled, Failed).
- **Remaining Time**—how long the transfer will take.
- **Duration**—how long the transfer took.
- **Started On**—the date and time the transfer started.
- **Finished On**—the date and time the transfer completed.
- **Job ID** — unique number of a transfer.
- **Limit Bandwidth**— Yes indicates the Limit bandwidth setting is turned on in Transfer Settings and No indicates it is off. See [Updating Transfer Settings on page 330](#).
- **Transferred Data**—the size of the data currently transferred in reference of the total size of the transfer.

---

**Note:** If the Transferred Data shows more data than requested, for example 6 GB / 4.5 GB, it might mean that some of documents were modified after the transfer was started.

---

- **Transferred Items**—the number of files currently transferred in reference to the total amount of files and empty directories of the transfer.

---





**Note:** The Transferred Data and Transferred Files total values increase while the Calculation phase is in progress.

---

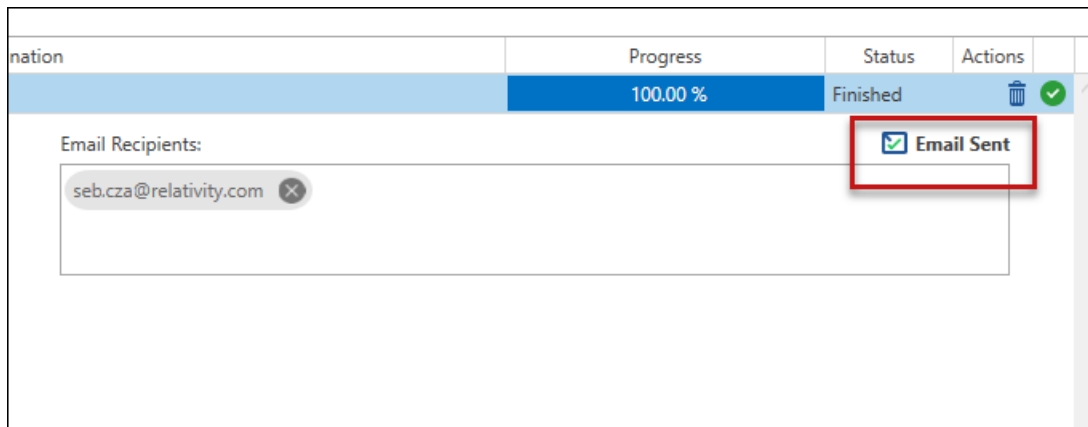
- **Incl. Empty Directories**—the number of empty directories included in Transferred Items.
- **Skipped files**—the number of skipped files in the transfer.
- **Failed files**—the number of failed files in the transfer.



---

**Notes:**

-  icon indicates the transfer Failed with failed path issues.
  -  icon indicates the transfer finished with skipped paths, but no failed paths, in the transfer.
  - For active transfer, if there are any path issues, failed or skipped, the  icon displays. However, if the transfer finishes with failed paths the  icon displays.
  - Click Skipped/Failed details link to download a CSV file to your local drive containing
- 
- **Email Recipients**—by default this field will be populated with the email addresses entered in [Transfer Email Notification Recipients](#) field. If applicable, remove or add email recipients for a particular transfer.
- 
- Note:** This field will only be visible to users who have the **Send Email Notification** permission on. They will only receive an email notification when a transfer finishes or fails.
- 
- **Error**—text box displays error messages.


The Email Sent checked box will display above the **Email Recipients** field when the email is sent.



Progress	Status	Actions
100.00 %	Finished	 

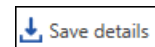
Email Recipients:

☒ Email Sent

seb.cza@relativity.com 

### 6.7.8 Saving the path issues report

The path issues report is generated for each transfer that has at least one skipped or failed path. The report



can be saved during and after the transfer completes by clicking on the **Save details** button. The saved file contains information about the phase when the issue occurred (Calculation or Transfer), the error message, and the path that was skipped or failed.

## 6.8 File and folder operations (copy, move, and delete)

File operations are available for files and folders in the **Local** and **Staging** panes.

---

**Notes:**

- There is no need to log in to Utility Server virtual machine (UVM) to copy, move or delete files and folders from Staging.
- Due to the inherent distinctions in storage technologies between traditional Windows file shares (such as on your local drive) and cloud-based file shares, there are differences in the behavior of file and folder operations which will be noted where applicable in this topic when they occur between Local pane and Staging pane functionality.
- File operations allows you to copy and move files and folders between different fileshares that you are permitted to use.

---

Below are the top-level directories included in the [Staging area](#) within each tenant or client domain storage area:

- **ARM**—a folder for archiving workspaces and for staging restores via the ARM application.
- **StructuredData**—a folder for importing and exporting workspace data using Import/Export and Integration Points. Refer to [Import/Export](#) and [Integration Points](#) documentation for more information.

---

**Note:** Relativity is deprecating the existing Export folder in September 2024 and is providing a new StructuredData folder in May 2024 to allow you to import and export data from the folder for easier integration with Import/Export and Integration Points. Begin using the StructuredData folder once it's available. This folder will be included in your Staging threshold and will be calculated and billed the same as the existing Staging folders (ProcessingSource, ARM, and TenantVM). The Export folder will be removed in September 2024 and will no longer be billable.

---

- **ProcessingSource**—a folder for storing files you want to process into your RelativityOne workspace.
- **TenantVM**—a folder to temporarily store Utility Server virtual machine (UVM) workflows. Refer to [Utility Server](#) documentation for more information.

---

**Note:** Starting in September 2024, RelativityOne will be streamlining its staging boundaries to bolster platform security and accelerate the delivery of innovation to your environment. With this change, you will no longer be able to write to or access data outside of the defined staging area folders listed above, and the FTA, Temp, Export, and dtSearch folders will be deprecated. It is strongly recommended that you begin utilizing the ProcessingSource, StructuredData, and ARM folders as soon as possible and be sure to transfer any data you would like to retain access to that is currently housed outside of the designated staging area to an appropriate folder by September 1, 2024. After that date, the folders and data will not be accessible. For more information, see the [Staging FAQ](#) article in Community.

---

## 6.8.1 Copying files and folders

To copy one or more folders or files in Staging Explorer:

1. Click on a listed folder or file in the **Local** or **Staging** pane to select it.

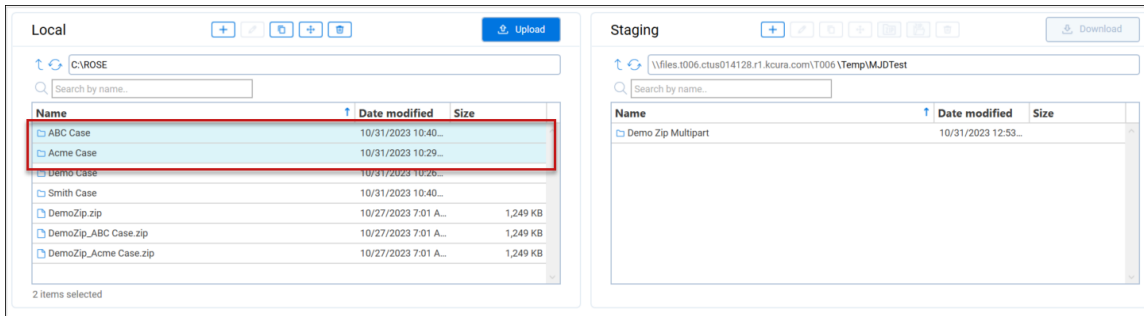
---

**Note:** You can also hold down **CTRL** to select multiple individual folders or files or hold down **SHIFT** to select all the folders or files between the first one you selected and the next.

---

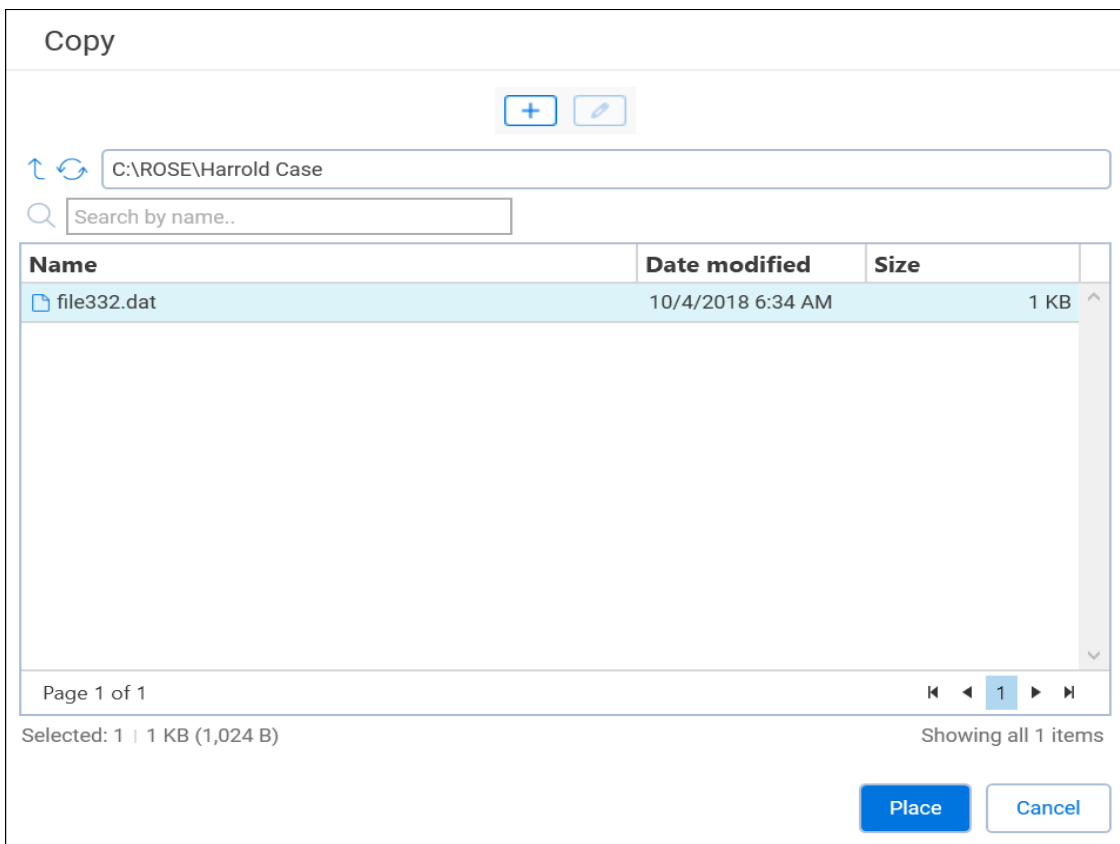
2. Click the **Copy** button in the **Local** or **Staging** pane.

**Note:** The Copy operation overwrites existing files and folders on the destination location. If a file or folder that is being copied exists on the destination location, it will be overwritten. This applies to the Local and Staging panes.



3. In the Copy dialog box, open the destination folder to copy the folder or file.


**Note:** From this dialog, you can create a new folder by clicking the plus button and rename an existing one by clicking the pencil button.



4. Click **Place**.



Monitor the copy progress via the **Progress** and **Status** columns displayed in the File Operations tab.

When the copy is complete, you can click the expand plus  button to view the copy details.





Transfers		File Operations				
Type	Created On	Source	Destination	Progress	Status	Actions
Copy	10/31/2023 10:57:01 AM	C:\ROSE	C:\ROSE\Smith Case\1Gb	<div><div></div></div> 100%	Finished	<div><div></div><div></div></div>
<div><div>Status: Finished</div><div>Duration: 00:00:18</div><div>Started On: 10/31/2023 10:57:01 AM</div><div>Finished On: 10/31/2023 10:57:20 AM</div><div>Job ID: adecb335-4fa4-48e8-927e-42da7343949a</div><div>Copied Data: 4 GB / 4 GB</div><div>Copied Files: 128 / 128</div><div>Path Issues Failed: 0</div></div>						

- **Status**—status of the copy (such as, New, In Queue, Calculating [only for Local pane], In Progress, Finished, Canceled, Failed).
- **Duration**—how long the copy took.
- **Started On**—the date and time the copy started.
- **Finished On**—the date and time the copy completed.
- **Job ID**—unique number of a copy operation.
- **Copied Data**—the size of the data currently copied in reference to the total size of the selected data to be copied. This field only applies to the Local pane.
- **Copied Files**—the number of files currently copied in reference to the total amount of files selected to be copied.

**Note:** When copying items in the Staging pane, the number of Copied Items only represents the number of items (folders and/or files) selected and not the total number of files in the folders copied. For example, if two folders containing 100 files each and one other separate file were selected and copied, the Copied Items value would be 3/3, meaning three items were copied (2 folders + 1 file). It would not indicate 201 files were copied (100 files + 100 files + 1 file). This is not the case when copying items in the Local pane. In that scenario using our example, the Copied Items value would be 201/201, meaning 200 files (from the two folders) and one other file were copied.

- **Path issues**—the number of skipped and/or failed files with the option to save the details.

#### Notes:

-  icon indicates the operation Failed with failed path issues.
-  icon indicates the operation finished with skipped paths, but no failed paths.
- For active operations, if there are any path issues, failed or skipped, the  icon displays. However, if the operation finishes with failed paths, the  icon displays.

## 6.8.2 Moving files and folders

To move one or more folders or files in Staging Explorer:

1. Click on a listed folder or file in the **Local** or **Staging** pane to select it.

---

**Note:** You can also hold down **CTRL** to select multiple individual folders or files or hold down **SHIFT** to select all the folders or files between the first one you selected and the next.

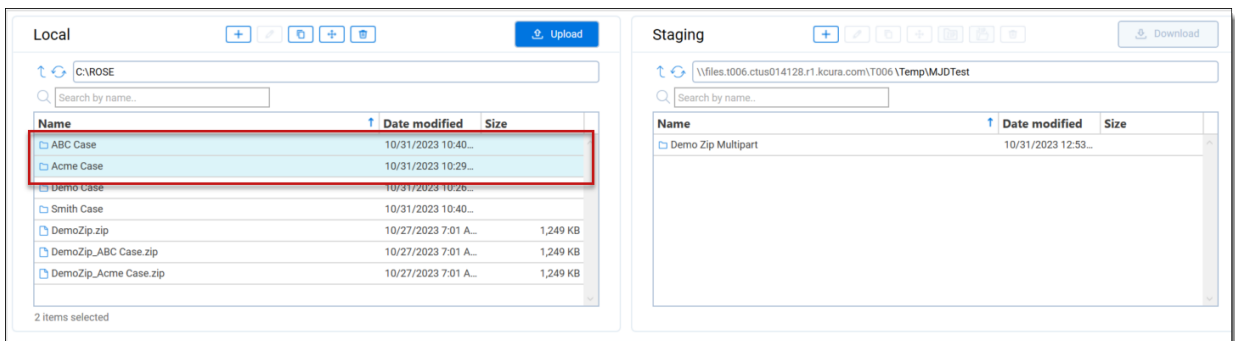
---

2. Click the **Move** button in the **Local** or **Staging** pane.

---

**Note:** For the Local pane, the Move operation overwrites any existing files and folders on the destination location. However, for the Staging pane, the Move operation will fail and not replace any existing files and folders that already exist on the destination location.

---

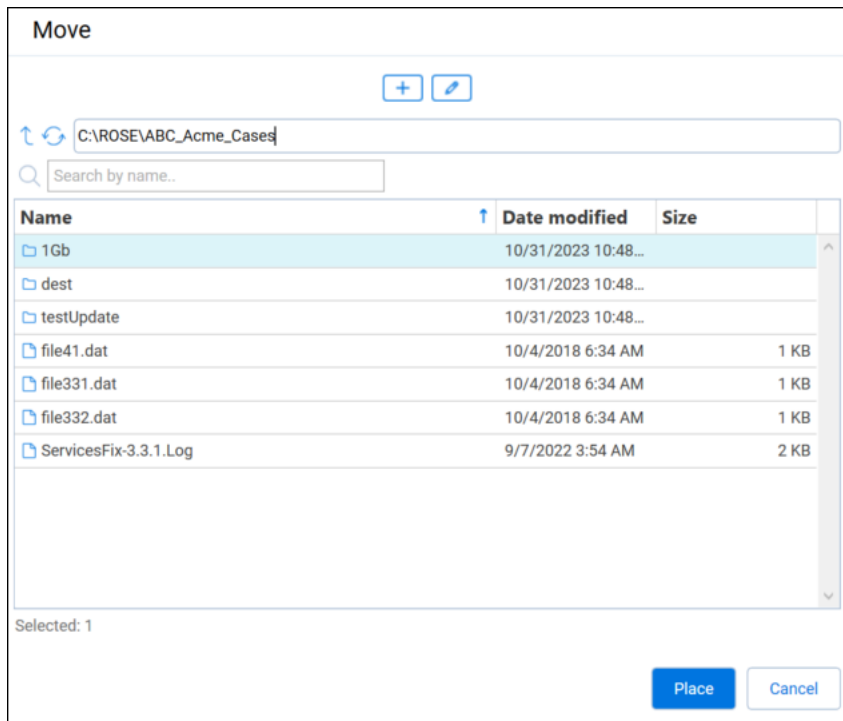


3. On the Move dialog box, open the destination folder to move the folder or file.

---


**Note:** From this dialog, you can create a new folder by clicking the plus button and rename an existing one by clicking the pencil button.

---



4. Click **Place**.

Monitor the move progress via the **Progress** and **Status** columns displayed in the File Operations

tab. When the move is complete, you can click the expand plus  button to view the move details.







- **Status**—status of the move (New, In Queue, Finished, Failed).
- **Duration**—how long the move took.
- **Started On**—the date and time the move started.
- **Finished On**—the date and time the move completed.
- **Job ID**—unique number of a move operation.
- **Moved Data**—the size of the data moved in reference to the total size of the selected data to move. This field only applies to the Local pane.
- **Moved Items**—the number of items currently moved in reference to the total items selected to be moved.

**Note:** When moving items in the Staging pane, the number of Moved Items only represents the number of items (folders and/or files) selected and not the total number of files in the folders moved. For example, if two folders containing 100 files each and one other separate file were selected and moved, the Moved Items value would be 3/3, meaning three items were moved (2 folders + 1 file). It would not indicate 201 files were moved (100 files + 100 files + 1 file). This is not the case when moving items in the Local pane. In that scenario using our example, the Moved Items value would be 201/201, meaning 200 files (from the two folders) and one other file were moved.

- **Path issues**—the number of skipped and/or failed files with the option to save the details.

**Notes:**

-  icon indicates the operation Failed with failed path issues.
-  icon indicates the operation finished with skipped paths, but no failed paths.
- For active operations, if there are any path issues, failed or skipped, the  icon displays. However, if the operation finishes with failed paths, the  icon displays.

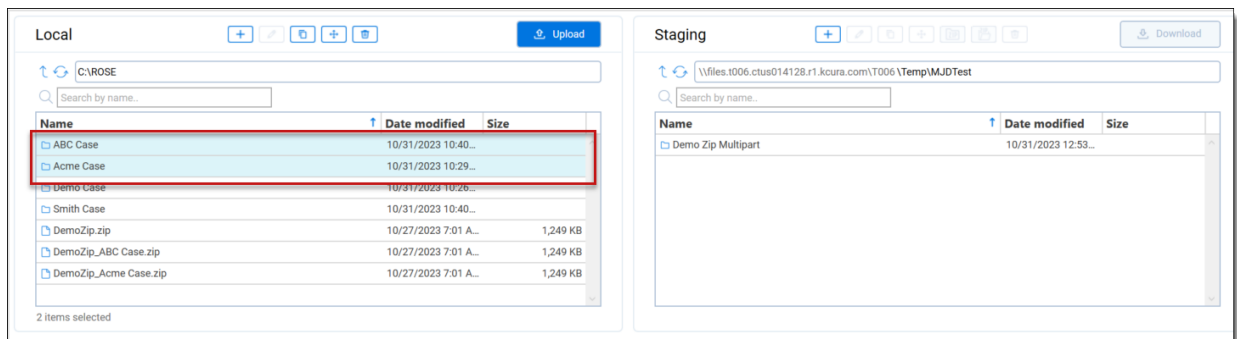
### 6.8.3 Deleting files and folders

To delete one or more folders or files in Staging Explorer:

1. Click on a listed folder or file in the **Local** or **Staging** pane to select it.


**Note:** You can also hold down **CTRL** to select multiple individual folders or files or hold down **SHIFT** to select all the folders or files between the first one you selected and the next.

2. Click the **Delete** button in the **Local** or **Staging** pane.




3. Click **Delete** on the delete confirmation dialog.

Monitor the deletion progress on the **File Operations** tab via the **Progress** and **Status**

columns. When the delete is complete, you can click the expand plus  button to view the

delete details.





Transfers File Operations						
Type	Created On	Source	Destination	Progress	Status	Actions
Delete	10/31/2023 2:23:36 PM	C:\ROSE		<div><div></div></div> 100%	Finished	
Status: Finished						
Duration: 00:00:02						
Started On: 10/31/2023 2:23:36 PM						
Finished On: 10/31/2023 2:23:38 PM						
Job ID: 0cc66b18-cc88-43ed-886e-b259f7ce250b						
Deleted Data: 2 GB / 2 GB						
Deleted Files: 64 / 64						
Path Issues Failed: 0						

- **Status**—status of the delete (Finished or Failed).
- **Duration**—how long the deletion process took to complete.
- **Started On**—the date and time the deletion process started.
- **Finished On**—the date and time the deletion process completed.
- **Job ID**—unique number of the delete operation.
- **Deleted Data**—the size of the data deleted in reference to the total size of the selected data to delete. This field only applies to the Local pane.
- **Deleted Files**—the number of files or folders deleted in reference to the total number of files or folders selected to delete.

**Note:** When deleting items in the Staging pane, the number of Deleted Files only represents the number of items (folders and/or files) selected and not the total number of files in the folders deleted. For example, if two folders containing 100 files each and one other separate file were selected and deleted, the Deleted Files value would be 3/3, meaning three items were deleted (2 folders + 1 file). It would not indicate 201 files were deleted (100 files + 100 files + 1 file). This is not the case when deleting items in the Local pane. In that scenario using our example, the Deleted Files value would be 201/201, meaning 200 files (from the two folders) and one other file were deleted.

- **Path issues**—the number of skipped and/or failed files with the option to save the details.

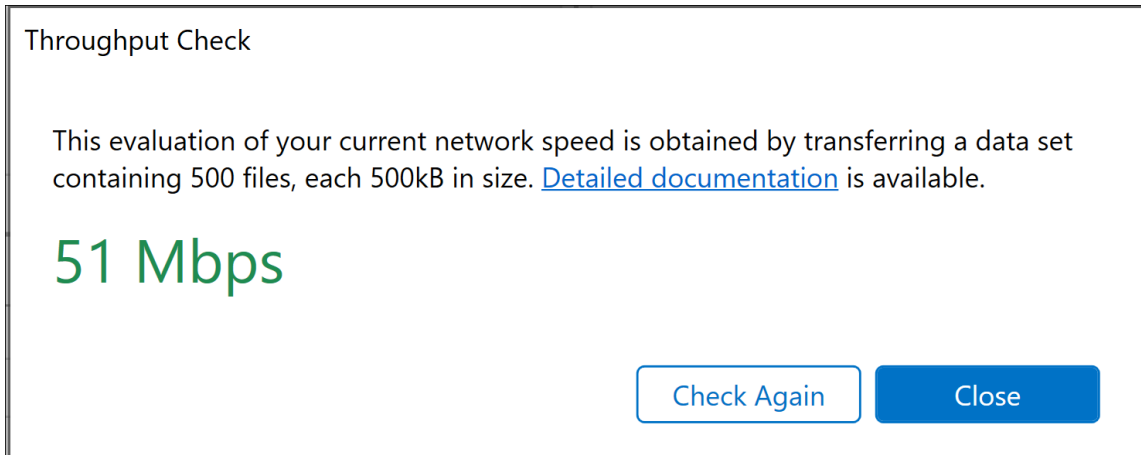
**Notes:**

-  icon indicates the operation Failed with failed path issues.
-  icon indicates the operation finished with skipped paths, but no failed paths.
- For active operations, if there are any path issues, failed or skipped, the  icon displays. However, if the operation finishes with failed paths, the  icon displays.

## 6.9 Requesting a Throughput Check

Throughput Check is used to provide reference transfer throughput based on your current connection.

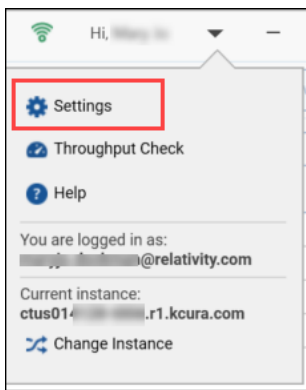
- The Throughput Check runs automatically when users click **Throughput Check** in the user drop-down menu next to your name.
- If applicable, click **Close** to cancel the Throughput Check.
- The Throughput Check performs a sample transfers (upload) of 500 files, each 500kB.
- The Throughput Check test results are shown under Throughput Check summary.
- The green number is your current network's speed available upload to RelativityOne.



## 6.10 Updating Transfer Settings

Complete the following steps to update various transfer settings and apply automatic updates.

1. [Launch the Staging Explorer.](#)
2. Navigate to Settings by clicking the down arrow next to your username, then click **Settings**.



3. On the Settings window, configure the following Transfer Settings fields as needed:

**Settings**

**Transfer Settings**

**Limit Bandwidth** ☐ Better quality of data transmission with lower speed.

**Overwrite Files** ☒ Overwrite files with the same name that already exist in the destination

**Transfer Empty Folders** ☒ Recreate empty directories on the destination

**Maximum Active Transfers** \* 3 ▼

**Transfer Email Notification Recipients**

r...@relativit... ✕ +

**Automatic update**

**Enable Automatic Update** ☒ New versions of RelativityOne Staging Explorer will have to be installed manually if this option is not enabled.

Save Cancel

- **Limit bandwidth**—select this option if your organization has slow internet speeds and there are issues with job transfer stability. By default, this option is not selected.

Some organizations may have slow internet speeds and experience issues with file transfer stability causing transfers to fail due to connection timeouts. In this situation, it may be necessary to limit bandwidth so that it's shared with Staging Explorer transfers and other business activities to improve the efficiency and stability of file transfers. When Limit bandwidth is enabled, transfers will be slower, but more stable.

- **Overwrite Files**—select this option to overwrite files that have the same name in the destination folder or leave it blank to not overwrite same name folders. This option is selected by default.
- **Transfer Empty Folder**—select this option to recreate corresponding empty folders in the destination folder that may exist in the source folder or leave it blank to ignore empty folders and not copy them to the destination folder. This option is selected by default.
- **Maximum Active Transfers**—select from the drop-down list the number of active transfer jobs permitted to run at the same time. The default value is 1 and maximum value is 3.
- **Transfer Email Notification Recipients**—if applicable, enter the default email addresses in the field. Email notifications will only be sent to recipients when a transfer job finishes or fails.

---

**Notes:**


- This field will only be visible to users who have the Send Email Notification [permission](#) on.
  - When opening Staging Explorer for the very first time, the user's email address from the current instance will be inserted into the **Transfer Email Notification Recipients** field by default.
- 

4. Optionally, select **Enable Automatic Update** to automatically permit Staging Explorer to update to the newest version when it's available.
5. Click **Save**.

## 6.11 Calculating folder size in Local/Staging panes



To calculate the size of a folder in the **Local** or **Staging** panes, complete the following steps:

1. [Launch the Staging Explorer](#).
2. Select and open the drive that contains the folders for which you want to calculate size.
3. Hover over the folder you want to calculate and click the **Calculate**  (binoculars) button that displays under the Size column. The **Calculating...** status displays briefly under the Size column during calculation. When finished, the size of the folder displays in that column. Click the binoculars icon again to recalculate the column, if needed. More detailed information about the calculated folder, size, number of folders, and files displays at the bottom of the pane.

---

**Notes:**

- You can hold down **CTRL** to select multiple individual folders or **SHIFT** to select all the folders between the first one you selected and the next. With the folders selected, you can click any of their binocular icons to begin the calculation.
  - Calculated data is not persistent. When you change the directory or refresh it, all calculated size data is lost, and you will have to use the Calculate button again to view the data.
-



Local

+

+

Upload

↶ ↷

C:\ROSE

🔍

Search by name..

Name	Date modified	Size
ABC Case	10/31/2023 2:23 PM	
Acme Case	12/18/2023 12:03 PM	1,050,137 KB
Demo Case	10/31/2023 10:26 AM	1,050,137 KB
Harrold Case	12/14/2023 2:42 PM	
Smith Case	3/15/2024 10:22 AM	5,249,127 KB
Acme_Case.zip	10/27/2023 7:01 AM	1,249 KB
DemoZip_ABC Case.zip	10/27/2023 7:01 AM	1,249 KB

Page 1 of 1

⏪ ⏩ 1 ⏪ ⏩

Showing all 10 items

## 7 Relativity Desktop Client

**Note:** Relativity ended support for and access to the Relativity Desktop Client (RDC) for RelativityOne commercial customers on December 31, 2023. Import/Export is being used for all importing and exporting workflows.

For RelativityOne Government customers, beginning March 31, 2024, RDC will only operate in web transfer mode, which will result in significantly slower transfer speeds. It is highly recommended that Government customers begin using Import/Export in RelativityOne as soon as possible to prepare for the deprecation of RDC on June 30, 2024. Starting July 1, 2024, RDC will no longer be operational. See the Community article [RDC Deprecation FAQ](#) for additional information.

The Relativity Desktop Client (RDC) provides the functionality for importing document load, image, and production files, as well as for exporting production sets, saved searches, and folders. You can also use this utility to import and export object data.

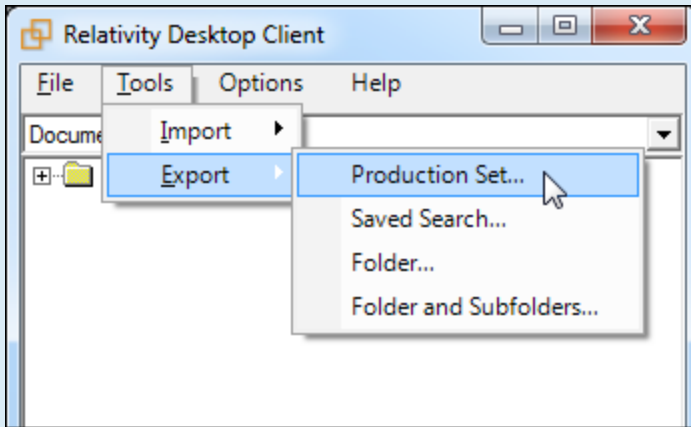
**Note:** After documents are imported using Relativity Desktop Client, you can automate creating a dtSearch index or run a search terms report with those documents using Automated Workflows.

### Using the RDC

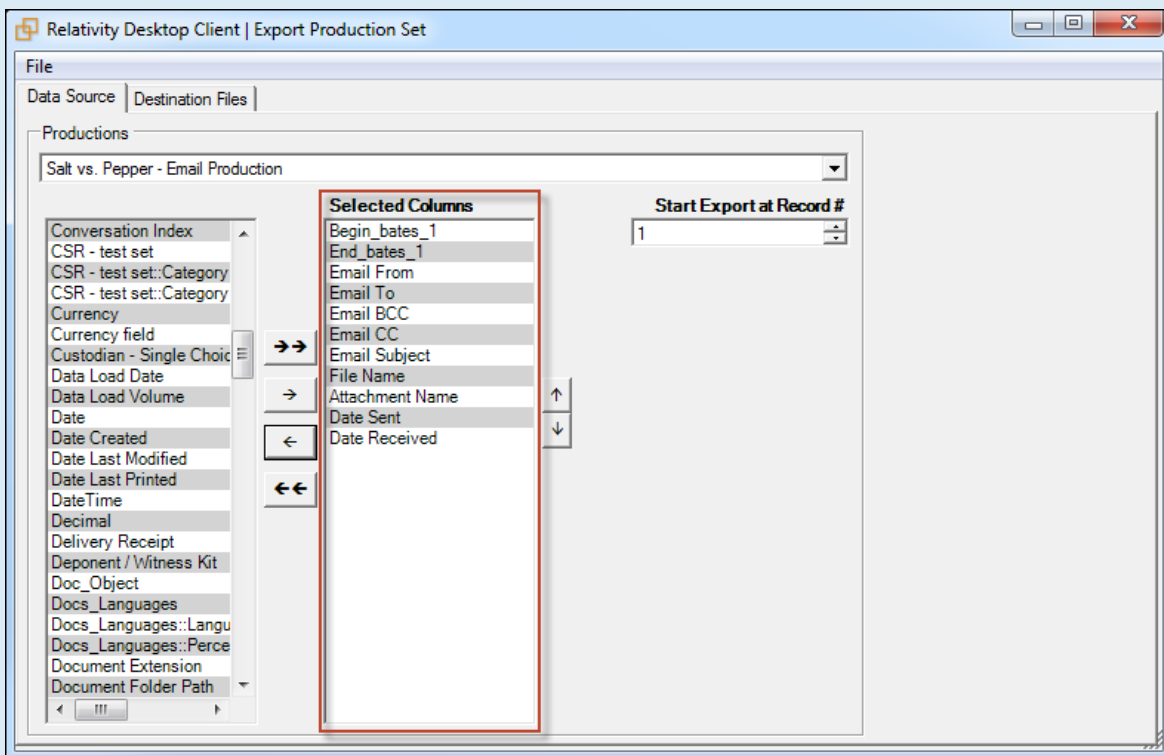
As a litigation support specialist, you need to export a production of email files for the opposing counsel in the Salt vs. Pepper case. You created a production set named "Salt vs. Pepper - Email Production" and ran your production, and now you need to export the production using the RDC. So, you open the RelativityDesktop Client and log in to your Relativity environment.

The screenshot shows the Relativity Desktop Client login screen. It consists of two side-by-side panels. The left panel has the 'Relativity one' logo at the top, followed by a 'Username' label and a text input field containing 'jsmith@example.com'. Below the input field is a blue 'Continue' button and a link that says 'Forgot your password?'. The right panel also has the 'Relativity one' logo, followed by a 'Password' label and a password input field with masked characters. Below the input field is a blue 'Login' button and a link that says 'Forgot your password?'. A red arrow points from the 'Continue' button on the left to the password input field on the right.

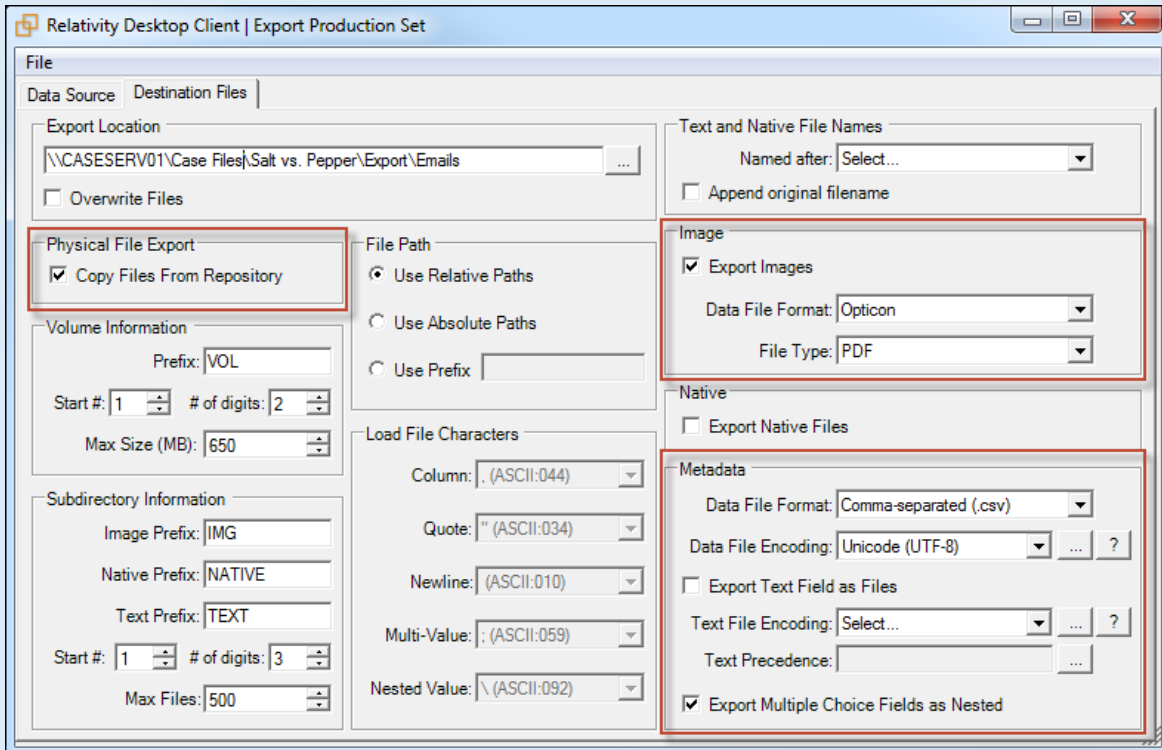
You select and open the Salt vs. Pepper case and then click **Production Set...** on the **Export** menu to open the production export options.



Since this production set consists only of email messages, you include your Bates numbering and email metadata fields in the exported metadata.



The case production format requirements you need to comply with include PDF images with an Opticon data file format and a .csv data file format with Unicode (UTF-8) encoding. On the **Destination Files** tab, you select the required format options and also select to copy the files from the repository to copy the exported emails to your export network directory.



After selecting your options, you're ready to click **Run** on the **File** menu to complete the production export to be able to send the Salt vs. Pepper emails as PDF images with the required data files to the opposing counsel.

## 7.1 RDC menu bar

The RDC menu bar appears above the workspace folder structure. It includes the following menu options:

### File:

- **Open**—switches between different workspaces.
- **Exit**—closes the RDC.
- **Refresh**—updates the folder browser.

### Tools - Import:

- **Image File**—imports images from a page-level load file.
- **Document Load File**—imports native files, document metadata, and extracted text from a document-level load file.
- **Production Load File**—imports productions from a page-level load file.

### Tools - Export:

- **Production Set**—exports production sets.
- **Saved Search**—exports from saved searches.
- **Folder**—exports from a specific folders.
- **Folder and Subfolders**—exports from a specific folder and its subfolders.

#### Options:

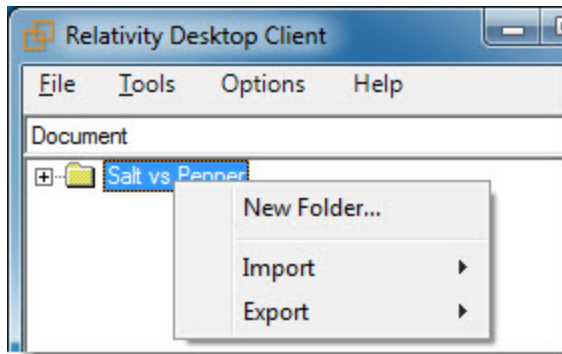
- **Settings**—changes the default value for Force Folder Preview and enter a WebService URL.
- **Check Connectivity**—assists with troubleshooting network and system configuration errors that occurred while importing and exporting.

#### Help:

- **About**—displays the version of the RDC.
- **Help**—opens the Relativity Desktop Client documentation in your internet browser.

## 7.2 Workspace folder options

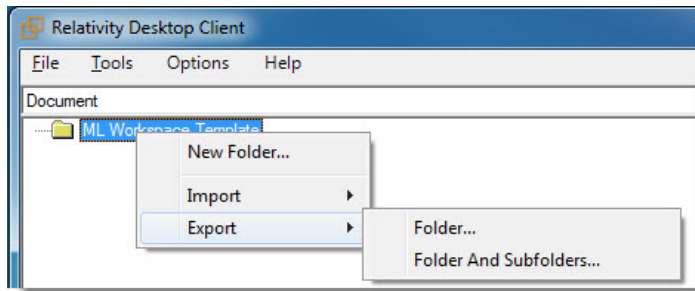
The RDC provides right-click options on folders, which you can use to build the workspace folder structure, or to import or export directly to and from a folder.



When you right-click on a workspace or folder, the following menu options display:

- **New Folder**—create subfolders. In the Add New Folder pop-up, enter a folder name, and then click **OK**. The maximum length for the folder name is 255 characters. Since the folder name is a system field, once you create it, you can not edit it. The new folder is added to the workspace through the RDC.
- **Import**—import an image file, document load file, or production file into a specific folder. Highlight the folder, point to **Import**, and select a file type. If you have metadata, natives and images to load, run the load file import first, then the image file import. See Importing through the RDC.

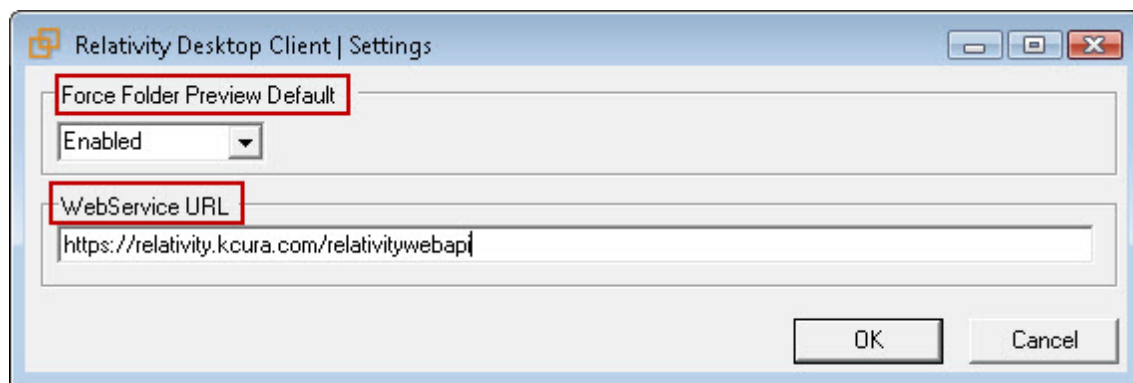
- **Export**—export a specific folder, or a folder and its subfolders.



## 7.3 Starting the RDC

To open the RDC:

1. Double-click on the shortcut installed on your desktop. The Settings dialog box appears when you open the application for first time.

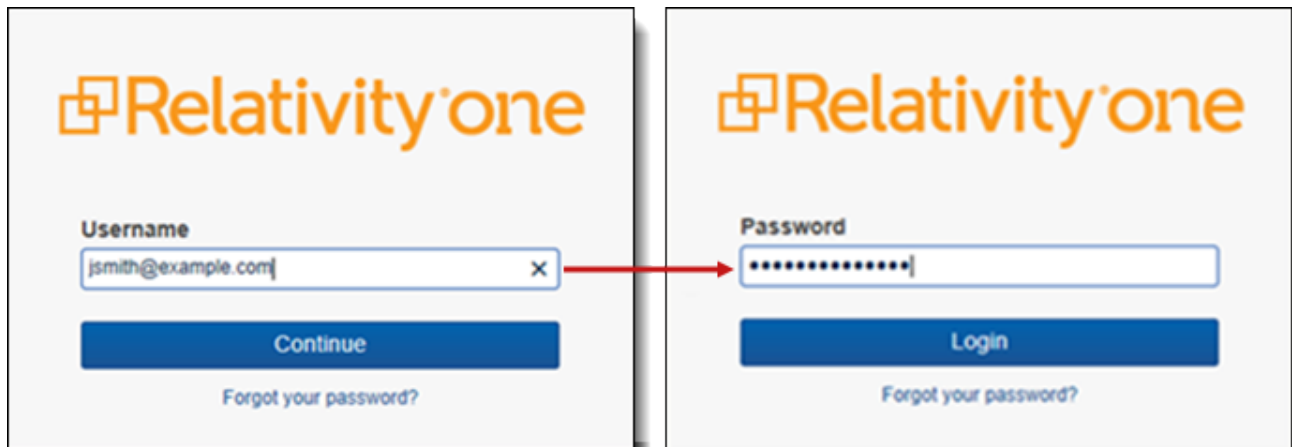


2. Select or enter settings for the following options:
  - **Force Folder Preview Default**—options to enable or disable this feature. When enabled, the RDC checks the first 1000 records of the load file after you click **Import**. It then displays the number of folders soon to be created. You can use this information to ensure that the load process is behaving as expected. If a large number of folders are listed, you can stop the load file, and verify that the **Folder Info** field is set correctly. By default, this feature is **Enabled**. See [Importing through the RDC](#).
  - **WebService URL**—enter the URL provided by your system admin. This URL is used to establish a connection between the RDC and your server. If the URL path is entered incorrectly, you are unable to connect the RDC to your database.  
The **WebService URL** has the format `http or https://<MyServiceName>/RelativityWebAPI/`. When you display a Relativity page, you see the web service name listed in the address bar on the browser. For example, if the address bar displayed `https://smith.com/Relativity`, then your web service URL would be `https://smith.com/ RelativityWebAPI/`. In addition, you can confirm this URL with your system admin.
3. Click **OK**. These settings are stored in your machine registry and they are retained when you upgrade the RDC.

## 7.4 Logging on to the RDC

Enter your **Username** and click **Continue**. Next, enter your **Password** and click **Login**. These are the same credentials you use to log in to Relativity. If the server certificate is untrusted, you can allow using untrusted certificate or close the RDC. Additionally, if you have difficulty displaying the login dialog, verify that Relativity is a trusted site in your browser.

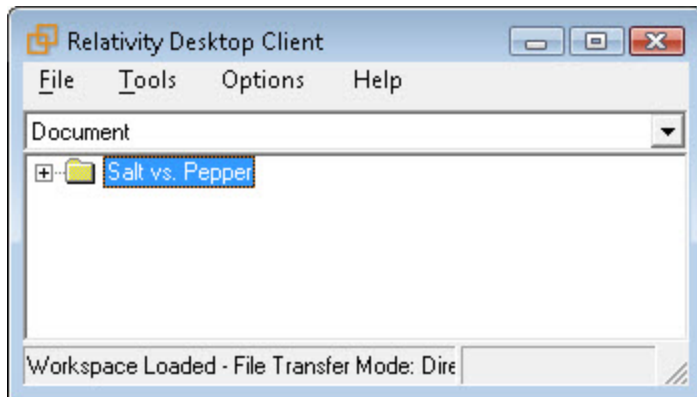
**Note:** Users log in to the Relativity Desktop Client (RDC) with the same provider method as they have with Relativity. The RDC supports most Relativity authentication providers, such as password, Integrated Authentication, and OpenID Connect, by displaying the Relativity login page within the RDC as a dialog window. The only provider that doesn't work with the RDC is SAML because the Relativity's IdP-initiated SAML doesn't display the Relativity login page directly.



After you log in, the RDC displays a list of workspaces where you have access rights. Use the filter bar to narrow the list.

**Note:** By default, Relativity uses a wildcard to filter workspaces in the RDC. For example, enter ELA to find workspaces named ELAN and Relativity.

Highlight your workspace and click **OK** to open it in the RDC. The folder structure of your workspace displays. A new workspace contains only a root folder, while an existing workspace may contain subfolders that you can display by clicking the plus sign.



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**Note:** In Relativity Desktop Client, Document is selected by default as the type of object for data import or export. You can also select other object types, including Relativity Dynamic Objects.

---

## 7.5 RDC OAuth2 client

The RDC uses the OAuth 2.0 authorization framework for verifying your login credentials. The OAuth 2 client offers increased security, because it uses an access token that is valid for only three days. After the token expires, you must log in to the RDC again. Any jobs currently in progress fail when the token expires. For general information about using OAuth2 in Relativity, see OAuth2 clients in the Relativity Admin guide.

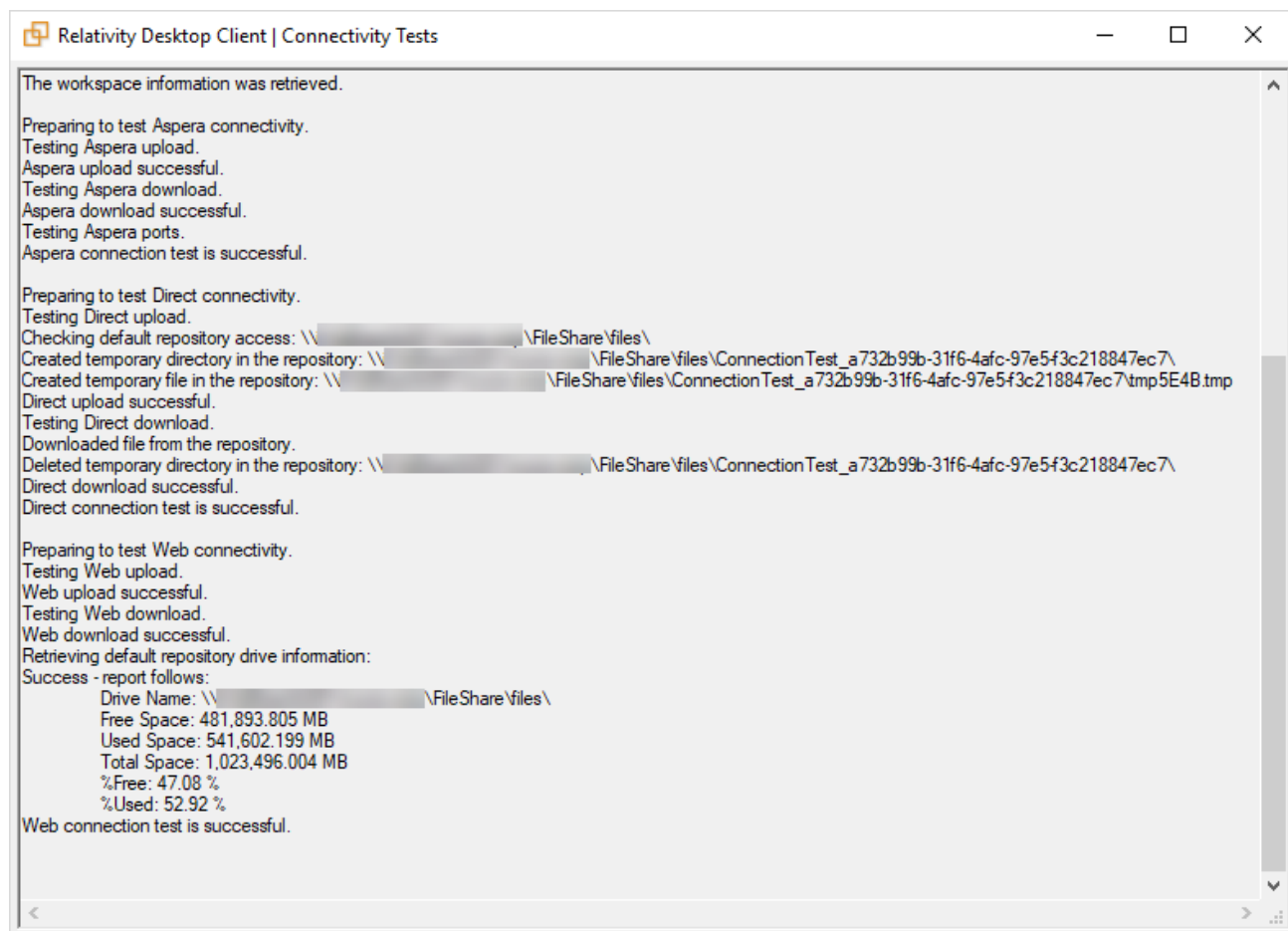
## 7.6 RDC transfer modes

RDC supports the following data transfer modes:

- **Direct**—uses the file share client. Direct mode provides the fastest transfer speed. Note the following details:
  - Direct mode uses the windows Active Directory account and has direct access to write to the file repository or the BCPPPath. This bypasses the need to go through the web server in order to ingest the data, saving a significant amount of time.
  - There are two direct modes to be aware of:
    - **Direct Mode for native files**—requires read/write access on the workspace file repository, so that native/image import/export is direct to the share.
    - **Direct Mode for file metadata**—requires Read/Write access on the BCPPPath for metadata. Document metadata passes through the BCPPPath, not native files.
- **Web**—uses the HTTP client. Because of the limitations of the HTTP protocol and varying network bandwidth, it is the slowest. Note the following details:
  - When you do not have read/write permissions to the BCPPPath, Relativity must authenticate via the web server.
  - When you do not have read/write permissions to the workspace file repository, Relativity must authenticate via the web server.
  - When loading through web mode, you can see a drastic performance reduction and an even greater reduction compared to direct mode. Web mode is the slowest method of all, it does, however, work without direct access to the BCPPPath.

When you select a Relativity workspace, the RDC queries the workspace and performs tests to determine the optimal transfer mode. You can see the details of the tests under **Options > Check Connectivity**:



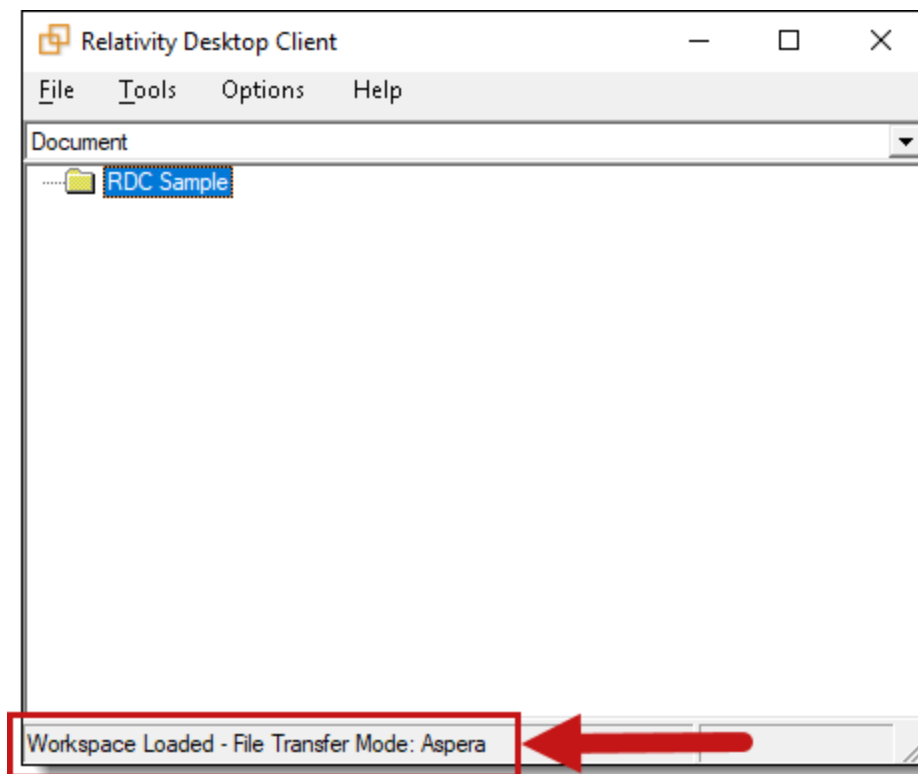


The RDC then automatically selects the optimal available mode for the transfer job.

---

**Note:** You can select more than one mode for the transfer job based on your configuration. The fastest mode will be displayed first.

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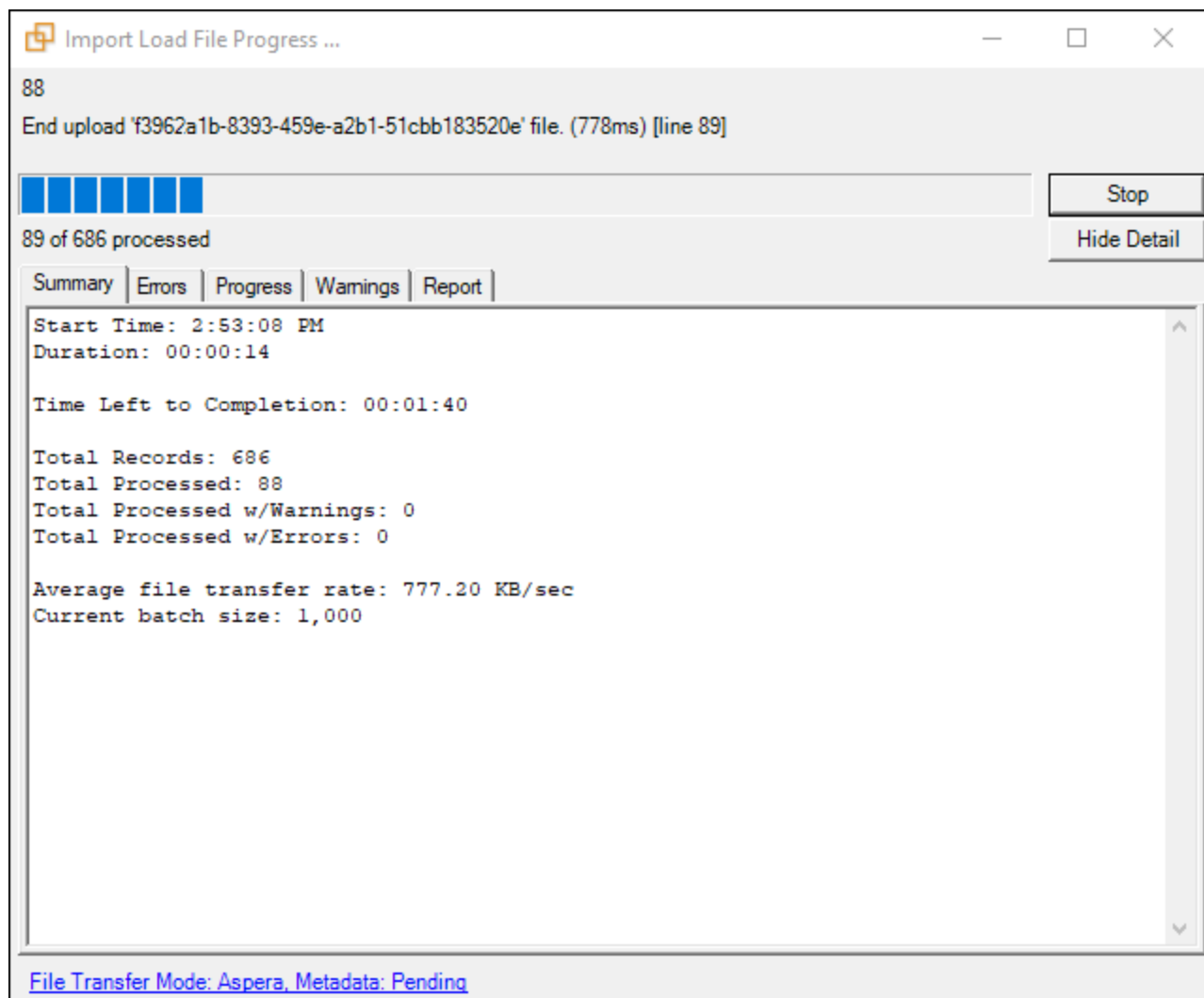


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**Note:** The mode initially selected based on the tests for the workspace may not be used in the actual transfer, for example due to a connection problem. If a problem occurs, RDC falls back to a different mode or displays an error.

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The transfer mode also displays on the RDC progress window.



You can also force the RDC to use a specific mode.

#### 7.6.0.1 Transfer Mode Statuses

The following statuses may display during the transfer:

- **Pending**—displays when transfer mode is not yet determined.
- **Disabled**—displays when File Repository Preference is set to not copy files.

### 7.6.1 Direct mode

Direct mode provides faster performance, but it requires a connection to the network hosting the data, as well as specific Windows group permissions. Direct mode has direct access to write to the file repository, which bypasses the need to go through the web server in order to ingest the data, saving a significant amount of time.

Direct mode can only be used on the Utility Server.

## 7.7 Importing through the RDC

**Note:** Relativity ended support for and access to the Relativity Desktop Client (RDC) for RelativityOne commercial customers on December 31, 2023. Import/Export is being used for all importing and exporting workflows.

For RelativityOne Government customers, beginning March 31, 2024, RDC will only operate in web transfer mode, which will result in significantly slower transfer speeds. It is highly recommended that Government customers begin using Import/Export in RelativityOne as soon as possible to prepare for the deprecation of RDC on June 30, 2024. Starting July 1, 2024, RDC will no longer be operational. See the Community article [RDC Deprecation FAQ](#) for additional information.

You can import document load files, as well as image and production files, through the Relativity Desktop Client (RDC). You need to install the RDC on your computer before you can perform an import.

**Note:** You must be logged in to a Relativity environment in order to successfully import files.

You may also use the Windows Command Line to import documents into Relativity. With the Windows Command Line you can automate document importing along with other parts of your processing and integration process. See the Command Line Import guide.

You can also use **RelativityOne Staging Explorer** in RelativityOne to import files to RelativityOne workspaces you have that are set up. This is a common way of importing files to and from RelativityOne.

### 7.7.1 Importing RDC Permissions

The following permissions are required to use the importing feature in Relativity Desktop Client:

Object Security	Tab Visibility	Admin Operations
■ Document: View, Add, Edit	■ Documents	■ Allow Import

**Note:** Changing root folder permissions during import is not a supported workflow.

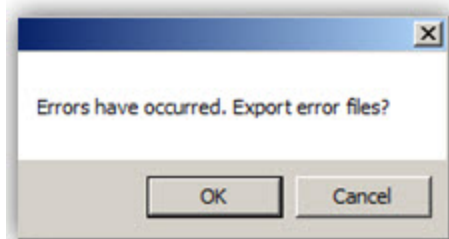
### 7.7.2 Importing multiple load files simultaneously

You can safely import multiple load files into the same workspace simultaneously. For best results, use multiple machines and one active instance of the RDC per machine.

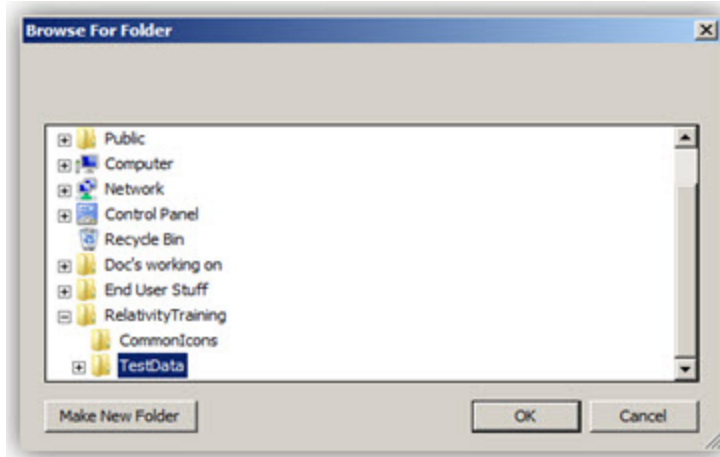
**Note:** We recommend limiting this to four concurrent imports at a time into one workspace.

### 7.7.3 Handling errors

Relativity skips any records with errors that it encounters during the load process. It warns you about any errors that were encountered after all the correct records have loaded.



When you click **OK** in the error warning box, Relativity creates a new document-level load file with only the erroneous records. This file lists all the errors that occurred during the load process. You are prompted to save these records to prevent any loss of data. Choose a path to save your error file and click **OK**.



After you have saved your error file, you can make any necessary corrections to those records, and then perform an **Append Load**. A record of these errors is also available in the Errors tab, referencing the workspace name and Artifact ID.

#### 7.7.4 Saving import settings

You can save the settings used to import a load file. This option is helpful if you frequently work with your own internal processing tools or with the same processing vendor. To save your import settings, point to the **File** menu, and then click **Save Import Settings**. Choose a location for the document load file (.kwe).

---

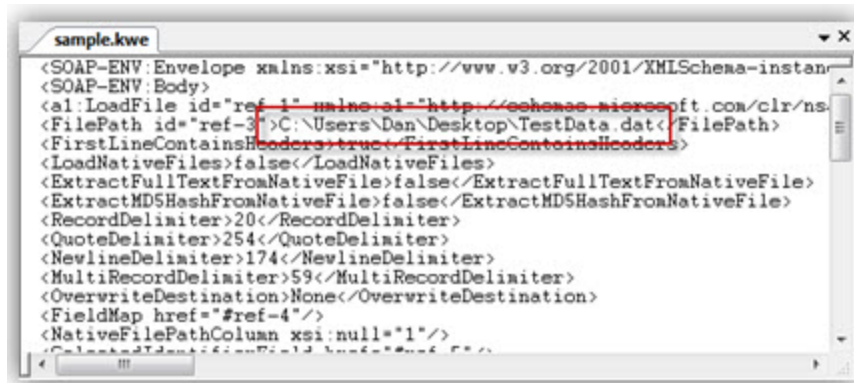
**Note:** .kwe stands for kCura Win Edds.

The settings for the selected destination path and for copying files to a repository aren't saved in the .kwe file.

---

When you have an identically formatted load file, you can use your saved .kwe. In the RDC, open the .kwe file, and select the file being loaded.

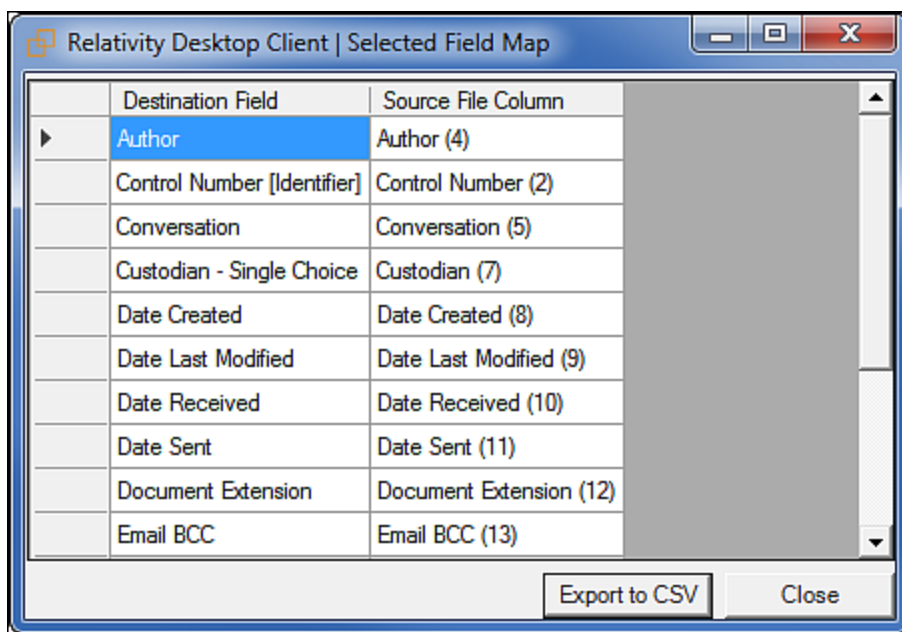
You can also update the path in the .kwe file. The following illustration displays the text of a .kwe file. The fourth line contains an absolute path to the document-level load file to be loaded. Update this section to point to your new load file. After you have updated your .kwe file, select **File** and **Load Import Settings**. Test for any errors, and then load the file.



#### 7.7.4.1 Saving a field map

You can save the field mapping used to import a load file. The field map is exported as a CSV file that saves the mapping of the Relativity fields to those in the dat file being imported. You can save or view your field map from the Field Map tab or from the File menu in the Import Document Load File window. To save your field map:

1. From the Import Document Load File window, click **View/Save Field Map**. The Selected Field Map window opens.
2. Click **Export to CSV**.



**Note:** When importing a CSV file with currencies, the formatted column must be Number.

#### 7.7.5 Viewing audit information for an import

After you import your file, the RDC records and audits this instance in the History tab. Click **Import** to display the settings used for the import. To view the transfer rate of the load file, add the **Execution Time** field to the

view, if necessary.

## 7.7.6 Load file specifications

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**Note:** Relativity ended support for and access to the Relativity Desktop Client (RDC) for RelativityOne commercial customers on December 31, 2023. Import/Export is being used for all importing and exporting workflows.

For RelativityOne Government customers, beginning March 31, 2024, RDC will only operate in web transfer mode, which will result in significantly slower transfer speeds. It is highly recommended that Government customers begin using Import/Export in RelativityOne as soon as possible to prepare for the deprecation of RDC on June 30, 2024. Starting July 1, 2024, RDC will no longer be operational. See the Community article [RDC Deprecation FAQ](#) for additional information.

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Using load files, Relativity can load the following types of files:

- [Metadata, extracted text, and native files](#)
- [Image and extracted text files](#)
- [Processed data](#)

These sections detail the load file requirements for the respective file types.

### 7.7.6.1 Metadata, extracted text, and native files

Relativity uses a flat, document-level load file to load metadata, document level extracted text, and natives files. Each line should represent one document.

#### Supported file types

Relativity accepts only the following load file types:

- .dat
- .csv
- .txt

#### Encoding

The Relativity Desktop Client (RDC) attempts to determine the encoding of a file, by default, when a load file is first selected. To do this, the RDC checks the byte order mark at the beginning of the file. If there is no byte order mark, it cannot determine the encoding type. The types of byte order marks include:

- Unicode (UTF16)
- Big-Endian Unicode
- UTF8

Everything else is considered undetectable by the RDC and uses the default encoding chosen for the load file or stand-alone extracted text file.

A variety of load file encoding options are supported, including:

- Western European (Windows)
- Unicode

- Unicode (Big-Endian)
- Unicode (UTF-7)
- Unicode (UTF-8)
- Other options, based on your SQL sever

### Header row

Relativity doesn't require load file header rows. However, they are strongly recommended to ensure accuracy.

The field names in your header don't need to match the field names in your workspace.

### Fields

Relativity doesn't require any specific load file field order. You can create any number of workspace fields to store metadata or coding. During the load process, you can match your load file fields to the fields in your workspace.

The identifier field is required for each load.

When loading new records, this is your workspace identifier.

When performing an overlay, you can use the workspace identifier or select another field as the identifier. This is useful when overlaying production data. For example, you could use the Bates number field rather than the document identifier in the workspace.

All fields except Identifier are optional; however, you may find some of the following system fields beneficial.

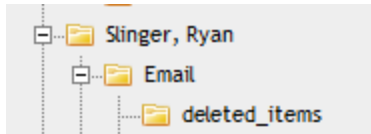
1. **Identifier** – the unique identifier of the record
2. **Group Identifier** – the identifier of a document's family group
  - The group identifier repeats for all records in the group.
  - Usually, this is the document identifier of the group's parent document. For example:
    - If an email with the document identifier of AS00001 has several attachments, the email and its attachments have a group identifier of AS00001.
  - If a group identifier for a record is not set, the document identifier populates the group identifier field in the case. This effectively creates a "group" of one document.
3. **MD5 Hash** – the duplicate hash value of the record
  - You can enter any type of hash value (and rename the field in your case).
  - If documents share the same hash value, Relativity identifies the documents as a duplicate group.
  - If a hash field for a record is not set, the document identifier populates the hash field in the case. This effectively creates a "group" of one document.
4. **Extracted Text** – The text of the document. Either the OCR or Full Text.
  - The extracted text appears in the viewer and is added to search indexes. This field can contain either:



- The actual OCR or Full Text
  - The path to a document level text file containing the OCR or Full Text. Both relative and absolute paths are supported (use Windows-style formatting containing backslashes "\").
5. **Native File Path** – the path to any native files you would like to load. Both relative and absolute paths are supported.
6. **Folder Info** – builds the folder browser structure for the documents.
- This field is backslash “\” delimited.
  - If not set, the documents load to the root of the case.
  - Each entry between backslashes is a folder in the Relativity folder browser.
  - Each backslash indicates a new subfolder in the browser.

---

**Note:** For example, if the load file contained the following entry in the folder info field:  
“Slinger, Ryan\Email\deleted\_items”  
Relativity would build the following folder structure:



Each document with the above entry would be stored in the “deleted\_items” folder.

---

7. **Relativity Native Time Zone Offset** - Relativity’s native viewer technology displays all email header dates and times in GMT. This numeric field offsets how email header dates and times appear in the viewer.
- If the value in this field is blank, or 0, for a document, then the email header date and time appears in GMT.
  - You can enter a whole number in this field – positive or negative – to offset the time from GMT to the local time zone of the document.
    - For example, if the document was collected from US CDT time, enter “-5” in the field, because the CDT offset from GMT is -5.
  - This ONLY applies when viewing email header dates and times in the Relativity Native File Viewer. Your metadata fields display as imported.

#### Accepted date formats

Relativity accepts date and time as one field. For example, Date Sent and Time Sent should be one field. If date sent and time sent ship separately, you must create a new field for time. You can format date fields to accept the date without the time, but not the time without the date. Dates can't have a zero value. Format dates in a standard date format such as “6/30/2017 1:23 PM” or “6/30/2017 13:23”.

---

**Note:** When you import data using a load file with a date format that differs from the format used on your local machine, Relativity follows the locale setting of your local machine to determine how it interprets what is in the load file.

---

The table below lists the date formats recognized by the Relativity Desktop Client and the Import API. It contains both valid and invalid date formats:

Entry in Load File	Object Type	Definition
12/31/9999	12/31/9999 0:00	
Monday January 4 2018	1/4/2018 0:00	
05/28/2016 7:11 AM	05/28/2016 7:11 AM	
5:08:40 PM	6/30/2019 17:08	The current date will be entered if the date is missing. For this example, assume the import was done on 6/30/2019.
17:08:33	6/30/2019 17:08	The current date will be entered if the date is missing. For this example, assume the import was done on 6/30/2019.
17:08	6/30/2019 17:08	The current date will be entered if the date is missing. For this example, assume the import was done on 6/30/2019.
5:08 PM	6/30/2019 17:08	The current date will be entered if the date is missing. For this example, assume the import was done on 6/30/2019.
14-Apr	4/14/2019 0:00	The current year will be entered if the year is missing.
9-Apr	4/9/2019 0:00	The current year will be entered if the year is missing.
14-Mar	3/14/2019 0:00	The current year will be entered if the year is missing.
1-Mar	3/1/2019 0:00	The current year will be entered if the year is missing.
22-Feb	2/22/2019 0:00	The current year will be entered if the year is missing.
20180420	4/20/2018 0:00	
20180420 2:22:00 AM	4/20/2018 0:00	
4/9/2018 16:13	4/9/2018 16:13	
4/9/2018 8:49	4/9/2018 8:49	
9-Apr-18	4/9/2018 0:00	
Apr. 9, 18	4/9/2018	

Entry in Load File	Object Type	Definition
	0:00	
4.9.2018	4/9/2018 0:00	
4.9.18	4/9/2018 0:00	
4/9/2018	4/9/2018 0:00	
4;9;2018	4/9/2018 0:00	
Wednesday, 09 April 2018	4/9/2018 0:00	
12-31-1753	12/31/1753 12:00 AM	
2014-11- 28T17:45:39.744- 08:00	11/28/2014 0:00	
4/9/18 13:30 PM		Results in an error
2018-044-09		Results in an error
4/9/2018 10:22:00 a.m.		Results in an error
00/00/0000		Results in an error unless the CreateErrorForInvalidDate value is set to false in the Relativity.Desktop.Client.exe.config file.

In addition, Relativity takes into account the regional settings of the SQL Server where the database resides. For example, you may have an SQL Server residing in the UK that uses the date format DD/MM/YYYY, such as 4/9/2011. When you access a workspace on a PC with UK regional settings, the date appears as 4/9/2011. When you access the same workspace on a PC with US regional settings, the date appears as 9/4/2011.

### Delimiters

During import, you can designate which delimiters are used in your load file. You can select each delimiter from the ASCII characters, 001 – 255.

The delimiter characters have the following functions:

- **Column** – separates load file columns
- **Quote** – marks the beginning and end of each load file field (also known as a text qualifier)
- **Newline** – marks the end of a line in any extracted or long text field
- **Multi-value** – separates distinct values in a column. This delimiter is only used when importing into a Relativity multi-choice field.

- **Nested-values** – denotes the hierarchy of a choice. This delimiter is only used when importing into a Relativity multi-choice field.  
For example, say a load file contained the following entry, and was being imported into a multi-choice field: “Hot\Really Hot\Super Hot; Look at Later”  
With the multi-value delimiter set as “;” and the nested value delimiter set as “\”, the choices would appear in Relativity as:

☒ Hot

☒ Really Hot

☒ Super Hot

☐ en fuego

☐ 정

☐ 박사 (Med Expert)

☒ Look at Later

All checkboxes are automatically selected under each nested value. The full path to each multi-choice element is required.

For example:

DocID	New Privilege
NZ997.001.00000048	04. Redact;01. Yes\b. Solicitor/Client;

appears as:

Privilege: ☒ 01. Yes

☐ a. Litigation

☒ b. Solicitor/Client

☐ c. Without Prejudice

☐ 02. No

☐ 03. Discuss

☒ 04. Redact

Manage

To select "01. Yes/a. Litigation" add it to the record after ";".

### Default delimiters

If you generate your own load files, you may choose to use Relativity's defaults:

- **Column** - Unicode 020 (ASCII 020 in the application)
- **Quote** - Unicode 254 (ASCII 254 in the application)
- **Newline** - Unicode 174 (ASCII 174 in the application)
- **Multi-Value** - Unicode 059 (ASCII 059 in the application)
- **Nested Values** - Unicode 092 (ASCII 092 in the application)

### 7.7.6.2 Image and extracted text files

For image imports, Relativity requires Opticon load files with ANSI/Western European encoding. This .opt text file references the Control ID on a page level. The first page should match up to any data you intend to load. You can use this same process for importing page-level extracted text.

Relativity does not support Unicode .opt files for image imports. When you have a Unicode .opt file, you must resave this file in ANSI/Western European encoding.

You must convert images in unsupported formats using a third-party conversion tool before Relativity can successfully upload them.

#### Supported image file types

Relativity accepts only the following file types for image loads:

- Single page, Group IV TIFs (1 bit, B&W)
- Single page JPGs

Multi page TIFs and PDFs can be imported into the system, but you must load them as native files.

#### Load file format

The Opticon load file is a page level load file, with each line representing one image.

Below is a sample:

```
REL00001,REL01,D:\IMAGES\001\REL00001.TIF,Y,,,3
REL00002,REL01,D:\IMAGES\001\REL00002.TIF,,,,
REL00003,REL01,D:\IMAGES\001\REL00003.TIF,,,,
REL00004,REL01,D:\IMAGES\001\REL00004.TIF,Y,,,2
REL00005,REL01,D:\IMAGES\001\REL00005.TIF,,,,
```

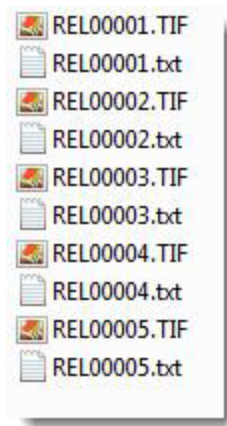
The fields are, from left to right:

- Field One – (REL00001) – the page identifier
- Field Two – (REL01) – the volume identifier is not required.
- Field Three – (D:\IMAGES\001\REL00001.TIF) – a path to the image to be loaded
- Field Four – (Y) – Document marker – a “Y” indicates the start of a unique document.
- Field Five – (blank) – can be used to indicate folder
- Field Six – (blank) – can be used to indicate box
- Field Seven – (3) – often used to store page count, but unused in Relativity

#### Importing extracted text during an image load

You can also import extracted text during the image import process by setting an option in the Relativity Desktop Client. For more information about importing extracted text during an image load, see Importing an image file in the Relativity Desktop Client Guide.

No changes are needed in the Opticon load file. If the aforementioned setting is active, Relativity looks for page level txt files named identical to their corresponding TIFs. For example:



#### 7.7.6.3 Processed data

Some data originates from client files and needs processing to extract the metadata. The following table shows the delimiters that your internal processing software must use to present data as fields.

Value	Character	ASCII Number
Column	¶	020
Quote	”	254
Newline	®	174
Multi-Value	;	059
Nested Value	\	092

You can provide this list to your vendor to help communicate the required delivery format for load files. The fielded data should be delivered as delimited files with column or field names located in the first line.

[illegible]

## 7.7.7 Importing document metadata, native files, and extracted text

**Note:** Relativity ended support for and access to the Relativity Desktop Client (RDC) for RelativityOne commercial customers on December 31, 2023. Import/Export is being used for all importing and exporting workflows.

For RelativityOne Government customers, beginning March 31, 2024, RDC will only operate in web transfer mode, which will result in significantly slower transfer speeds. It is highly recommended that Government customers begin using Import/Export in RelativityOne as soon as possible to prepare for the deprecation of RDC on June 30, 2024. Starting July 1, 2024, RDC will no longer be operational. See the Community article [RDC Deprecation FAQ](#) for additional information.

You can use a document-level load file to import document metadata, native files, and extracted text. For large data sets, consider breaking the load file into smaller document counts. Use multiple computers and instances to load the individual load files. It may be helpful to break up the types of information into distinct subgroups; such as load metadata, natives, text, and images. Loading data in smaller amounts can assist with quality assurance. We recommend having no more than four concurrent RDC imports running on the same server or in the same workspace.

In addition, you may see warning or errors during an import under the following conditions:

- **Native file with 0 KB**—The RDC imports native files with the size of 0 KB. In the RDC, the Warnings tab displays a message indicating that the file is empty and only metadata has been loaded for the record. In the viewer, users see extracted text when it exists for the file. If the file has no extracted text, users see a blank placeholder, and no image or viewer options are available. See [Configuring the RDC on page 421](#).
- **Long file path names**— If the load file contains a field used to set the folder path on the folders browser, and the field is longer than 255 characters for a document, the RDC displays an error message for that document on the Errors tab. The RDC doesn't import the document into Relativity. The RDC continues to import any other documents in the load file with fields shorter than 255 characters.

### 7.7.7.1 Importing RDC Permissions

The following permissions are required to use the importing feature in Relativity Desktop Client:

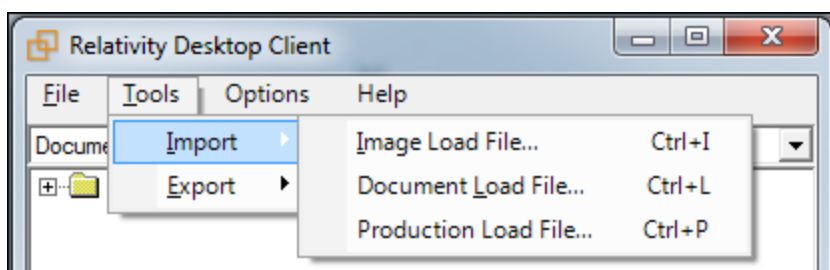
Object Security	Tab Visibility	Admin Operations
■ Document: View, Add, Edit	■ Documents	■ Allow Import


**Note:** You must also be part of a group that has access to the parent folder of the workspace or you will receive an error when selecting that workspace in the RDC.

### 7.7.7.2 Importing documents

Use the following steps to import documents:

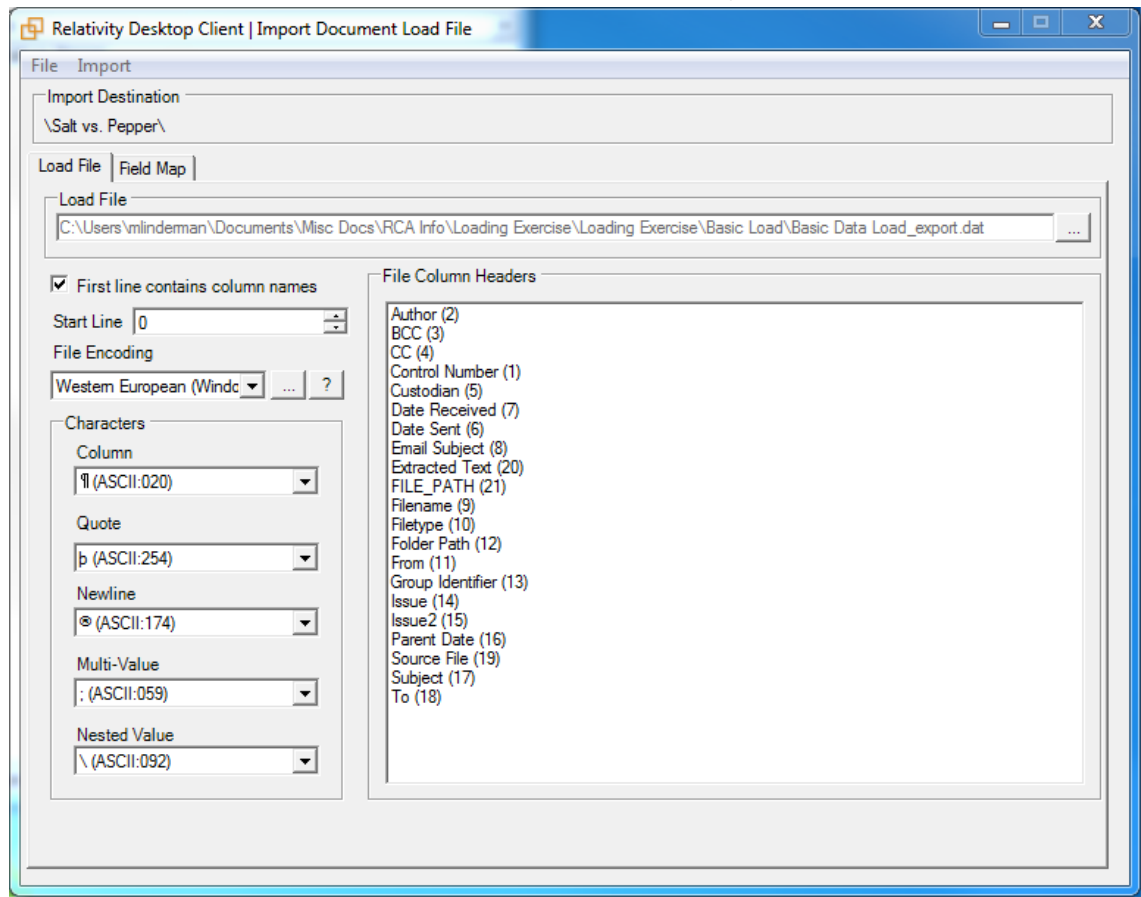
1. Open the RDC and select a workspace.
2. On the **Tools** menu, point to **Import** and then click **Document Load File**. (In the RDC browser, you can right-click on a specific folder, point to **Import** and click **Load File**.) The Load File tab in the Import Document Load File window appears.





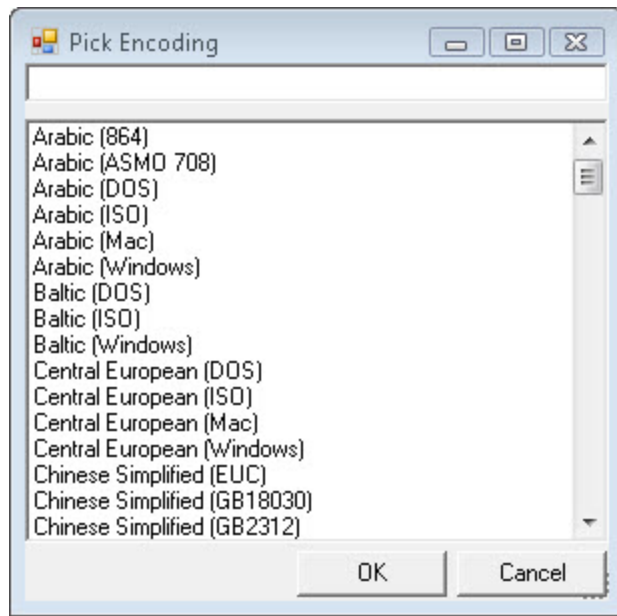
3. (Optional) To use settings in from an existing import file, use these steps:
  - a. On the Import Document Load File dialog, click the **File** menu, and select **Load Import Settings**.
  - b. Browse for your load field map file (.kwe) in the **Open Saved Field Map** dialog, and then click **Open**.
  - c. Click **OK** on the kCura.EDDS.WinForm dialog. Click **Open** on **Choose Load File** dialog. Settings from the file are used to populate fields in the Load File and Field Map tabs. (You can also modify any settings on these tabs as necessary.)
  - d. Continue with step 7.
4. Click  to browse for a document load file on the Load File tab. Set the other options as necessary. On the Load File tab, set the following options to indicate how your load file is configured:



- **First line contains column names** — select this option if your load file has a header.

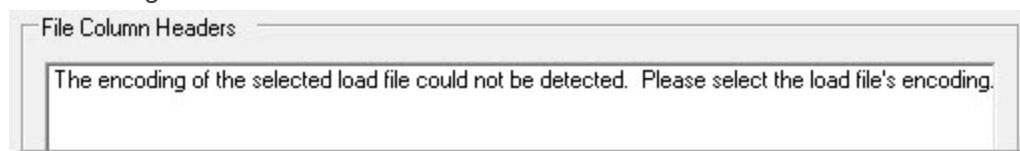


- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is 0, which results in loading the entire file.
- **File Encoding**—select an encoding for the document load file. (Consult your processing vendor or department to determine the correct encoding option, if necessary.) If your file contains a language other than English, choose a Unicode option. Click  for additional options or click  for additional information about encoding.

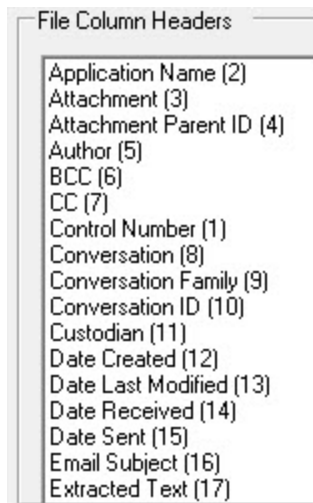


Review the following information about how the encoding of load files is handled:

- Relativity uses auto-detection to determine the encoding of your text files. If it finds a different file type in your text files, it changes to the appropriate method.
  - Relativity immediately applies any changes that you make to the encoding of a load file, and displays these changes in the column header preview.
  - Relativity provides you with the ability to audit the encoding of a load file.
  - Relativity includes the functionality for previewing the import file as well as the encoding of the extracted text files.
- **File Column Headers**—Relativity automatically updates this section of the Load File tab when you select the file encoding. This section may display the following message before you select an encoding for the load file.

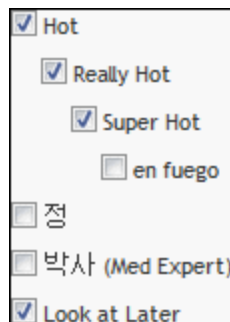


After you select the encoding, this section displays the fields in the load file. The column headers in the file display as vertical list. The fields display in alphanumeric order. The numeric value in parentheses indicates the position of the field within the file. For example, the control number is the first column in this illustration, while the Application Name is second.

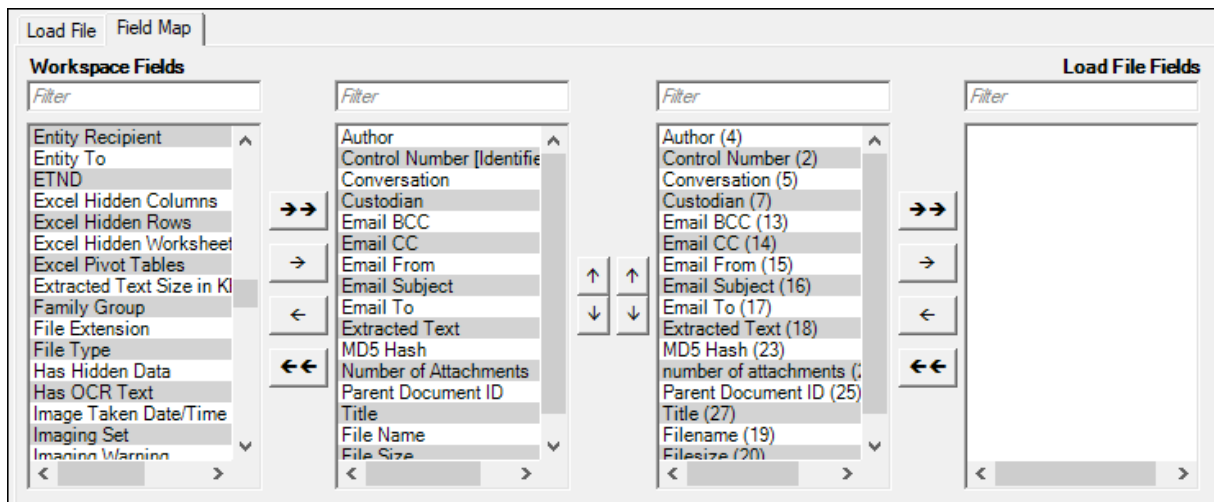


Since the load file is parsed based on the delimiter set, you may need to check delimiters used in the load file if the column headers are not lined up correctly. Determine the delimiters used in the file, and then select them in the Character section of this tab.

- **Characters**—select the delimiters used by your load file:
  - **Column delimiter**—select the character used to separate columns.
  - **Quote**—select the character used as the text qualifier.
  - **Newline**—select the character used to indicate the end of a line in any extracted text or long text field.
  - **Multi-value delimiter**—select the character used to separate choices within a field.
  - **Nested value**—select the character used to separate the different levels of a multi-choice hierarchy.  
For example, you might import a field with following values: “Hot\Really Hot\Super Hot; Look at Later”. Using a semi-colon (;) as a multi-value delimiter, and a backslash (\) as a nested value delimiter, Relativity displays the choices as illustrated below:



5. Click the **Field Map** tab. To automatically map fields, click **Auto Map Fields** below the lists of fields. The fields from the load file are mapped to any existing fields of the same name in the workspace.



Only fields matched in the center columns are loaded into the workspace. Other fields in the Workspace Fields and Load File Fields lists are ignored. You must always match the identifier field for the load file.

Consider the following when auto-mapping fields:

- Case isn't taken into account for the mapping. For example, a field named "email" in the load file would map to a field named "Email" in the workspace.
- Spacing is taken into account. For example, in a two-word field name, if there is one space between words in the workspace field, and two spaces between words in the load file field, the fields will not be mapped.
- Characters are mapped only to themselves. For example, an underscore is only mapped to another underscore, not to a space.

---

**Note:** You can also manually map fields in the load file to existing fields in the workspace. To manually map fields, highlight a field from the Workspace Fields list and click the right arrow to move the field into the center column. Then, highlight the corresponding field in the Load File Fields list and click the left arrow to move the field into the center column. You can move all fields in a list into a new column by clicking the double arrow buttons. Use the up and down arrow buttons to reorder the fields.

---

Review these additional guidelines when you map fields for a workspace and load file:

- Before importing relational fields, review the Import Behavior option on the New or Edit Field form. You can use this option to determine how blank values are handled in relational fields.
- If you are importing a field that contains more than 200 choices, you will see these choices automatically displayed in a Popup Picker. You will see an error if duplicate choices exist for the field.

Overwrite and Overlay identifiers:

In the Overwrite section, select one of these options to indicate the type of load:

- **Append Only**—loads only new records.
- **Overlay Only**—updates existing records only. You must include an **Overlay Identifier** in an overlay load. This field acts as a link indicating to Relativity where to import the data.
- **Append/Overlay**—adds new records and overlays data on existing records

If you are performing an overlay or append/overlay, select an **Overlay Identifier** to specify the field that links your overlay load file to the workspace.

---

**Note:** The fields in the drop-down menu are fixed-length fields with a manually-applied SQL index. This is NOT the same as adding the field to the full-text index. Contact your SQL database administrator to apply an index to a field.

---

#### Multi-Select Field Overlay Behavior:

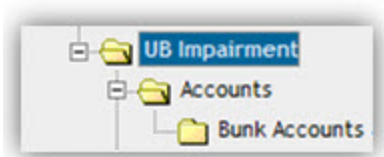
The following fields are only available if you select the Append / Overlay or Overlay only Overwrite option:

- **Merge Values**—merges all values for multi-choice and multi-object fields in the load file with corresponding multi-choice and multi-option fields in the workspace. The fields are merged regardless of the overlay behavior settings in the environment.
- **Replace Values**—replaces all values for multi-choice and multi-object fields in the load file with corresponding multi-choice and multi-option fields in the workspace. The fields are merged regardless of the overlay behavior settings in the environment.
- **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the load file with corresponding multi-choice and multi-option fields in the workspace. The fields are merged according to the overlay behavior settings in the environment.

#### Folder Info:

In the **Folder Info** section, select **Folder Information Column** if you want to use a metadata field to build the folder structure for the workspace. In the drop-down box, choose the field that you want Relativity to use for building the folder structure. This field is commonly a source or folder path field. All folders are built under the Import Destination folder.

When building the folder structure, Relativity looks for backslashes to indicate a new sub-folder. The following folder structure would result from a field containing field with the value UB Impairment\Accounts\Bunk Accounts:



Before importing, you can use the **Preview Choices and Folders** option to check the number of choices and folders created by importing the records to the workspace.

---

**Note:** The number of folders reported during preview is inaccurate if the folder name contains a backslash. Avoid using backslashes in folder names.

---

---

**Note:** Do not select **Folder Information Column** if you do not want to build a folder structure based on metadata. When this option is not selected, Relativity loads all documents directly into the folder indicated by the import destination.

---

#### Parent Info:

The **Parent Info** section will display instead of the **Folder info** section if you are importing an object or objects that are children of other objects such as Search Terms Results. If desired, you can check **Parent Information Column** and select an object from the drop-down list to determine which parent object you would like to map it to. Alternatively, you can leave this option unchecked if you do not wish to map the object with a parent object.

---

**Note:** The **Parent Information Column** can only be unchecked if **Overlay only** is selected in the **Overwrite** section.

---

#### Native File Behavior:

In the Native File Behavior section, select **Load Native Files** if you want to load native files along with database records. (Do not select this option if you do not have any native files to load.)

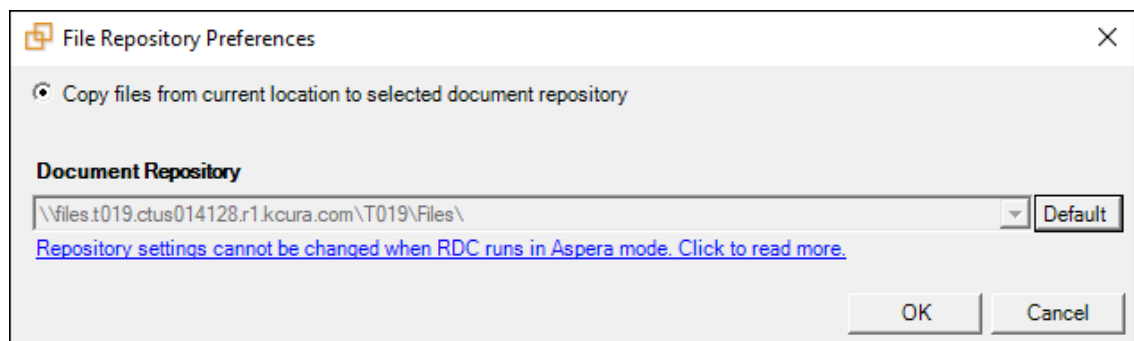
In the **Native file paths contained in column** drop-down box, select a field from your load file that contains a relative or absolute path to the native files. If the native files reside in a Relativity-accessible location, click **Repository**, and select one of these options:

- **Copy files from current location to selected document repository** - select this option to copy files from the location in the selected load file field to the selected document repository.

---

**Note:** You can use the **Default** option to configure an environment level. See the CopyFilesToRepository instance setting.



---



#### Extracted Text:

In the Extracted Text section, set the following options to control how the Full Text or OCR is loaded into the database. You can import full text or OCR into any long-text field that has been mapped. These options are only available for selection if you've already mapped a long-text field:

- **Cell contains file location**—select this option if your extracted text is in document-level text files, and your load file contains a path to those text files. You don't need to select this option if a field in your load file contains extracted text.

- **Encoding for undetectable files**—select an encoding for the text file. Click  for additional language options or click  for additional information about encoding.
  - **Western European (Windows)**—indicates the Windows standard encoding for English.
  - **Unicode**—utilizes more than 107,000 characters covering 90 scripts.
  - **Unicode (Big-Endian)**—is the same as Unicode, except that the byte order is reversed.
  - **Unicode (UTF-7)**—represents Unicode text using a stream of ASCII characters to guarantee that the high bit will always be zero.
  - **Unicode (UTF-8)**—represents all characters in the Unicode character set using 8-bit bytes.

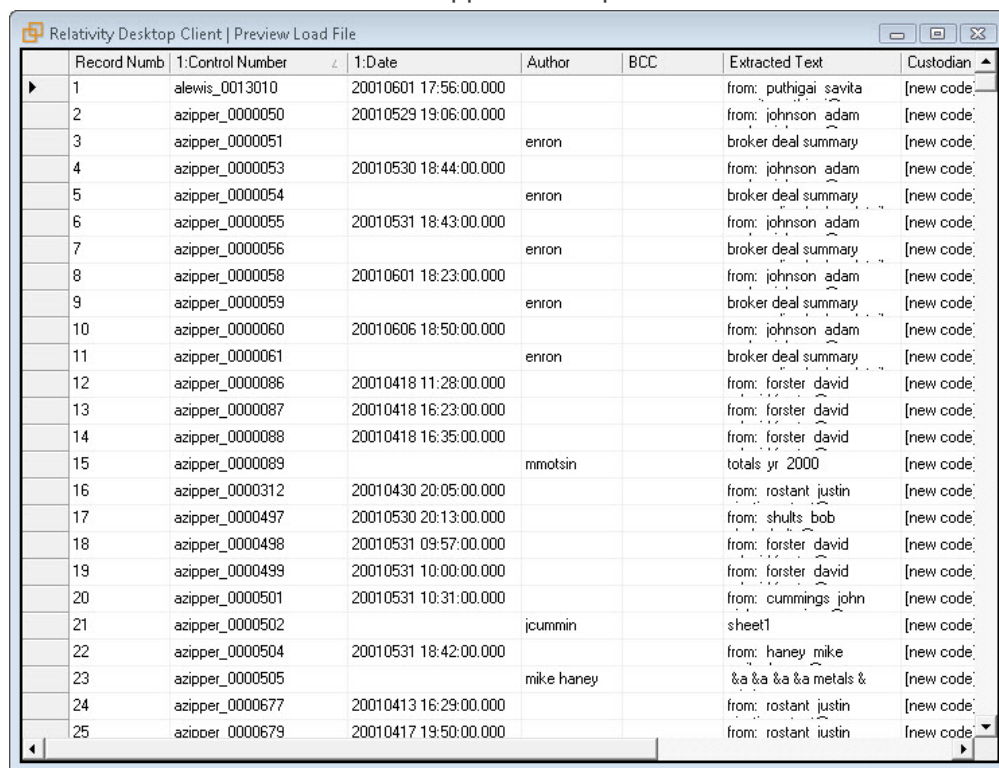
---

**Note:** A warning message appears if you are missing information required to run the import. Update the settings for the required options, and click **Import File** again.

---

6. (Optional) To preview information about the content you are importing to the workspace, select **Import**, and click one of these options:

- **Preview File**—displays the first 1000 documents in the load file. Only mapped fields appear. Make sure that matched fields that appear in the preview are correct.



Record Number	1:Control Number	1:Date	Author	BCC	Extracted Text	Custodian
1	alewis_0013010	20010601 17:56:00.000			from: puthigai savita	[new code]
2	azipper_0000050	20010529 19:06:00.000			from: johnson adam	[new code]
3	azipper_0000051		enron		broker deal summary	[new code]
4	azipper_0000053	20010530 18:44:00.000			from: johnson adam	[new code]
5	azipper_0000054		enron		broker deal summary	[new code]
6	azipper_0000055	20010531 18:43:00.000			from: johnson adam	[new code]
7	azipper_0000056		enron		broker deal summary	[new code]
8	azipper_0000058	20010601 18:23:00.000			from: johnson adam	[new code]
9	azipper_0000059		enron		broker deal summary	[new code]
10	azipper_0000060	20010606 18:50:00.000			from: johnson adam	[new code]
11	azipper_0000061		enron		broker deal summary	[new code]
12	azipper_0000086	20010418 11:28:00.000			from: forster david	[new code]
13	azipper_0000087	20010418 16:23:00.000			from: forster david	[new code]
14	azipper_0000088	20010418 16:35:00.000			from: forster david	[new code]
15	azipper_0000089		mmotsin		totals yr 2000	[new code]
16	azipper_0000312	20010430 20:05:00.000			from: rostant justin	[new code]
17	azipper_0000497	20010530 20:13:00.000			from: shults bob	[new code]
18	azipper_0000498	20010531 09:57:00.000			from: forster david	[new code]
19	azipper_0000499	20010531 10:00:00.000			from: forster david	[new code]
20	azipper_0000501	20010531 10:31:00.000			from: cummings john	[new code]
21	azipper_0000502		jcummin		sheet1	[new code]
22	azipper_0000504	20010531 18:42:00.000			from: haney mike	[new code]
23	azipper_0000505		mike haney		&a &a &a &a metals &	[new code]
24	azipper_0000677	20010413 16:29:00.000			from: rostant justin	[new code]
25	azipper_0000679	20010417 19:50:00.000			from: rostant justin	[new code]

- **Preview Errors**—checks all documents for potential loading errors, but displays only the first 1000 errors. If your file does not contain errors, a **no errors** message appears.

---

**Note:** You can use the error report to correct any errors, and then you can re-add the file to the RDC. Relativity only loads valid records. Records with errors are skipped. You can export the records for correction and reload. See [Handling errors on page 344](#).

---

- **Preview Choices and Folders**—displays the number of choices created in the browser and the number of choices created by importing the records.

7. On the Import menu, click **Import File**.

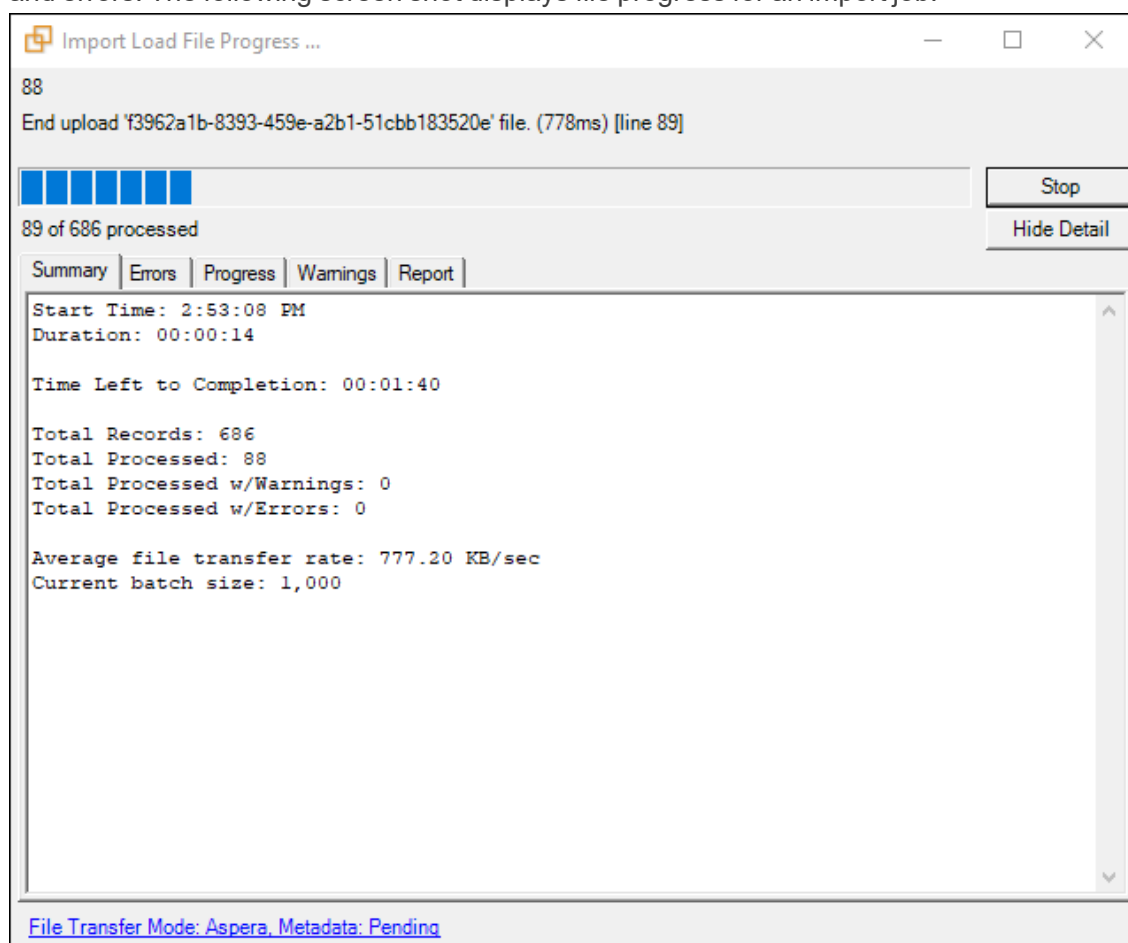
---

**Note:** If **Force folder preview** is selected, a confirmation message appears, which contains information about the number of folders that will be created. Click **OK** to continue with the import.

---

8. Review the progress of the import.  
You can view the progress of an import through the RDC. Select the following tabs to display specific information:

- **Summary** - displays general information about the number of records, processing warnings, and errors. The following screen shot displays file progress for an import job.



- **Errors** - lists any errors encountered during the load. The Errors tab displays any errors that occur when you import content with the RDC.



---

**Note:** When you run an import job, the RDC only imports records with no errors into the workspace.

---

- **Progress** - displays a detailed view of the load progress.
  - **Warnings** - displays information about loading or connection issues.
  - **Report** - includes the following files that you can export:
    - **Export Error Report** - exports a .csv file with a summary of errors.
    - **Export Error File** - exports a .dat file, which is a document-level load file containing only records with errors.
  - **File Transfer Mode** - displays the following information:
    - **Web mode** - this mode uses the web server and it is the standard.
    - **Direct mode** - this mode provides faster performance, but requires a connection to the network hosting the data, as well as specific Windows group permissions.
- 

**Note:** For deployments that have client domains enabled, client domain users will not be able to use Direct Mode within the Relativity Desktop Client. Client domain-enabled servers will not have access to the BCPPATH.

---

9. (Optional) To save your import settings, point to the **File** menu, and then click **Save Import Settings**. Choose a location for the document load file (.kwe). See [Saving import settings on page 345](#).

#### 7.7.7.3 Importing Yes/No fields on documents

To ensure that you get the correct results when importing into Yes/No fields, use these guidelines:

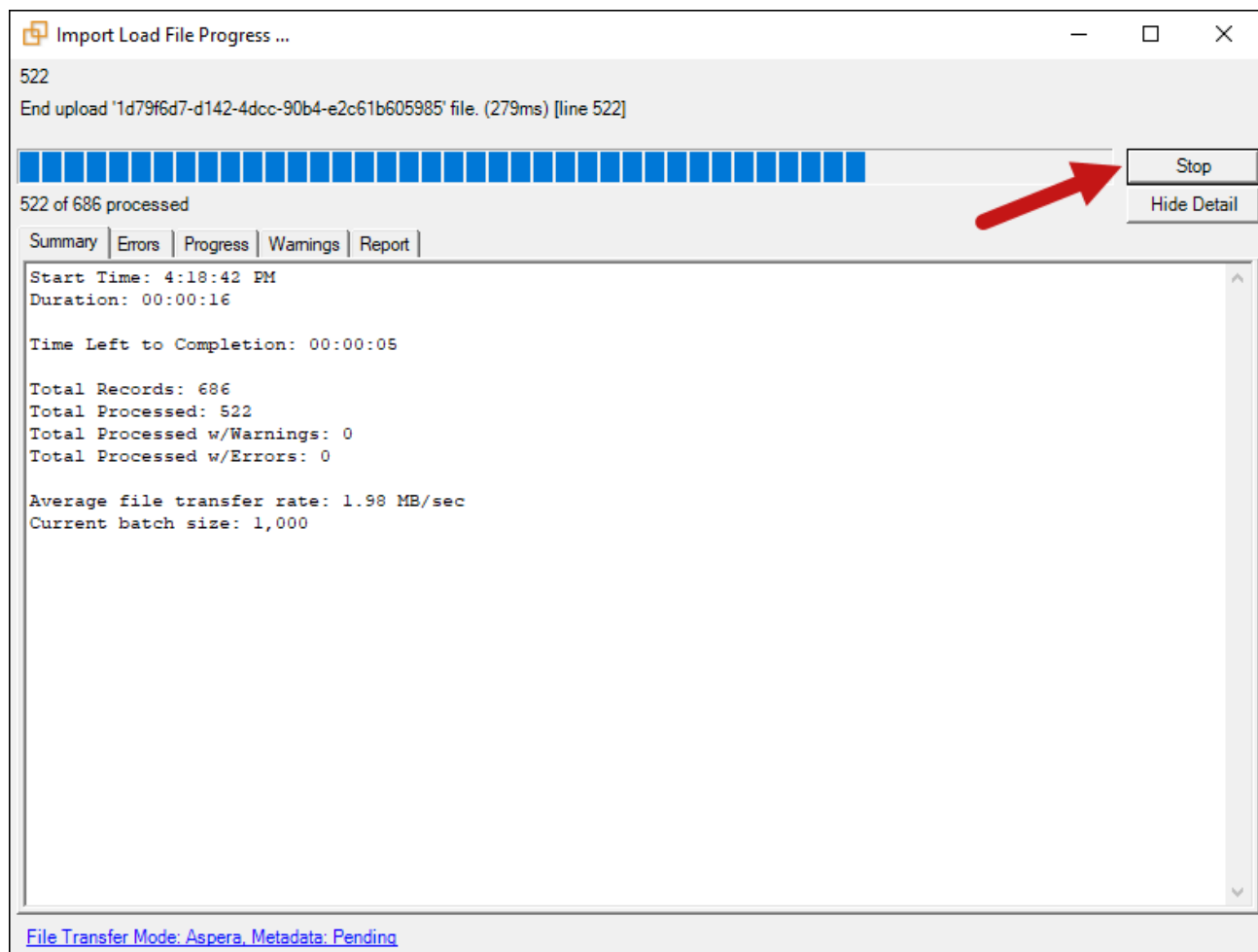
- **No values**—Import Yes/No fields containing any values except those specified for Yes values.
  - **Yes values**—Import Yes/No fields containing only "Yes", "Y", "True", "T", and any non-zero integer. (For example, if you import an "X", the RDC assigns a value of "No" to the documents.)
  - **Null values**—Leave the Yes/No field empty.
- 

**Note:** You can change the display values on a Yes/No field, but your modification doesn't affect how the RDC handles these values during a document import.

---

#### 7.7.7.4 Stopping an import or export job

To stop an import or export job in the RDC, click **Stop** on the import load file progress window.



Once you click Stop, note that the **Progress** tab displays the following status messages:

- **Job has been stopped – X documents have been transferred.**
- **Finalizing job...**
- **Job has been finalized.**

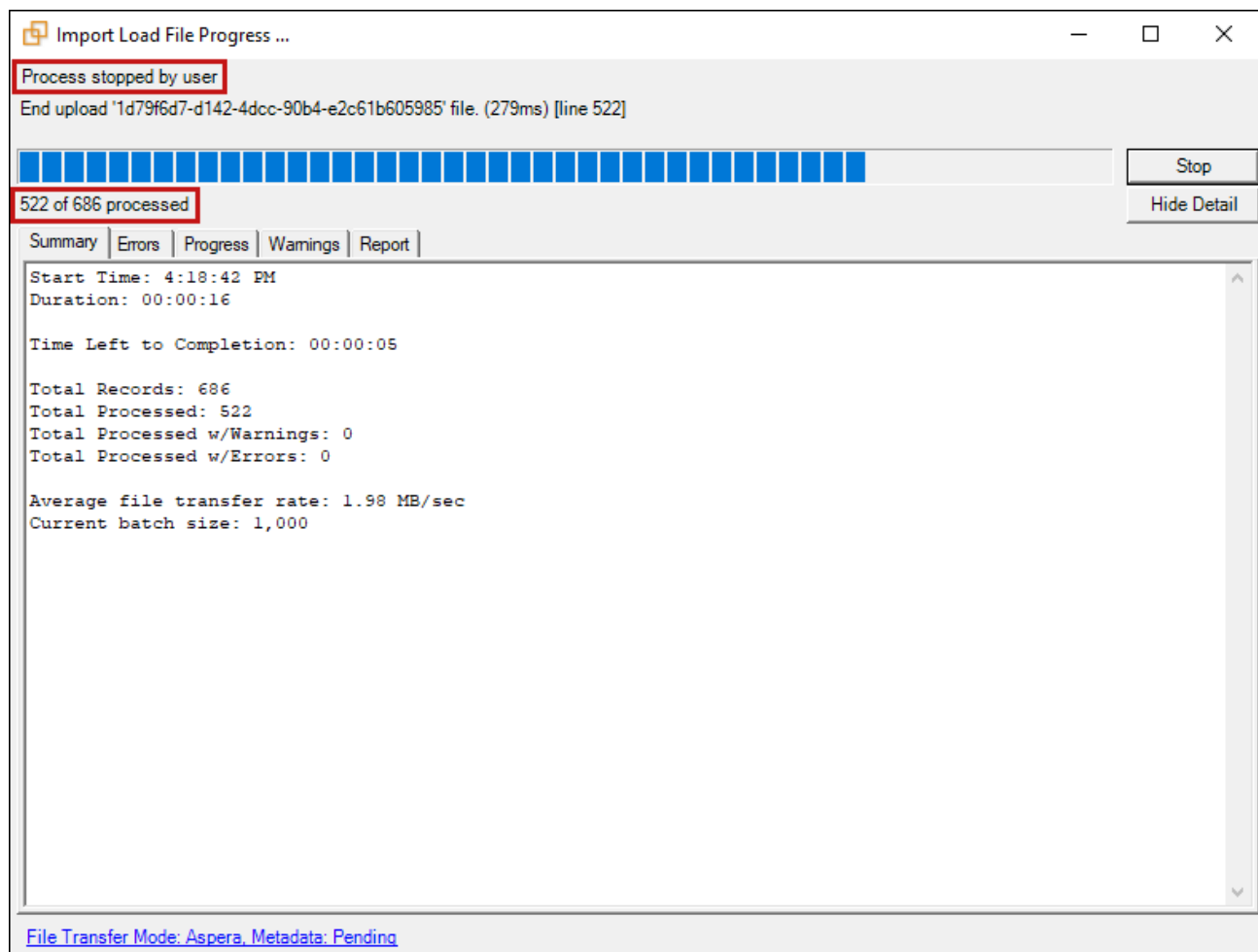
---

**Note:** Between **Finalizing job** and **Job has been finalized**, you could see a variety of job-specific messages, such as **Native file uploads completed**.

---

When you stop a job, only the files from the last configured batch are imported/exported, and the progress bar is reverted to display this.

For example, when you clicked Stop, the window displayed that 331 out of 371 files had been processed up to that point; however, because you configured the batch size in the config file to be 10MB, only 263 documents were actually processed because the metadata size for 263 docs is 10MB. Accordingly, the progress window then displayed a message of **Process stopped by user** with a processed count of 263 of 371.



## 7.7.8 Importing an image file

**Note:** Relativity ended support for and access to the Relativity Desktop Client (RDC) for RelativityOne commercial customers on December 31, 2023. Import/Export is being used for all importing and exporting workflows.

For RelativityOne Government customers, beginning March 31, 2024, RDC will only operate in web transfer mode, which will result in significantly slower transfer speeds. It is highly recommended that Government customers begin using Import/Export in RelativityOne as soon as possible to prepare for the deprecation of RDC on June 30, 2024. Starting July 1, 2024, RDC will no longer be operational. See the Community article [RDC Deprecation FAQ](#) for additional information.

You can import image load files that are Opticon-formatted page-level files. Relativity only accepts single page TIFF (Group IV) or single page JPG files.

### 7.7.8.1 Importing RDC Permissions

The following permissions are required to use the importing feature in Relativity Desktop Client:

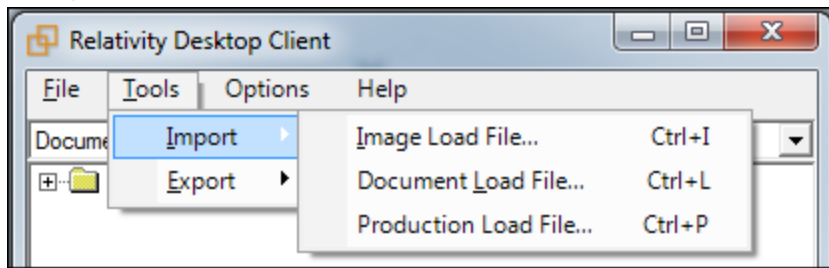
Object Security	Tab Visibility	Admin Operations
<ul style="list-style-type: none"> <li>Document: View, Add, Edit</li> </ul>	<ul style="list-style-type: none"> <li>Documents</li> </ul>	<ul style="list-style-type: none"> <li>Allow Import</li> </ul>

### 7.7.8.2 Importing images

When you import images, Relativity adds them to a workspace as documents.

To import an image load file:

1. Open the RDC and select a workspace.
2. On the **Tools** menu, point to **Import** and then click **Image Load File**. (In the RDC browser, you can right-click on a specific folder, point to **Import** and click **Image File**.) The Import Production Load File dialog appears.




3. (Optional) To use settings in an existing import file, complete these steps:
  - a. On the Import Image Load File dialog, click the **Import** menu, and then select **Load Settings**.
  - b. Browse for your load settings file (.kwi) in the **Open** dialog, and then click **Open**.

---

**Note:** The RDC denotes all image and production import settings with a .kwi file extension. However, when you select these file types to filter on when you're choosing to save or load the settings file, the RDC denotes these settings with a .kwx file extension.

---

- c. Click **OK** on the kCura.EDDS.WinForm dialog. Click **Open** on **Choose Load File** dialog. Settings from the file are used to populate fields in the Import Image Load File dialog. (You can also modify the settings on this dialog as necessary.)
  - d. Continue with step 5.
4. On the Import Image Load File dialog, set the options as necessary. Select the following options:
    - **Load File**—click  to browse for your page-level load file. Relativity accepts Opticon format image load files.
    - **Start Line**—select the line number in the load file where you want the import process to begin. The default value is 0, which results in loading the entire file.

- **Numbering**—select one of the following options:
  - **Use load file page IDs**—default setting.
  - **Auto-number pages**—select this option if page IDs in the production are not unique. For example, you might import a set of TIFFs that share a page identifier for each record. The page identifiers are shared per document and are not unique. The **Auto-number pages** option appends the 01, .02, and so on to the page-level identifier, creating a unique number per page.

```
100001,,D:\IMAGES\001\100001_001.TIF,Y,,,3
100001,,D:\IMAGES\001\100001_002.TIF,,,,
100001,,D:\IMAGES\001\100001_003.TIF,,,,
100002,,D:\IMAGES\001\100002_001.TIF,Y,,,2
100002,,D:\IMAGES\001\100002_002.TIF,,,,
```

---

**Note:** Enable **Auto-number pages** if you are importing productions that use document level numbering without page numbers, and include documents that contain multiple pages.

---

- **Select Mode**—select one of the following options:
  - **Append Only**—load only new records.
  - **Overlay Only**—update existing records only. You must include a workspace identifier in an overlay load. This field acts as a link indicating to Relativity where to import the data.
  - **Append/Overlay**—adds new records and overlays data on existing records.

---

**Note:** Select Append to import the extracted text and natives from a .dat file. Select overlay when overlaying production images onto the existing documents.

---

- (Available Only for Production Load Files) **Production** - select a Relativity production that you want to upload images to. Only new production sets without a production source appear in this list.
- **Overlay Identifier** - select a field that stores overlaid document-level Bates information on the document.

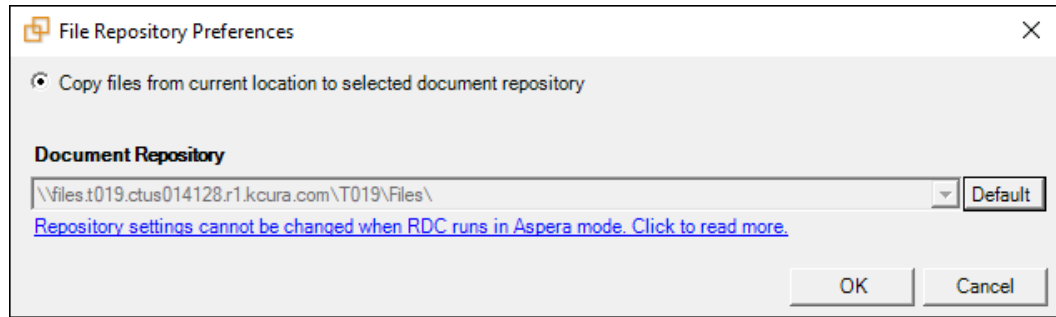
---



**Note:** The fields in the drop-down menu are fixed-length fields with a manually-applied SQL index. Note that this is NOT the same as adding the field to the full-text index. Contact your SQL database administrator to apply an index to a field.

---

- **Repository** - if the native files reside in a Relativity-accessible location, click **Repository**, and select one of the following options. (You can ignore this option if your files are on your desktop or laptop, or if you are a consulting partner loading data into our hosting environment.)
  - **Copy files from current location to selected document repository** - select this option to copy files from the location in the selected load file field to the selected doc-

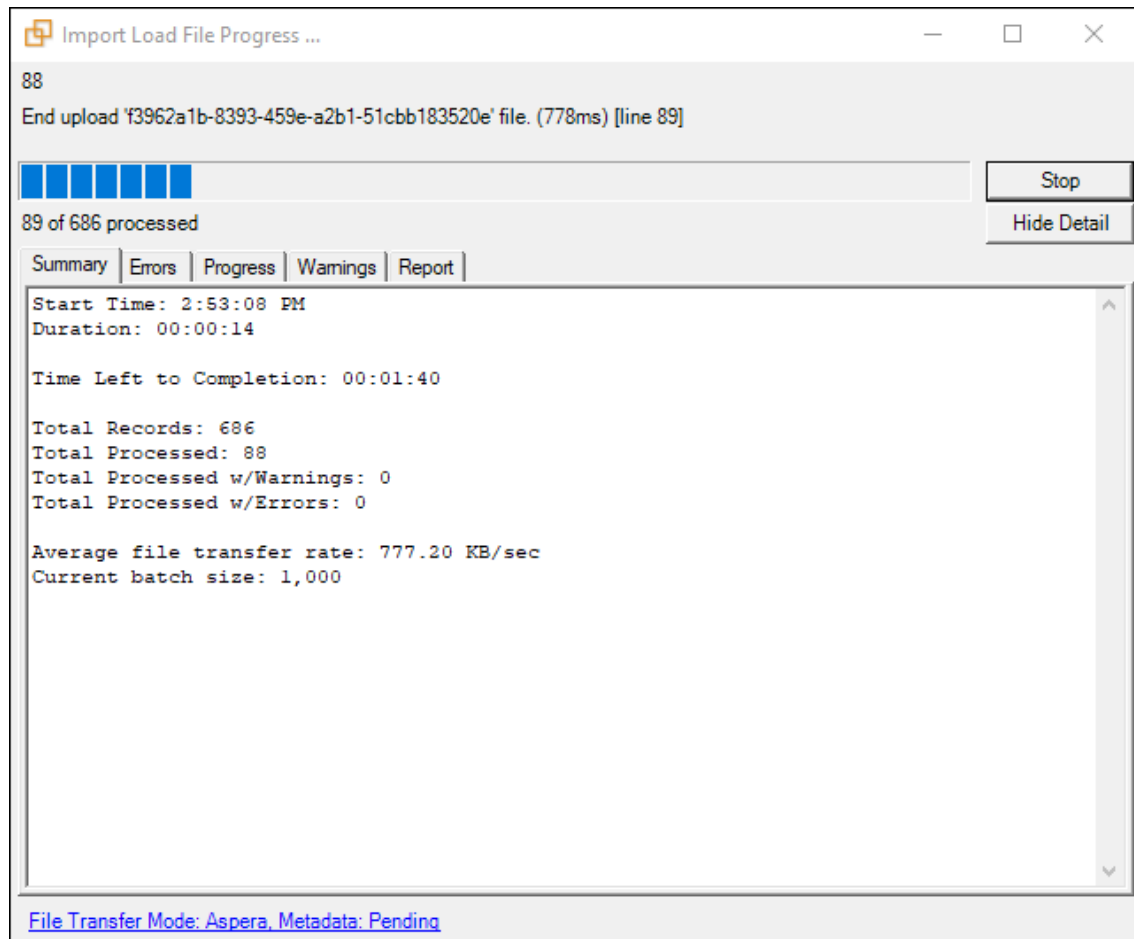
ument repository.



- (Available Only for Image Load Files) **Load Extracted Text** - select this option to load new text for Production documents that may be revised based on redactions. The text files must be meet these requirements:
    - Have .txt extensions
    - Stored in the same directory as TIFF files,
    - Named in the same way as the TIFF files
  - (Available Only for Image Load Files) **Encoding for undetectable files** - select an encoding for the text file. Click  for additional language options or click  for additional information about encoding.
    - **Western European (Windows)** - indicates the Windows standard encoding for English.
    - **Unicode** - utilizes more than 107,000 characters covering 90 scripts.
    - **Unicode (Big-Endian)** - is the same as Unicode, except that the byte order is reversed.
    - **Unicode (UTF-7)** - represents Unicode text using a stream of ASCII characters to guarantee that the high bit will always be zero.
    - **Unicode (UTF-8)** - represents all characters in the Unicode character set using 8-bit bytes.
5. (Optional) To view any errors, click **Import**, and then select **Check Errors**. The preview dialog lists several tabs that may contain information about any errors in your import. See [Handling errors on page 344](#).
  6. Click **Import File** on the **Import** menu.
  7. Review the progress of the import.

You can view the progress of an import through the RDC. Select the following tabs to display specific information:

    - **Summary** - displays general information about the number of records, processing warnings, and errors. The following screen shot displays file progress for an import job.



- **Errors** - lists any errors encountered during the load. The Errors tab displays any errors that occur when you import content with the RDC.

**Note:** When you run an import job, the RDC only imports records with no errors into the workspace.

- **Progress** - displays a detailed view of the load progress.
- **Warnings** - displays information about loading or connection issues.
- **Report** - includes the following files that you can export:
  - **Export Error Report** - exports a .csv file with a summary of errors.
  - **Export Error File** - exports a .dat file, which is a document-level load file containing only records with errors.
- **File Transfer Mode** - displays the following information:
  - **Web mode** - this mode uses the web server and it is the standard.
  - **Direct mode** - this mode provides faster performance, but requires a connection to the network hosting the data, as well as specific Windows group permissions.

---

**Note:** For deployments that have client domains enabled, client domain users will not be able to use Direct Mode within the Relativity Desktop Client. Client domain-enabled servers will not have access to the BCPPPath.

---

8. (Optional) To save your import settings, point to the **File** menu, and then click **Save Import Settings**. Choose a location for the production load file (.kwi). See [Saving import settings on page 345](#).

## 7.7.9 Importing a production file

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**Note:** Relativity ended support for and access to the Relativity Desktop Client (RDC) for RelativityOne commercial customers on December 31, 2023. Import/Export is being used for all importing and exporting workflows.

For RelativityOne Government customers, beginning March 31, 2024, RDC will only operate in web transfer mode, which will result in significantly slower transfer speeds. It is highly recommended that Government customers begin using Import/Export in RelativityOne as soon as possible to prepare for the deprecation of RDC on June 30, 2024. Starting July 1, 2024, RDC will no longer be operational. See the Community article [RDC Deprecation FAQ](#) for additional information.

---

You can import external productions into Relativity through the Relativity Desktop Client. This is useful when a case team, after a production goes out the door, needs access to documents as they were in the production and needs them available for searching.

### 7.7.9.1 Special considerations

Follow these guidelines when you want to work with externally created production:

- When you import productions, Relativity adds them to a workspace as documents.
- Create a production set in Relativity. The numbering imported with the Opticon file functions as sequential Bates numbering for each page.
- Run the production with the external tool to generate the following files:
  - **Document level control file** - it should minimally contain an identifier field that is also present in the workspace, and a new production or Bates number.

---

**Note:** When loading a production set into Relativity, you may map a production numbering field to the identifier field, as long as it is unique.

---

- **Page level Opticon file** - it should use the production or Bates numbering scheme.
- Overlay document level load file in Relativity.
- Loading documents into a 'staging' production marks the production set as produced.
- When loading a production set into Relativity, the systems loads the newly created documents into the root folder. It may be prudent to move these documents to a new folder to ensure proper foldering and security of the documents.
- Using Append/Overlay during the metadata import creates new documents that did not have images, but these documents aren't associated with the production. To associate these files with a production set, create and load an image load file pointing to placeholder images and then overlay the metadata.



Using the Overlay Only option shows an error on any document not already loaded, and you can use the error file as a list to identify documents that may not have had images.

### 7.7.9.2 Importing RDC Permissions

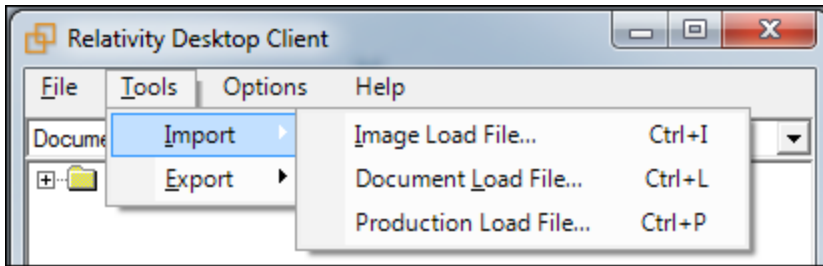
The following permissions are required to use the importing feature in Relativity Desktop Client:

Object Security	Tab Visibility	Admin Operations
<ul style="list-style-type: none"> <li>Document: View, Add, Edit</li> </ul>	<ul style="list-style-type: none"> <li>Documents</li> </ul>	<ul style="list-style-type: none"> <li>Allow Import</li> </ul>

### 7.7.9.3 Importing a production


To import a production, use these steps:

1. Open the RDC and select a workspace.
2. On the **Tools** menu, point to **Import**, and then click **Production Load File**. (In the RDC browser, you can right-click on a specific folder, point to **Import** and click **Production File**.) The Import Production Load File dialog appears.



3. (Optional) To use settings in an existing import file, complete these steps:
  - a. On the Import Production Load File dialog, click the **Import** menu, and then select **Load Settings**.
  - b. Browse for your load settings file (.kwi) in the **Open** dialog, and then click **Open**.

**Note:** The RDC denotes all image and production import settings with a .kwi file extension. However, when you select these file types to filter on when you're choosing to save or load the settings file, the RDC denotes these settings with a .kwx file extension.

- c. Click **OK** on the kCura.EDDS.WinForm dialog. Click **Open** on **Choose Load File** dialog. Settings from the file are used to populate fields in the Import Production Load File dialog. (You can also modify the settings on this dialog as necessary.)
  - d. Continue with step 5.
4. On the Import Production Load File dialog, set the options as necessary.
    - **Load File**—click  to browse for your page-level load file. Relativity accepts Opticon format image load files.

- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is 0, which results in loading the entire file.
- **Numbering**—select one of the following options:
  - **Use load file page IDs**—default setting.
  - **Auto-number pages**—select this option if page IDs in the production are not unique. For example, you might import a set of TIFFs that share a page identifier for each record. The page identifiers are shared per document and are not unique. The **Auto-number pages** option appends the 01, .02, and so on to the page-level identifier, creating a unique number per page.

```
100001,,D:\IMAGES\001\100001_001.TIF,Y,,,3
100001,,D:\IMAGES\001\100001_002.TIF,,,,
100001,,D:\IMAGES\001\100001_003.TIF,,,,
100002,,D:\IMAGES\001\100002_001.TIF,Y,,,2
100002,,D:\IMAGES\001\100002_002.TIF,,,,
```

---

**Note:** Enable **Auto-number pages** if you are importing productions that use document level numbering without page numbers, and include documents that contain multiple pages.

---

- **Select Mode**—select one of the following options:
  - **Append Only**—load only new records.
  - **Overlay Only**—update existing records only. You must include a workspace identifier in an overlay load. This field acts as a link indicating to Relativity where to import the data.
  - **Append/Overlay**—adds new records and overlays data on existing records.

---

**Note:** Select Append to import the extracted text and natives from a .dat file. Select overlay when overlaying production images onto the existing documents.

---

- (Available Only for Production Load Files) **Production** - select a Relativity production that you want to upload images to. Only new production sets without a production source appear in this list.
- **Overlay Identifier** - select a field that stores overlaid document-level Bates information on the document.

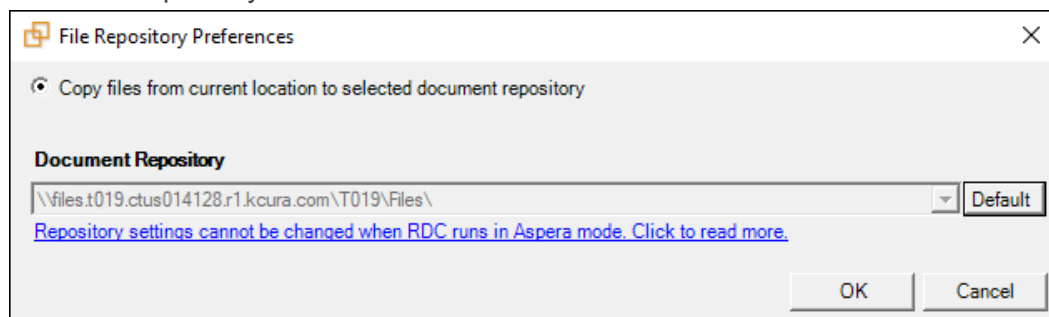
---



**Note:** The fields in the drop-down menu are fixed-length fields with a manually-applied SQL index. Note that this is NOT the same as adding the field to the full-text index. Contact your SQL database administrator to apply an index to a field.

---

- **Repository** - if the native files reside in a Relativity-accessible location, click **Repository**, and select one of the following options. (You can ignore this option if your files are on your desktop or laptop, or if you are a consulting partner loading data into our hosting environment.)
  - **Copy files from current location to selected document repository** - select this option to copy files from the location in the selected load file field to the selected

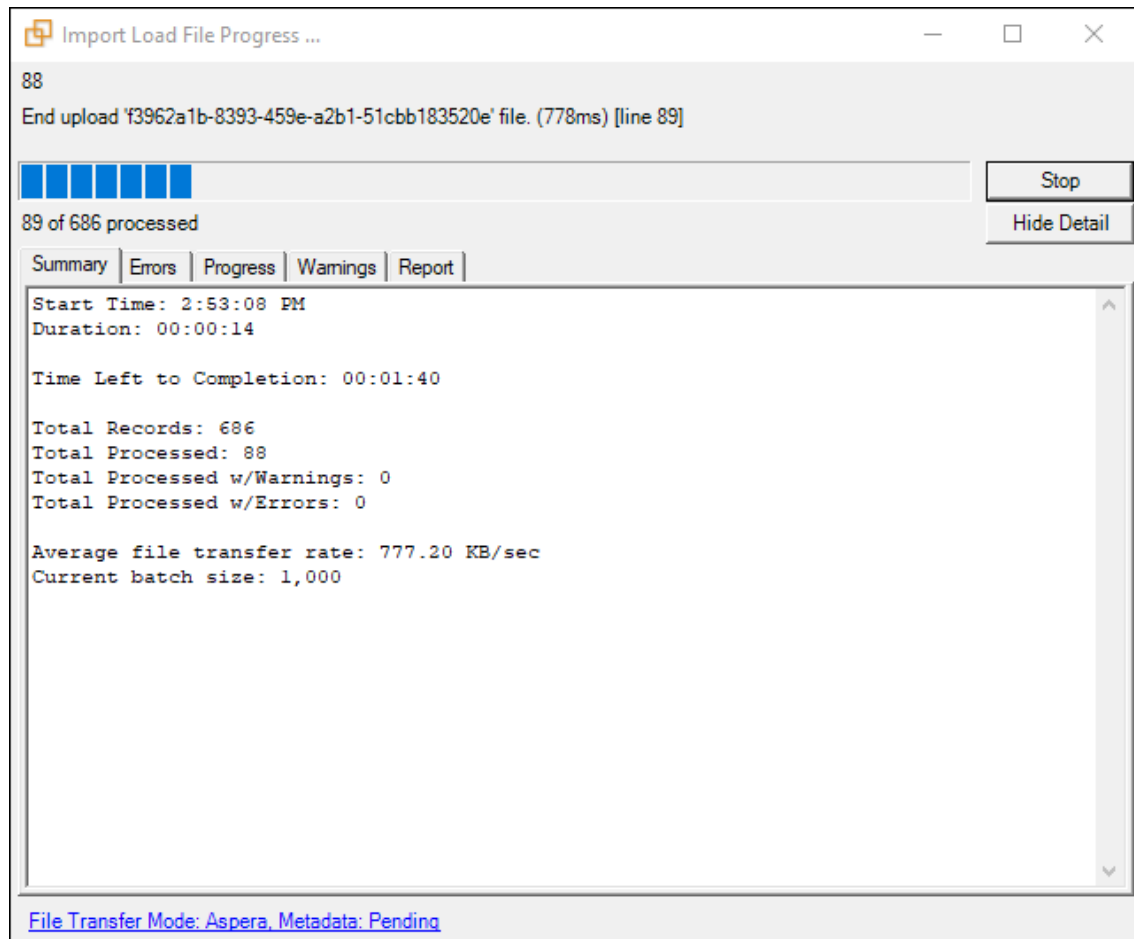
document repository.



- (Available Only for Image Load Files) **Load Extracted Text** - select this option to load new text for Production documents that may be revised based on redactions. The text files must be meet these requirements:
    - Have .txt extensions
    - Stored in the same directory as TIFF files,
    - Named in the same way as the TIFF files
  - (Available Only for Image Load Files) **Encoding for undetectable files** - select an encoding for the text file. Click  for additional language options or click  for additional information about encoding.
    - **Western European (Windows)** - indicates the Windows standard encoding for English.
    - **Unicode** - utilizes more than 107,000 characters covering 90 scripts.
    - **Unicode (Big-Endian)** - is the same as Unicode, except that the byte order is reversed.
    - **Unicode (UTF-7)** - represents Unicode text using a stream of ASCII characters to guarantee that the high bit will always be zero.
    - **Unicode (UTF-8)** - represents all characters in the Unicode character set using 8-bit bytes.
5. (Optional) To view any errors, click **Import**, and then select **Check Errors**. The preview dialog lists several tabs that may contain information about any errors in your import. See [Handling errors on page 344](#).
  6. Click **Import File** on the Import menu.
  7. Review the progress of the import.

You can view the progress of an import through the RDC. Select the following tabs to display specific information:

    - **Summary** - displays general information about the number of records, processing warnings, and errors. The following screen shot displays file progress for an import job.



- **Errors** - lists any errors encountered during the load. The Errors tab displays any errors that occur when you import content with the RDC.

**Note:** When you run an import job, the RDC only imports records with no errors into the workspace.

- **Progress** - displays a detailed view of the load progress.
- **Warnings** - displays information about loading or connection issues.
- **Report** - includes the following files that you can export:
  - **Export Error Report** - exports a .csv file with a summary of errors.
  - **Export Error File** - exports a .dat file, which is a document-level load file containing only records with errors.
- **File Transfer Mode** - displays the following information:
  - **Web mode** - this mode uses the web server and it is the standard.
  - **Direct mode** - this mode provides faster performance, but requires a connection to the network hosting the data, as well as specific Windows group permissions.

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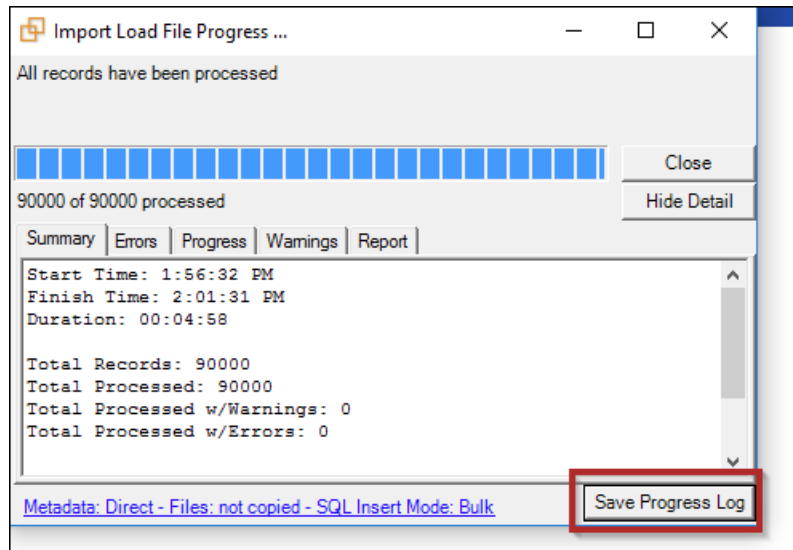
**Note:** For deployments that have client domains enabled, client domain users will not be able to use Direct Mode within the Relativity Desktop Client. Client domain-enabled servers will not have access to the BCPPATH.

---

- (Optional) To save your import settings, point to the **File** menu, and then click **Save Import Settings**. Choose a location for the production load file (.kwi). See [Saving import settings on page 345](#).

### Saving the progress log

Once your import or export job is complete, you have the option of saving the event log from that job to your machine. You can do so by clicking **Save Progress Log** on the progress window of the RDC.



Note the following details:

- This log comes in the form of a temp folder containing all the messages displayed in the interface while the import or export job was running.
- The option to save the progress log is only available if you've set the LogAllEvents value to True in the RDC configuration file.

## 7.7.10 Import errors for Desktop Client

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**Note:** Relativity ended support for and access to the Relativity Desktop Client (RDC) for RelativityOne commercial customers on December 31, 2023. Import/Export is being used for all importing and exporting workflows.

For RelativityOne Government customers, beginning March 31, 2024, RDC will only operate in web transfer mode, which will result in significantly slower transfer speeds. It is highly recommended that Government customers begin using Import/Export in RelativityOne as soon as possible to prepare for the deprecation of RDC on June 30, 2024. Starting July 1, 2024, RDC will no longer be operational. See the Community article [RDC Deprecation FAQ](#) for additional information.

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**Note:** When an item-level error occurs in a load file, Relativity Desktop Client uses the proper delimiter automatically so that when users access the load file, they will not experience the error.

---

The following table lists the most common import errors found in the Relativity Desktop Client, including their messages and fixes.

Message	Fix
Invalid date.	Change the date information to one of the standard date formats.
Invalid boolean.	Change data to a YES or NO format.
Invalid decimal.	Change the data to a valid number.
Invalid integer.	Change the data to an integer.
Input length exceeds maximum set length of <max length> for this VarChar field.	Increase the character restriction on the field.
Input length exceeds maximum set length of <max length> for the associated object field <name>.	Increase the character size of associated object.
Error uploading file. Skipping line.	Verify and correct line information.
File upload failed. Either the access to the path is denied or there is no disk space available.	Verify disk space is available and check permissions on data server.
File '<file name>' not found.	Verify the file is available in path provided.  If file is hosted in RelativityOne cloud share, verify that the case in the folders, files, or file extensions names match to the load file.
File '<file name>' contains 0 bytes.	No data exists in the file.
Identifier Value not set.	The Overlay Identifier field has not been mapped. Map the Overlay Identifier field.
Choice name specified twice for this record.	Two choice name fields are titled identically. Each choice name should be unique from all others in the load file.
Proposed choice name exceeds 200 characters.	Rename the specified choice to something less than 200 characters.
User does not exist in the system or is not available for assignment.	Email used in the entity file is not associated with any entity in the system.
Document has been previously processed in this file	Same ID trying to load twice.
Error: full text file specified does not exist.	Verify the path of extracted text file.
There are an invalid number of cells in this row - expecting:<expected>, actual:<actual>.	Remove the extra column delimiter from load file.

Message	Fix
- This document identifier does not exist in the system - no document to overwrite	Overlay unavailable. You must append the data.
A document with identifier <document identifier> already exists in the system	The identifier field already exists in the system. You need to do an overlay to overwrite the existing data.
This file identifier exists attached to another document with selected key field {0}	Same ID trying to load twice.
This file identifier exists attached to another document with selected ArtifactID {0}	Same ID trying to load twice.
This file identifier exists attached to another document	Duplicate page ID in a different document.
Document is already in the selected production	<p>The Bates number is already loaded.</p> <p>Because you can't overlay into an existing production, you must create a new production or replace the images manually on the back end.</p>
This document contains redactions or highlights that can't be overwritten	Delete the markups.
There is no image specified on this line	Make sure image id is present in load file.
One of the files specified for this document does not exist	Make sure image files are present for represented path.
The image file specified is not a supported format in Relativity	This can't be loaded without conversion to an approved format.
The file being uploaded is empty	No data exists in the file so it can't be loaded.
The identifier field for this row is either empty or unmapped	Verify that an identifier exists.
The identifier specified on this line has been previously specified in the file	Make sure the identifier field is unique or overlay data.
The document specified has been secured for editing.	Change security permissions to allow document edit rights.
Your account does not have rights to add a document or object to this case	Change security permissions to allow document add rights.
A non-unique associated object is specified for this new object.	Two objects with the same name exist in the workspace. Identify the duplicates and change one of their names.
Your account does not have rights to add an associated object to the current object.	Change security permissions to allow updates to object.
An object field references a child object which does not exist.	Add a child object.

Message	Fix
This record's Overlay Identifier is shared by multiple documents in the case, and cannot be imported.	Use a unique ID to overlay the data

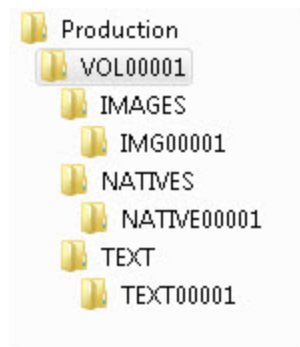
## 7.8 Exporting with the RDC

**Note:** Relativity ended support for and access to the Relativity Desktop Client (RDC) for RelativityOne commercial customers on December 31, 2023. Import/Export is being used for all importing and exporting workflows.

For RelativityOne Government customers, beginning March 31, 2024, RDC will only operate in web transfer mode, which will result in significantly slower transfer speeds. It is highly recommended that Government customers begin using Import/Export in RelativityOne as soon as possible to prepare for the deprecation of RDC on June 30, 2024. Starting July 1, 2024, RDC will no longer be operational. See the Community article [RDC Deprecation FAQ](#) for additional information.

You can use the Relativity Desktop Client (RDC) to export production sets, saved search results, and folders. When you perform an export, the RDC automatically creates top-level folders for images, text, and natives. The RDC exports all documents included in the production set, search result, or folder.

You can also use **RelativityOne Staging Explorer** in RelativityOne to export files from RelativityOne workspaces that are set up. This is the most common way of exporting files to and from RelativityOne.



**Note:** You need to install the RDC on your computer before you can perform an export.

### 7.8.1 Exporting RDC Permissions

The following permissions are required to use the exporting feature in Relativity Desktop Client:

Object Security	Admin Operations
<ul style="list-style-type: none"> <li>Document: Local Access (Download, Copy Text)</li> </ul>	<ul style="list-style-type: none"> <li>Allow Export</li> </ul>

### 7.8.2 Technical considerations for .kwx files

Note the following:



- .kwx stands for kCura Win edds eXport.
- The .kwx file you call on when you load export settings is a SOAP-serialized file used to run the export.
- SOAP is a protocol based on XML. It's designed specifically to transport or store procedure calls using XML. It does this by converting fields and properties of an object into the serial format of an XML stream.
- When you run an export, the RDC collects all the inputs from the form into an object in memory. The RDC also passes the object on to the export process.
- When you save an export settings object, Relativity passes that object in memory to a SOAP serializer. The SOAP serializer writes that object's settings to XML.
- When you load export settings, Relativity takes a serialized object and deserializes it to an in-memory settings object. Then it loops over all the properties and sets the actual form values to reflect those settings.

### 7.8.3 Exporting a production set

**Note:** Relativity ended support for and access to the Relativity Desktop Client (RDC) for RelativityOne commercial customers on December 31, 2023. Import/Export is being used for all importing and exporting workflows.

For RelativityOne Government customers, beginning March 31, 2024, RDC will only operate in web transfer mode, which will result in significantly slower transfer speeds. It is highly recommended that Government customers begin using Import/Export in RelativityOne as soon as possible to prepare for the deprecation of RDC on June 30, 2024. Starting July 1, 2024, RDC will no longer be operational. See the Community article [RDC Deprecation FAQ](#) for additional information.

You can export the contents of a production set created in Relativity through the Relativity Desktop Client (RDC).

#### 7.8.3.1 Exporting RDC Permissions

The following permissions are required to use the exporting feature in Relativity Desktop Client:

Object Security	Admin Operations
<ul style="list-style-type: none"> <li>■ Document: Local Access (Download, Copy Text)</li> </ul> <p><b>Note:</b> This is required when exporting long-text cells greater than the value defined by the MaximumLongTextSizeForExportInCell instance setting, the default value of which is 1048576.</p>	<ul style="list-style-type: none"> <li>■ Allow Export</li> </ul>

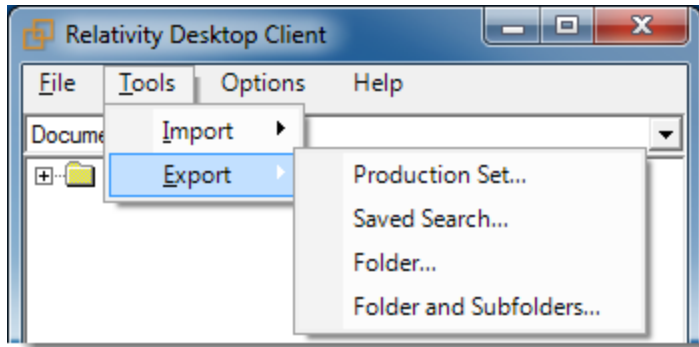
#### 7.8.3.2 Exporting a production set

To export a production set:

**Note:** Exported production sets must not contain any native files that have had markups applied with the Redact application.

1. Open the RDC and select a workspace.
2. On the **Tools** menu, point to **Export** and then click **Production Set**.

The Data Source tab in the Export Production window appears.

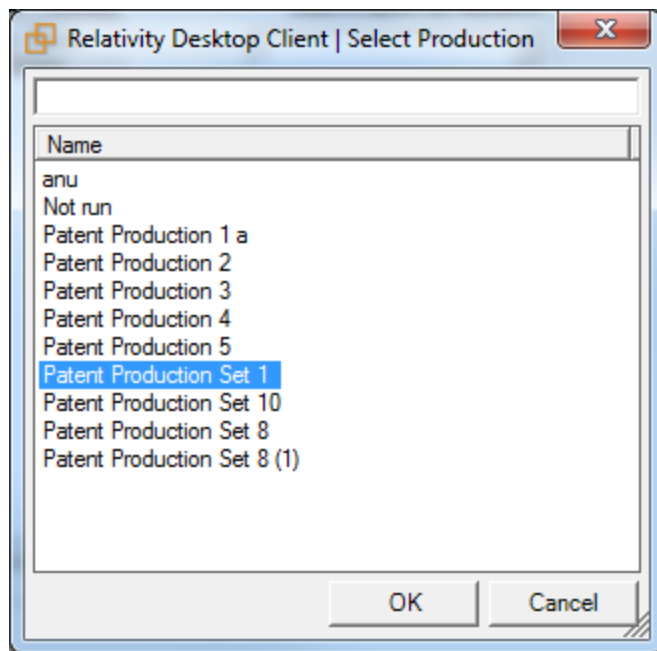


3. (Optional) To use settings in an existing export file, use these steps:
  - a. Click the **File** menu, and select **Load Export Settings**.
  - b. Browse for your export settings file (.kwx) in the Open dialog.
  - c. Select a production set, and click **OK**. Your production set appears on the Data Source tab, and the settings from the file populate the Destination Files tab. (You can also modify any settings on the Data Source and Destination Files tab as necessary.)

---

**Note:** On the Destination Files tab, you may want to select **Overwrite Files** if you're re-exporting the same group of files to the previously used location.

---



- d. Continue with step 7.

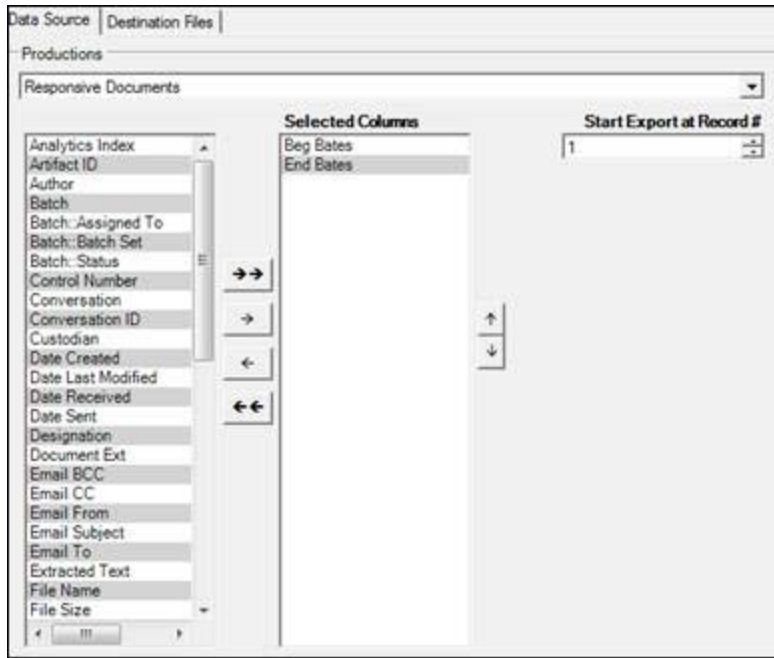
4. On the Data Source, select a production set in the **Productions** box. Update the remaining options as necessary.

The Data Source tab appears when you select the option to export production sets, saved searches, folders, and subfolders. Each of these actions have similar actions, but you may want to select different settings for them.

---

**Note:** The Production:: Begin Bates and Production:: End Bates reflective fields automatically populate in the Selected Columns.

---




On the **Data Source** tab, you can set the following options for the data that you want to export:

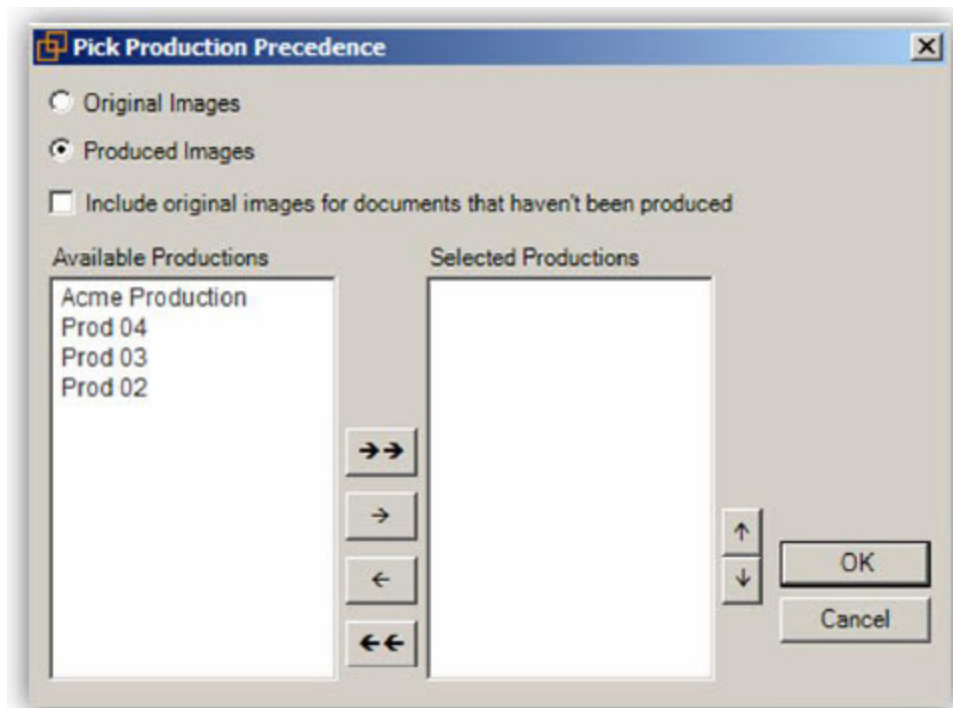
- **Views**—select a view for the data that you want to export.
- **Selected Columns**—choose the fields that you want to export by moving them to the **Selected Columns** box. The box on the right displays all available fields, but the RDC only exports the fields in the **Selected Columns** box.

---

**Note:** If you select any reflected fields the only value for the production you select displays.

---

- **Start Export at Record #**—select a record number that identifies the initial document for export. The RDC begins by exporting the document with this record number and continues by exporting documents with subsequent record numbers.
- (Available only for Saved Searches, Folders, and Subfolders) **Production Precedence**—click  to display the Pick Production Precedence dialog where you can select a group of produced documents for export instead of the original images.



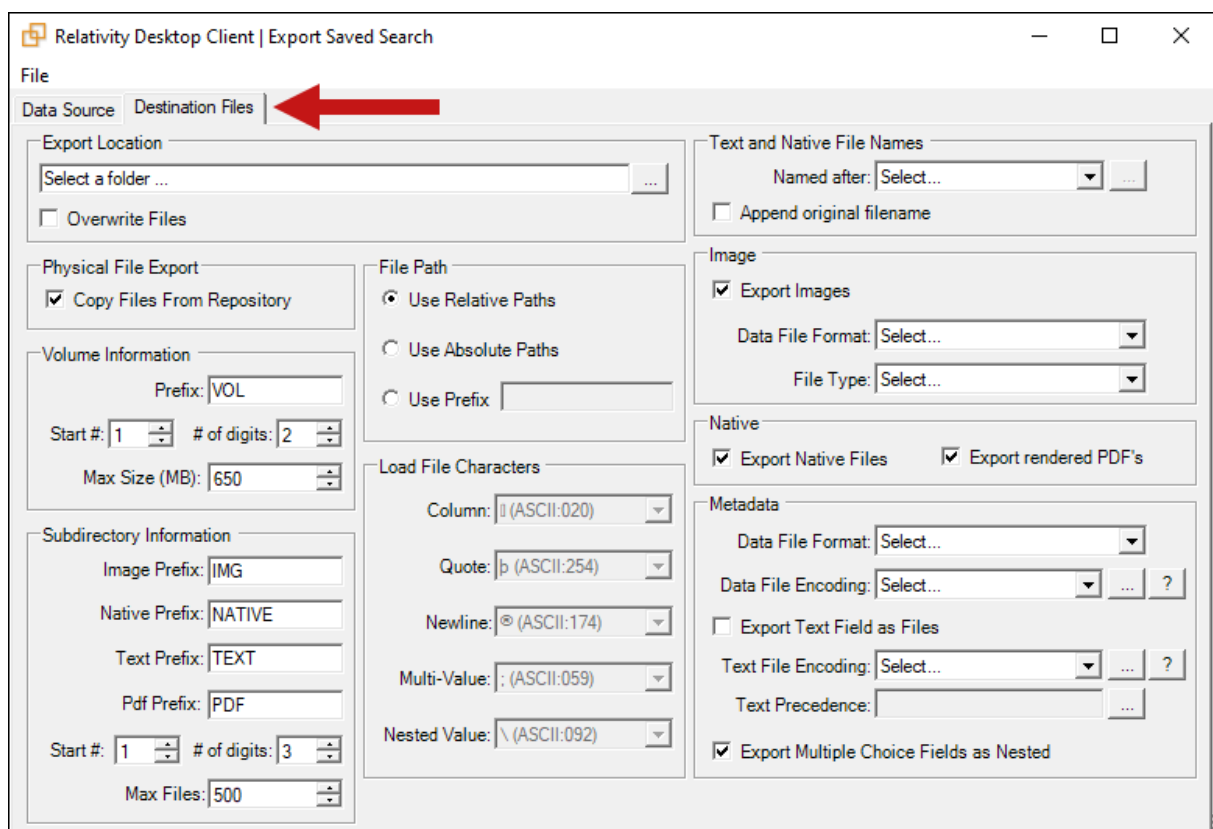
- Select the images that you want to export:
  - **Original Images**—only the original, non-produced images.
  - **Produced Images**—a produced version of the images.
  - **Include original images...**—original images for the documents that are not in a specified production.
- Move the productions that you want to exported to the **Selected Productions** box. To move productions between columns, highlight them and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the precedence of the fields.

---

**Note:** The RDC only produces one version of each document. The version of the document in the topmost production exports first. If the document doesn't exist in the topmost production, Relativity checks for the document in the second production and so on. If the document is not a part of any of the selected productions, and **Include original images ...** is enabled, then the original document produces.

---

5. Select the **Destination Files** tab.  
On the Destination tab, you can set options that control how the files in folders, searches, and production sets are exported. The Export dialog displays this tab when you select an **Export** option from the **Tools** menu, or when you right-click on a folder or workspace in the RDC. The Destination tab displays the same options when you export files in folders, searches, or production sets.

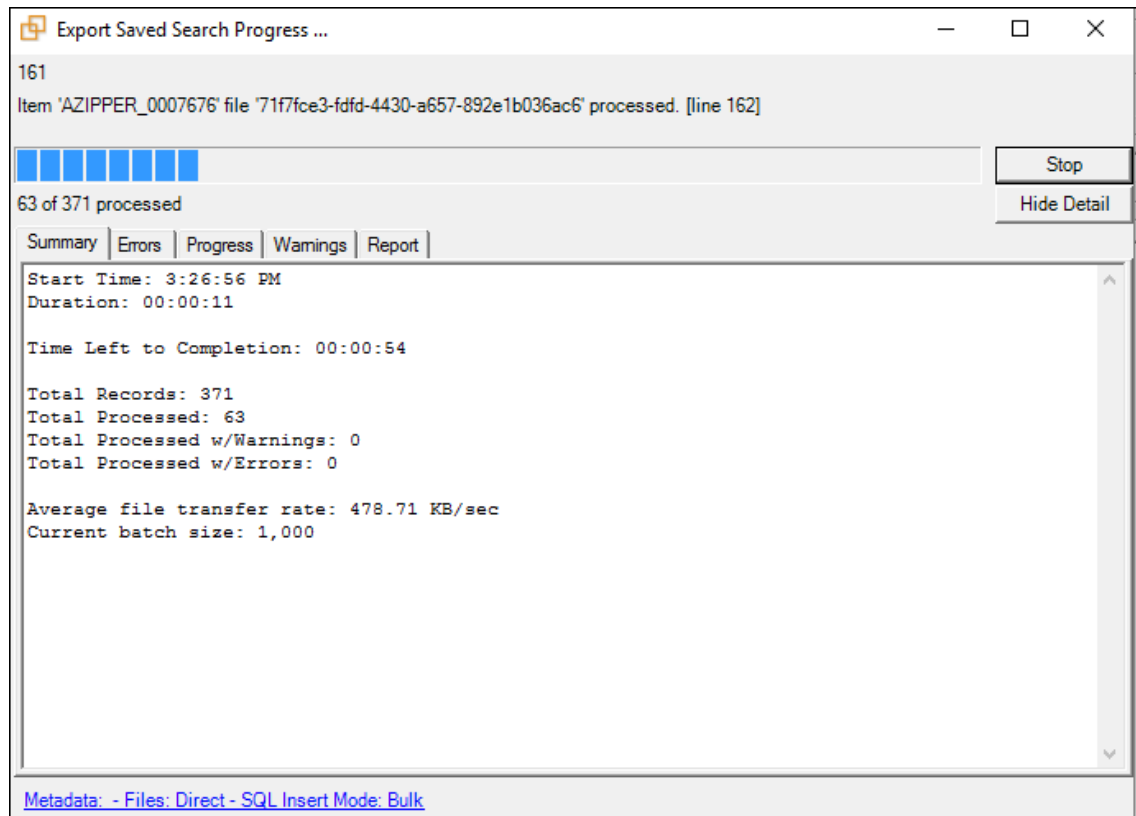


**Note:** In the Text and Native File Name section, the Named after option is available only for Production Sets.

6. Complete the fields on the Destination Files tab. See [Fields on the Destination Files tab on the next page](#).
7. After you select your export settings, select **File** and click **Run**.

**Note:** A warning message appears if you are missing information required to run the export. Update the settings for the required options, and click **Run** again.

8. Review the progress of the export.  
You can view the progress of an export through the RDC. Select the following tabs to display specific information:
  - **Summary** - displays general information about the number of records, processing warnings, and errors. The following screen shot displays file progress for an export job.



- **Errors** - lists any errors encountered during the load. The Errors tab displays any errors that occur when you export content with the RDC.
- **Progress** - displays a detailed view of the load progress.
- **Warnings** - displays information about loading or connection issues.
- **Report** - includes the following files that you can export:
  - **Export Error Report** - exports a .csv file with a summary of errors.
  - **Export Error File** - exports a .dat file, which is a document-level load file containing only records with errors.
- **File Transfer Mode** - displays the following information:
  - **Web mode** - this mode uses the web server and it is the standard.
  - **Direct mode** - this mode provides faster performance, but requires a connection to the network hosting the data, as well as specific Windows group permissions.

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
**Note:** For deployments that have client domains enabled, client domain users will not be able to use Direct Mode within the Relativity Desktop Client. Client domain-enabled servers will not have access to the BCPPATH.

---

9. (Optional) To save your export settings, point to the **File** menu, and click **Save Export Settings**. Choose a location for the export settings file (.kwx).

### 7.8.3.3 Fields on the Destination Files tab

The Destination Files tab contains the following sections with their respective fields:

- **Export Location** - select a target directory for exporting folders, searches, and production sets. Click  to browse for a location. Select **Overwrite Files** to overwrite any existing files of the same name in the target export directory.
- **Physical File Export** - select the **Copy Files From Repository** option. This is the default option and copies files from the file server to the specified export location. If you don't select **Copy Files From Repository**, Relativity doesn't copy the files to the export location. Instead, the exported load files reference the repository location of the files.
- **Volume Information** - controls the naming and size of the volume identifier. Set the following options in this section:
  - **Prefix** - enter the alpha prefix for the volume identifier.
  - **Start #** - select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
  - **# of Digits** - select the number of digits attached to the prefix. (For example, if you select 3, the output is VOL001, VOL002, and so on.)
  - **Max size** - select the maximum size allowed for each volume in MBs.
- **Subdirectory Information** - controls the naming and size of volume subfolders. Set the following options in this section:
  - **Image Prefix** - enter the alpha prefix for the subdirectory that stores exported images.
  - **Native Prefix** - enter the alpha prefix for the subdirectory that stores exported native files.
  - **Text Prefix** - enter the alpha prefix for the subdirectory that stores exported extracted text files.
  - **Pdf Prefix** - enter the alpha prefix for the subdirectory that stores exported extracted PDF files.
  - **Start #** - select the starting number for the subdirectories.
  - **# of Digits** - select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
  - **Max Files** - select the number of files to store in each subdirectory.
- **File Path** - controls how the export path for the files is referenced. Select one of the following options:
  - **Use absolute paths** - paths to exported files are represented as absolute paths.  
C:\Desktop\VOL001\NATIVE001\AS000001.msg
  - **Use relative paths** - paths to exported files are represented as relative paths.  
.\VOL001\NATIVE001\AS000001.msg
  - **Use prefix** - a prefix is added to the relative path, such as a CD drive letter.  
D:\VOL001\NATIVE001\AS000001.msg
- **Load File Characters** - select the delimiters to use in a document-level load file when **Data File Format** in the **Metadata** section is set to **Custom**. Select the following options as necessary:
  - **Column** - this delimiter separates columns in the load file.
  - **Quote** - this delimiter qualifies the text in each field of the load file.

- **Newline** - this delimiter signifies the end of any extracted text or long text field in the load file.
- **Multi-Value** - this delimiter separates different choices within a choice field.
- **Nested Value** - this delimiter indicates the hierarchy of choices within a choice field.

- **Text and Native File Names** - select the following options for naming exported native and extracted text files:



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**Note:** The following field types are supported by this feature: Date, Decimal, Fixed-Length Text, Single Choice, Whole Number, and Yes/No.

---

- (Available Only for Production Sets) **Named after** - select one of the following naming convention for exported files:
  - **Identifier** - select this option to name the files after the identifier for your workspace.
  - **Beginning production number** - select this option to name the files after the production number. (This number may be the Bates number for a production.)
  - **Custom** - select this option to name the native and text files in an export by appending them with either a control number or production begin bates and, optionally, a field of your choice. This option does not apply to image files.


To select custom naming options for your exported native and text files, do the following:

- Select **Custom** from the Named after drop-down menu.
- Click  to the right of the Named after drop-down menu.
- Select either the control number or production begin bates naming option from the drop-down menu.
- Optionally, to append a field or custom text to the file name, click .
- Select the desired spacing option from the **\_ (underscore)** drop-down menu.
- To either add custom text to the name or to add a field to the name, do the following:
  - To include custom text as part of the name, choose the **Custom Text...** option in the drop-down menu and enter the desired custom text in the textbox underneath the **Custom Text...** drop-down menu.
  - To include a field as part of the file names, select the desired field option from the **Custom Text...** drop-down menu. If a field is empty in a workspace it will not display as part of the file name even if selected from the **Custom Text...** drop-down menu.

---

**Note:** If a boolean field is selected, the name of the field will be displayed and not the value. For example: JWOLFE\_009\_confidential-HAS IMAGES.

---

- Optionally, to add an additional field or custom text after the previously selected options, click .



- Select the desired spacing option from the **\_ (underscore)** drop-down menu.
- To either add additional custom text to the name or to add an additional field to the name, do the following:
  - To include additional custom text as part of the name before a field, choose the **Custom Text...** option in the drop-down menu and enter the desired custom text in the textbox underneath the **Custom Text...** drop-down menu.
  - To include an additional field as part of the name, select the desired field option from the **Custom Text...** drop-down menu. If a field is empty in a workspace it will not display as part of the file name even if selected from the **Custom Text...** drop-down menu.

---

**Note:** If a boolean field is selected, the name of the field will be displayed and not the value. For example: JWOLFE\_009\_confidential-HAS IMAGES.

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- Click **Apply** to save the current naming options.

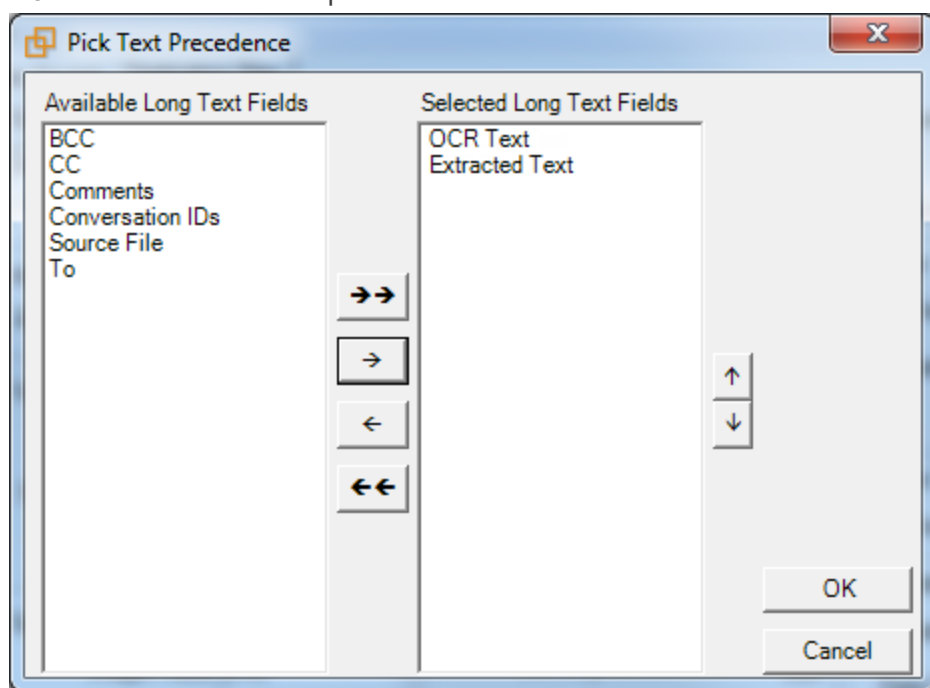
---

**Note:** If a file is not found in any of the production sets, the name will revert to the control number or production begin bates regardless of which naming options you have selected.

---

- **Append original file** - Select this option to append the original file name which is defined as the file name as it was on disk to the end of the exported file name.
- **Image** - determines whether to include images in an export and sets the format of the load file. Set the following options:
  - **Check Export Images** - select this option to include images in the export. (You must set the **Data File Format** and the **File Type** when you export images.)
  - **Data File Format** - select one of these formats for image-level load file:
    - Opticon
    - IPRO
  - **File Type** - select one of these file types:
    - Single-page TIF/JPG
    - Multi-page TIF
    - PDF
- **Native**—controls which files are exported by RDC.
  - **Export Native Files**—select to export native files.
  - **Export rendered PDF's**—select to export PDF files.
- **Metadata** - use the following options to control the export of the document-level load file and extracted text:

- **Data File Format** - select a the format for the document-level load file you're exporting:
  - Comma separated (.csv)
  - Concordance (.dat) - load file exports with the standard Concordance delimiters.
  - Custom (.txt) - load file exports with the custom delimiters that you select in the **Load File Characters** section.
  - HTML (.html) - load file is in HTML and contains hyperlinks to launch any exported files.
- **Data File Encoding** - select an encoding for the document-level load file from the drop-down box. Click  for additional options.
- **Export Text Field as Files** - determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. The RDC includes text as part of your load file if you deselect this option.
- **Text File Encoding** - select the encoding for the document-level text files. Click  for additional options.
- **Text Precedence** - select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click  to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the precedence of the fields.



If you add any fields to the **Selected Long Text Fields** column, Relativity adds the Text Precedence column as the last column in the load file. During an export, Relativity checks the topmost field in the **Selected Long Text Fields** column for text, and if the field is null, it checks the next field in order of precedence for text. When it finds a field that contains text, Relativity

adds the contents of that field to the Text Precedence column in the document load file, and then continues checking the fields for the next document.

For example, you want the Text Precedence column in the load file to contain the contents of the OCR Text field when it is available for a document and the contents of the Extracted Text field when the OCR Text for a document is null. In the Pick Text Precedence pop-up, you add the OCR Text as the first field in the **Selected Long Text Fields** column followed by the Extracted Text field.

---

**Note:** If you want to improve export performance, you don't need to add all of the long text fields you select in the Pick Text Precedence pop-up to the Selected Columns option on the Data Source tab. When you don't select these fields on the Data Source tab, but you add them to **Selected Long Text Fields** column, the RDC adds the content of these fields to the Text Precedence column as described above. When you add the long text fields on the Data Source tab, Relativity adds these columns to the document level load file.

---

The Precedence Text column displays the file path to the exported files if you select the **Export Text Field as Files** checkbox.

- **Export Multiple-Choice Fields as Nested** - select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.

## 7.8.4 Exporting a saved search

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**Note:** Relativity ended support for and access to the Relativity Desktop Client (RDC) for RelativityOne commercial customers on December 31, 2023. Import/Export is being used for all importing and exporting workflows.

For RelativityOne Government customers, beginning March 31, 2024, RDC will only operate in web transfer mode, which will result in significantly slower transfer speeds. It is highly recommended that Government customers begin using Import/Export in RelativityOne as soon as possible to prepare for the deprecation of RDC on June 30, 2024. Starting July 1, 2024, RDC will no longer be operational. See the Community article [RDC Deprecation FAQ](#) for additional information.

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### 7.8.4.1 Exporting RDC Permissions

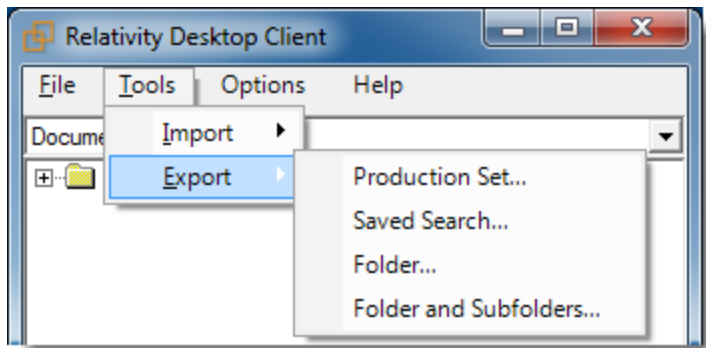
The following permissions are required to use the exporting feature in Relativity Desktop Client:

Object Security	Admin Operations
<ul style="list-style-type: none"><li>■ Document: Local Access (Download, Copy Text)</li></ul> <hr/> <p><b>Note:</b> This is required when exporting long-text cells greater than the value defined by the MaximumLongTextSizeForExportInCell instance setting, the default value of which is 1048576.</p> <hr/>	<ul style="list-style-type: none"><li>■ Allow Export</li></ul>

### 7.8.4.2 Exporting a saved search

To export a saved search:

1. Open the RDC and select a workspace.
2. On the **Tools** menu, point to **Export** and click **Saved Search**.  
The Data Source tab in the Export Production window appears.

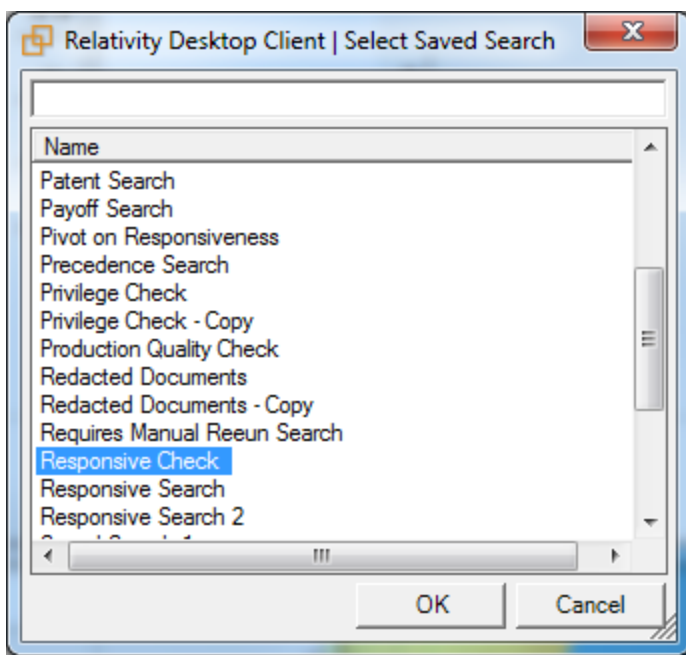


3. (Optional) To use settings in an existing export file complete these steps:
  - a. Click the **File** menu, and select **Load Export Settings**.
  - b. Browse for your export settings file (.kwx) in the Open dialog.
  - c. Select a saved search, and click **OK**. Your saved search is listed on the Data Source tab, and the settings from the file are used to populate the Destination Files tab. (You can also modify any settings on the Data Source and Destination Files tab as necessary.)

---

**Note:** On the Destination Files tab, you may want to select **Overwrite Files** if you are re-exporting the same group of files to the previously used location.

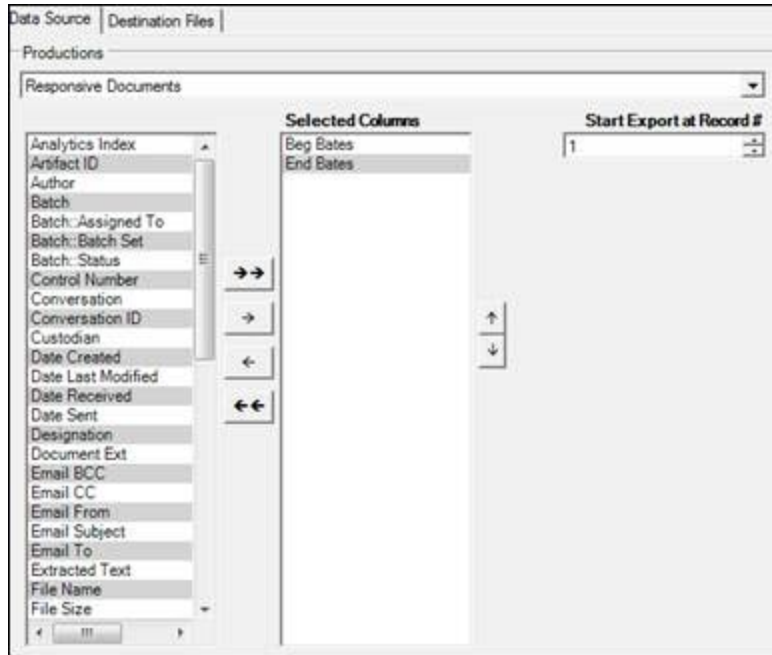
---



- d. Continue with step 4.

4. On the Data Source, select a saved search in the **Searches** box. Update the remaining options as necessary.

The Data Source tab appears when you select the option to export production sets, saved searches, folders, and subfolders. You will see similar options on the tab for each of these actions, but you may want to select different settings for them. The following screen shot uses a production set as an example, but the settings are the same when exporting production sets, saved searches, folders, and subfolders.




On the **Data Source** tab, you can set the following options for the data that you want to export. Depending on the type of data you want to export, the dropdown updates accordingly. Select from the following:

- **Views - Folders and subfolders** - select a view for the data that you want to export.
- **Searches - Saved Search** - select a saved search you want to export.
- **Productions - Production set** - select a production set you want to export
- **Selected Columns** - choose the fields that you want to export by moving them to the **Selected Columns** box. The box on the right displays all available fields. Only the fields in the **Selected Columns** box are exported.

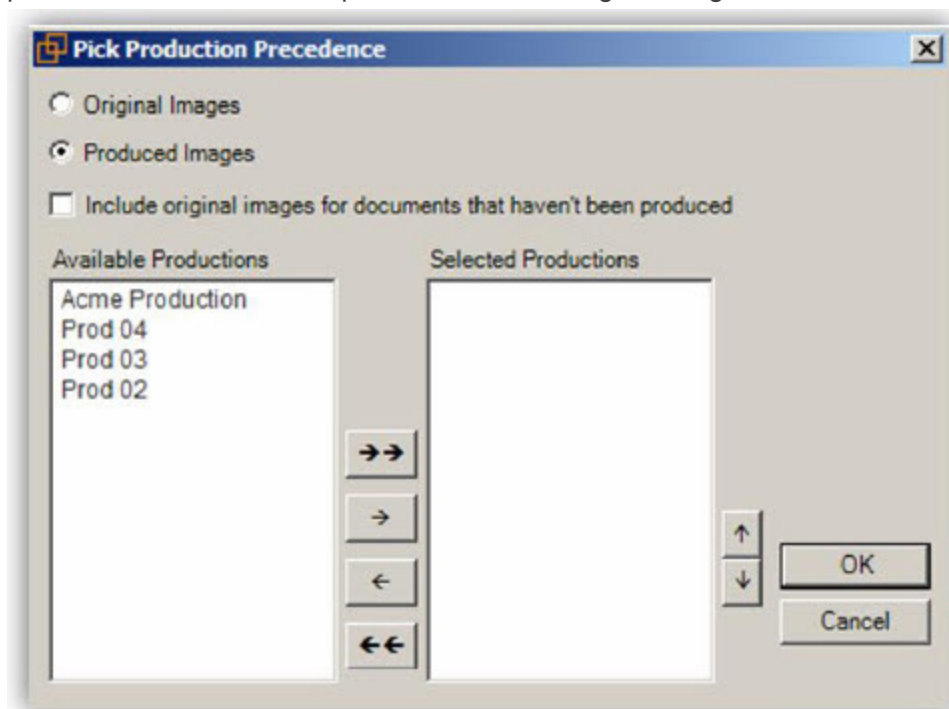
---

**Note:** If a reflected production field is selected for Selected Column, the RDC doesn't narrow down the field to a specific production. The reflected field for all productions is included.

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- **Start Export at Record #** - select a record number that identifies the initial document for export. The RDC exports the document with this record number and continues exporting documents with subsequent record numbers.
- (Available only for Saved Searches, Folders, and Subfolders) **Production Precedence** - click  to display the Pick Production Precedence dialog where you can select a group of

produced documents for export instead of the original images.



- Select the images that you want to export:
  - **Original Images** - export only the original, non-produced images.
  - **Produced Images** - export a produced version of the images.
  - **Include original images...** - export original images for the documents that are not in a specified production.
- Move the productions that you want to exported to the **Selected Productions** box. To move productions between columns, highlight the production and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the precedence of the fields.

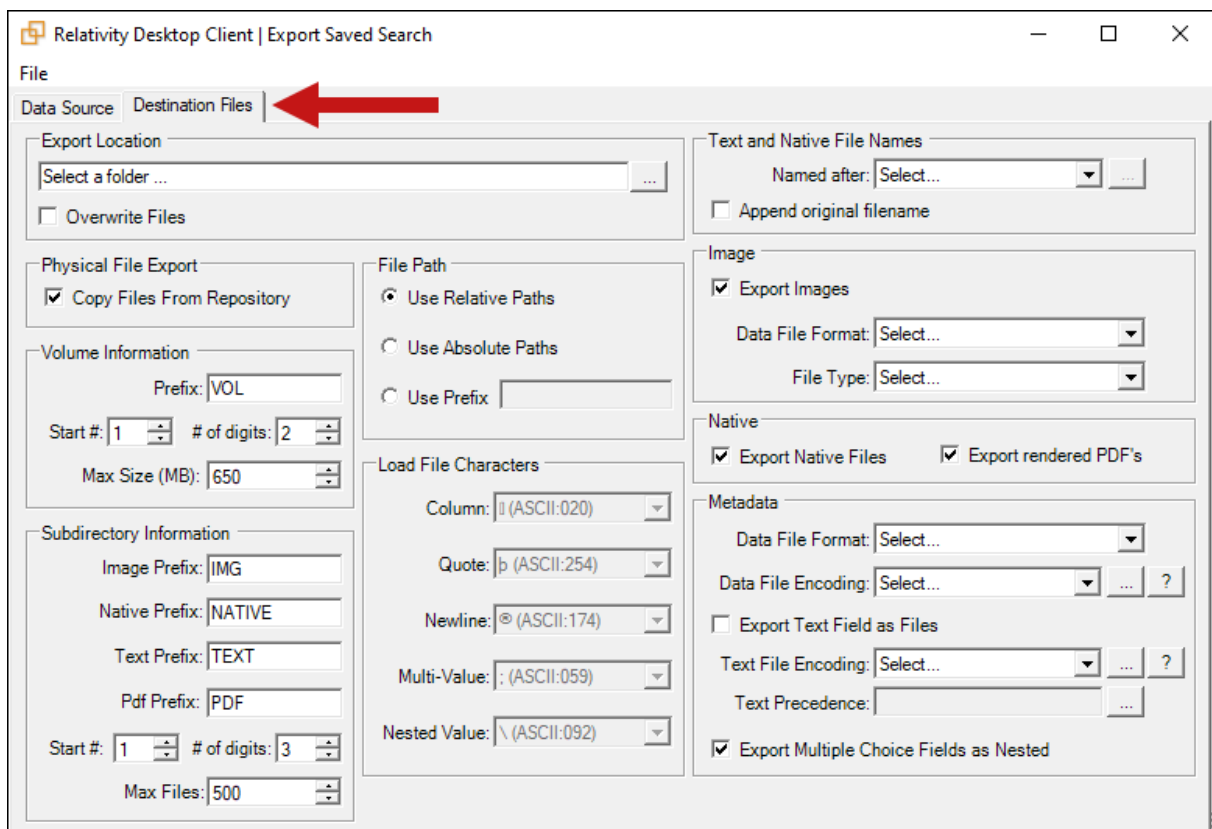
---

**Note:** Any produced native files will be exported as a native instead of an image. Only one produced image is exported based on precedence in the list. If the document is in the topmost production, that version is exported. If not, Relativity checks for the document in the second production and so on. If the document is not a part of any of the selected productions, and **Include original images ...** is enabled, then the original document is produced.

---

5. Select the Destination Files tab.

On the Destination tab, you can set options that control how the files in folders, searches, and production sets are exported. The Export dialog displays this tab when you select an **Export** option from the **Tools** menu, or when you right-click on a folder or workspace in the RDC. The Destination tab displays the same options when you export files in folders, searches, or production sets.

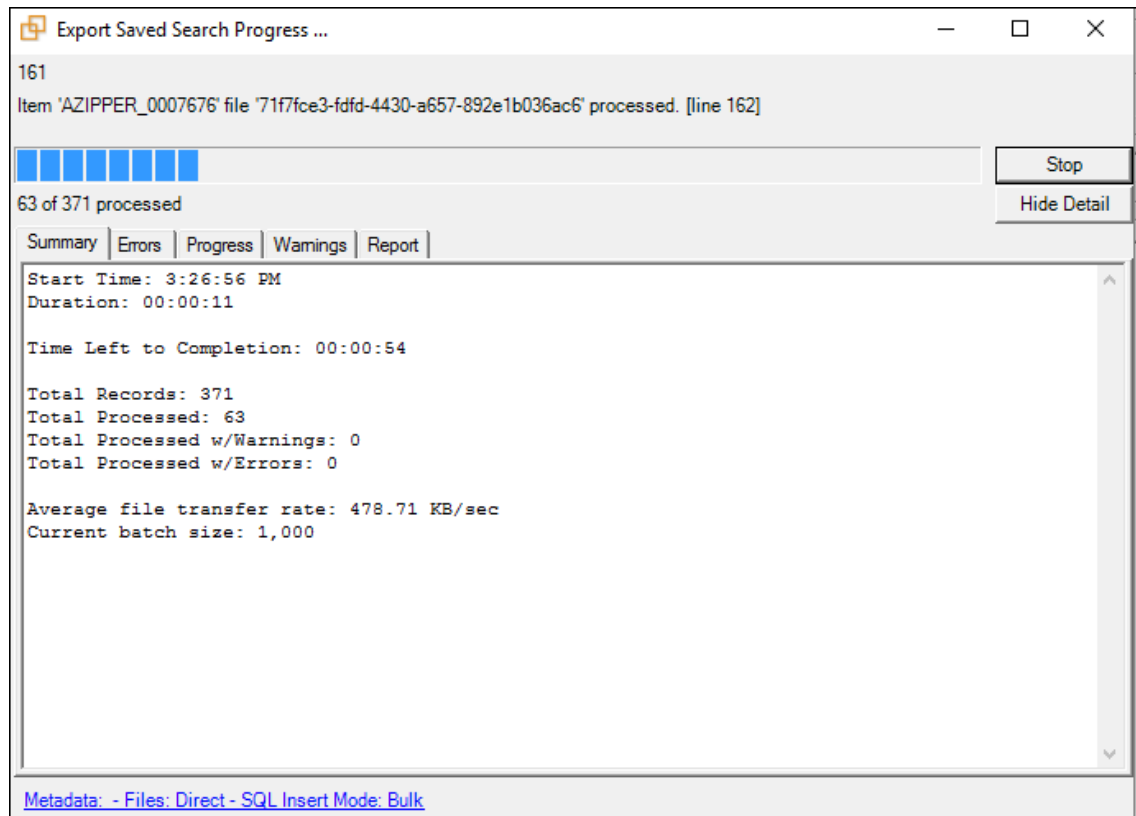


**Note:** In the Text and Native File Name section, the Named after option is available only for Production Sets.

6. Complete the fields on the Destination Files tab. See [Fields on the Destination Files tab on the next page](#).
7. After you have selected your export settings, select **File** and click **Run**.

**Note:** A warning message is displayed if you are missing information required to run the export. Update the settings for the required options, and run the export again.

8. Review the progress of the export.  
You can view the progress of an export through the RDC. Select the following tabs to display specific information:
  - **Summary** - displays general information about the number of records, processing warnings, and errors. The following screen shot displays file progress for an export job.



- **Errors** - lists any errors encountered during the load. The Errors tab displays any errors that occur when you export content with the RDC.
- **Progress** - displays a detailed view of the load progress.
- **Warnings** - displays information about loading or connection issues.
- **Report** - includes the following files that you can export:
  - **Export Error Report** - exports a .csv file with a summary of errors.
  - **Export Error File** - exports a .dat file, which is a document-level load file containing only records with errors.
- **File Transfer Mode** - displays the following information:
  - **Web mode** - this mode uses the web server and it is the standard.
  - **Direct mode** - this mode provides faster performance, but requires a connection to the network hosting the data, as well as specific Windows group permissions.

---

**Note:** For deployments that have client domains enabled, client domain users will not be able to use Direct Mode within the Relativity Desktop Client. Client domain-enabled servers will not have access to the BCPPATH.


---

9. (Optional) To save your export settings for reuse, point to the **File** menu, and click **Save Export Settings**. Choose a location for the export settings file (.kwx).

#### 7.8.4.3 Fields on the Destination Files tab

The Destination Files tab contains the following sections with their respective fields:



- **Export Location** - select a target directory for exporting folders, searches, and production sets. Click  to browse for a location. Select **Overwrite Files** to overwrite any existing files of the same name in the target export directory.
- **Physical File Export** - select the **Copy Files From Repository** option. This is the default option and copies files from the file server to the specified export location. If you don't select **Copy Files From Repository**, Relativity doesn't copy the files to the export location. Instead, the exported load files reference the repository location of the files.
- **Volume Information** - controls the naming and size of the volume identifier. Set the following options in this section:
  - **Prefix** - enter the alpha prefix for the volume identifier.
  - **Start #** - select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
  - **# of Digits** - select the number of digits attached to the prefix. (For example, if you select 3, the output is VOL001, VOL002, and so on.)
  - **Max size** - select the maximum size allowed for each volume in MBs.
- **Subdirectory Information** - controls the naming and size of volume subfolders. Set the following options in this section:
  - **Image Prefix** - enter the alpha prefix for the subdirectory that stores exported images.
  - **Native Prefix** - enter the alpha prefix for the subdirectory that stores exported native files.
  - **Text Prefix** - enter the alpha prefix for the subdirectory that stores exported extracted text files.
  - **Pdf Prefix** - enter the alpha prefix for the subdirectory that stores exported extracted PDF files.
  - **Start #** - select the starting number for the subdirectories.
  - **# of Digits** - select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
  - **Max Files** - select the number of files to store in each subdirectory.
- **File Path** - controls how the export path for the files is referenced. Select one of the following options:
  - **Use absolute paths** - paths to exported files are represented as absolute paths.  
C:\Desktop\VOL001\NATIVE001\AS000001.msg
  - **Use relative paths** - paths to exported files are represented as relative paths.  
.\VOL001\NATIVE001\AS000001.msg
  - **Use prefix** - a prefix is added to the relative path, such as a CD drive letter.  
D:\VOL001\NATIVE001\AS000001.msg
- **Load File Characters** - select the delimiters to use in a document-level load file when **Data File Format** in the **Metadata** section is set to **Custom**. Select the following options as necessary:
  - **Column** - this delimiter separates columns in the load file.
  - **Quote** - this delimiter qualifies the text in each field of the load file.

- **Newline** - this delimiter signifies the end of any extracted text or long text field in the load file.
- **Multi-Value** - this delimiter separates different choices within a choice field.
- **Nested Value** - this delimiter indicates the hierarchy of choices within a choice field.

- **Text and Native File Names** - select the following options for naming exported native and extracted text files:



---

**Note:** The following field types are supported by this feature: Date, Decimal, Fixed-Length Text, Single Choice, Whole Number, and Yes/No.

---

- (Available Only for Production Sets) **Named after** - select one of the following naming convention for exported files:
  - **Identifier** - select this option to name the files after the identifier for your workspace.
  - **Beginning production number** - select this option to name the files after the production number. (This number may be the Bates number for a production.)
  - **Custom** - select this option to name the native and text files in an export by appending them with either a control number or production begin bates and, optionally, a field of your choice. This option does not apply to image files.


To select custom naming options for your exported native and text files, do the following:

- Select **Custom** from the Named after drop-down menu.
- Click  to the right of the Named after drop-down menu.
- Select either the control number or production begin bates naming option from the drop-down menu.
- Optionally, to append a field or custom text to the file name, click .
- Select the desired spacing option from the **\_ (underscore)** drop-down menu.
- To either add custom text to the name or to add a field to the name, do the following:
  - To include custom text as part of the name, choose the **Custom Text...** option in the drop-down menu and enter the desired custom text in the textbox underneath the **Custom Text...** drop-down menu.
  - To include a field as part of the file names, select the desired field option from the **Custom Text...** drop-down menu. If a field is empty in a workspace it will not display as part of the file name even if selected from the **Custom Text...** drop-down menu.

---

**Note:** If a boolean field is selected, the name of the field will be displayed and not the value. For example: JWOLFE\_009\_confidential-HAS IMAGES.

---

- Optionally, to add an additional field or custom text after the previously selected options, click .

- Select the desired spacing option from the **\_ (underscore)** drop-down menu.
- To either add additional custom text to the name or to add an additional field to the name, do the following:
  - To include additional custom text as part of the name before a field, choose the **Custom Text...** option in the drop-down menu and enter the desired custom text in the textbox underneath the **Custom Text...** drop-down menu.
  - To include an additional field as part of the name, select the desired field option from the **Custom Text...** drop-down menu. If a field is empty in a workspace it will not display as part of the file name even if selected from the **Custom Text...** drop-down menu.

---

**Note:** If a boolean field is selected, the name of the field will be displayed and not the value. For example: JWOLFE\_009\_confidential-HAS IMAGES.

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- Click **Apply** to save the current naming options.

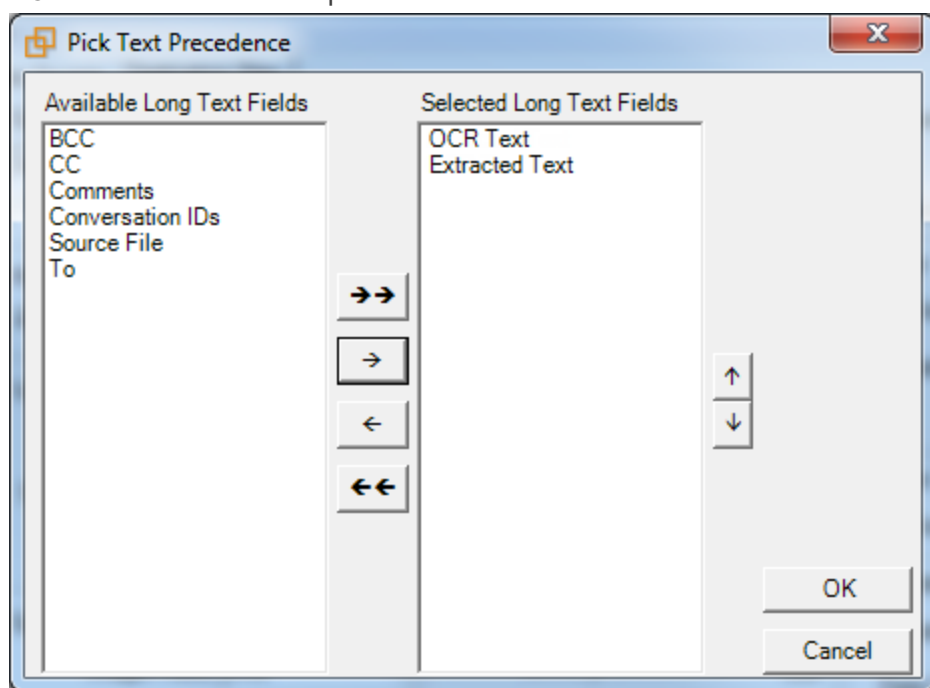
---

**Note:** If a file is not found in any of the production sets, the name will revert to the control number or production begin bates regardless of which naming options you have selected.

---

- **Append original file** - Select this option to append the original file name which is defined as the file name as it was on disk to the end of the exported file name.
- **Image** - determines whether to include images in an export and sets the format of the load file. Set the following options:
  - **Check Export Images** - select this option to include images in the export. (You must set the **Data File Format** and the **File Type** when you export images.)
  - **Data File Format** - select one of these formats for image-level load file:
    - Opticon
    - IPRO
  - **File Type** - select one of these file types:
    - Single-page TIF/JPG
    - Multi-page TIF
    - PDF
- **Native**—controls which files are exported by RDC.
  - **Export Native Files**—select to export native files.
  - **Export rendered PDF's**—select to export PDF files.
- **Metadata** - use the following options to control the export of the document-level load file and extracted text:

- **Data File Format** - select a the format for the document-level load file you're exporting:
  - Comma separated (.csv)
  - Concordance (.dat) - load file exports with the standard Concordance delimiters.
  - Custom (.txt) - load file exports with the custom delimiters that you select in the **Load File Characters** section.
  - HTML (.html) - load file is in HTML and contains hyperlinks to launch any exported files.
- **Data File Encoding** - select an encoding for the document-level load file from the drop-down box. Click  for additional options.
- **Export Text Field as Files** - determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. The RDC includes text as part of your load file if you deselect this option.
- **Text File Encoding** - select the encoding for the document-level text files. Click  for additional options.
- **Text Precedence** - select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click  to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the precedence of the fields.



If you add any fields to the **Selected Long Text Fields** column, Relativity adds the Text Precedence column as the last column in the load file. During an export, Relativity checks the topmost field in the **Selected Long Text Fields** column for text, and if the field is null, it checks the next field in order of precedence for text. When it finds a field that contains text, Relativity

adds the contents of that field to the Text Precedence column in the document load file, and then continues checking the fields for the next document.

For example, you want the Text Precedence column in the load file to contain the contents of the OCR Text field when it is available for a document and the contents of the Extracted Text field when the OCR Text for a document is null. In the Pick Text Precedence pop-up, you add the OCR Text as the first field in the **Selected Long Text Fields** column followed by the Extracted Text field.

---

**Note:** If you want to improve export performance, you don't need to add all of the long text fields you select in the Pick Text Precedence pop-up to the Selected Columns option on the Data Source tab. When you don't select these fields on the Data Source tab, but you add them to **Selected Long Text Fields** column, the RDC adds the content of these fields to the Text Precedence column as described above. When you add the long text fields on the Data Source tab, Relativity adds these columns to the document level load file.

---

The Precedence Text column displays the file path to the exported files if you select the **Export Text Field as Files** checkbox.

- **Export Multiple-Choice Fields as Nested** - select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.

## 7.8.5 Exporting a folder

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**Note:** Relativity ended support for and access to the Relativity Desktop Client (RDC) for RelativityOne commercial customers on December 31, 2023. Import/Export is being used for all importing and exporting workflows.

For RelativityOne Government customers, beginning March 31, 2024, RDC will only operate in web transfer mode, which will result in significantly slower transfer speeds. It is highly recommended that Government customers begin using Import/Export in RelativityOne as soon as possible to prepare for the deprecation of RDC on June 30, 2024. Starting July 1, 2024, RDC will no longer be operational. See the Community article [RDC Deprecation FAQ](#) for additional information.

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You can export the contents of a specific workspace folder through the RDC.

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**Note:** To preserve the current folder structure of each document in a long text field, you have the option of running the Set Relativity folder path field script when you're exporting a folder through the RDC.

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### 7.8.5.1 Exporting RDC Permissions

The following permissions are required to use the exporting feature in Relativity Desktop Client:

Object Security	Admin Operations
<ul style="list-style-type: none"><li>■ Document: Local Access (Download, Copy Text)</li></ul> <p><b>Note:</b> This is required when exporting long-text cells greater than the value defined by the MaximumLongTextSizeForExportInCell instance setting, the default value of which is 1048576.</p>	<ul style="list-style-type: none"><li>■ Allow Export</li></ul>

Object Security	Admin Operations

### 7.8.5.2 Exporting a folder

**Note:** When you select the **Folder** option, only the contents of the current folder are exported. Use **Folder and Subfolders** option to export the contents of both the folder and its subfolders, or the contents of an entire workspace. See [Exporting a folder and its subfolders on page 411](#).

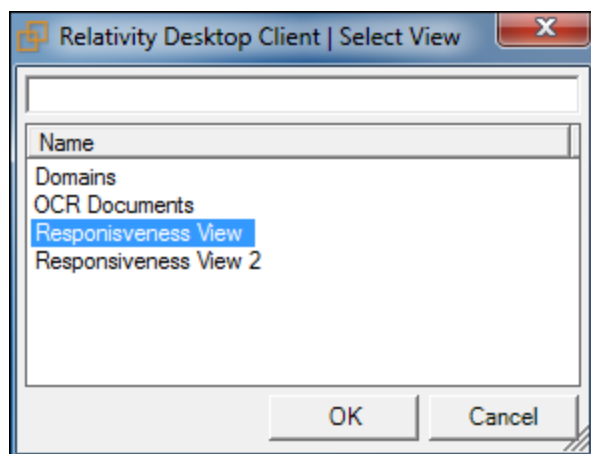
To export a folder:

1. Open the RDC and then select a workspace.
2. In the RDC browser, right-click on a specific folder, point to **Export** and then click **Folder**.

You can also highlight a folder in the RDC browser. On the **Tools** menu, point to **Export** and click **Folder**.) The Data Source tab in the Export Production window appears.

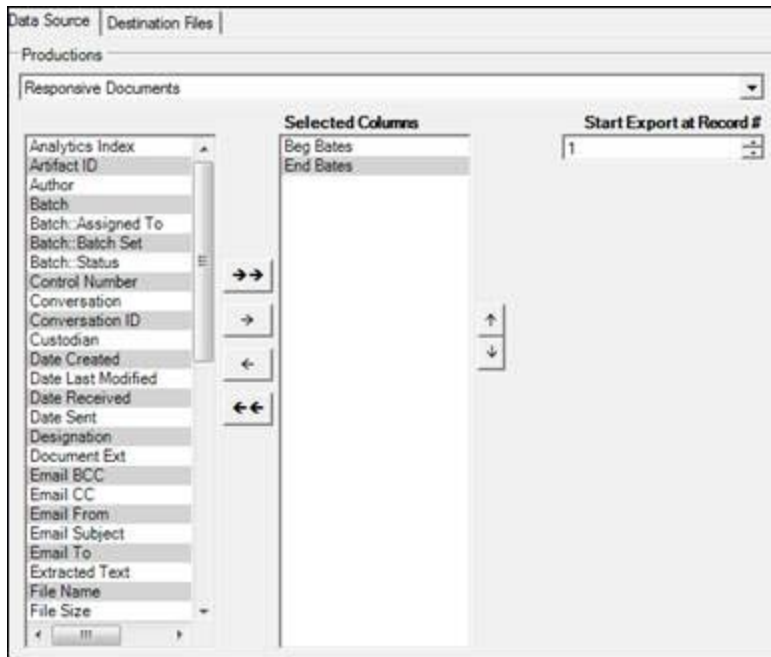
3. (Optional) To use settings in an existing export file, complete these steps:
  - a. Click the **File** menu, and select **Load Export Settings**.
  - b. Browse for your export settings file (.kwx) in the Open dialog.
  - c. Select a view, and click **OK**. Your view is listed on the Data Source tab, and determines the fields displayed in the **Selected Columns** box. Other settings from the file are used to populate the Destination Files tab. (You can also modify any settings on the Data Source and Destination Files tab as necessary.)

**Note:** On the Destination Files tab, you may want to select **Overwrite Files** if you are re-exporting the same group of files to the previously used location.



- d. Continue with step 7.

1. On the Data Source tab, select a view in the Views box. Update the remaining options as necessary. The Data Source tab appears when you select the option to export production sets, saved searches, folders, and subfolders. You will see similar options on the tab for each of these actions, but you may want to select different settings for them. The following screen shot uses a production set as an example, but the settings are the same when exporting production sets, saved searches, folders, and subfolders.




On the **Data Source** tab, you can set the following options for the data that you want to export. Depending on the type of data you want to export, the dropdown updates accordingly. Select from the following:

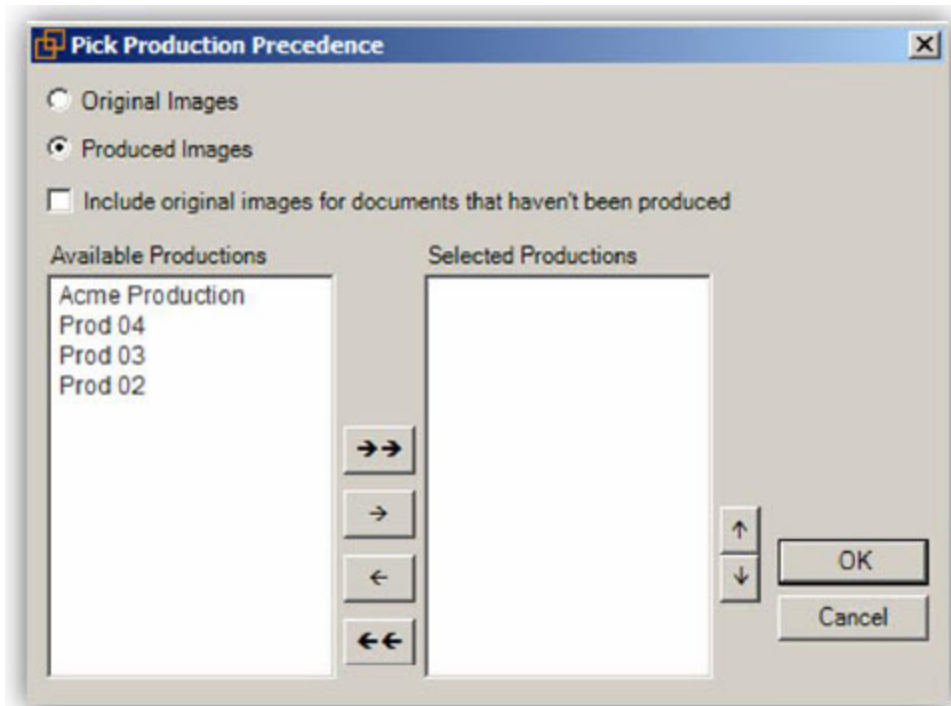
- **Views - Folders and subfolders** - select a view for the data that you want to export.
- **Searches - Saved Search** - select a saved search you want to export.
- **Productions - Production set** - select a production set you want to export
- **Selected Columns** - choose the fields that you want to export by moving them to the **Selected Columns** box. The box on the right displays all available fields. Only the fields in the **Selected Columns** box are exported.

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**Note:** If a reflected production field is selected for Selected Column, the RDC doesn't narrow down the field to a specific production. The reflected field for all productions is included.

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- **Start Export at Record #** - select a record number that identifies the initial document for export. The RDC exports the document with this record number and continues exporting documents with subsequent record numbers.
- (Available only for Saved Searches, Folders, and Subfolders) **Production Precedence** - click  to display the Pick Production Precedence dialog where you can select a group of produced documents for export instead of the original images.



- Select the images that you want to export:
  - **Original Images** - export only the original, non-produced images.
  - **Produced Images** - export a produced version of the images.
  - **Include original images...** - export original images for the documents that are not in a specified production.
- Move the productions that you want to exported to the **Selected Productions** box. To move productions between columns, highlight the production and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the precedence of the fields.

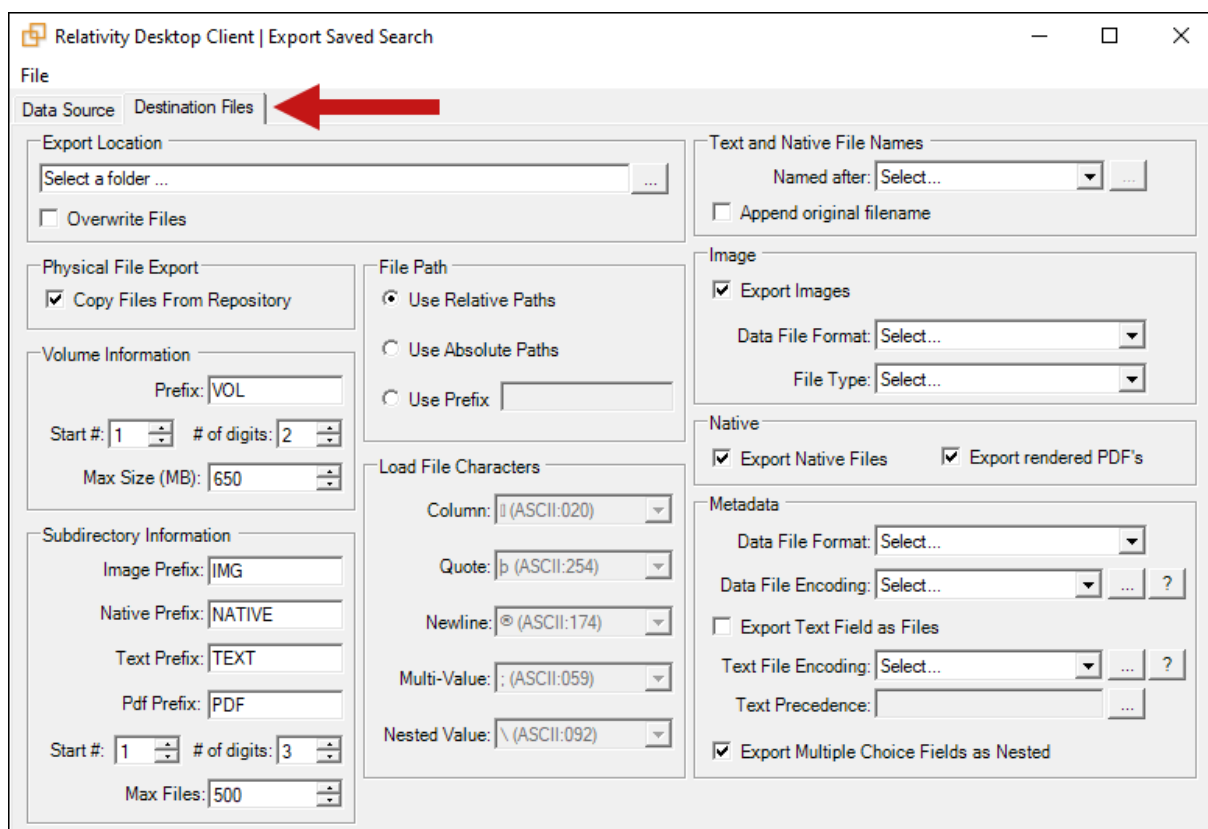
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**Note:** Any produced native files will be exported as a native instead of an image. Only one produced image is exported based on precedence in the list. If the document is in the topmost production, that version is exported. If not, Relativity checks for the document in the second production and so on. If the document is not a part of any of the selected productions, and **Include original images ...** is enabled, then the original document is produced.

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4. Select the Destination Files tab.  
On the Destination tab, you can set options that control how the files in folders, searches, and production sets are exported. The Export dialog displays this tab when you select an **Export** option from the **Tools** menu, or when you right-click on a folder or workspace in the RDC. The Destination tab displays the same options when you export files in folders, searches, or production sets.



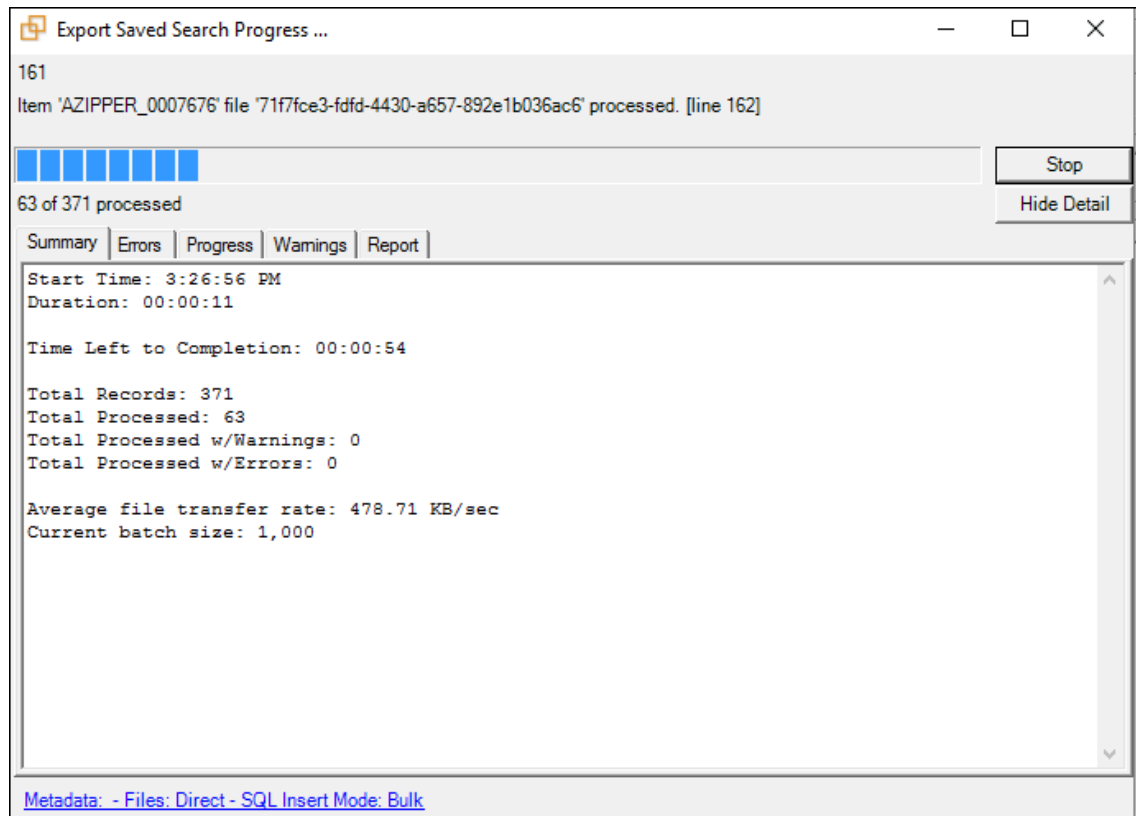


**Note:** In the Text and Native File Name section, the Named after option is available only for Production Sets.

5. Complete the fields on the Destination Files tab. See [Fields on the Destination Files tab on the next page](#).
6. After you have selected your export settings, select **File** and click **Run**.

**Note:** A warning message appears if you are missing information required to run the export. Update the settings for the required options, and run the export again.

7. Review the progress of the export.  
You can view the progress of an export through the RDC. Select the following tabs to display specific information:
  - **Summary** - displays general information about the number of records, processing warnings, and errors. The following screen shot displays file progress for an export job.



- **Errors** - lists any errors encountered during the load. The Errors tab displays any errors that occur when you export content with the RDC.
- **Progress** - displays a detailed view of the load progress.
- **Warnings** - displays information about loading or connection issues.
- **Report** - includes the following files that you can export:
  - **Export Error Report** - exports a .csv file with a summary of errors.
  - **Export Error File** - exports a .dat file, which is a document-level load file containing only records with errors.
- **File Transfer Mode** - displays the following information:
  - **Web mode** - this mode uses the web server and it is the standard.
  - **Direct mode** - this mode provides faster performance, but requires a connection to the network hosting the data, as well as specific Windows group permissions.

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
**Note:** For deployments that have client domains enabled, client domain users will not be able to use Direct Mode within the Relativity Desktop Client. Client domain-enabled servers will not have access to the BCPPATH.

---

8. (Optional) To save your export settings, point to the **File** menu, and click **Save Export Settings**. Choose a location for the export settings file (.kwx).

### 7.8.5.3 Fields on the Destination Files tab

The Destination Files tab contains the following sections with their respective fields:

- **Export Location** - select a target directory for exporting folders, searches, and production sets. Click  to browse for a location. Select **Overwrite Files** to overwrite any existing files of the same name in the target export directory.
- **Physical File Export** - select the **Copy Files From Repository** option. This is the default option and copies files from the file server to the specified export location. If you don't select **Copy Files From Repository**, Relativity doesn't copy the files to the export location. Instead, the exported load files reference the repository location of the files.
- **Volume Information** - controls the naming and size of the volume identifier. Set the following options in this section:
  - **Prefix** - enter the alpha prefix for the volume identifier.
  - **Start #** - select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
  - **# of Digits** - select the number of digits attached to the prefix. (For example, if you select 3, the output is VOL001, VOL002, and so on.)
  - **Max size** - select the maximum size allowed for each volume in MBs.
- **Subdirectory Information** - controls the naming and size of volume subfolders. Set the following options in this section:
  - **Image Prefix** - enter the alpha prefix for the subdirectory that stores exported images.
  - **Native Prefix** - enter the alpha prefix for the subdirectory that stores exported native files.
  - **Text Prefix** - enter the alpha prefix for the subdirectory that stores exported extracted text files.
  - **Pdf Prefix** - enter the alpha prefix for the subdirectory that stores exported extracted PDF files.
  - **Start #** - select the starting number for the subdirectories.
  - **# of Digits** - select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
  - **Max Files** - select the number of files to store in each subdirectory.
- **File Path** - controls how the export path for the files is referenced. Select one of the following options:
  - **Use absolute paths** - paths to exported files are represented as absolute paths.  
C:\Desktop\VOL001\NATIVE001\AS000001.msg
  - **Use relative paths** - paths to exported files are represented as relative paths.  
.\VOL001\NATIVE001\AS000001.msg
  - **Use prefix** - a prefix is added to the relative path, such as a CD drive letter.  
D:\VOL001\NATIVE001\AS000001.msg
- **Load File Characters** - select the delimiters to use in a document-level load file when **Data File Format** in the **Metadata** section is set to **Custom**. Select the following options as necessary:
  - **Column** - this delimiter separates columns in the load file.
  - **Quote** - this delimiter qualifies the text in each field of the load file.

- **Newline** - this delimiter signifies the end of any extracted text or long text field in the load file.
- **Multi-Value** - this delimiter separates different choices within a choice field.
- **Nested Value** - this delimiter indicates the hierarchy of choices within a choice field.

- **Text and Native File Names** - select the following options for naming exported native and extracted text files:



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**Note:** The following field types are supported by this feature: Date, Decimal, Fixed-Length Text, Single Choice, Whole Number, and Yes/No.

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- (Available Only for Production Sets) **Named after** - select one of the following naming convention for exported files:
  - **Identifier** - select this option to name the files after the identifier for your workspace.
  - **Beginning production number** - select this option to name the files after the production number. (This number may be the Bates number for a production.)
  - **Custom** - select this option to name the native and text files in an export by appending them with either a control number or production begin bates and, optionally, a field of your choice. This option does not apply to image files.


To select custom naming options for your exported native and text files, do the following:

- Select **Custom** from the Named after drop-down menu.
- Click  to the right of the Named after drop-down menu.
- Select either the control number or production begin bates naming option from the drop-down menu.
- Optionally, to append a field or custom text to the file name, click .
- Select the desired spacing option from the **\_ (underscore)** drop-down menu.
- To either add custom text to the name or to add a field to the name, do the following:
  - To include custom text as part of the name, choose the **Custom Text...** option in the drop-down menu and enter the desired custom text in the textbox underneath the **Custom Text...** drop-down menu.
  - To include a field as part of the file names, select the desired field option from the **Custom Text...** drop-down menu. If a field is empty in a workspace it will not display as part of the file name even if selected from the **Custom Text...** drop-down menu.

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**Note:** If a boolean field is selected, the name of the field will be displayed and not the value. For example: JWOLFE\_009\_confidential-HAS IMAGES.

---

- Optionally, to add an additional field or custom text after the previously selected options, click .

- Select the desired spacing option from the **\_ (underscore)** drop-down menu.
- To either add additional custom text to the name or to add an additional field to the name, do the following:
  - To include additional custom text as part of the name before a field, choose the **Custom Text...** option in the drop-down menu and enter the desired custom text in the textbox underneath the **Custom Text...** drop-down menu.
  - To include an additional field as part of the name, select the desired field option from the **Custom Text...** drop-down menu. If a field is empty in a workspace it will not display as part of the file name even if selected from the **Custom Text...** drop-down menu.

---

**Note:** If a boolean field is selected, the name of the field will be displayed and not the value. For example: JWOLFE\_009\_confidential-HAS IMAGES.

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- Click **Apply** to save the current naming options.

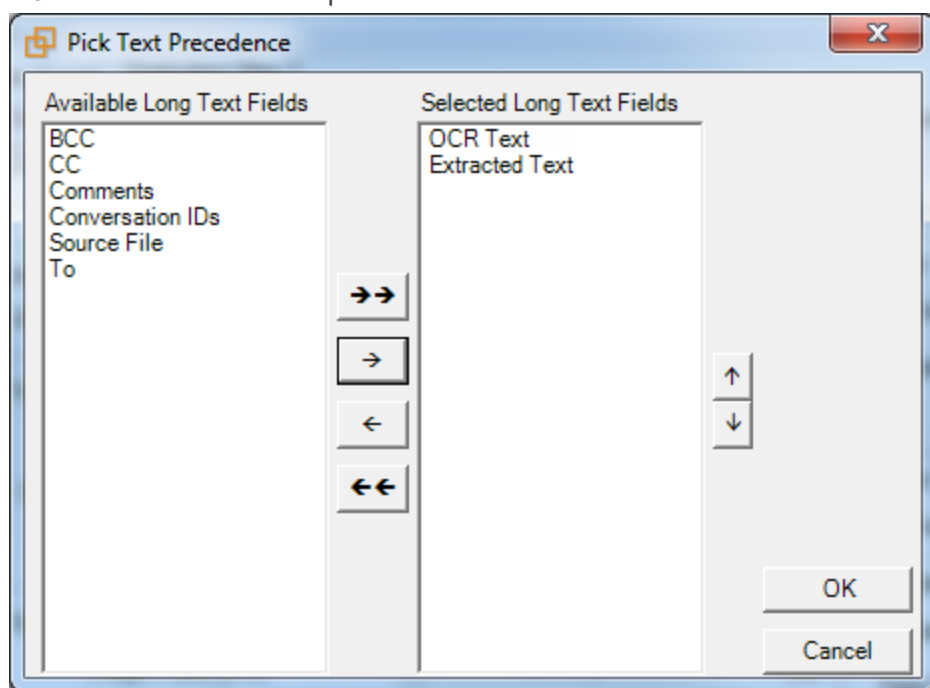
---

**Note:** If a file is not found in any of the production sets, the name will revert to the control number or production begin bates regardless of which naming options you have selected.

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- **Append original file** - Select this option to append the original file name which is defined as the file name as it was on disk to the end of the exported file name.
- **Image** - determines whether to include images in an export and sets the format of the load file. Set the following options:
  - **Check Export Images** - select this option to include images in the export. (You must set the **Data File Format** and the **File Type** when you export images.)
  - **Data File Format** - select one of these formats for image-level load file:
    - Opticon
    - IPRO
  - **File Type** - select one of these file types:
    - Single-page TIF/JPG
    - Multi-page TIF
    - PDF
- **Native**—controls which files are exported by RDC.
  - **Export Native Files**—select to export native files.
  - **Export rendered PDF's**—select to export PDF files.
- **Metadata** - use the following options to control the export of the document-level load file and extracted text:

- **Data File Format** - select a the format for the document-level load file you're exporting:
  - Comma separated (.csv)
  - Concordance (.dat) - load file exports with the standard Concordance delimiters.
  - Custom (.txt) - load file exports with the custom delimiters that you select in the **Load File Characters** section.
  - HTML (.html) - load file is in HTML and contains hyperlinks to launch any exported files.
- **Data File Encoding** - select an encoding for the document-level load file from the drop-down box. Click  for additional options.
- **Export Text Field as Files** - determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. The RDC includes text as part of your load file if you deselect this option.
- **Text File Encoding** - select the encoding for the document-level text files. Click  for additional options.
- **Text Precedence** - select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click  to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the precedence of the fields.



If you add any fields to the **Selected Long Text Fields** column, Relativity adds the Text Precedence column as the last column in the load file. During an export, Relativity checks the topmost field in the **Selected Long Text Fields** column for text, and if the field is null, it checks the next field in order of precedence for text. When it finds a field that contains text, Relativity

adds the contents of that field to the Text Precedence column in the document load file, and then continues checking the fields for the next document.

For example, you want the Text Precedence column in the load file to contain the contents of the OCR Text field when it is available for a document and the contents of the Extracted Text field when the OCR Text for a document is null. In the Pick Text Precedence pop-up, you add the OCR Text as the first field in the **Selected Long Text Fields** column followed by the Extracted Text field.

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**Note:** If you want to improve export performance, you don't need to add all of the long text fields you select in the Pick Text Precedence pop-up to the Selected Columns option on the Data Source tab. When you don't select these fields on the Data Source tab, but you add them to **Selected Long Text Fields** column, the RDC adds the content of these fields to the Text Precedence column as described above. When you add the long text fields on the Data Source tab, Relativity adds these columns to the document level load file.

---

The Precedence Text column displays the file path to the exported files if you select the **Export Text Field as Files** checkbox.

- **Export Multiple-Choice Fields as Nested** - select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.

## 7.8.6 Exporting a folder and its subfolders

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**Note:** Relativity ended support for and access to the Relativity Desktop Client (RDC) for RelativityOne commercial customers on December 31, 2023. Import/Export is being used for all importing and exporting workflows.

For RelativityOne Government customers, beginning March 31, 2024, RDC will only operate in web transfer mode, which will result in significantly slower transfer speeds. It is highly recommended that Government customers begin using Import/Export in RelativityOne as soon as possible to prepare for the deprecation of RDC on June 30, 2024. Starting July 1, 2024, RDC will no longer be operational. See the Community article [RDC Deprecation FAQ](#) for additional information.

---

You can export the contents of a folder and its subfolders, as well as an entire workspace, through the RDC.

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**Note:** To preserve the current folder structure of each document in a long text field, you have the option of running the Set Relativity folder path field script when you're exporting a folder through the RDC.

---

### 7.8.6.1 Exporting RDC Permissions

The following permissions are required to use the exporting feature in Relativity Desktop Client:

Object Security	Admin Operations
<ul style="list-style-type: none"><li>■ Document: Local Access (Download, Copy Text)</li></ul> <p><b>Note:</b> This is required when exporting long-text cells greater than the value defined by the MaximumLongTextSizeForExportInCell instance setting, the default value of which is 1048576.</p>	<ul style="list-style-type: none"><li>■ Allow Export</li></ul>

Object Security	Admin Operations

### 7.8.6.2 Exporting a folder and its subfolders

**Note:** You can also export only the content of the current folder using the **Folder** option. See [Exporting a folder on page 401](#).

To export a folder and its subfolders:

1. Open the RDC and select a workspace.
2. In the RDC browser, right-click on a specific folder, point to **Export** and then click **Folder and Subfolders**.

You can also highlight a folder in the RDC browser. On the **Tools** menu, point to **Export** and click **Folder and Subfolders**.

The Data Source tab in the Export Production window appears.

**Note:** To export an entire workspace, highlight the root folder.

3. (Optional) To use settings in an existing export file, complete these steps:
  - a. Click **File** and select **Load Export Settings**.
  - b. Browse for your export settings file (.kwx) in the Open dialog.
  - c. Select a view, and then click **OK**. Your view is lists on the Data Source tab. This determines the fields listed in the **Selected Columns** box. Other settings from the file are used to populate the Destination Files tab. You can also modify any settings on the Data Source and Destination Files tab as necessary.

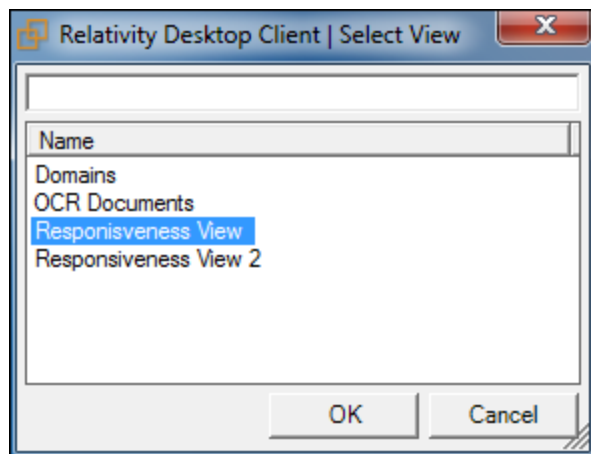
**Note:** On the Destination Files tab, you may want to select **Overwrite Files** if you are re-



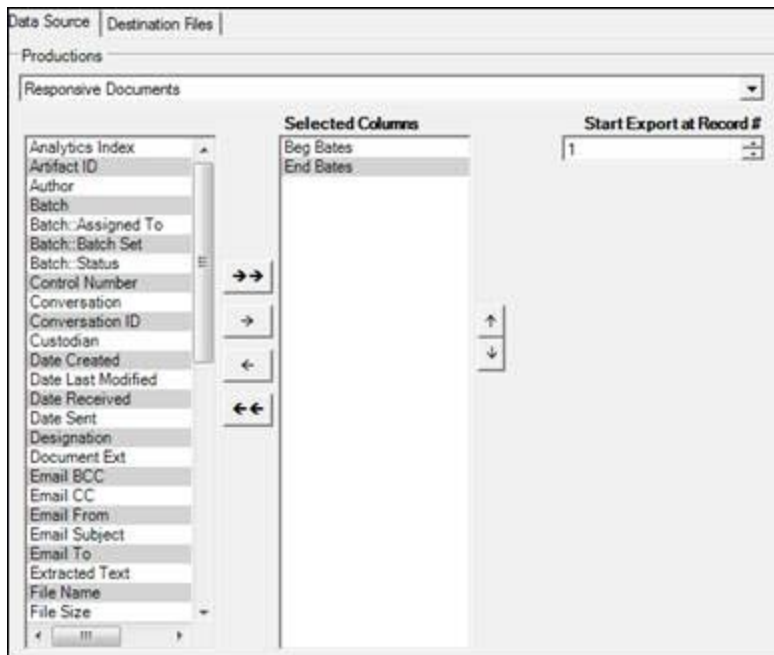
---

exporting the same group of files to the previously used location.

---



- d. Continue with step 7.
4. On the Data Source, select a view in the **Views** box. Update the remaining options as necessary. The Data Source tab appears when you select the option to export production sets, saved searches, folders, and subfolders. You will see similar options on the tab for each of these actions, but you may want to select different settings for them. The following screen shot uses a production set as an example, but the settings are the same when exporting production sets, saved searches, folders, and subfolders.




On the **Data Source** tab, you can set the following options for the data that you want to export. Depending on the type of data you want to export, the dropdown updates accordingly. Select from the following:

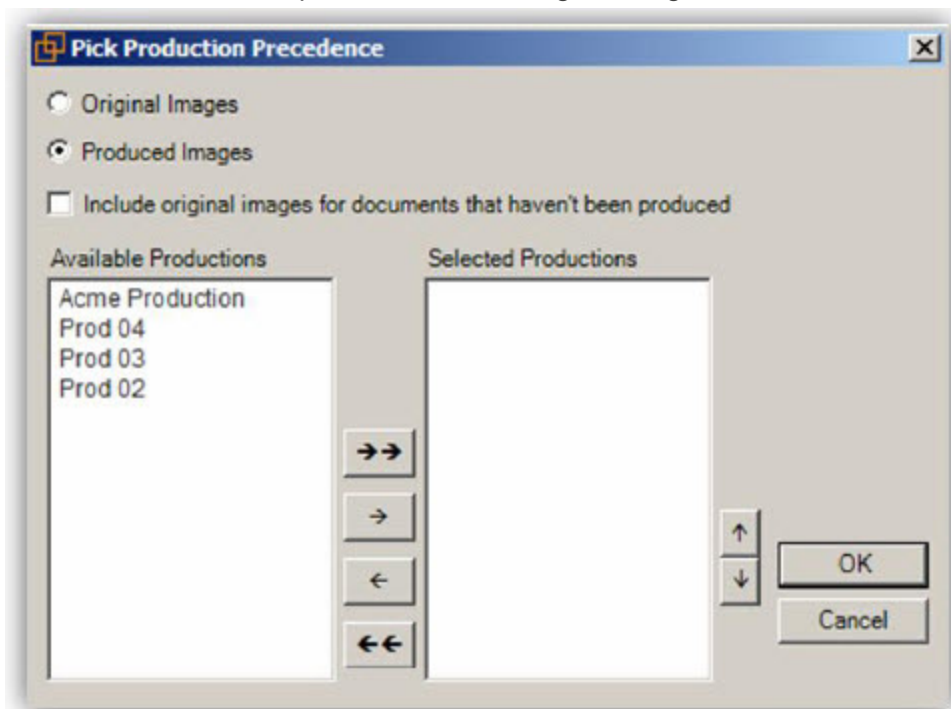
- **Views - Folders and subfolders** - select a view for the data that you want to export.
- **Searches - Saved Search** - select a saved search you want to export.
- **Productions - Production set** - select a production set you want to export
- **Selected Columns** - choose the fields that you want to export by moving them to the **Selected Columns** box. The box on the right displays all available fields. Only the fields in the **Selected Columns** box are exported.

---

**Note:** If a reflected production field is selected for Selected Column, the RDC doesn't narrow down the field to a specific production. The reflected field for all productions is included.

---

- **Start Export at Record #** - select a record number that identifies the initial document for export. The RDC exports the document with this record number and continues exporting documents with subsequent record numbers.
- (Available only for Saved Searches, Folders, and Subfolders) **Production Precedence** - click  to display the Pick Production Precedence dialog where you can select a group of produced documents for export instead of the original images.



- Select the images that you want to export:
  - **Original Images** - export only the original, non-produced images.
  - **Produced Images** - export a produced version of the images.

- **Include original images...** - export original images for the documents that are not in a specified production.
- Move the productions that you want to exported to the **Selected Productions** box. To move productions between columns, highlight the production and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the precedence of the fields.

**Note:** Any produced native files will be exported as a native instead of an image. Only one produced image is exported based on precedence in the list. If the document is in the topmost production, that version is exported. If not, Relativity checks for the document in the second production and so on. If the document is not a part of any of the selected productions, and **Include original images ...** is enabled, then the original document is produced.

5. Select the **Destination Files** tab.

On the Destination tab, you can set options that control how the files in folders, searches, and production sets are exported. The Export dialog displays this tab when you select an **Export** option from the **Tools** menu, or when you right-click on a folder or workspace in the RDC. The Destination tab displays the same options when you export files in folders, searches, or production sets.

**Note:** In the Text and Native File Name section, the Named after option is available only for Production Sets.

6. Complete the fields on the Destination Files tab. See [Fields on the Destination Files tab on page 417](#).

- After you have selected your export settings, select **File** and then click **Run**.

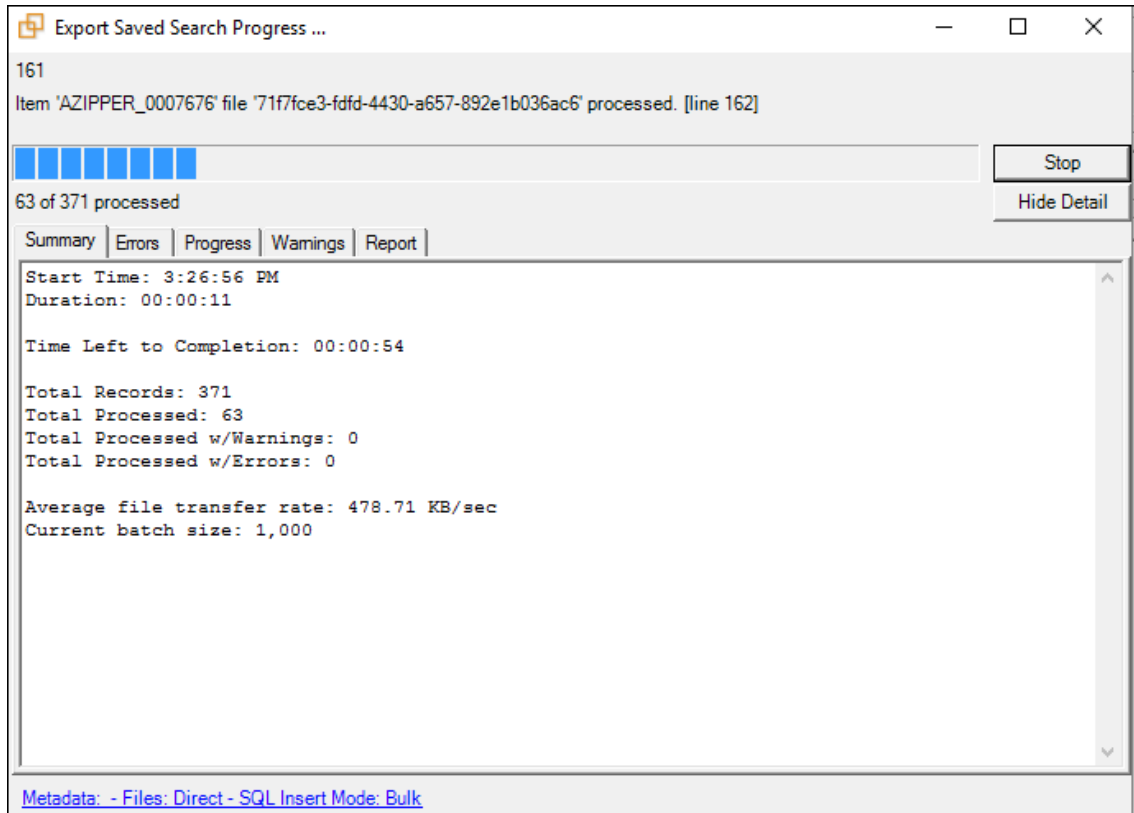
---

**Note:** A warning message displays if you are missing information required to run the export. Update the settings for the required options, and run the export again.

---

- Review the progress of the export.  
You can view the progress of an export through the RDC. Select the following tabs to display specific information:

- **Summary** - displays general information about the number of records, processing warnings, and errors. The following screen shot displays file progress for an export job.



- **Errors** - lists any errors encountered during the load. The Errors tab displays any errors that occur when you export content with the RDC.
- **Progress** - displays a detailed view of the load progress.
- **Warnings** - displays information about loading or connection issues.
- **Report** - includes the following files that you can export:
  - **Export Error Report** - exports a .csv file with a summary of errors.
  - **Export Error File** - exports a .dat file, which is a document-level load file containing only records with errors.

- **File Transfer Mode** - displays the following information:
  - **Web mode** - this mode uses the web server and it is the standard.
  - **Direct mode** - this mode provides faster performance, but requires a connection to the network hosting the data, as well as specific Windows group permissions.

---


**Note:** For deployments that have client domains enabled, client domain users will not be able to use Direct Mode within the Relativity Desktop Client. Client domain-enabled servers will not have access to the BCPPPath.

---

9. (Optional) To save your export settings, click **File > Save Export Settings**. Choose a location for the export settings file (.kwx).

#### 7.8.6.3 Fields on the Destination Files tab

The Destination Files tab contains the following sections with their respective fields:



- **Export Location** - select a target directory for exporting folders, searches, and production sets. Click  to browse for a location. Select **Overwrite Files** to overwrite any existing files of the same name in the target export directory.
- **Physical File Export** - select the **Copy Files From Repository** option. This is the default option and copies files from the file server to the specified export location. If you don't select **Copy Files From Repository**, Relativity doesn't copy the files to the export location. Instead, the exported load files reference the repository location of the files.
- **Volume Information** - controls the naming and size of the volume identifier. Set the following options in this section:
  - **Prefix** - enter the alpha prefix for the volume identifier.
  - **Start #** - select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
  - **# of Digits** - select the number of digits attached to the prefix. (For example, if you select 3, the output is VOL001, VOL002, and so on.)
  - **Max size** - select the maximum size allowed for each volume in MBs.
- **Subdirectory Information** - controls the naming and size of volume subfolders. Set the following options in this section:
  - **Image Prefix** - enter the alpha prefix for the subdirectory that stores exported images.
  - **Native Prefix** - enter the alpha prefix for the subdirectory that stores exported native files.
  - **Text Prefix** - enter the alpha prefix for the subdirectory that stores exported extracted text files.
  - **Pdf Prefix** - enter the alpha prefix for the subdirectory that stores exported extracted PDF files.
  - **Start #** - select the starting number for the subdirectories.
  - **# of Digits** - select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
  - **Max Files** - select the number of files to store in each subdirectory.

- **File Path** - controls how the export path for the files is referenced. Select one of the following options:
  - **Use absolute paths** - paths to exported files are represented as absolute paths.  
C:\Desktop\VOL001\NATIVE001\AS000001.msg
  - **Use relative paths** - paths to exported files are represented as relative paths.  
.\VOL001\NATIVE001\AS000001.msg
  - **Use prefix** - a prefix is added to the relative path, such as a CD drive letter.  
D:\VOL001\NATIVE001\AS000001.msg
- **Load File Characters** - select the delimiters to use in a document-level load file when **Data File Format** in the **Metadata** section is set to **Custom**. Select the following options as necessary:
  - **Column** - this delimiter separates columns in the load file.
  - **Quote** - this delimiter qualifies the text in each field of the load file.
  - **Newline** - this delimiter signifies the end of any extracted text or long text field in the load file.
  - **Multi-Value** - this delimiter separates different choices within a choice field.
  - **Nested Value** - this delimiter indicates the hierarchy of choices within a choice field.
- **Text and Native File Names** - select the following options for naming exported native and extracted text files:

---

**Note:** The following field types are supported by this feature: Date, Decimal, Fixed-Length Text, Single Choice, Whole Number, and Yes/No.

---


- (Available Only for Production Sets) **Named after** - select one of the following naming convention for exported files:
  - **Identifier** - select this option to name the files after the identifier for your workspace.
  - **Beginning production number** - select this option to name the files after the production number. (This number may be the Bates number for a production.)
  - **Custom** - select this option to name the native and text files in an export by appending them with either a control number or production begin bates and, optionally, a field of your choice. This option does not apply to image files.  
To select custom naming options for your exported native and text files, do the following:
    - Select **Custom** from the Named after drop-down menu.
    - Click  to the right of the Named after drop-down menu.
    - Select either the control number or production begin bates naming option from the drop-down menu.
    - Optionally, to append a field or custom text to the file name, click .
    - Select the desired spacing option from the **\_ (underscore)** drop-down menu.
    - To either add custom text to the name or to add a field to the name, do the following:
      - To include custom text as part of the name, choose the **Custom Text...** option in the drop-down menu and enter the desired custom text in the textbox underneath the **Custom Text...** drop-down menu.

- To include a field as part of the file names, select the desired field option from the **Custom Text...** drop-down menu. If a field is empty in a workspace it will not display as part of the file name even if selected from the **Custom Text...** drop-down menu.

---

**Note:** If a boolean field is selected, the name of the field will be displayed and not the value. For example: JWOLFE\_009\_confidential-HAS IMAGES.

---

- Optionally, to add an additional field or custom text after the previously selected options, click .
- Select the desired spacing option from the **\_ (underscore)** drop-down menu.
- To either add additional custom text to the name or to add an additional field to the name, do the following:
  - To include additional custom text as part of the name before a field, choose the **Custom Text...** option in the drop-down menu and enter the desired custom text in the textbox underneath the **Custom Text...** drop-down menu.
  - To include an additional field as part of the name, select the desired field option from the **Custom Text...** drop-down menu. If a field is empty in a workspace it will not display as part of the file name even if selected from the **Custom Text...** drop-down menu.

---

**Note:** If a boolean field is selected, the name of the field will be displayed and not the value. For example: JWOLFE\_009\_confidential-HAS IMAGES.

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- Click **Apply** to save the current naming options.

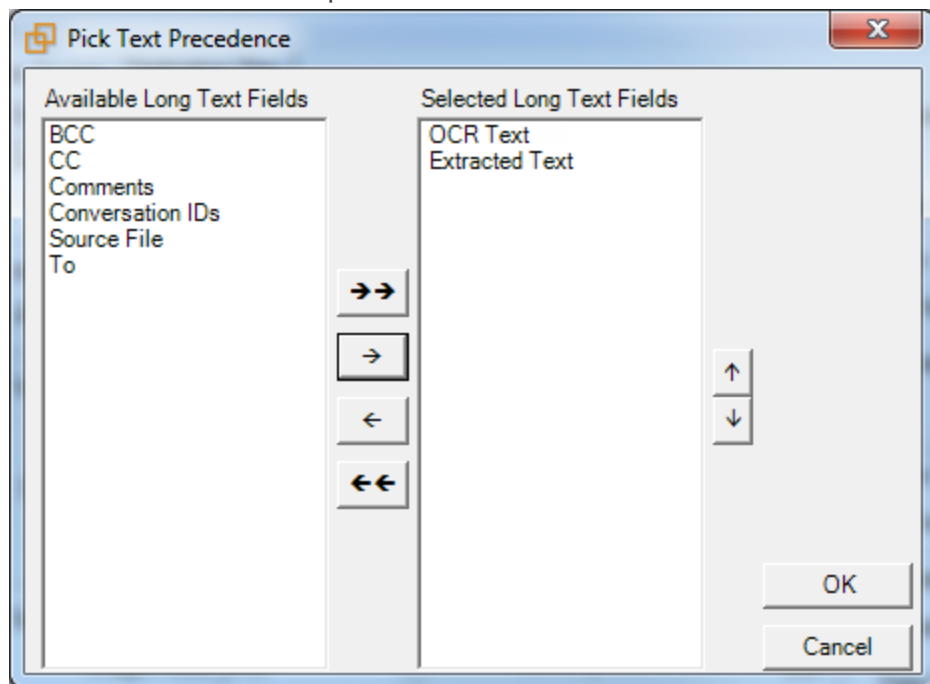
---

**Note:** If a file is not found in any of the production sets, the name will revert to the control number or production begin bates regardless of which naming options you have selected.

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- **Append original file** - Select this option to append the original file name which is defined as the file name as it was on disk to the end of the exported file name.
- **Image** - determines whether to include images in an export and sets the format of the load file. Set the following options:
  - **Check Export Images** - select this option to include images in the export. (You must set the **Data File Format** and the **File Type** when you export images.)
  - **Data File Format** - select one of these formats for image-level load file:
    - Opticon
    - IPRO
  - **File Type** - select one of these file types:
    - Single-page TIF/JPG
    - Multi-page TIF
    - PDF

- **Native**—controls which files are exported by RDC.
  - **Export Native Files**—select to export native files.
  - **Export rendered PDF's**—select to export PDF files.
- **Metadata** - use the following options to control the export of the document-level load file and extracted text:
  - **Data File Format** - select a the format for the document-level load file you're exporting:
    - Comma separated (.csv)
    - Concordance (.dat) - load file exports with the standard Concordance delimiters.
    - Custom (.txt) - load file exports with the custom delimiters that you select in the **Load File Characters** section.
    - HTML (.html) - load file is in HTML and contains hyperlinks to launch any exported files.
  - **Data File Encoding** - select an encoding for the document-level load file from the drop-down box. Click  for additional options.
  - **Export Text Field as Files** - determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. The RDC includes text as part of your load file if you deselect this option.
  - **Text File Encoding** - select the encoding for the document-level text files. Click  for additional options.
  - **Text Precedence** - select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click  to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the precedence of the fields.





If you add any fields to the **Selected Long Text Fields** column, Relativity adds the Text Precedence column as the last column in the load file. During an export, Relativity checks the topmost field in the **Selected Long Text Fields** column for text, and if the field is null, it checks the next field in order of precedence for text. When it finds a field that contains text, Relativity adds the contents of that field to the Text Precedence column in the document load file, and then continues checking the fields for the next document.

For example, you want the Text Precedence column in the load file to contain the contents of the OCR Text field when it is available for a document and the contents of the Extracted Text field when the OCR Text for a document is null. In the Pick Text Precedence pop-up, you add the OCR Text as the first field in the **Selected Long Text Fields** column followed by the Extracted Text field.

---

**Note:** If you want to improve export performance, you don't need to add all of the long text fields you select in the Pick Text Precedence pop-up to the Selected Columns option on the Data Source tab. When you don't select these fields on the Data Source tab, but you add them to **Selected Long Text Fields** column, the RDC adds the content of these fields to the Text Precedence column as described above. When you add the long text fields on the Data Source tab, Relativity adds these columns to the document level load file.

---

The Precedence Text column displays the file path to the exported files if you select the **Export Text Field as Files** checkbox.

- **Export Multiple-Choice Fields as Nested** - select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.

## 7.9 Configuring the RDC

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**Note:** Relativity ended support for and access to the Relativity Desktop Client (RDC) for RelativityOne commercial customers on December 31, 2023. Import/Export is being used for all importing and exporting workflows.

For RelativityOne Government customers, beginning March 31, 2024, RDC will only operate in web transfer mode, which will result in significantly slower transfer speeds. It is highly recommended that Government customers begin using Import/Export in RelativityOne as soon as possible to prepare for the deprecation of RDC on June 30, 2024. Starting July 1, 2024, RDC will no longer be operational. See the Community article [RDC Deprecation FAQ](#) for additional information.

---

You can fine-tune the performance of the RDC in your environment by adjusting its configuration settings, for example, for batching, data validation, and retries.

### 7.9.1 RDC configuration file

You can use the information in this section to update the configuration settings used by the RDC. The Import API also uses these same settings located in the app.config file.

Use the following instructions to locate the config file on your machine, and set custom configuration properties for the RDC.

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**Note:** The WebService URL setting is a key component of RDC configuration, as it includes a reference to the RelativityWebAPI and establishes a connection between the RDC and your server. For details on this URL see [Starting the RDC](#).

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1. Exit the RDC if it is currently open.
2. Navigate to the **Relativity.Desktop.Client.exe.config** file on the machine where the RDC is installed. By default, this configuration file is located in the following directory:  
[Installation\_Directory]\kCura Corporation\Relativity Desktop Client

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**Note:** Make a backup copy of this file in case you need to rollback any configuration changes made to it.

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3. Open the **Relativity.Desktop.Client.exe.config** file in a text or XML editor and modify it as necessary.

#### 7.9.1.1 Configuration settings

The Relativity.DataExchange section of the **Relativity.Desktop.Client.exe.config** contains the configuration properties in the following table.

##### General settings

Name	Description	Default Value
ApplicationName	The application name is used for APM metrics and other reporting features.	Remote Desktop Client
CreateErrorForInvalidDate	When this value is set to True, a zeroed date, such as 0/0/0000, causes an Invalid Date error. When False, the date is treated as a NULL value.	True
FileTypeIdentifyTimeoutSeconds	Defines the maximum number of seconds to identify a file type before reaching the timeout.	10
HttpExtractedTextTimeoutSeconds	Defines the timeout, in seconds, for HTTP/REST-based API web services specifically used for extracted text.  <b>Note:</b> This value doesn't impact WebAPI-based web services, which means that WebAPIOperationTimeout setting is still honored.	900
HttpTimeoutSeconds	Defines the timeout, in seconds, for HTTP/REST-based API web services.  <b>Note:</b> This value doesn't impact WebAPI-based web services, which means the WebAPIOperationTimeout setting is still honored.	300
IOErrorNumberOfRetries	Defines the number of times the RDC retries an	20

Name	Description	Default Value
	operation within an import or export process after an IO failure occurs.	
IOErrorWaitTimeInSeconds	Defines the number of seconds the RDC waits before retrying an operation within an import or export process after an IO failure occurs.	30
LogAllEvents	Enables an option to Save Progress Log when job completes.	False
LogConfigFile	Defines the Relativity Logging configuration file name.	LogConfig.xml
SuppressCertificateCheckOnClient	When this value is set to True, SSL certificate validation errors are suppressed. When False, SSL certificate validation errors cause job failures.	False
TempDirectory	Defines a temp directory override where short lived import files are stored. When not defined, the user profile %TEMP% directory is used.	
WebAPIOperationTimeout	Defines the time in milliseconds, which an XML Web service client waits for the reply to a synchronous XML Web service request to arrive.	600000

#### Transfer settings

Name	Description	Default Value
BadPathErrorsRetry	<p>When this value is set to True, bad path errors are retried during a transfer. When False, permission errors aren't retried and cause job failures.</p> <hr/> <p><b>Note:</b> This setting is a transfer specific setting that addresses scenarios where transfer clients fail to transfer a file because of intermittent I/O errors.</p> <hr/>	True
PermissionErrorsRetry	When this value is set to True, permission errors are retried before and during a transfer. When False, permission errors aren't retried and cause job failures.	True
TapiFileNotFoundErrorsDisabled	When this value is set to True, missing files aren't treated as errors. When False, missing files are treated as errors.	False
TapiFileNotFoundErrorsRetry	When this value is set to True, missing files are retried. When False, missing files aren't retried.	True
TapiForceBcpHttpClient	When this value is set to True, the HTTP transfer client is forced only for BCP operations. When	False

Name	Description	Default Value
	<p>false, the best fit transfer client is chosen at runtime.</p> <hr/> <p><b>Note:</b> This setting is provided for RelativityOne client domain environments where the BCP share isn't accessible from the primary file share.</p> <hr/>	
TapiForceClientCandidates	Forces an ordered list of transfer clients when probing a workspace and choosing the best client. This value represents a semi-colon delimited list. Native transfer client identifiers must be used, such as FileShare or Http.	
TapiForceFileShareClient	When this value is set to True, the file share transfer client is forced. When False, the best fit transfer client is chosen at runtime.	False
TapiForceHttpClient	<p>When this value is set to True, the HTTP transfer client is forced. When false, the best fit transfer client is chosen at runtime.</p> <hr/> <p><b>Note:</b> This setting is the same as web mode.</p> <hr/>	False
TapiLargeFileProgressEnabled	When this value is set to True, large-file progress is used by transfer clients to display "Trip x of y" chunk info within the status area. When False, no chunk info is displayed .	False
TapiMaxInactivitySeconds	The maximum number of seconds that elapse with no data movement occurring before the transfer is treated as inactive. When this occurs, the import or export job continues but performance may be degraded.	180
TapiMaxJobParallelism	Defines the maximum degree of parallelism for a transfer client job. This value isn't guaranteed to be honored by all clients.	10
TapiMinDataRateMbps	Defines the minimum data rate in Mbps units. If set to zero, the best value is chosen. This value isn't guaranteed to be honored by all clients.	0
TapiPreserveFileTimestamps	<p>When this value is set to True, the RDC preserves the import and export file timestamps. Only direct mode supports this functionality.</p> <hr/> <p><b>Note:</b> By default, this value is set to False, because preserving file timestamps may degrade performance between 10-20%.</p> <hr/>	False

Name	Description	Default Value
TapiSubmitApmMetrics	When this value is set to True, APM metrics are submitted upon completion of the transfer job. When False, no APM metrics are submitted.	True
TapiTargetDataRateMbps	Defines the target data rate in Mbps units. This value isn't guaranteed to be honored by all clients.	100
TapiTransferLogDirectory	Defines the directory where Relativity Logging and transfer client logs are stored.	%temp%\RDC_log\

### Import settings

Name	Description	Default Value
AuditLevel	Controls the details collected in an audit: <ul style="list-style-type: none"> <li>▪ <b>FullAudit</b> - includes create, update, and delete messages. Snapshot is also enabled so all current field values (Audit Details) are captured for updates. This is the default setting.</li> <li>▪ <b>NoSnapshot</b> - Includes create, update, and delete messages. Snapshot is disabled so current field values (Audit Details) aren't captured for updates.</li> <li>▪ <b>NoAudit</b> - Auditing is disabled.</li> </ul>	FullAudit
CreateErrorForInvalidDate	When this value is set to True, a zeroed date, such as 0/0/0000, causes an Invalid Date error. When False, the date is treated as a NULL value.	True
DisableImageLocationValidation	Disables the validation of the image file locations for all jobs when set to True. See <a href="#">Additional guidelines for disabling file validation on the next page</a> .	False
DisableImageTypeValidation	Disables the validation of image file types for all jobs when set to True. Image type validation is dependent upon image location validation. See <a href="#">Additional guidelines for disabling file validation on the next page</a> .	False
DisableNativeLocationValidation	Disables the validation of the native file locations for all jobs when set to True. See <a href="#">Additional guidelines for disabling file validation on the next page</a> . <p><b>Note:</b> Don't use the DisableNativeLocationValidation flag when copying files to a repository. File locations are validated regardless of the flag before they are copied.</p>	False
DisableNativeValidation	Disable the validation of native file types for all jobs. Nat-	False

Name	Description	Default Value
	ive type validation is dependent upon native location validation. See <a href="#">Additional guidelines for disabling file validation below</a> .	
DynamicBatchResizingOn	When this value is set to True, the batch size is automatically decreased by 100 when a large import job is in progress, and it causes a timeout.	True
ImportBatchMaxVolume	Defines the maximum number of bytes before the metadata is imported.	10485760
ImportBatchSize	Defines the maximum number of documents or objects before the metadata is imported.	1000
JobCompleteBatchSize	Defines the file count threshold at which the RDC completes and recreates the transfer job used to transfer files.	50000
MinimumBatchSize	When AutoBatch is set to True, this value represents the lower bound on the batch size. Batch sizes can't be smaller than this value.	100

#### Additional guidelines for disabling file validation

You can disable file validation by setting these configuration settings to true:

- DisableImageLocationValidation
- DisableImageTypeValidation
- DisableNativeLocationValidation
- DisableNativeValidation

Review the following guidelines before disabling file validation:

- When you disable file type validation, you do not receive any warnings regarding unsupported file types. It's therefore possible for files to be imaged and result in errors.
- Disabling the file type validation also causes the application to set the Relativity Native Types field to Unknown Format.
  - Setting a native type to unknown has no effect on productions or OCR.
  - Setting a native type to unknown has no effect on how the viewer or imaging engine handles the file. This means that a native type of unknown can't be the sole cause of an error in the viewer or the imaging engine. If a file is designated unknown and it actually has an unsupported file type, the Viewer or imaging engine throws an error based on the fact that it has an unsupported file type.

## Export settings

Name	Description	Default Value
ExportBatchSize	Defines the maximum number of export documents per batch.	1000
ExportErrorNumberOfRetries	Defines the number of times the RDC retries an operation within an export process after a non-IO failure. This value should be greater than or equal to the IOErrorNumberOfRetries value.	20
ExportErrorWaitTimeInSeconds	Defines the number of seconds the RDC waits before retrying an operation within an export process after a non-IO failure. This value should be greater than or equal to the IOErrorWaitTimeInSeconds value.	30
ExportThreadCount	<p>Defines the number of threads that get created during export.</p> <hr/> <p><b>Note:</b> This configuration setting is only used when the UseOldExport setting is true.</p> <hr/>	2
UseOldExport	When this value is set to True, the legacy export method is used. When False, the new export method is used. The old export should only be used when encountering compatibility issues.	False

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