

# Import/Export Guide

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May 8, 2024

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# 1 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 26](#) and review the section below on considerations when to use and not use Express Transfer.

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## 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
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## 1.1 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](#).

## 1.2 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

## 1.3 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.

## 1.4 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.

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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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## 1.5 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 24](#).

- **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.

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**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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## 1.6 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.

## 1.7 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](#).



## 2 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.

### 2.1 Requirements

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

#### 2.1.1 Workspace requirements

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

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**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.

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- 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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#### 2.1.2 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.

### 2.2 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 26](#) and [Activating Express Transfer on page 38](#) for more information.

### 3 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><li>■ <b>Quick Create Set</b> - Add, Edit</li></ul>		<p>Mass operations</p> <ul style="list-style-type: none"><li>■ Allow Import</li><li>■ Assign to Entity</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>		<p>Admin operations</p> <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 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.

### 4.1 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.

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**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

### 4.2 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.

#### 4.2.1 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)

### 4.2.2 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.

### 4.2.3 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.

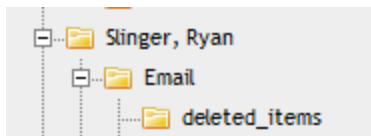
All fields except Identifier are optional; however, you may find some of the following system fields beneficial.

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.

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**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.

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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.

#### 4.2.4 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 AM	05/28/2023 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	4/20/2023	

Entry in Load File	Object Type	Definition
AM	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	
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.

### 4.2.5 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 ";".

## 4.2.6 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)

#### 4.2.7 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^

### 4.3 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.

#### 4.3.1 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

### 4.3.2 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

### 4.3.3 ZIP archive with images

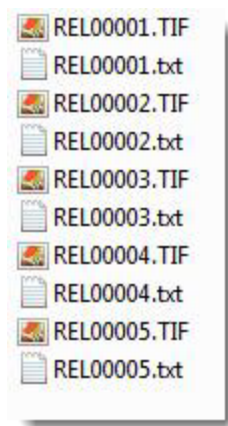
To import images when not using Express Transfer, you need to zip the image files and upload the zip file in the Choose Load File And Location dialog in Import/Export.

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.

### 4.3.4 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:



## 4.4 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_0000003p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000004p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000005p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000006p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000007p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000008p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000009p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000010p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000011p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000012p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000013p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000014p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000015p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000016p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000017p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000018p0.69pNon Responsive;Info on some cuts for 05
```

## 4.5 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.



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

### 5.1 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.

### 5.2 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.



## 6 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 40](#)

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 27](#) 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 42](#) for more information.

### 6.1 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.
3. Express Transfer must be activated within Import/Export. Refer to [Activating Express Transfer](#) for more information.

### 6.2 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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## 6.3 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.

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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 the next 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 42](#) for more information.

### 6.3.1 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.
3. Express Transfer must be activated within Import/Export. Refer to [Activating Express Transfer](#) for more information.

### 6.3.2 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.

---

## 6.4 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 40](#)

### 6.4.1 Requirements

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

#### 6.4.1.1 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

System Configuration	Requirement
Windows Server operating system	Windows Server 2019 or Windows Server 2022
System memory	4 GB RAM, recommended 8 GB RAM

#### 6.4.1.2 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.

## 6.4.2 Prerequisites

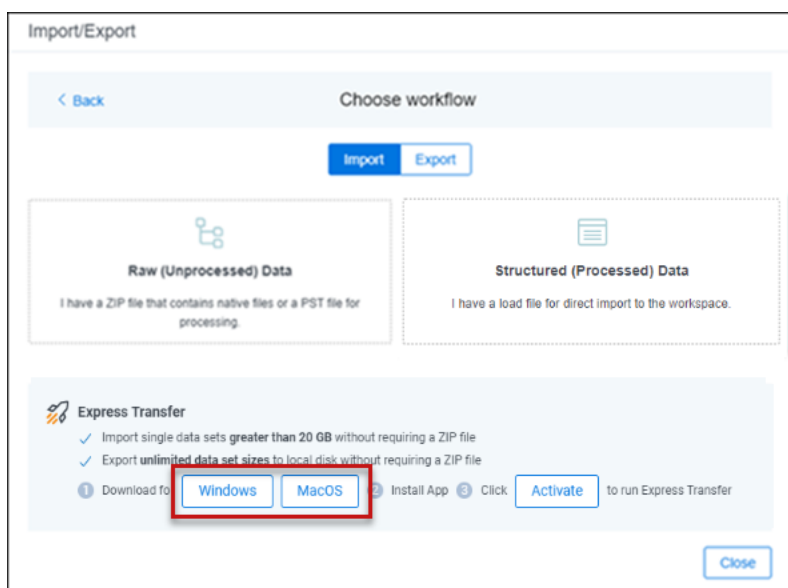
To use Express Transfer, the following must be completed in this order:

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.

## 6.4.3 Installing Express Transfer

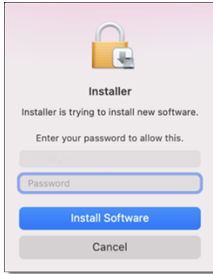
To install the Express Transfer application on your computer for use with Import/Export:

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**.

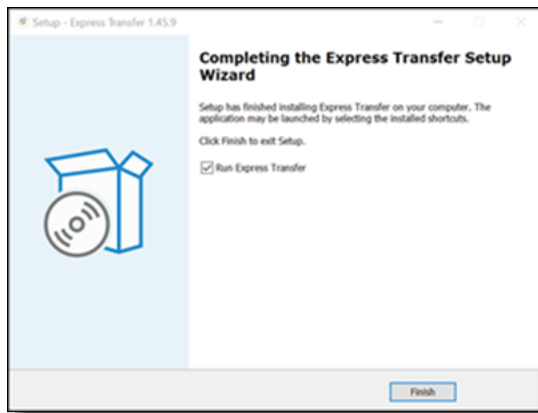


- 
4. Navigate to the folder on your computer where the installer file was downloaded. Depending on the operation system, double-click one of the following files to begin the installation process:
    - For Windows OS: **Express Transfer Setup.exe**
    - For macOS: **Express Transfer Setup.pkg**
  5. 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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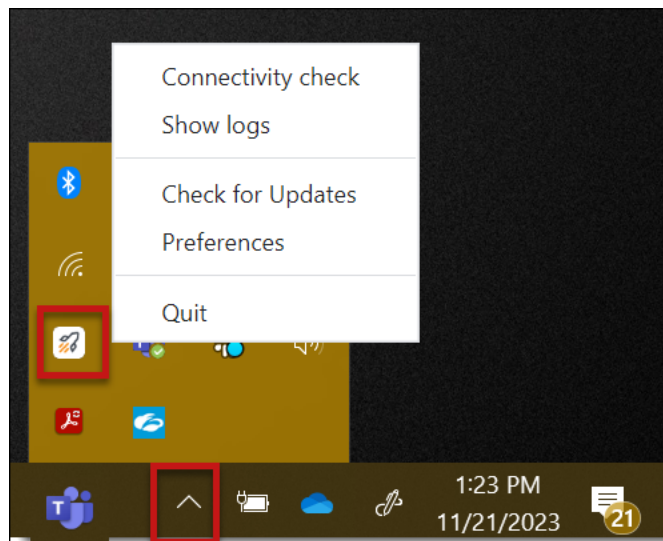
**Note:** To use Express Transfer for import and export workflows, you must activate it within Import/Export. See [Activating Express Transfer](#) for more information.

---



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\\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 36](#) 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.

#### 6.4.4 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:

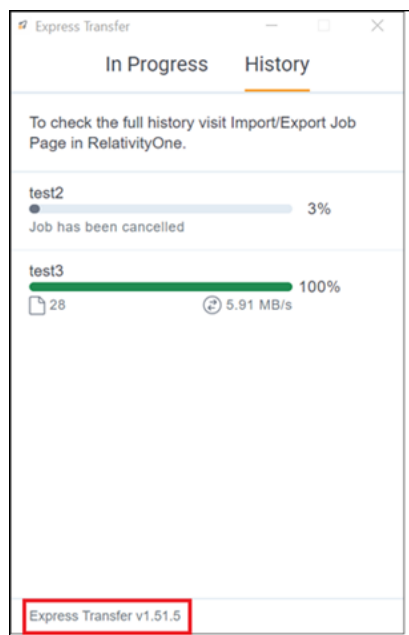
- **/silent**—this option displays the installation wizard as it goes through the installation process. All the default options are automatically selected.
- **/verysilent**—this option does not display the installation wizard as it goes through the installation process. All default options are selected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

#### 6.4.5 Locating the Express Transfer version number

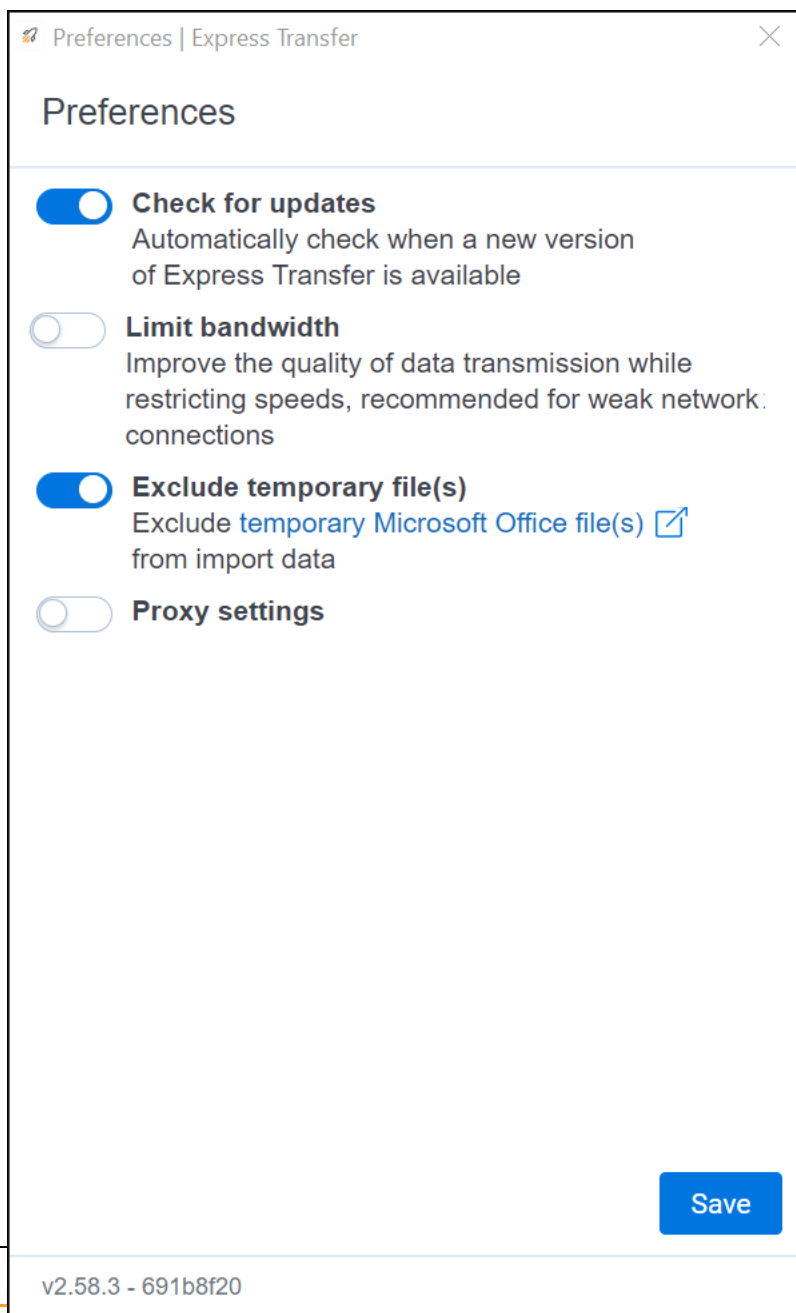
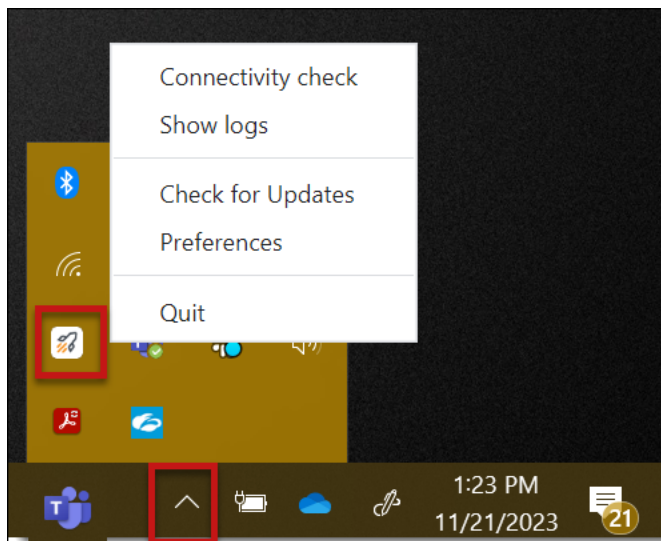
The Express Transfer version number is displayed at the bottom of the **In Progress** and **History** tabs within the application.



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**.





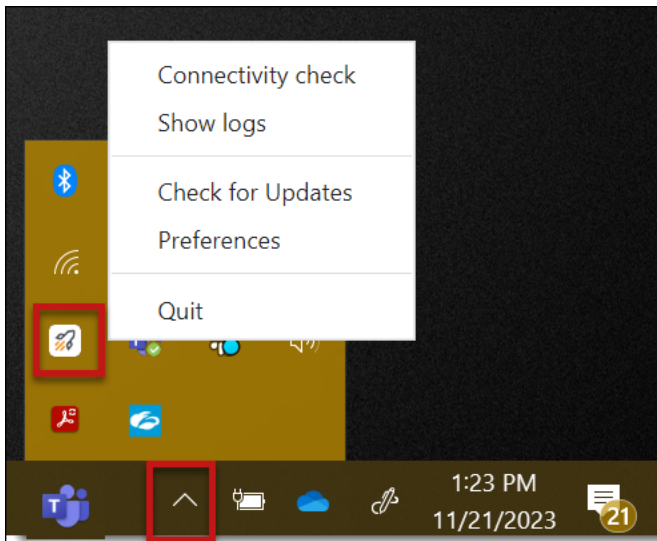
The Express Transfer software version number is contained in the first few numbers after the "v", for example "v2.49.0." The numbers after the hyphen are session identifiers that change each time you launch Express Transfer after quitting the application. These numbers may be used by Customer Support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

### 6.4.6 Automatically checking for software updates

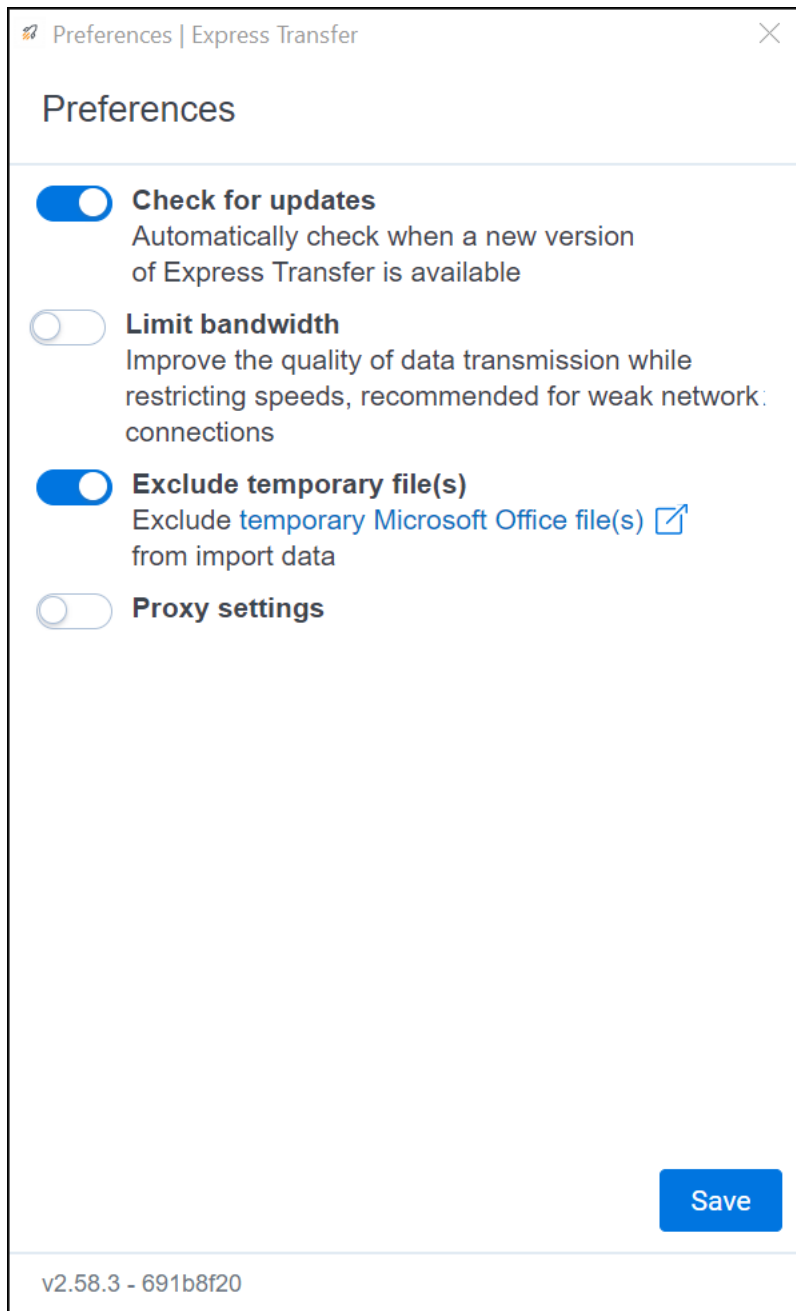
You can configure whether or not you want the system to automatically check for new software versions of Express Transfer each time it opens and notify you with a message box. By default, this feature is enabled in Express Transfer Preferences. We recommend that you keep it enabled to ensure your system 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 36](#) for more information.

To automatically check for software updates:

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



2. Click **Preferences**.




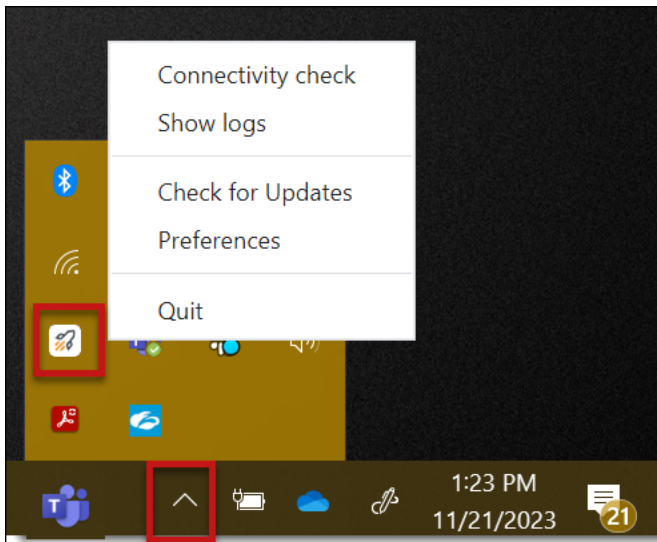
3. By default, the **Check for Updates** is toggled on. If you do not want the system to automatically check for updates and notify you, toggle it off.

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**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.

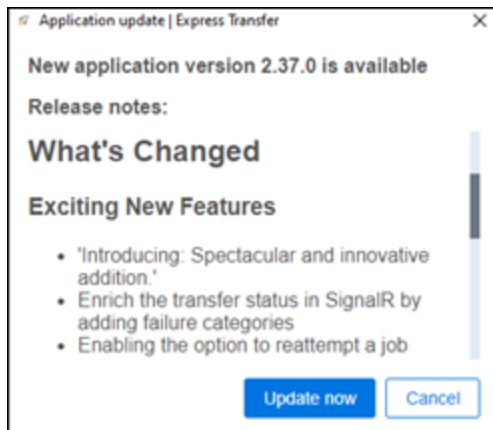
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4. Click **Save** after updating the setting.
5. To apply any changes made to Preferences, quit the Express Transfer application by right-clicking on the **Express Transfer**  icon in your system tray and clicking **Quit**.




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.

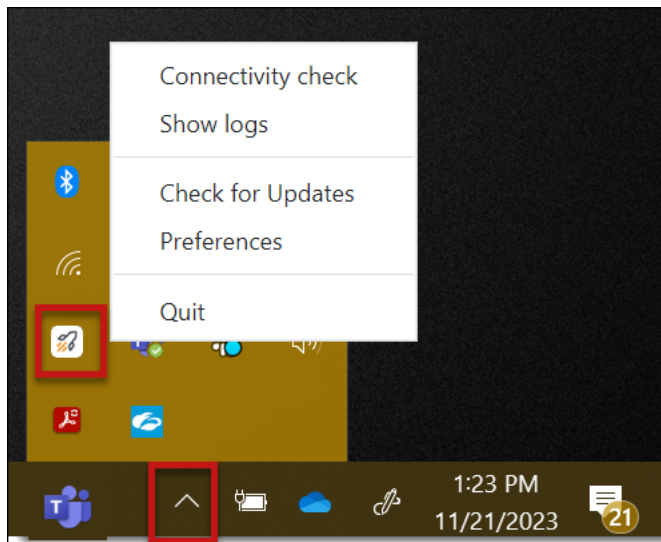
Whenever a new version is available, you'll be notified with an Application update dialog displaying the new version number available and release notes for it. Click **Update now** to download the new version's executable file, and then follow the [Installing Express Transfer on page 28](#) steps to finish installing the update on your system.



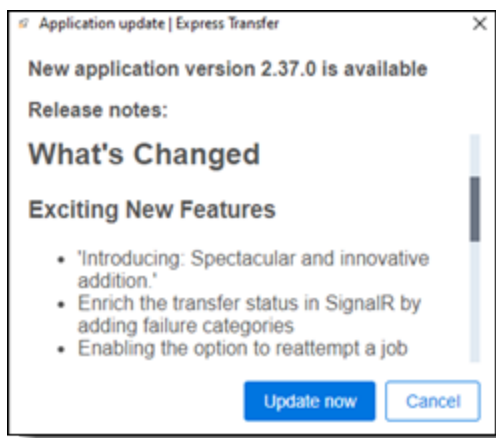
### 6.4.7 Manually checking for software updates

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 28](#) steps to finish installing the update.



## 6.5 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.

### 6.5.1 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.

- Express Transfer desktop application must be installed on your computer. Refer to Installing Express Transfer for more information.

## 6.5.2 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.

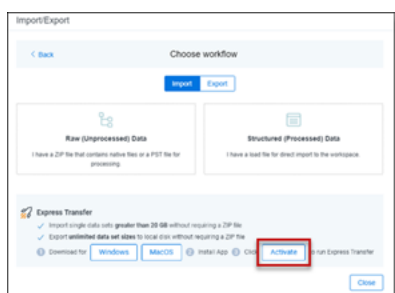
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## 6.5.3 Activating Express Transfer

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.

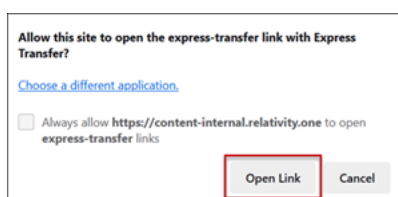


4. If a browser message box appears asking to allow the site to open Express Transfer, click **Open Link** to proceed with activating Express Transfer. If you do not, then Express Transfer will not be activated.

---

**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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**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 54](#) for more information on connection status information.

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

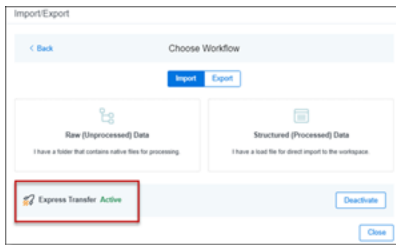


6. Return to the Import/Export application. The Express Transfer status will change to **Active** on the Choose Workflow dialog.

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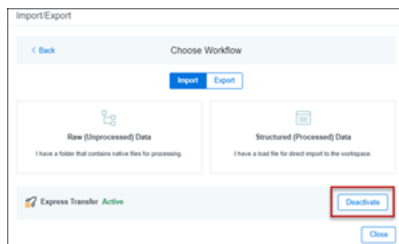
**Note:** The Express Transfer application will remain active until you click the Deactivate button or log out of RelativityOne. You do not need to keep reactivating it to use it. However, if you [deactivate](#) it or log out of RelativityOne, you will need to reactivate Express Transfer to use it again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

---



### 6.5.4 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.

### 6.5.5 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.

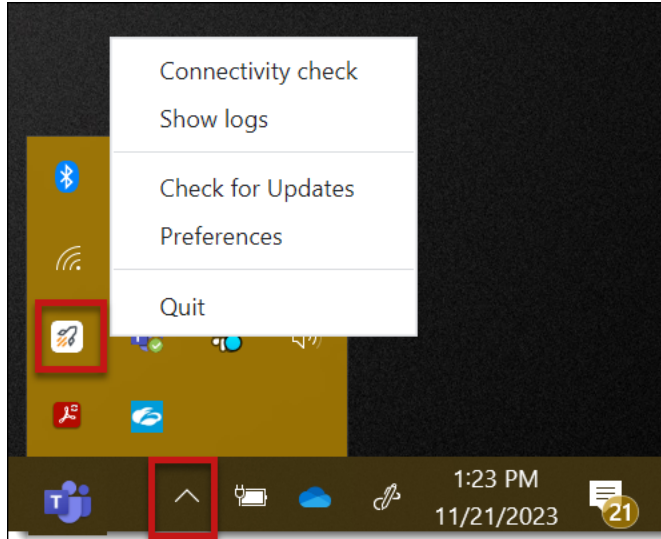


- **Internet speed:** Transfer speeds are dependent on your internet speeds. Check your internet connection using [Speedtest](#) or any other bandwidth testing website. Make note of the upload speed in megabits per second. Also refer to Express Transfer [Limit bandwidth](#) setting if needed.
- **Local 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.

## 6.6 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 36](#) 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 27](#) 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 on the next page](#) 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.

## 6.7 Express Transfer Preferences

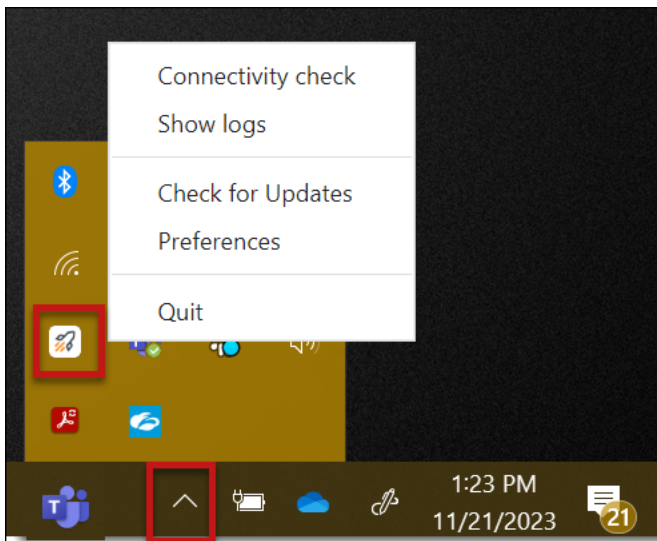
Use Express Transfer Preferences to modify the Check for Updates setting, to limit bandwidth, to exclude temporary Microsoft Office files from data import, and to configure proxy settings.

### 6.7.1 Automatically checking for software updates

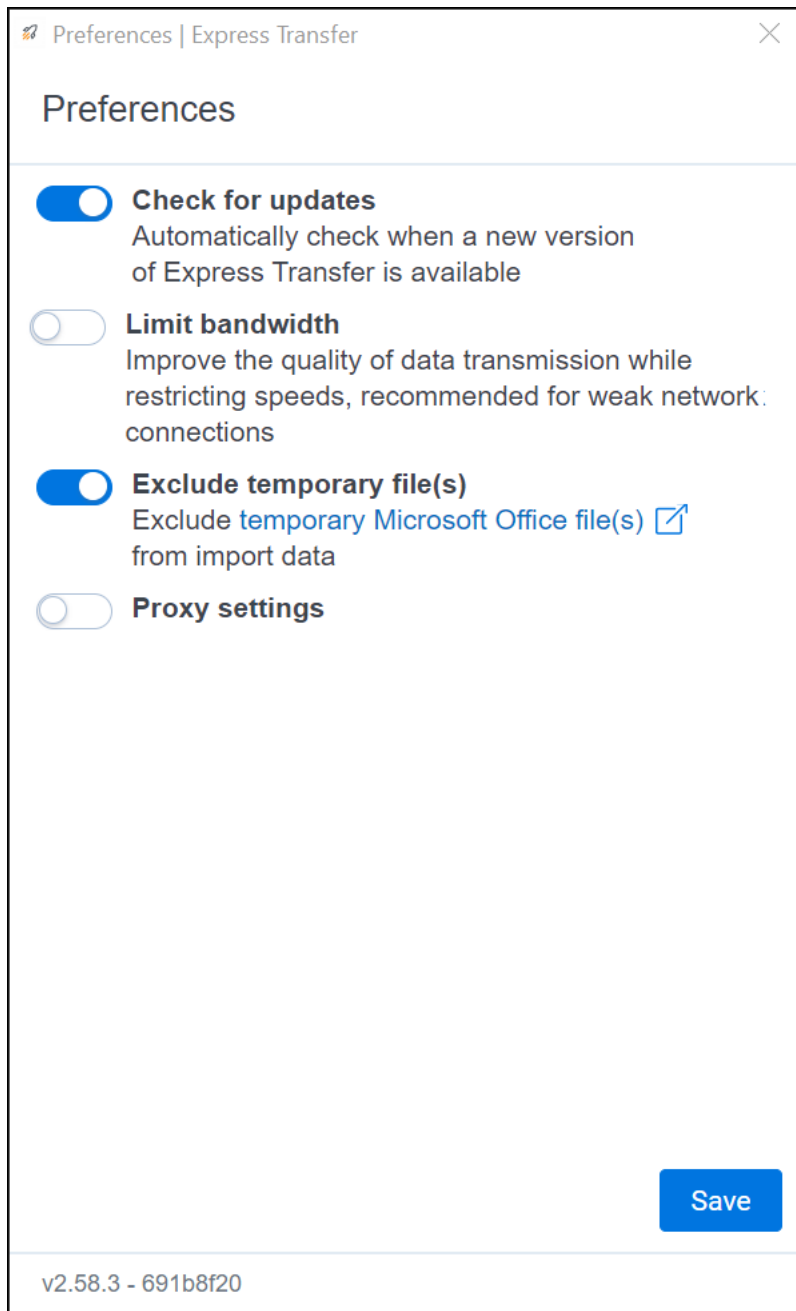
You can configure whether or not you want the system to automatically check for new software versions of Express Transfer each time it opens and notify you with a message box. By default, this feature is enabled in Express Transfer Preferences. We recommend that you keep it enabled to ensure your system 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 36](#) for more information.

To automatically check for software updates:

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



2. Click **Preferences**.




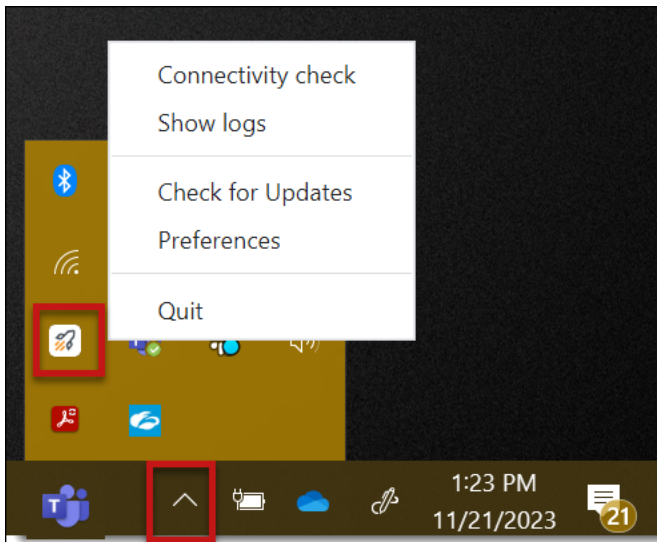
3. By default, the **Check for Updates** is toggled on. If you do not want the system to automatically check for updates and notify you, toggle it off.

---

**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 36](#) for more information.

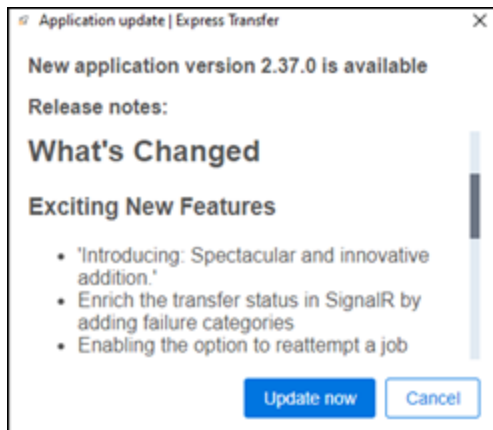
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4. Click **Save** after updating the setting.
5. To apply any changes made to Preferences, quit the Express Transfer application by right-clicking on the **Express Transfer**  icon in your system tray and clicking **Quit**.



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 43](#) steps to finish installing the update on your system.



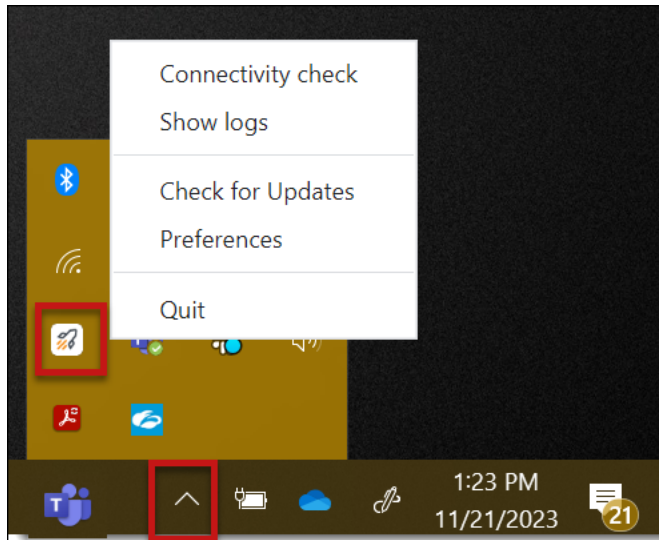
### 6.7.2 Limit bandwidth

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

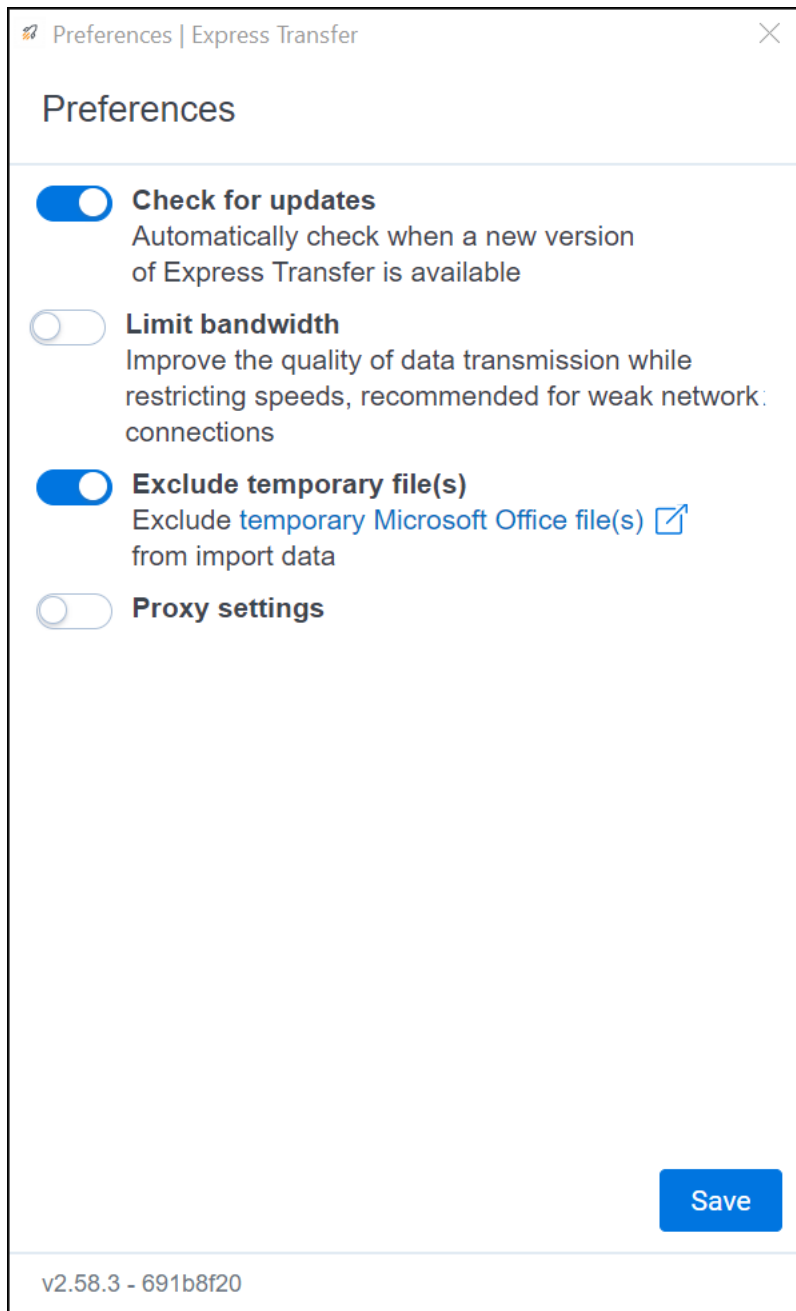
Transfer by turning on the **Limit bandwidth** option in Preferences. When this option is on, Express Transfer job transfers will be slower, but more stable.


To configure Limit bandwidth:

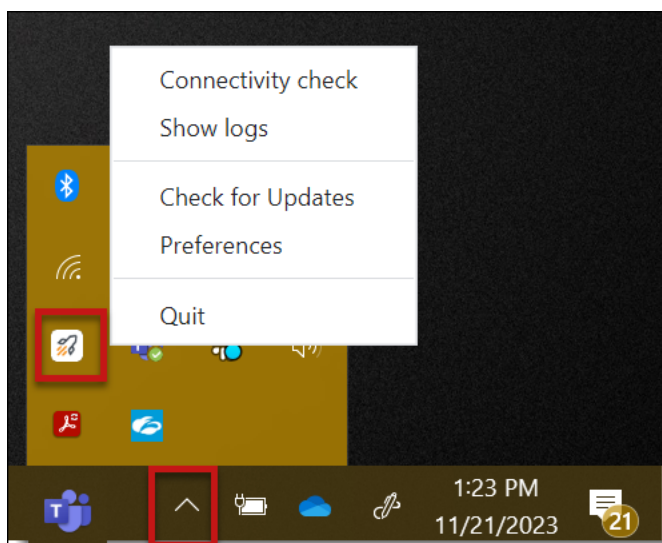
1. Right-click on the **Express Transfer**  icon in your system tray.



2. Click **Preferences**.



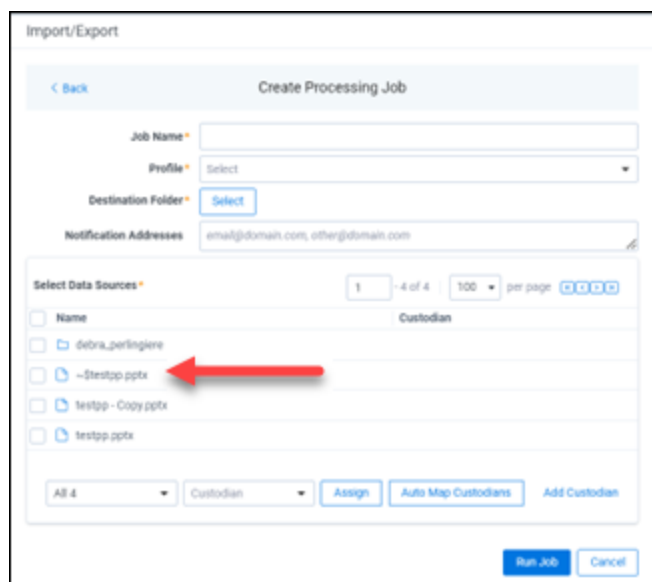
3. The **Limit bandwidth** option is off by default. If you wish to turn the option on, click the toggle.
4. Click **Save** after updating the setting.
5. To apply any changes made to Preferences, quit the Express Transfer application by right-clicking on the **Express Transfer**  icon in your system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

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

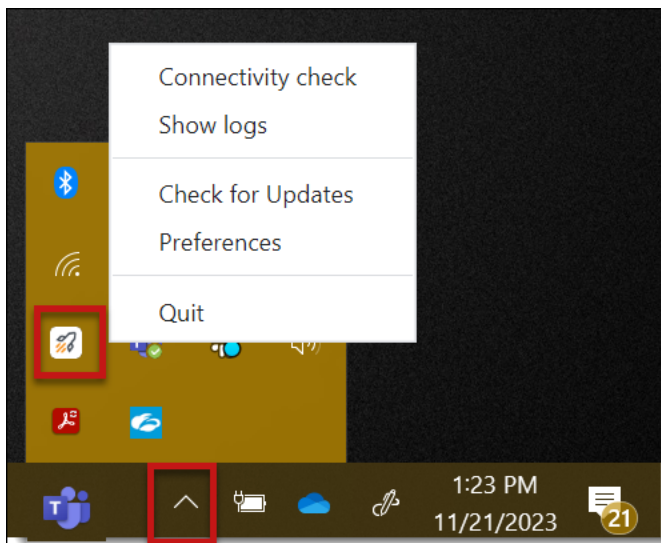
Whenever you open a Microsoft Office file, a temporary file is created which contains a ~ (tilde) sign at the beginning of the file name. When you're [importing unprocessed data for Processing](#) and selecting the data source on the [Create Processing Job dialog](#), these temporary files will display 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.



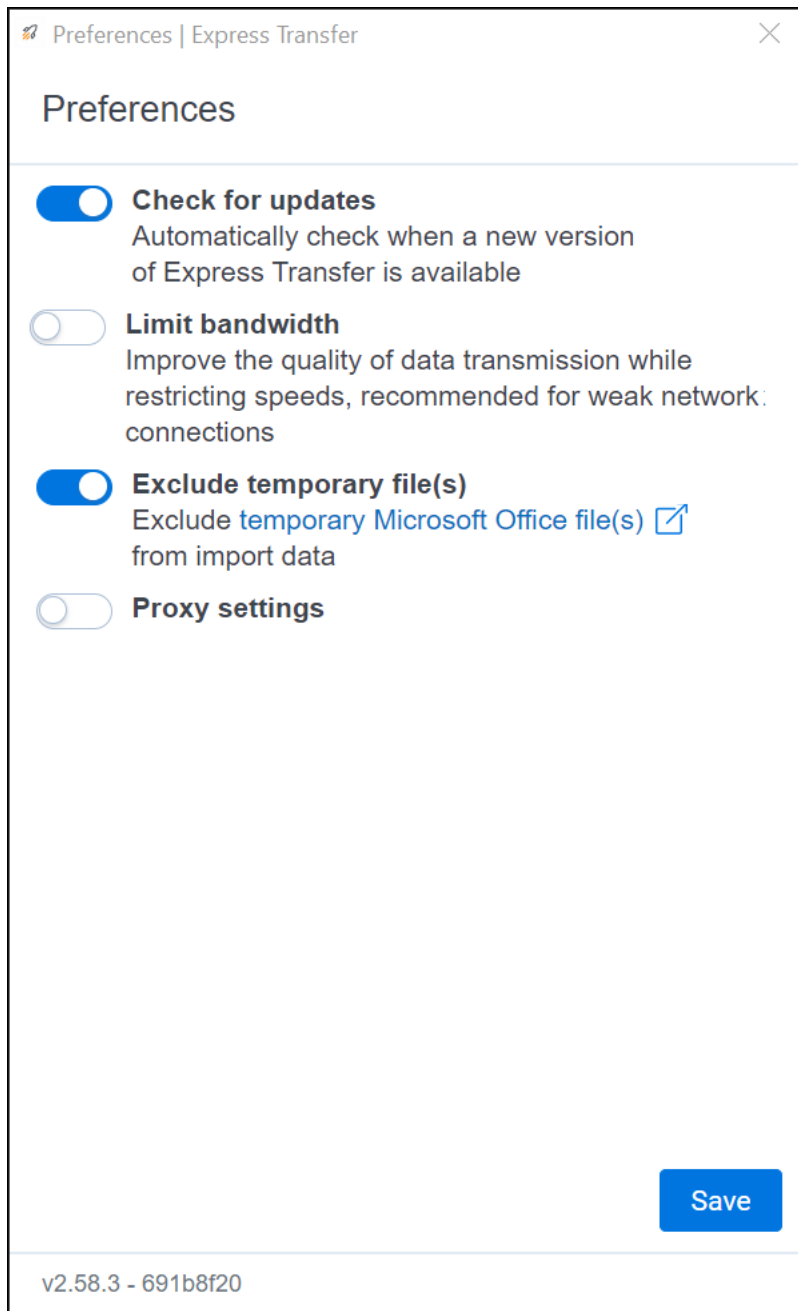
To include temporary Microsoft Office files in import jobs:




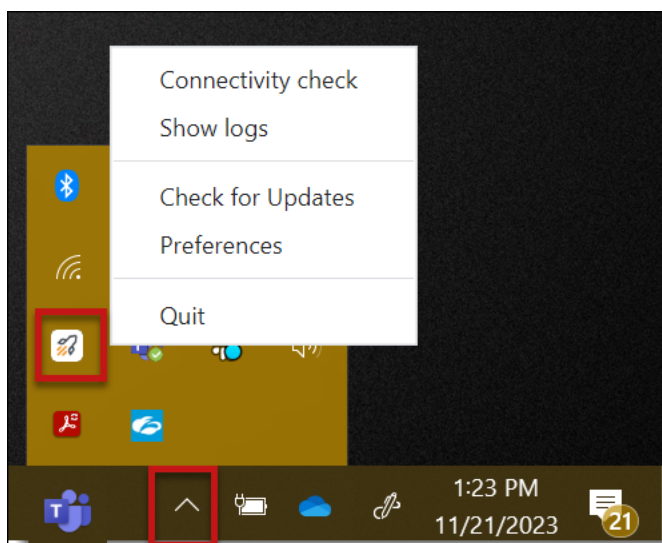
1. Right-click on the **Express Transfer**  icon in your system tray.



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.

#### 6.7.4 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

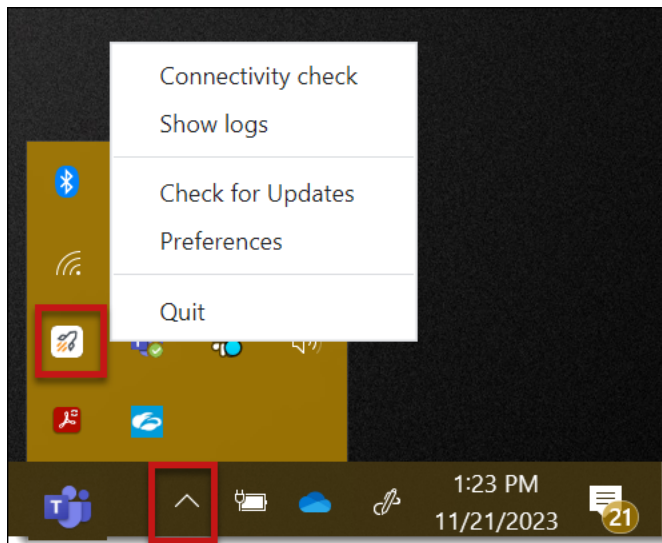
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**Note:** The port number used in the steps below will be different from Port 443, which is still required to be open to the public Internet regardless of this proxy configuration. See [Port access on page 28](#) for more information.

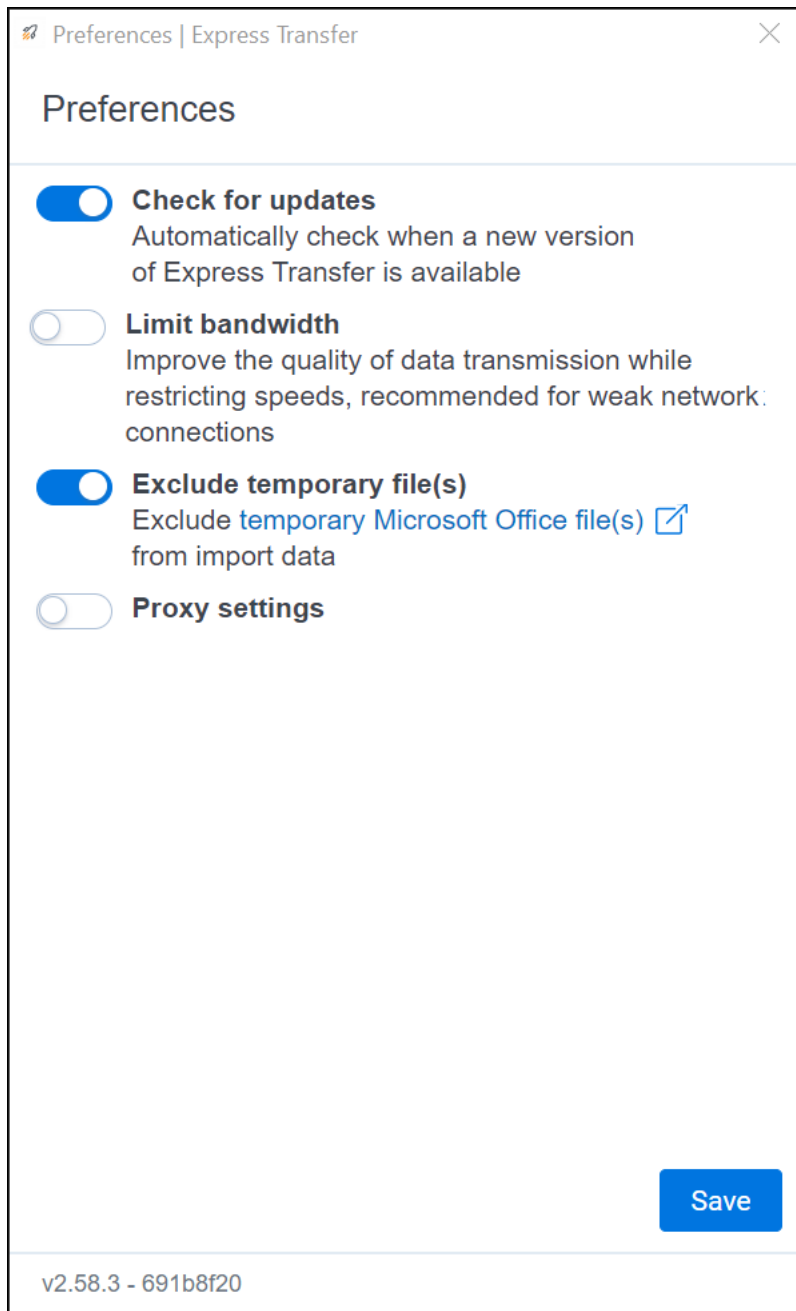
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To configure proxy settings:


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

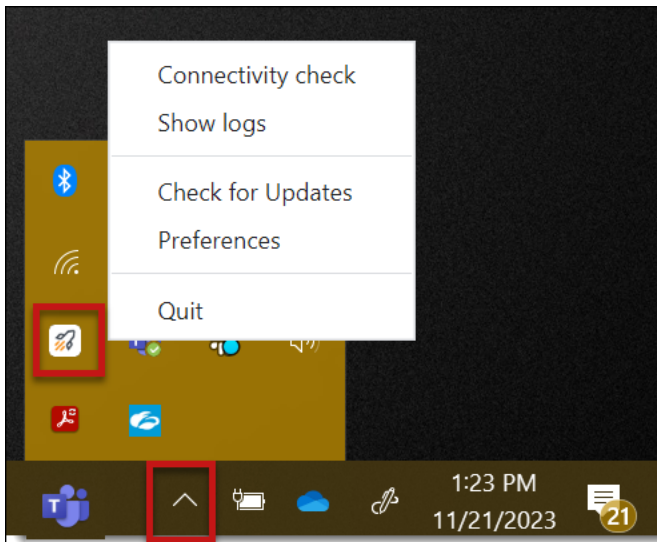


2. Click **Preferences**.



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.


## 6.8 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:

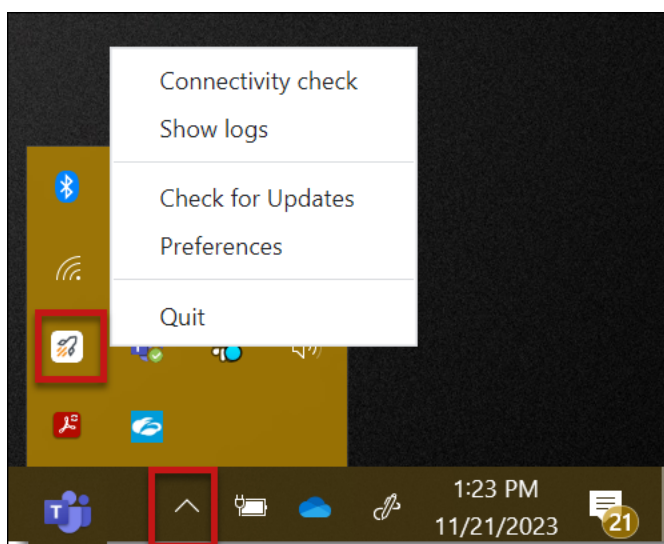
Connectivity Check	Description
Internet connection	This step confirms your system is connected to the internet. If this step fails, there is either no internet connection available or the proxy or firewall is blocking the connection for Express Transfer. Please contact your IT department for help.
Access 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.
Connection with Express Trans-	This step confirms Express Transfer successfully connected to the infrastructure specific to your RelativityOne region. If this step fails, please contact your IT department

Connectivity Check	Description
fer infra-structure	so they can verify the correct port configuration. For more information, refer to the Express Transfer Application - Required Ports 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.

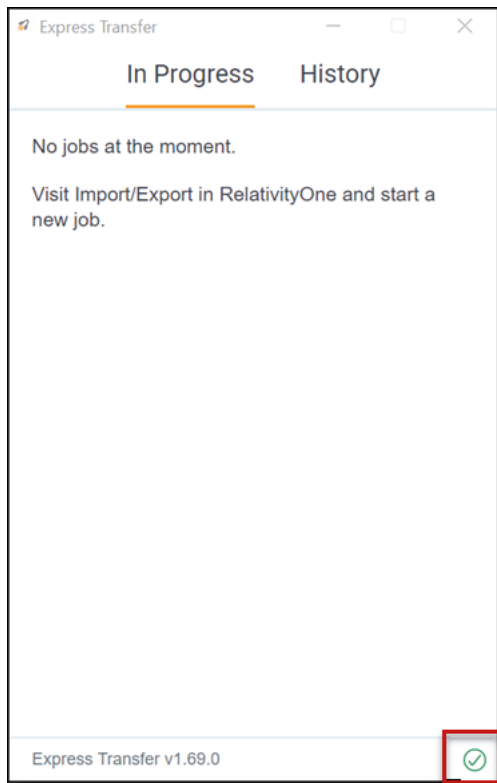
**Note:** If you perform a connectivity check before activating Express Transfer in Import/Export, only the Internet connection is checked and the others display the no connectivity  icon. Express Transfer must be [active](#) to perform the full connectivity check.

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.



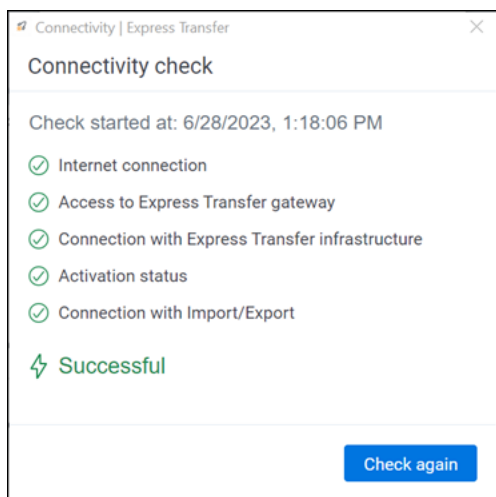
The test results display after each process completes. The word "Successful" displays when all connections are working properly. If any of the system checks fail, Express Transfer will not work.

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.)

## 6.8.1 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.

## 6.9 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.

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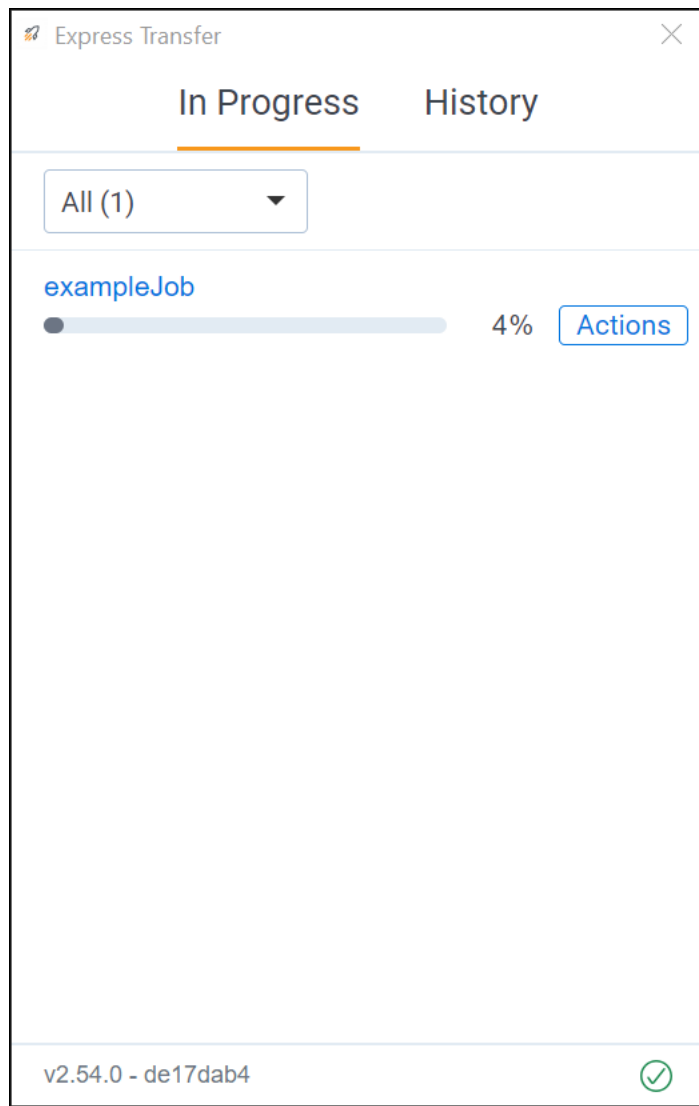
### 6.9.0.1 Prerequisites

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.

### 6.9.0.2 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.

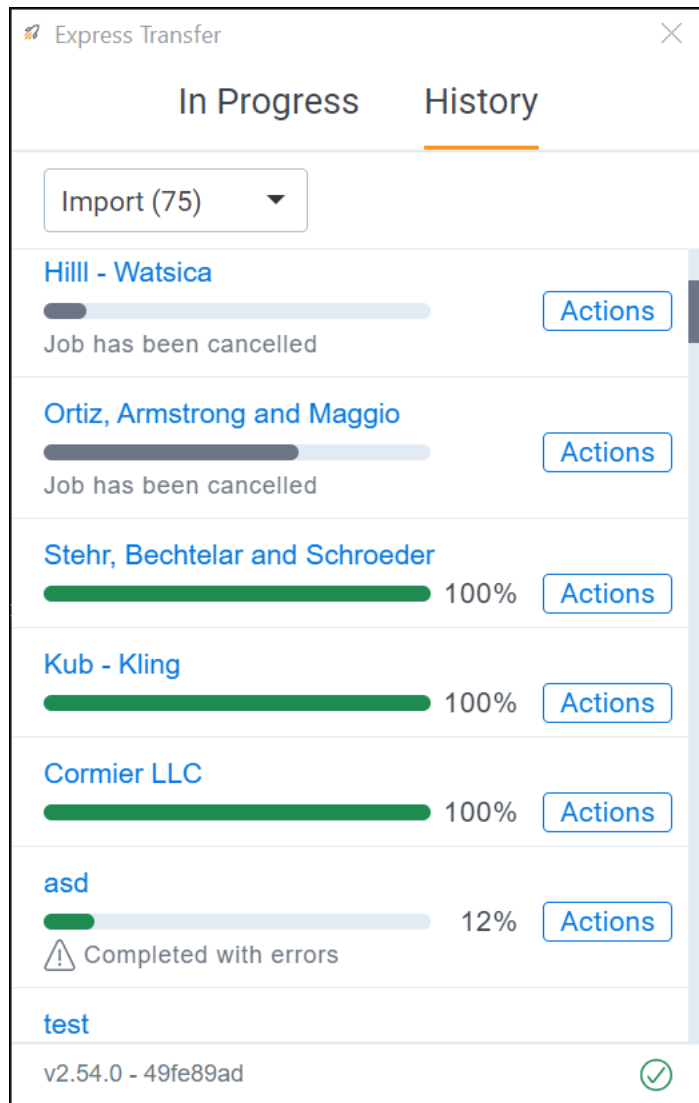


- **Job Name**—displays the name of the job. Click the job name to view more information about the job on the Job Details window. Or, click the **Actions** button next to the transfer line, then click **View details**. See [Viewing and copying details of Express Transfer jobs](#).
- **Transfer progress 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.

### 6.9.0.3 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

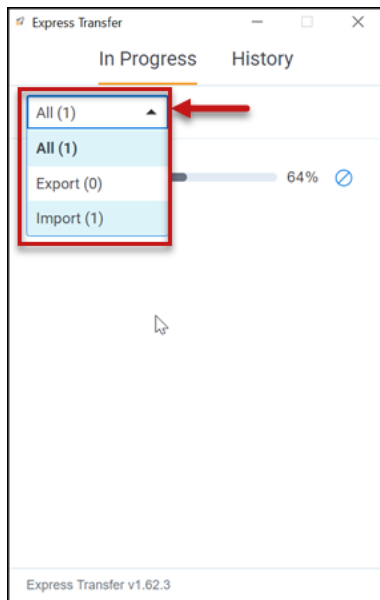
the **Actions** button next to the transfer line and then clicking **Skip failed files**. See [Express Transfer reporting jobs failed or completed with errors](#) for more information. To view job details, click the **Actions** button next to the transfer line and then click **View details**.

- **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.

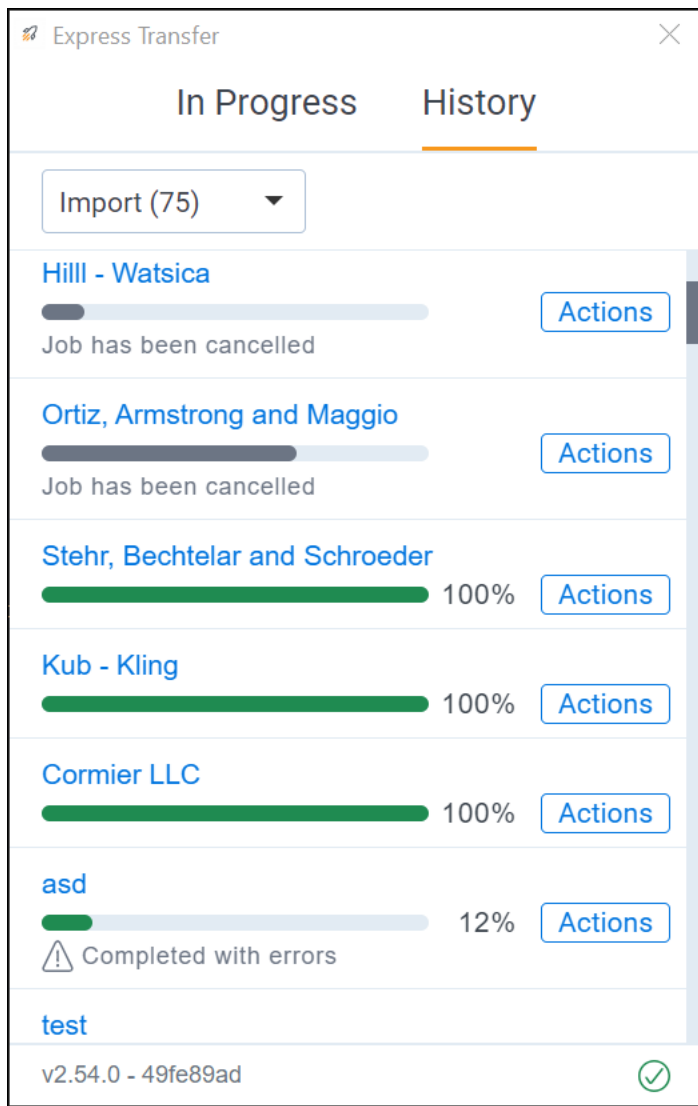
#### 6.9.0.4 Filtering Express Transfer jobs

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.



#### 6.9.0.5 Viewing and copying details of Express Transfer jobs

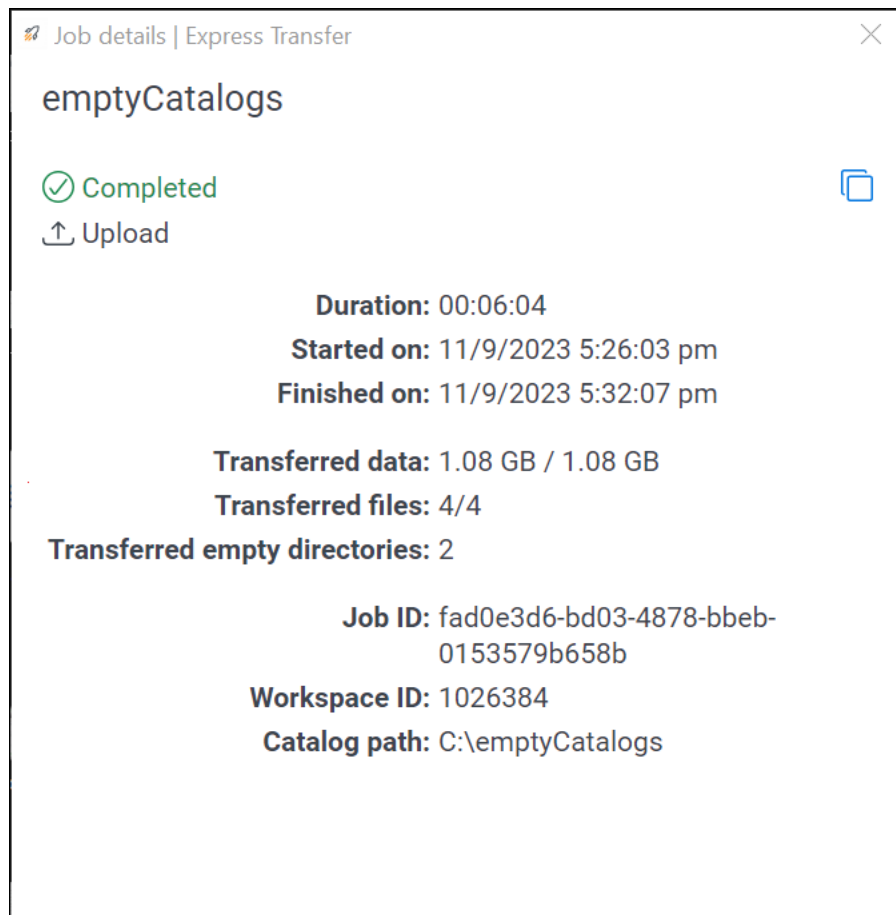
To obtain information about a particular Express Transfer job, click the **Actions** button next to the transfer line and then click **View details**.



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.



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

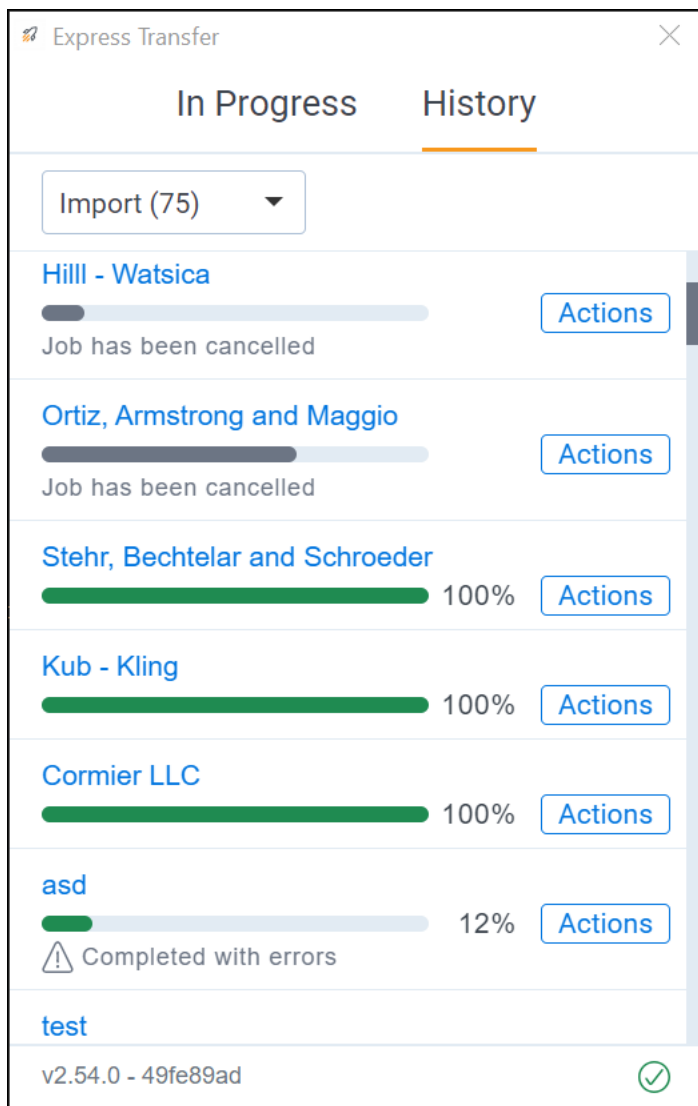
When using Express Transfer with Import/Export, if a job fails to finish or completes with errors, you can generate a report from Express Transfer Job Details that includes information such as the time stamp, file status, file name, error message, and file path. You also have a few options on how to 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 57](#).

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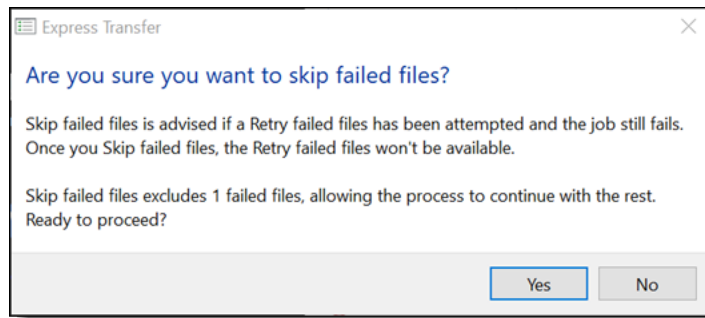
**Note:** Available for Express Transfer version 2.21.1 and above. See [Locating the Express Transfer version number on page 31](#) if needed.

---

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.





## 7 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 8](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 24](#).

- 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.

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**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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### 7.1 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 8](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 24](#).

- 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.

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**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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## 7.2 Importing a document load file via Import/Export

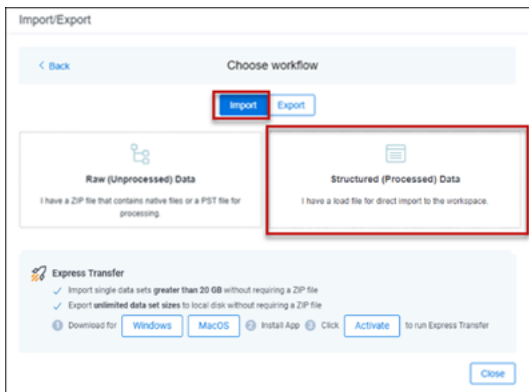
You can use Import/Export to import document load files (.dat, .csv, and .txt) into RelativityOne that contain document metadata, native files, or extracted text. You're also able to use saved job profiles to expedite the configuration process.

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 26](#) for more information.

Refer to [Import/Export load file specifications](#) and [Data upload size limitation on page 8](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 24](#).

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.

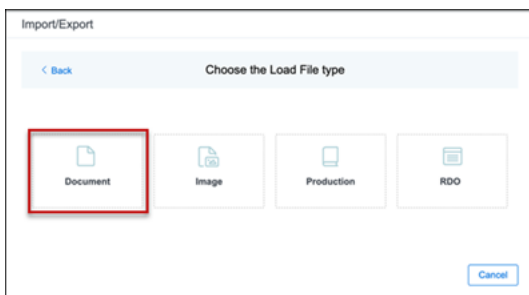


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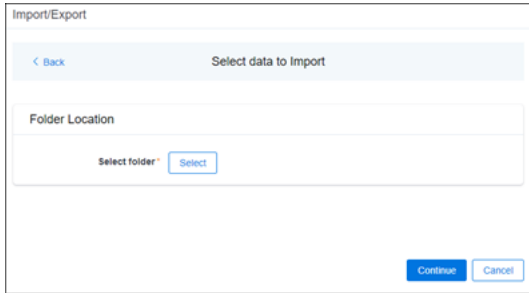
**Note:** If Express Transfer has been activated, the Express Transfer section will display a status of **Active**. See [Activating and deactivating Express Transfer on page 37](#) for more information.

---

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.



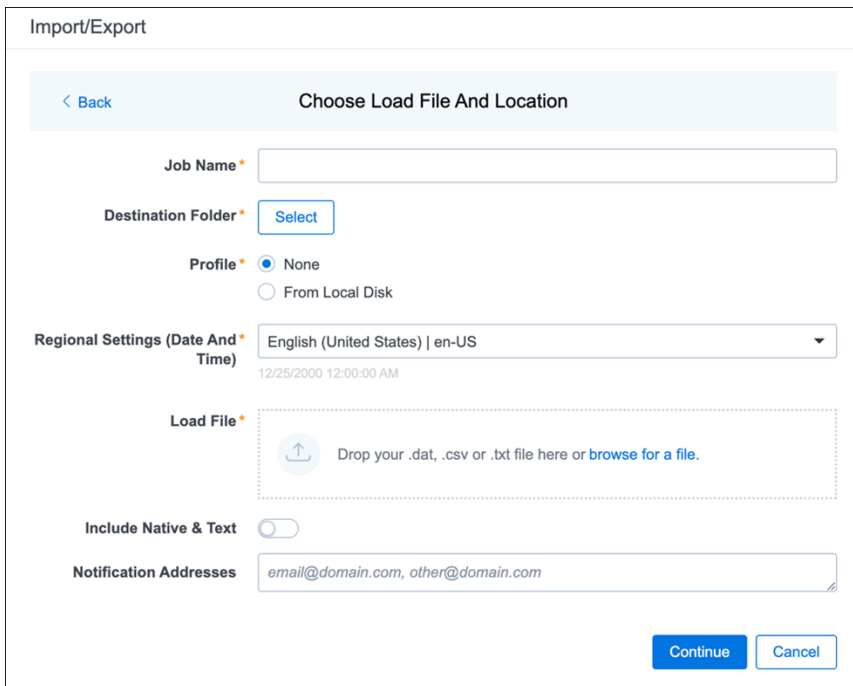
The screenshot shows a dialog box titled 'Import/Export' with a sub-header 'Select data to Import'. It features a 'Folder Location' section with a text input field labeled 'Select folder\*' and a 'Select' button. At the bottom right, there are 'Continue' and 'Cancel' buttons.

---

**Notes:**

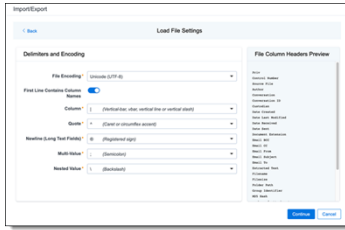
- You can choose only one folder with files to transfer.
- File names must be 200 characters or less, including the extension.
- We recommend using a local drive instead of a mapped or external drive to avoid potential slowness and connection issues with the file import process. Also see [Data transfer performance considerations on page 40](#).
- 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 dialog box titled 'Import/Export' with a sub-header 'Choose Load File And Location'. It contains several fields: 'Job Name\*' (text input), 'Destination Folder\*' (with a 'Select' button), 'Profile\*' (radio buttons for 'None' and 'From Local Disk'), 'Regional Settings (Date And Time)\*' (dropdown menu showing 'English (United States) | en-US' and a timestamp '12/25/2000 12:00:00 AM'), 'Load File\*' (a dashed box with an upload icon and text 'Drop your .dat, .csv or .txt file here or [browse for a file](#)'), 'Include Native & Text' (toggle switch), and 'Notification Addresses' (text input with placeholder 'email@domain.com, other@domain.com'). At the bottom right, there 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.
  - **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 20](#)
  - **(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.

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 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
VOL001\NATIVES\NATIVE001\USBECK_0048460.docx	Document Extension	Choose	+ Choose
VOL001\NATIVES\NATIVE001\	Extracted text	Example   Long text	+ Choose
	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 Overly 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.

---



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 12:58 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.

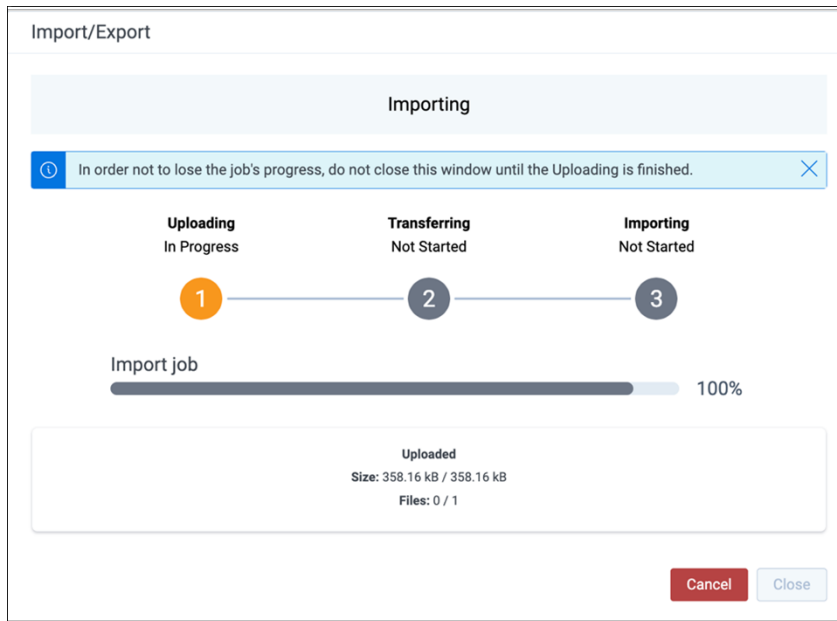
Errors Choices

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

Import Cancel

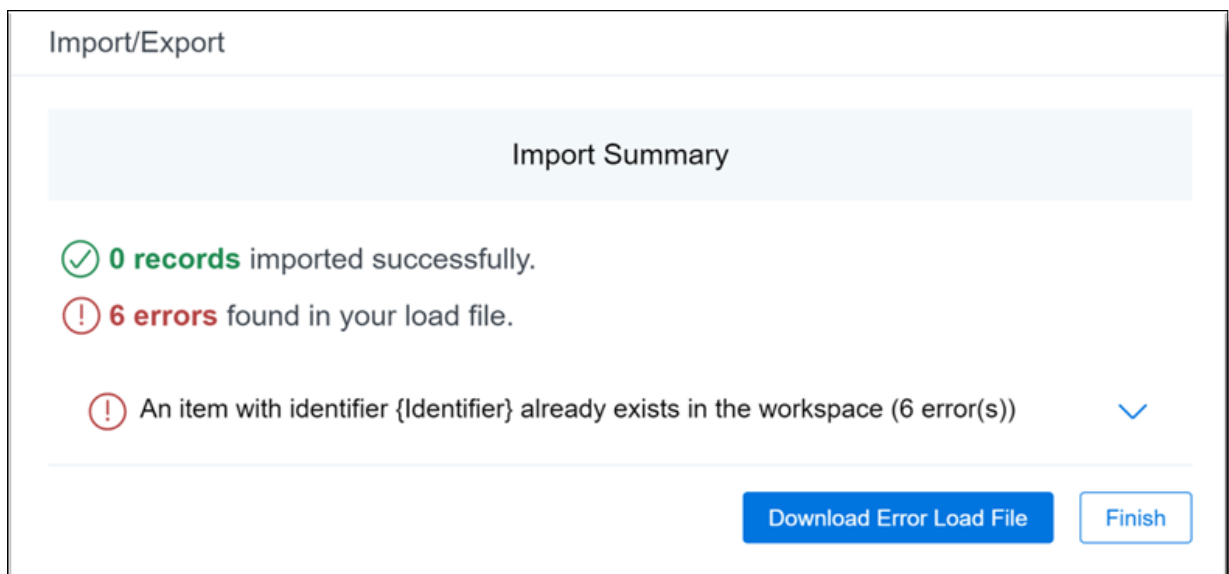
12. Click the **Import** button to start the importing process.
13. Review the importing progress on the Importing dialog. Real-time details regarding the number of transferred files and data size being processed displays during the Uploading and Extracting steps. If needed, click **Cancel** to stop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



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.

---

## 7.3 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)

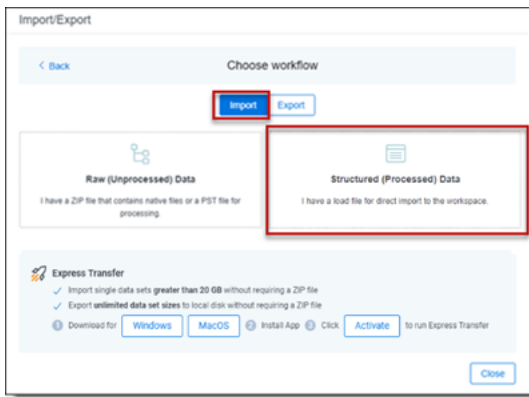
If you want to use Import/Export with Express Transfer active, which is the recommended workflow for data transfer, refer to [Express Transfer overview on page 26](#) for more information.

Refer to [Import/Export load file specifications](#) and [Data upload size limitation on page 8](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 24](#).

To import an image load file:

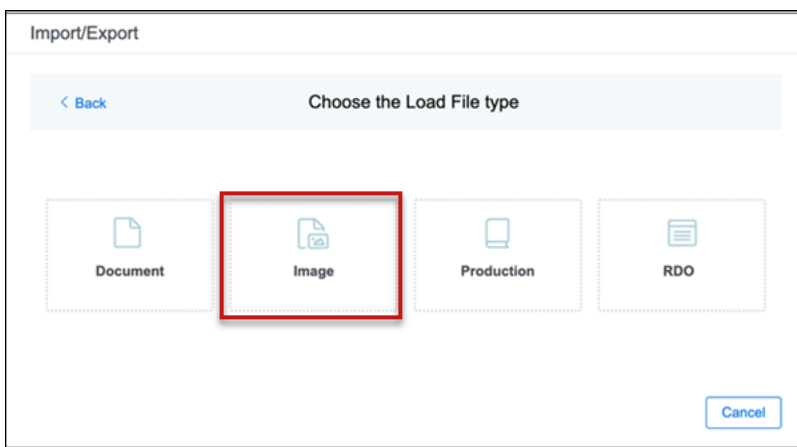
1. Use tabs, search, or the quick nav bar to navigate to the **Import/Export Job** page.
2. On the Import/Export Job page, click the **New Import/Export Job** button to start a new job.
3. On the Choose Workflow dialog, the **Import** button is selected by default. Next, click the **Structured**

**(Processed) Data** workflow box to import an image load file to your workspace.

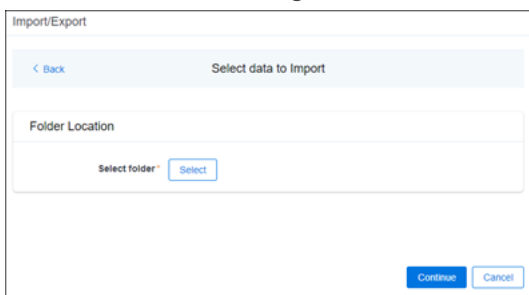


**Note:** If Express Transfer has been activated, the Express Transfer section will display a status of **Active**. See [Activating and deactivating Express Transfer on page 37](#) for more information.

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, \\Server-Name\\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 40](#).
  - 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'. At the top left is a '< Back' link. The form contains several fields: 'Job Name\*' with a text input; 'Destination Folder\*' with a 'Select' button; 'Profile\*' with two radio buttons, 'None' (selected) and 'From Local Disk'; 'Load File\*' with a dashed box containing an upload icon and the text 'Drop your .opt, .txt or .log file here or [browse for a file](#)'; 'Images\*' with a dashed box containing an upload icon and the text 'Drop your .zip file here or [browse for a file](#)'; and 'Notification Addresses' with a text input containing '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 20](#).
  - **(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.

Import/Export

< Back

Import Settings

Start Line

Numbering\*

☒ Use Load File Page IDs
 ☐ Auto-Number Pages

Import Mode\*

☒ Append Only
 ☐ Overlay Only
 ☐ Append/Overlay

Load Extracted Text

☐

Import

Save Settings

Cancel

- **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.

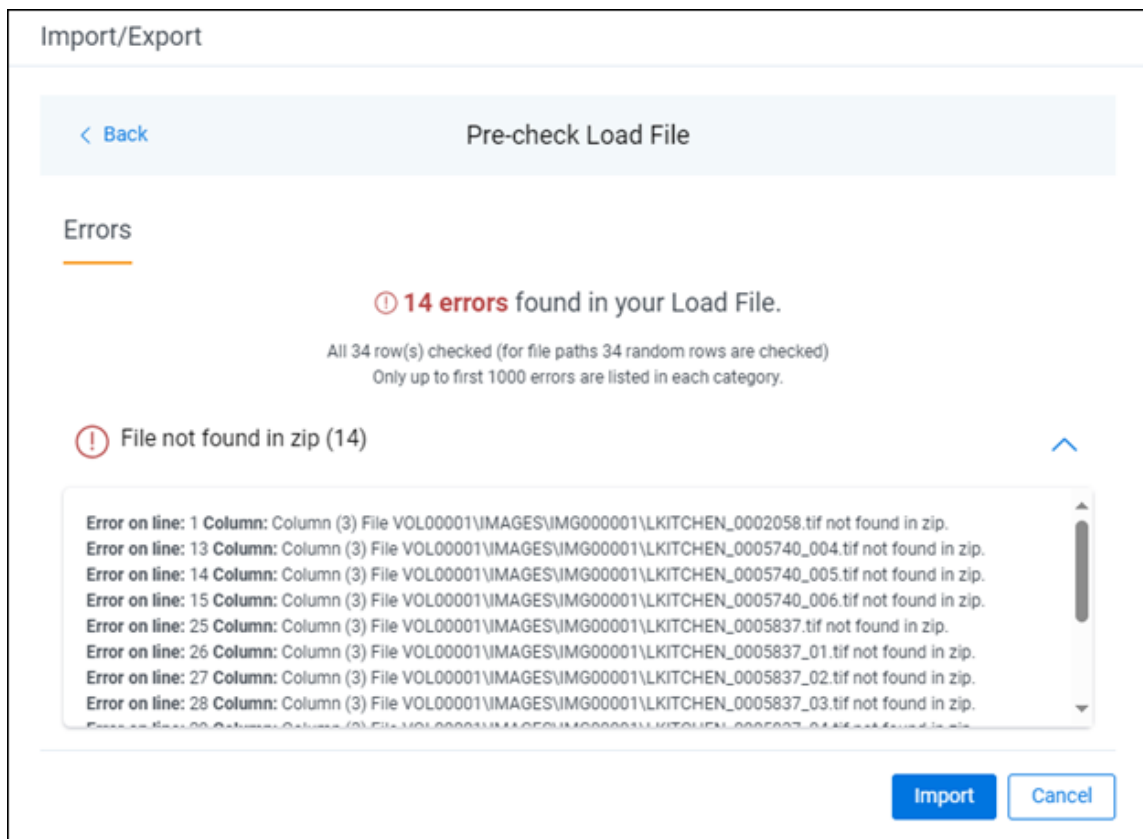
Click the down arrow next to any error message to view its details. If you want to correct the errors in the source file(s) and repeat the importing steps, click **Cancel** to discontinue importing the file at this time. Otherwise, go to the next step to import the load file with errors and correct them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

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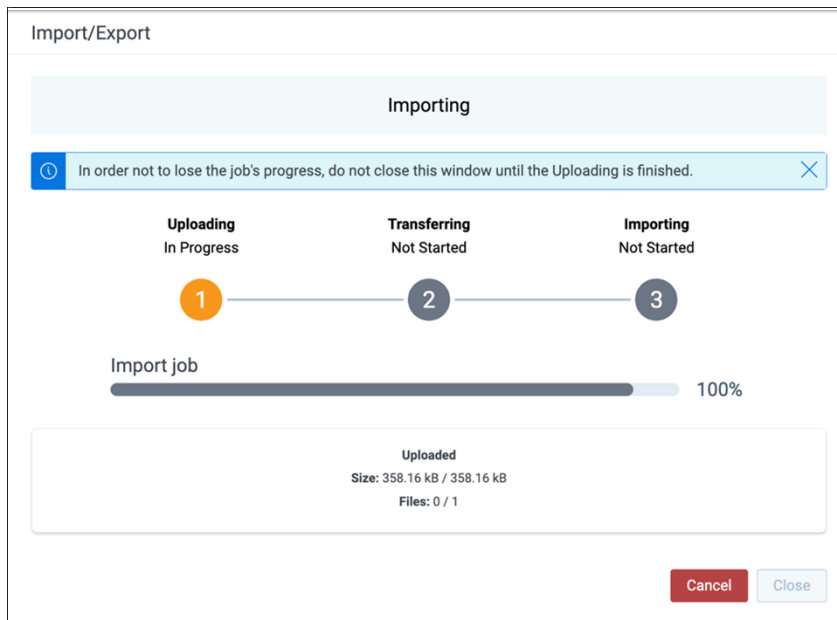


10. Click the **Import** button to start the importing process.
11. Review the importing progress on the Importing dialog. Real-time details regarding the number of transferred files and data size being processed displays during the Uploading and Extracting steps. If needed, click **Cancel** to stop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

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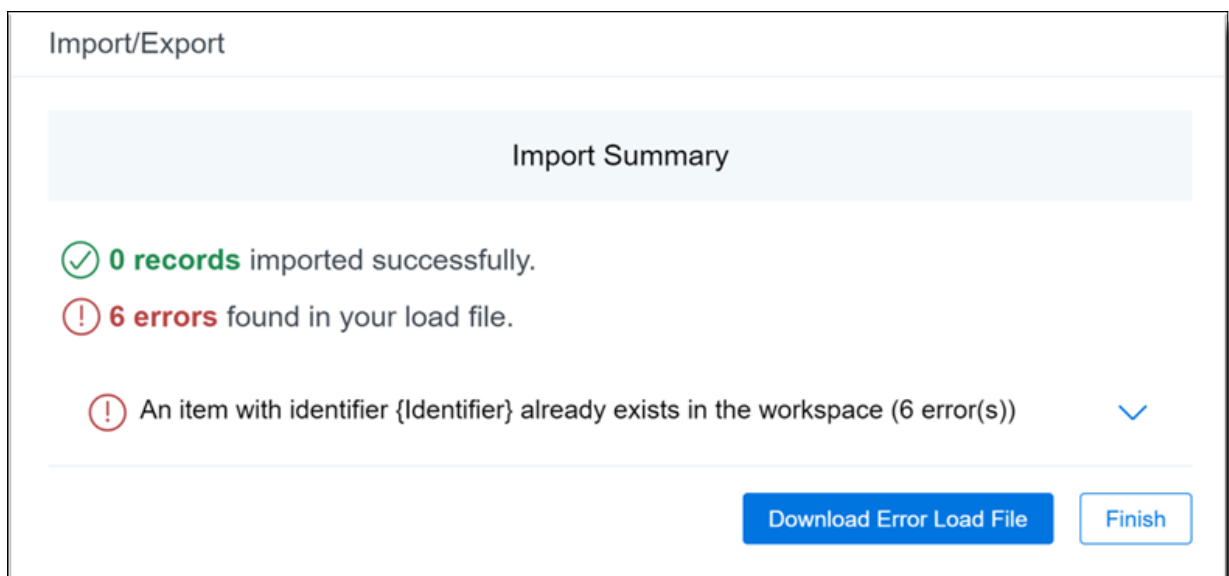
**Caution:** If you used Import/Export in web only mode (meaning Express Transfer was not active), do **not** close the Importing dialog until *after* the Uploading step has successfully completed. Closing the dialog prior to the Uploading step completing will terminate the data transfer (upload) process.

---



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](#).

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**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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## 7.4 Importing a production load file via Import/Export

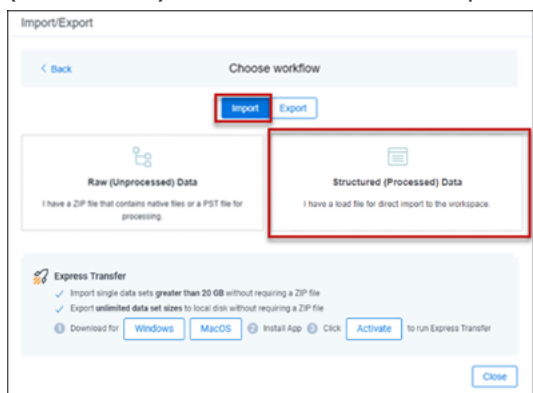
You can use Import/Export to import external productions, including single and multiple PDF files, into RelativityOne with Import/Export. This is useful after a production goes out the door in the event a case team needs access to documents as they were in the production and needs them available for 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 26](#) for more information.

Refer to [Import/Export load file specifications](#) and [Data upload size limitation on page 8](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 24](#).

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.

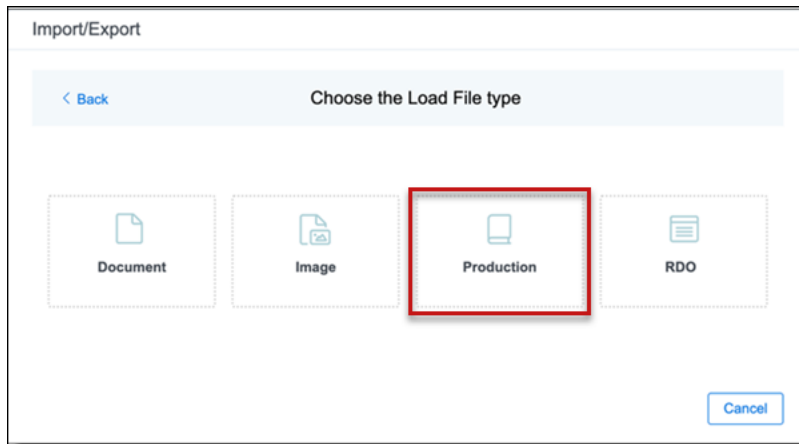


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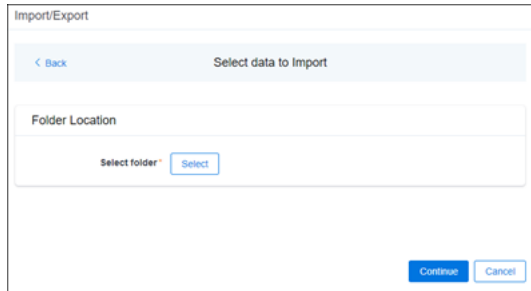
**Note:** If Express Transfer has been activated, the Express Transfer section will display a status of **Active**. See [Activating and deactivating Express Transfer on page 37](#) for more information.

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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.



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**Notes:**

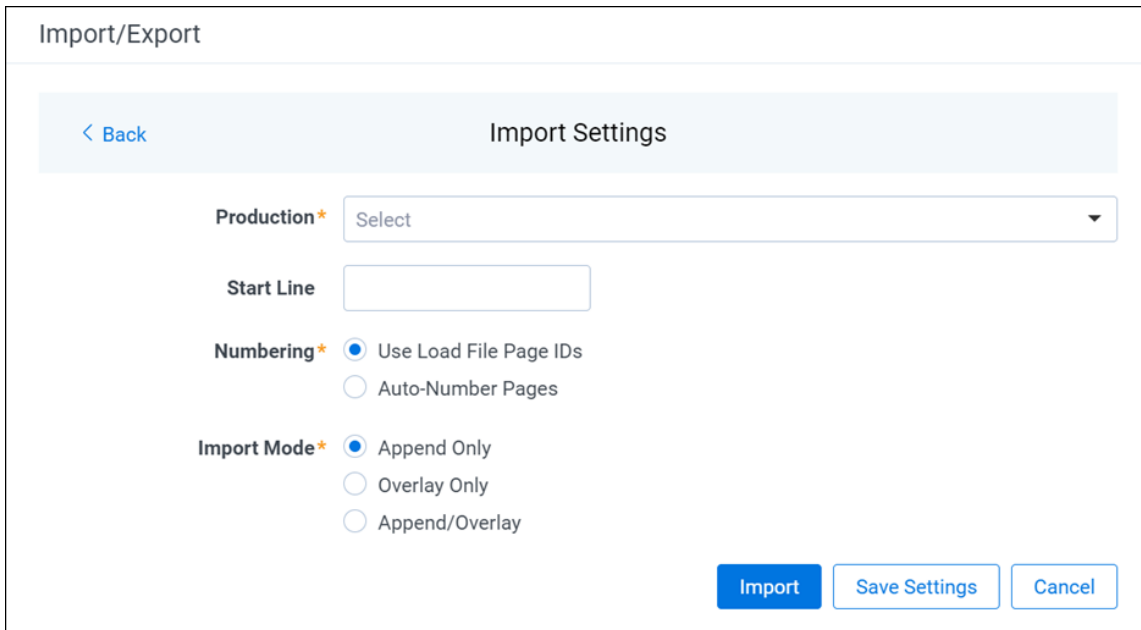
- You can choose only one folder with files to transfer.
  - File names must be 200 characters or less, including the extension.
  - We recommend using a local drive instead of a mapped or external drive to avoid potential slowness and connection issues with the file import process. Also see [Data transfer performance considerations on page 40](#).
  - 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 features a '< Back' button in the top left. The form includes several fields: 'Job Name\*' with a text input; 'Destination Folder\*' with a 'Select' button; 'Profile\*' with two radio buttons, 'None' (selected) and 'From Local Disk'; 'Load File\*' with a dashed box containing an upload icon and the text 'Drop your .opt, .txt or .log file here or [browse for a file.](#)'; 'Images\*' with a similar dashed box for '.zip' files; and 'Notification Addresses' with a text input containing '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 20](#).
  - **(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.

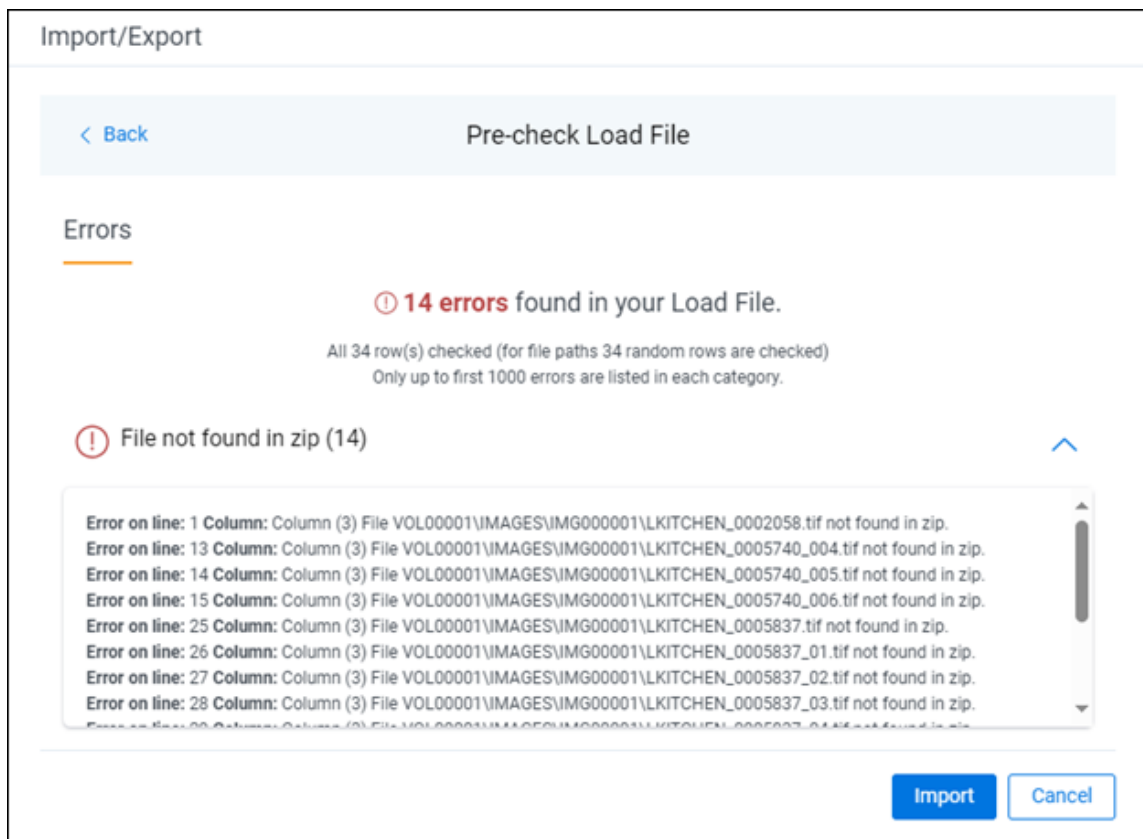
---
- 10. (Optional) Click **Precheck Load File** on the Import settings dialog to run a validation process on the load file to check for errors prior to importing it. The following validation is performed during precheck: Image file paths (checks 1,000 random lines across the whole load file). All detected 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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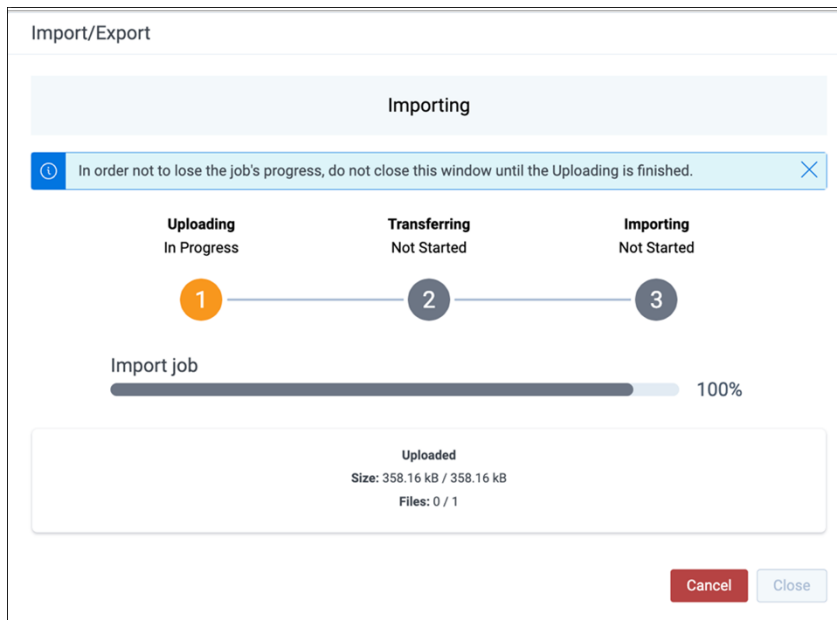
11. Click the **Import** button to start the importing process.
12. Review the importing progress on the Importing dialog. Real-time details regarding the number of transferred files and data size being processed displays during the Uploading and Extracting steps. If needed, click **Cancel** to stop 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.

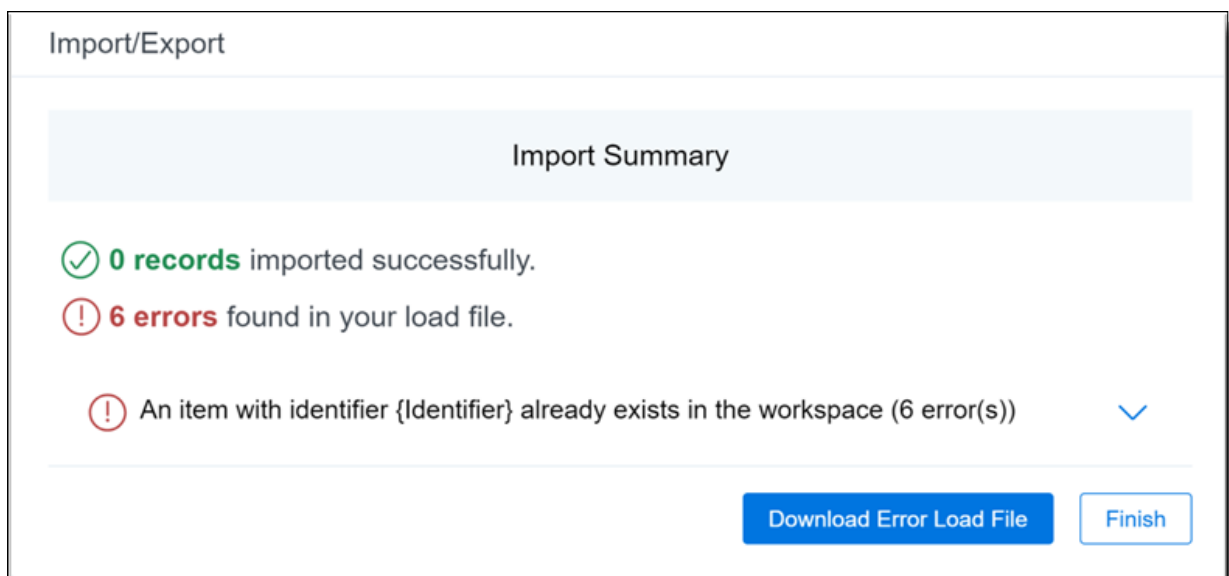
---





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

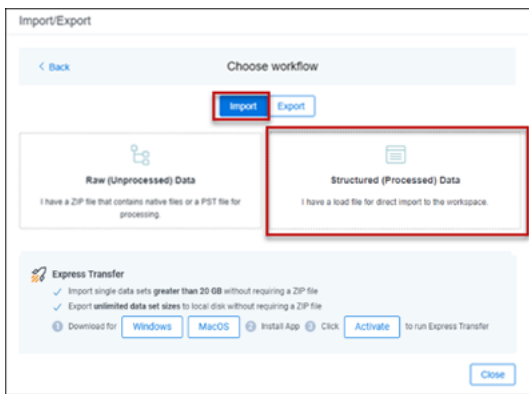
You can import data into Relativity Dynamic Objects (RDO) for use in Relativity applications. The workflow for RDO data import follows the same general guidelines as those for document load file imports.

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 26](#) for more information.

Refer to [Import/Export load file specifications](#) and [Data upload size limitation on page 8](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 24](#).

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.

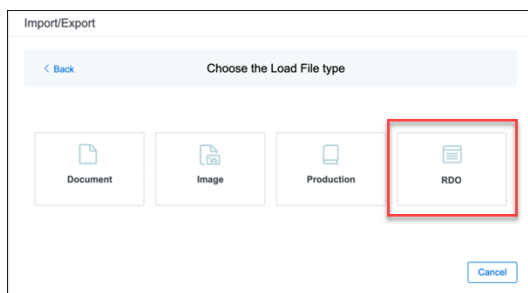


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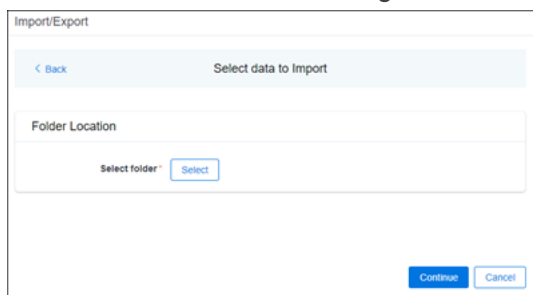
**Note:** If Express Transfer has been activated, the Express Transfer section will display a status of **Active**. See [Activating and deactivating Express Transfer on page 37](#) for more information.

---

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.




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#### 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 40](#).
  - 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 ☐

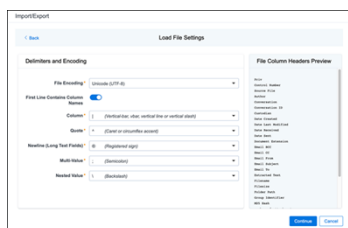
Notification Addresses email@domain.com, other@domain.com

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.

- **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 20](#)
  - **(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 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\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:

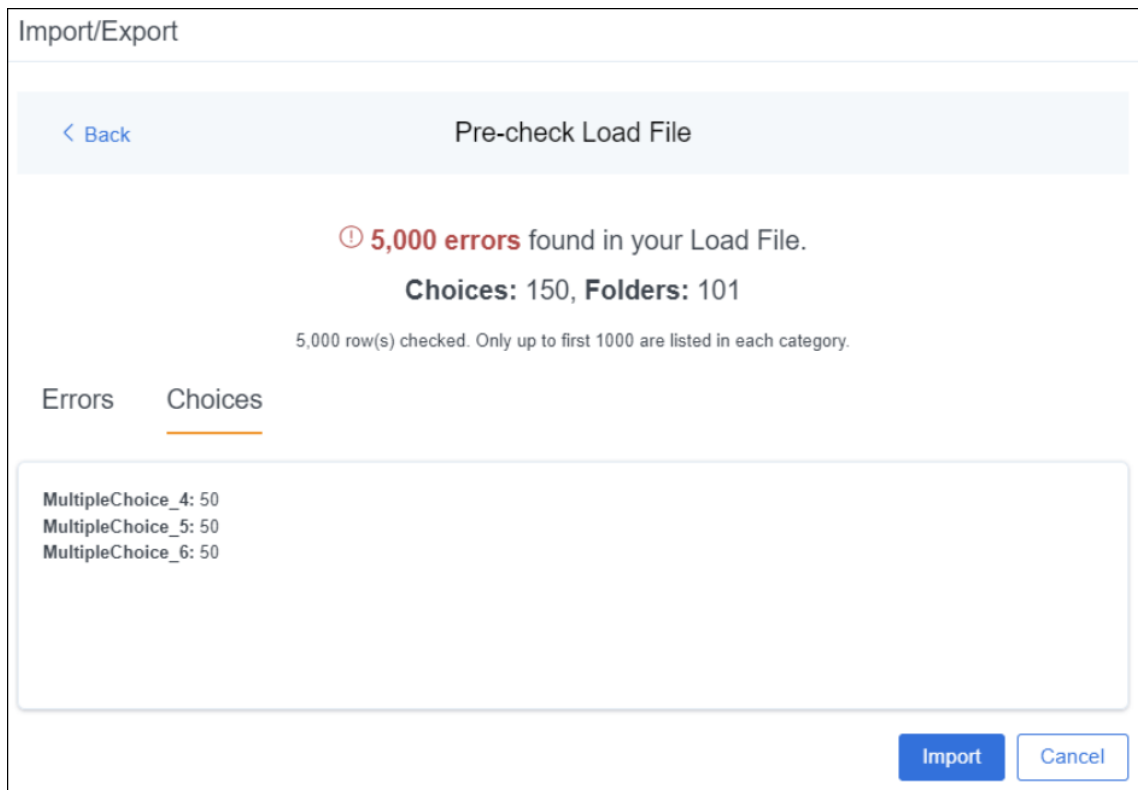
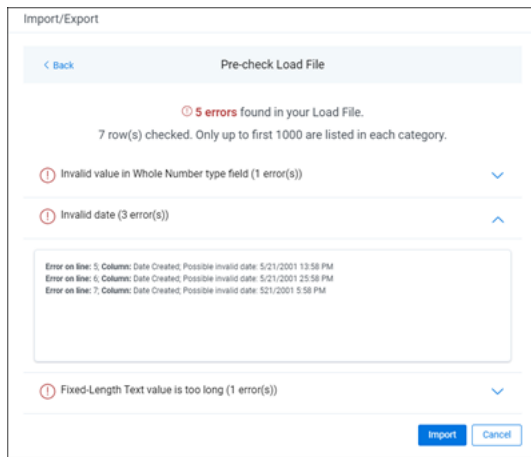
- Date format
- Field type
- Field length
- Number of load file cells
- Number of folders and choice fields
- File paths for natives and extracted text (checks 1,000 random lines across the whole load file)

---

**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.

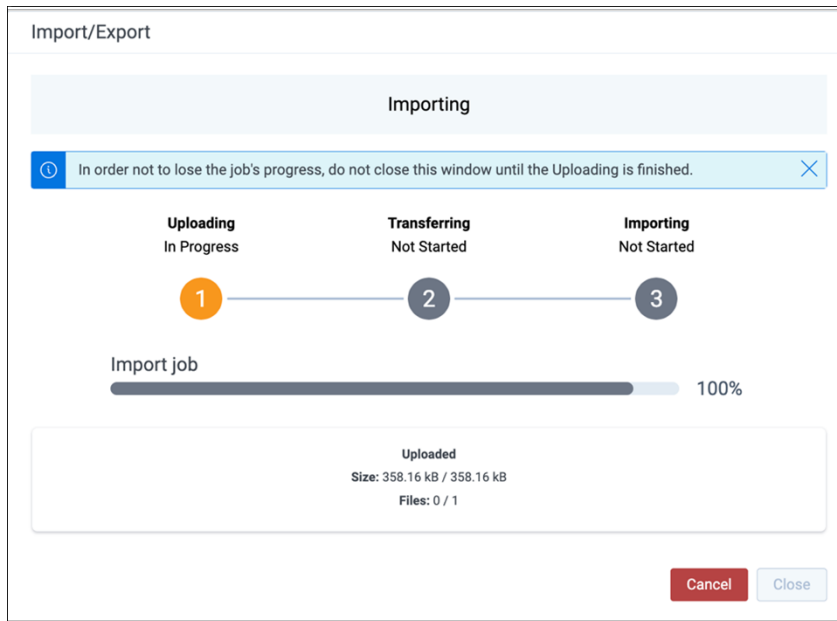
---





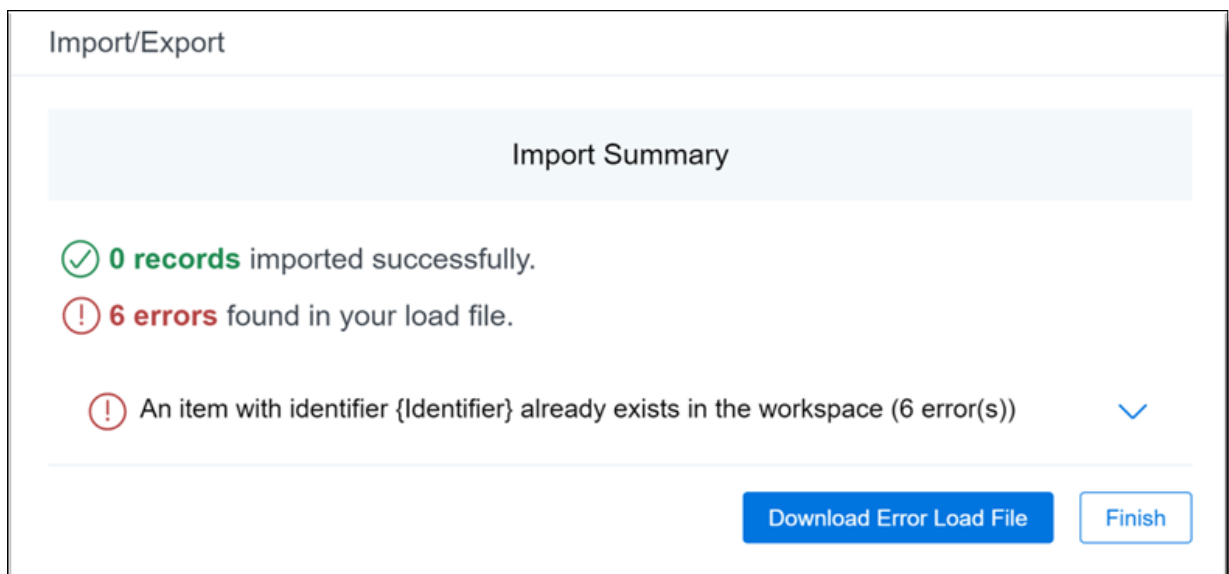
12. Click the **Import** button to start the importing process.
13. Review the importing progress on the Importing dialog. Real-time details regarding the number of transferred files and data size being processed displays during the Uploading and Extracting steps. If needed, click **Cancel** to stop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

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## 7.6 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.

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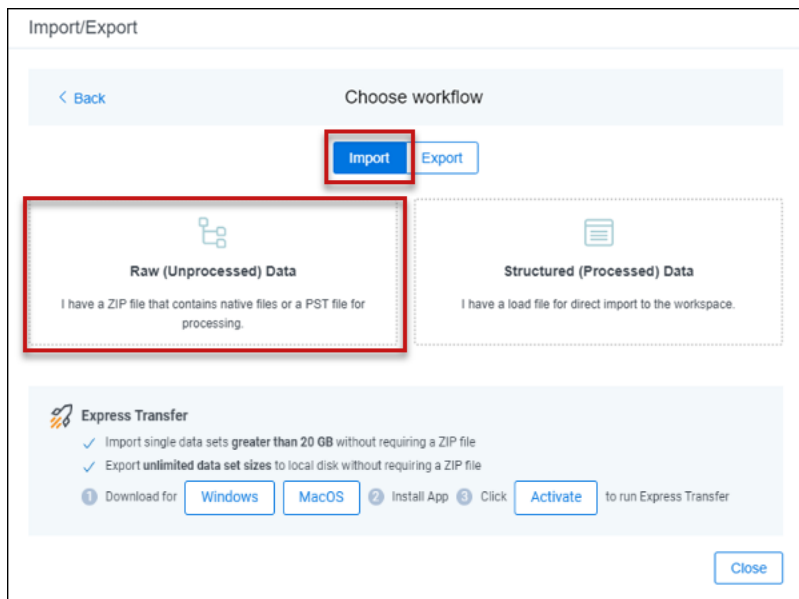
### Notes:

- 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 26](#) 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.



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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 37](#) 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.

---

The screenshot shows the 'Import/Export' dialog box with the title 'Import/Export'. Below the title bar is a light blue header with a '< Back' button and the text 'Select data to Import'. The main area is titled 'Folder Location' and contains the text 'Select folder\*' followed by two buttons: 'Select' and 'Choose From File Share', separated by the word 'or'. At the bottom right are 'Continue' and 'Cancel' buttons.

- **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.

The left screenshot shows the 'Import/Export' dialog box with the title 'Import/Export'. Below the title bar is a light blue header with a '< Back' button and the text 'Select file'. The main area contains a large dashed box with an upload icon and the text 'Drop your .zip or .pst file here or browse for a file.' Below this is the text 'or Choose from File Share'. At the bottom right is a 'Close' button.

The right screenshot shows the 'Import Source' dialog box. It has a tree view with 'WebImportExport' expanded, showing 'ImportSource' and 'ProcessingSource' subfolders. At the bottom are 'Select' and 'Cancel' buttons.

- 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\*

Destination Folder\*

Notification Addresses

Select Data Sources\*  - 3 of 3  per page

Limit of selected data sources: 0/70 ⓘ

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

All 3

- **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 106](#) 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 48](#) 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.

---

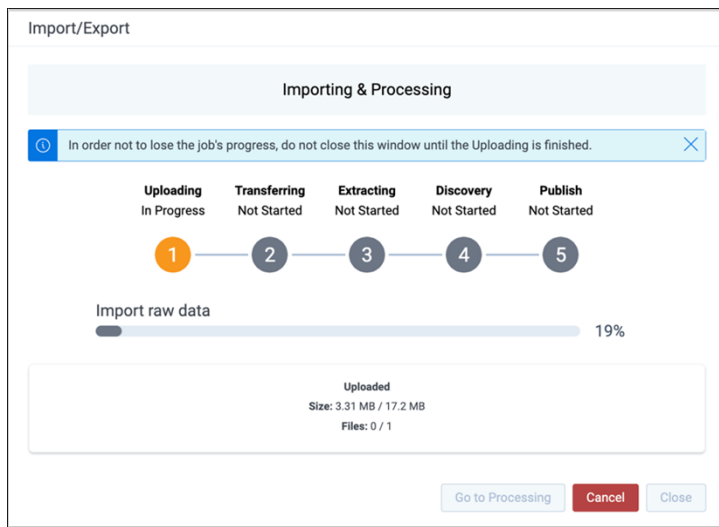
8. Review the importing progress on the Importing & Processing dialog. Real-time details regarding the number of transferred files and data size being processed displays during the Uploading and Extracting steps. Do any of the following:

---

**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.

---

#### 7.6.0.1 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 37](#) 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.

---

## 8 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 24](#).

### 8.1 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 24](#).

### 8.2 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 26](#) 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 8](#).

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 24](#).

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 37](#) 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 \*

**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 \*

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 \* DC4 (Device control 4)

Quote \* " (Latin Small Letter Two)

Newline (Long Text Field) \* ␣ (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 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.



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

- **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**.

#### 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:

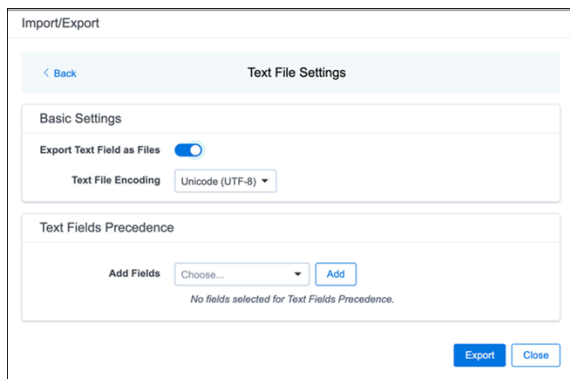
---

**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.



The screenshot shows the 'Text File Settings' dialog within the 'Import/Export' window. The dialog has a 'Back' button and a title bar. It is divided into two main sections: 'Basic Settings' and 'Text Fields Precedence'. In the 'Basic Settings' section, the 'Export Text Field as Files' toggle is turned on, and the 'Text File Encoding' is set to 'Unicode (UTF-8)'. The 'Text Fields Precedence' section has an 'Add Fields' button with a 'Choose...' dropdown menu and an 'Add' button. Below this, it states 'No fields selected for Text Fields Precedence.' At the bottom right, there 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
☒

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.

---

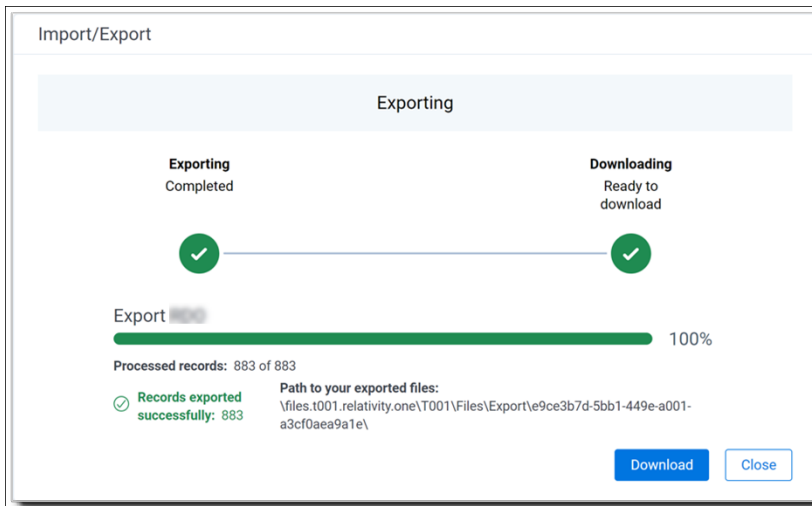
17. Click the **Export** button to start the exporting process.
18. When it's complete, the job summary lists the records exported successfully (including Load files containing .dat, opt, etc.), errors found, and path to your exported files.
  - If Express Transfer is active, the exported files automatically 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.

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

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

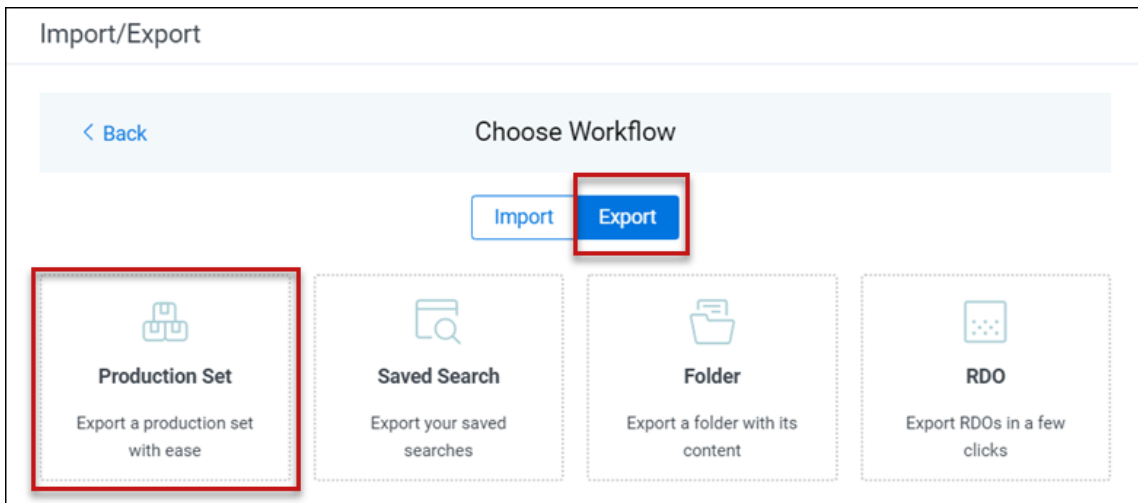


If you want to use Import/Export with Express Transfer, which is the recommended method for data transfer, refer to [Express Transfer overview on page 26](#) for more information. With Express Transfer activated, you can run up to five concurrent export jobs on a single client machine. For more information, see [Concurrent and consecutive jobs on page 8](#).

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 24](#).

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 37](#) 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.

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. 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**.

Import/Export

< Back File Settings

Natives

Export Native Files ☒

Images

Export Images ☒

Data File Format ☒ Opticon  
☐ IPRO  
☐ IPRO (FullText)

File Type ☒ Single-page TIFF/JPG  
☐ Multi-page TIFF/JPG  
☐ Rendered PDF

Continue Close

#### 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.

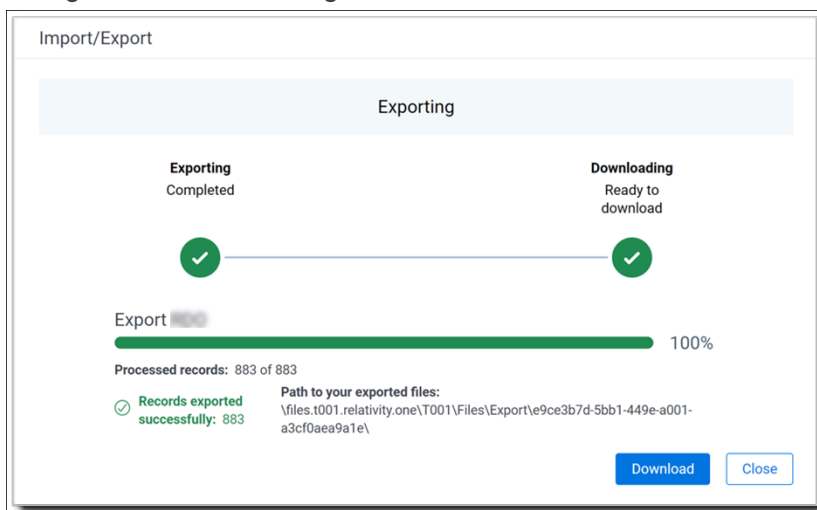
- If Express Transfer is active, the exported files automatically start to download. You can track the download's progress in the Exporting dialog or in Express Transfer (see [Express Transfer Job tracking and history](#)).

---

**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.

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

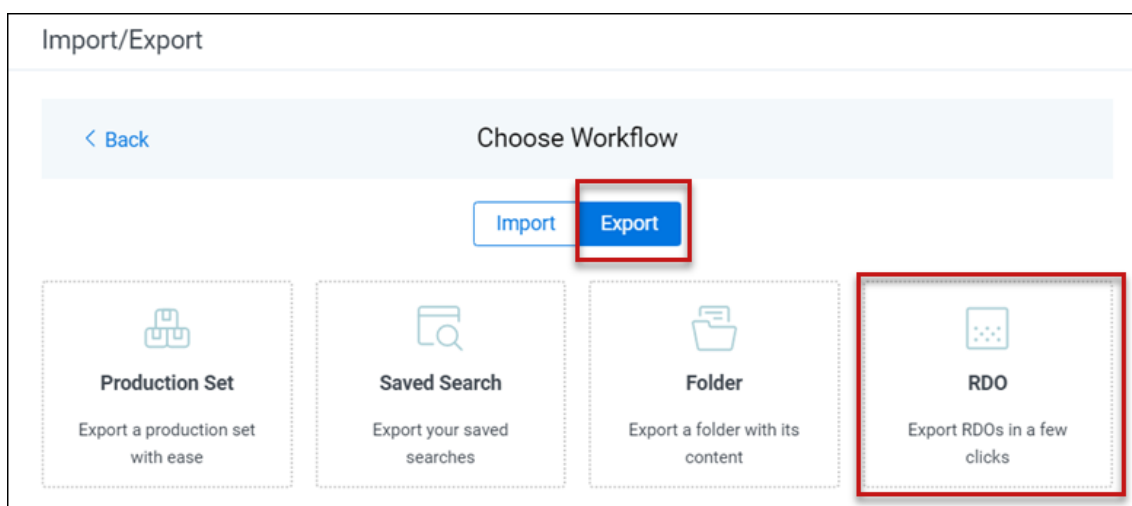
You can use Import/Export to export a Relativity Dynamic Object (RDO) data load file out of RelativityOne.

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 26](#) 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 8](#).

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 24](#).

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 37](#) 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 \***

**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 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

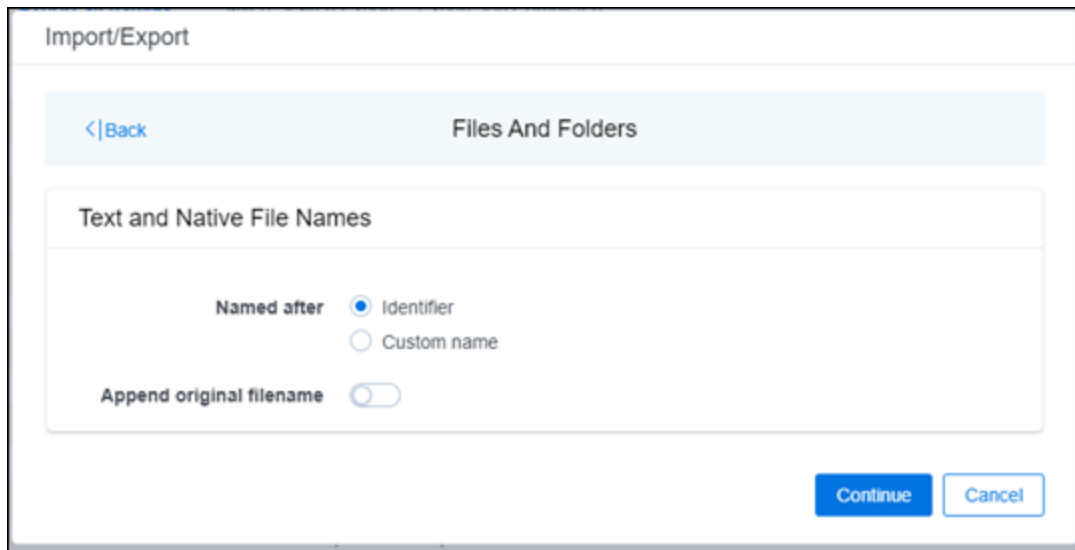
<| Back File Settings

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

Continue

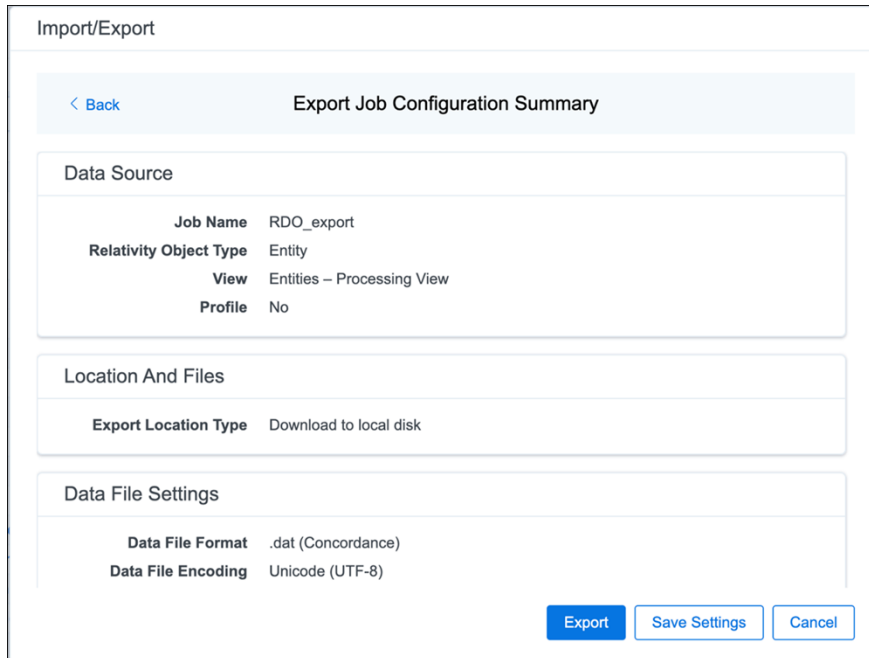
Cancel

**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:

- **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.



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.

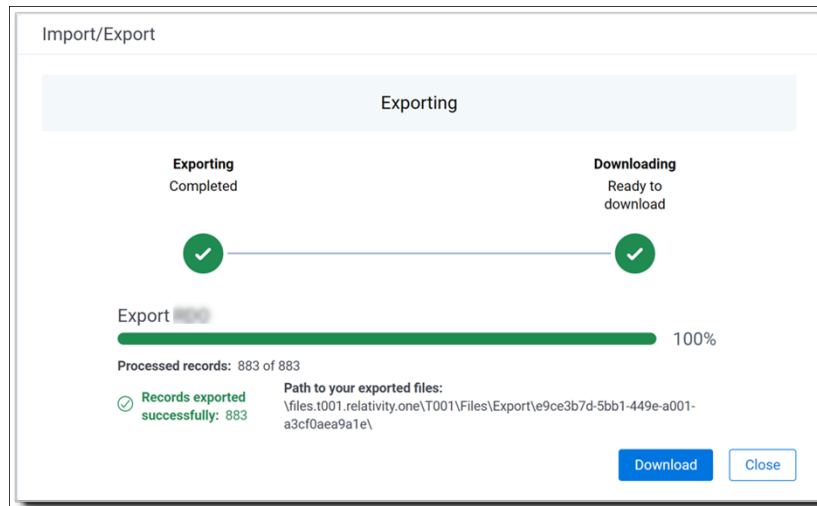
---

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.



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

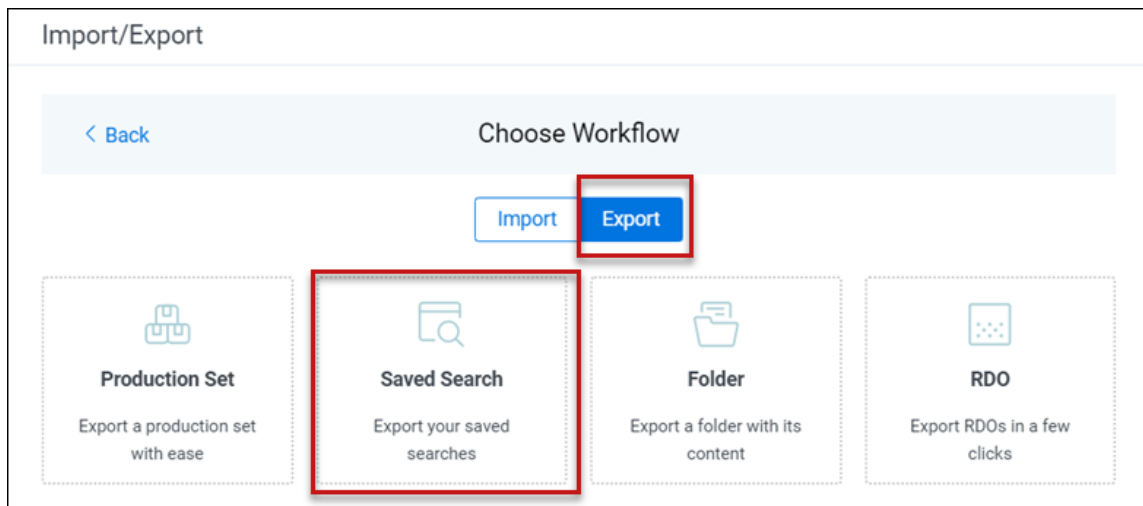
You can use Import/Export to export a saved search load file out of RelativityOne.

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 26](#) 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 8](#).

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 24](#).

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 37](#) 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**.



- **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.

The screenshot shows a dialog box titled "Import/Export" with a sub-header "Production Image Type". At the top left is a "< Back" button. Below the sub-header, there is a section titled "Production Image Type" containing two radio buttons: "Original Images" (unselected) and "Produced Images" (selected). Below this is a section titled "Select Productions". Inside this section, there is a toggle switch for "Include original images" which is currently turned off, with the text "For documents that haven't been produced." next to it. Below the toggle are two side-by-side boxes: "Available Productions" and "Selected Productions". Each box has a "Filter" input field. At the bottom right of the dialog are "Continue" and "Cancel" buttons.

**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.

---

8. 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's a section titled "File Settings" with a back button. Three categories are listed: "Natives", "Images", and "PDFs". Each category has a corresponding "Export" toggle switch, all of which are currently turned off. At the bottom right, there are "Continue" and "Cancel" buttons.

- **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)).
9. 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 within the 'Import/Export' window. The dialog has a title bar with 'Import/Export' and a '< Back' button. Below the title bar is a 'Text File Settings' section. Under 'Basic Settings', there is a toggle for 'Export Text Field as Files' which is currently turned on, and a 'Text File Encoding' dropdown menu set to 'Unicode (UTF-8)'. Below this is a 'Text Fields Precedence' section with an 'Add Fields' button and a 'Choose...' dropdown. Below the dropdown, it says 'No fields selected for Text Fields Precedence.' At the bottom right of the dialog 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
☒

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.

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.

---

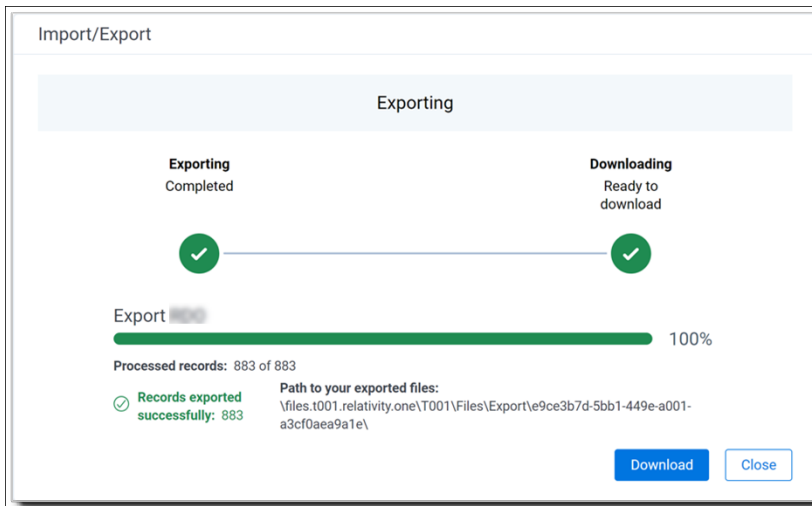
16. Click **Export** to begin the exporting process.
17. When it's complete, the job summary lists the records exported successfully (including Load files containing .dat, opt, etc.), errors found, and path to your exported files.
  - If Express Transfer is active, the exported files automatically start 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](#).

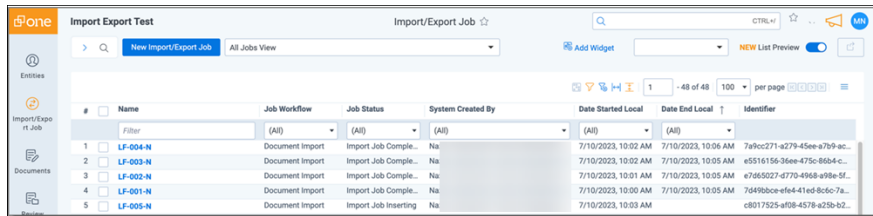
You can always view the job's Exporting dialog information after it's closed by going to the [Import/Export Job page](#) and clicking the **job name link**. The Job page also contains more details about all jobs.

## 9 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 page 161](#).

To access the page, use tabs, search, or the quick nav bar to navigate to the **Import/Export Job** page.



#	Name	Job Workflow	Job Status	System Created By	Date Started Local	Date End Local	Identifier
1	LF-004-N	Document Import	Import Job Complete...	Na	7/10/2023, 10:02 AM	7/10/2023, 10:06 AM	7a90c271-e279-45ee-a7b9-ac...
2	LF-003-N	Document Import	Import Job Complete...	Na	7/10/2023, 10:02 AM	7/10/2023, 10:05 AM	e5516156-36ee-475c-86b4-c...
3	LF-002-N	Document Import	Import Job Complete...	Na	7/10/2023, 10:01 AM	7/10/2023, 10:05 AM	e7865027-d770-4968-a98e-5f...
4	LF-001-N	Document Import	Import Job Complete...	Na	7/10/2023, 10:00 AM	7/10/2023, 10:05 AM	7d49b0ce-efe4-41ed-8c6c-7a...
5	LF-005-N	Document Import	Import Job Inserting	Na	7/10/2023, 10:03 AM		c8017525-a708-4578-a25b-b2...

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.



## 10 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 page 159](#).

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.

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