

Data Transfer Guide

October 28, 2024

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1 Data transfer

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

1.1 Data transfer considerations

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

1.2 Data transfer network considerations

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

1.3 Data transfer workflows in RelativityOne

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

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

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

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

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

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

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

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

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

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

Note: As of July 1, 2024 the Relativity Desktop Client (RDC) is no longer operational for any RelativityOne customers. Import/Export should be used for all RelativityOne importing and exporting workflows. See the Community article [RDC Deprecation FAQ](#) for additional information.

1. Upload local files to your RelativityOne the [staging directory](#) using the Staging Explorer.
2. After you upload the files to your staging directory you can then ingest those files from your staging directory into RelativityOne using **Integration Points**. Integration Points provides you with the ability to import data directly into your workspace. This includes importing a CSV file, LDAP, or load file directly into your workspace, and scheduling future or recurrent import jobs.

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

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

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

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

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

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

2 Staging Area

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

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

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

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

2.1 Staging Area folders

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

Note: You are able to create subfolders within these four Staging Area folders, but you cannot create folders at the same level as them.

- **ARM**—a folder for archiving workspaces and for staging restores via the ARM application.
- **ProcessingSource**—a folder for storing files you want to process into your RelativityOne workspace. There will be a dedicated job folder for each of the jobs. For example, \ProcessingSource\[JobFolder-Name].
- **StructuredData**—a folder for importing and exporting workspace data using Import/Export and Integration Points. Refer to [Import/Export](#) and [Integration Points](#) documentation for more information.

Note: Relativity is deprecating the existing Export folder in September 2024. It is being replaced by the StructuredData folder starting in May 2024. Begin using the StructuredData folder immediately for importing and exporting data via Import/Export and Integration Points. The StructuredData folder is included in your Staging Area threshold and is calculated and billed the same as the existing Staging Area folders (ProcessingSource, ARM, and TenantVM). The Export folder will be completely removed in September 2024 and will no longer be accessible or billable.

- **TenantVM**—a folder to temporarily store Utility Server virtual machine (UVM) workflows. Refer to [Utility Server](#) documentation for more information.

2.2 Billable

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

2.3 Best Practices

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

3 Utility Server (UVM)

Note: Utility Server is not available for FedRAMP customers.

RelativityOne customers may request a Utility Server for their RelativityOne instance. The Utility Server is a virtual machine that allows third-party applications to assist with pre-processing data imported to RelativityOne, post-processing data exported from RelativityOne, and other bespoke eDiscovery workflows. The Utility Server is accessed through a VPN and Remote Desktop connection, using an issued set of credentials and an IP address.

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

- Install RelativityOne Staging Explorer (ROSE) to access data in the staging area.
 - For information on ROSE, see the [Staging Explorer](#) topic.
 - Review the article [RelativityOne File Storage Architecture Best Practices](#) prior to working with files on the RelativityOne file share.
- Manage local users
 - See the section on [Utility Server access](#) for details on user management.

Note: This functionality is only available through an administrator account, which Relativity will issue if not previously provided.

- Install applications
 - You can install Microsoft Office using your own license to correct any errors in load files or other more robust data editing needs. Relativity does not provide licenses for Microsoft Office on the Utility Server.
 - While Relativity supports clients installing or using applications on the Utility Server, the applications or how they interact with RelativityOne are not supported.

Note: This functionality is only available through an administrator account, which Relativity will issue if not previously provided.

Note: Upon request, Relativity can provide up to 11 Utility Servers per RelativityOne instance, including Client Domain utility servers. To request an additional Utility Server, contact your Customer Success Manager.

3.1 Utility Server access

Note: Access is limited to two users concurrently. If required, you may be provided capacity for up to 10 concurrent user sessions. Contact [Relativity support](#) to request additional user sessions.

By default, the Utility Server is issued to you with two non-administrator users and one administrator user account.

Note: If you do not currently have an administrator account and require it, contact your Implementation Specialist or [Relativity Support](#) to request administrator privileges.

Refer to the table below for details on security permissions on the Utility Server by role.

Role	Can install applications	Can access file share	Issued by request	Issued by default
Administrator	X	X	X	X*
Default Relativity user account		X		X
Custom users (client-managed)	NA	X	NA	NA

*Starting May 1, 2024, Relativity issues administrator accounts by default. You must request an administrator account for Utility Servers provisioned before May 1, 2024.

Note: Custom users are client-managed, meaning you determine these permissions. However, custom users also have access to the file share configured automatically upon first login to the Utility Server. Refer to the article, [RelativityOne - Creating a Windows user on the Utility Server](#) for details on Utility Server user administration.

3.2 Connecting to your Utility Server

1. Before you begin, have your credentials ready to log in to the VPN and Utility Server. Your customer Service Manager or Relativity Support will share these credentials with you.
2. Use the provided credentials to connect to the [Global Protect VPN](#).

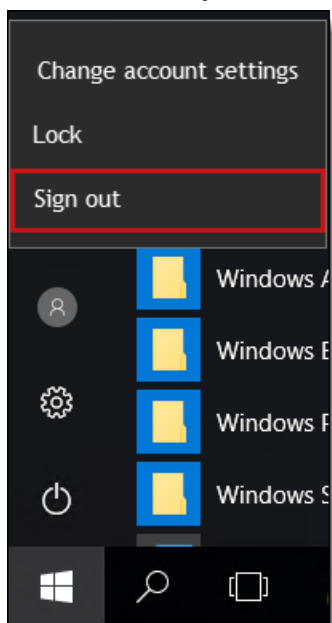
Note: VPN and Utility Server user credentials are unique credentials. Make sure you use the correct credentials to connect to the VPN and Utility Server, respectively. If you cannot establish a connection to the VPN, contact [Relativity support](#) for assistance with troubleshooting.

3. After you have successfully connected to the VPN client, open the Utility Server .zip file, then open the Credentials text file to access your Utility Server credentials.
4. Launch the Windows Remote Desktop Connection tool.
5. When the Windows Remote Desktop Connection window appears, enter the IP address (from the Credentials file) in the Computer field.
6. Click Connect.
7. Enter the Username and Password (from the Credentials file) when prompted and click OK.
8. You have successfully logged into the RelativityOne Utility Server. If you experience issues accessing your Utility Server or the RelativityOne file share, contact [Relativity support](#).

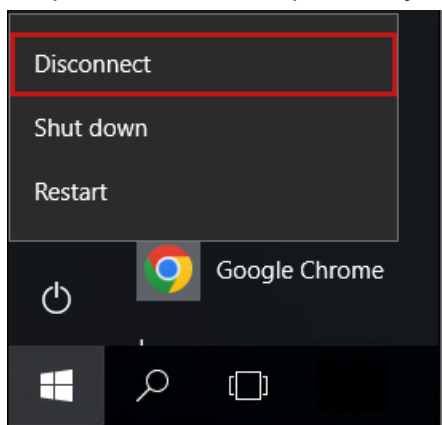
Note: For added security, change your password after you log in. You should change your password a minimum of every 90 days.

3.3 Logging off or disconnecting Utility Server sessions

1. Navigate to the Windows Start menu and select Sign Out to cleanly exit your Remote Desktop session. Relativity recommends logging off the session to avoid leaving a disconnected or orphaned session on the Utility Server.



2. Alternatively, you can disconnect from the Utility Server (through the Windows Start menu > Disconnect, or by clicking the exit icon (X) on the remote session connection bar) if you are executing long-running jobs. When disconnecting without explicitly logging off, Remote Desktop Services will keep the session alive, potentially blocking connections for other users.



3. To monitor active or disconnected sessions on the Utility Server, navigate to the Windows Task Manager > Users tab.

4. Local administrators should clear out disconnected sessions through the Windows Task Manager. You should clear any session with a user name of (4), as these users can no longer reconnect to their sessions. Accumulating disconnected sessions may prevent other users from establishing new connections or reconnecting to the Utility Server.

3.4 Data, applications and storage capacity on the Utility Server

Considerations:

- Data and applications on the Utility Server are not backed up.
- Do not use the Utility Server for permanent or long-term data storage. You should maintain copies of data on the server in other external locations.
- You are responsible for managing the disk capacity of the local Utility Server drives. In cases where the OS disk nears critical capacity, Relativity sends warning notifications to your account and the organization's administrative contact. It is your responsibility to remove files to free up disk space. Failure to do so may make the Utility Server inoperable and require server replacement.

3.5 Accessing data in the staging area

Your Utility Server only provides you access to the staging area. Review the [Staging Area](#) topic for more information.

3.6 Utility Server limitations and expectations

For information on limitations and expectations, see the article [Utility Server Limitations and Expectations](#).

3.7 Workflow recommendations and changes

For information on workflow recommendations and changes, see the article [UVM workflow recommendations and change log](#).

3.8 GlobalProtect VPN client

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

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

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

- Direct access to SQL

3.8.1 GlobalProtect VPN requirements

Consider the following local machine requirements:

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

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

3.8.1.1 Port requirements

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

Destination Port	Protocol	Description
443	TCP	Used for communication between GlobalProtect agents and portals, or GlobalProtect agents and gateways and for SSL tunnel connections. GlobalProtect gateways also use this port to collect host information from GlobalProtect agents and perform host information profile (HIP) checks.
4501	UDP	Used for IPSec tunnel connections between GlobalProtect agents and gateways.

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

3.8.2 Current VPN portal URL

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

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

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

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

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

Primary Azure/Entra ID region	VPN Portal URL
US-Central (CTUS)	vpn.ctus.relativity.one
US-East (ESUS)	vpn.esus.relativity.one
Canada-Central (CACT)	vpn.cact.relativity.one

Primary Azure/Entra ID region	VPN Portal URL
UK-South (UKSO)	vpn.ukso.relativity.one
Asia-East (ESAS)	vpn.esas.relativity.one
Brazil-South (BRSO)	vpn.brso.relativity.one
Europe-West (WSEU)	vpn.wseu.relativity.one
France - Central (FRCT)	vpn.frct.relativity.one
Germany-West Central (DECT)	vpn.dect.relativity.one
Switzerland North (CHNO)	vpn.chno.relativity.one
Australia-East (AUEA)	vpn.auea.relativity.one
Korea-Central (KRCT)	vpn.krct.relativity.one
United Arab Emirates (AENO)	vpn.aeno.relativity.one
India (INCT)	vpn.inct.relativity.one
Ireland (NOEU)	vpn.noeu.relativity.one
South Africa (ZANO)	vpn.zano.relativity.one
Southeast Asia (SEAS)	vpn.seas.relativity.one
Japan (JPES)	vpn.jpes.relativity.one
Legacy Sandboxes	vpn.ctusssbx.relativity.one

3.8.3 Accepting the invitation from Microsoft Entra ID

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

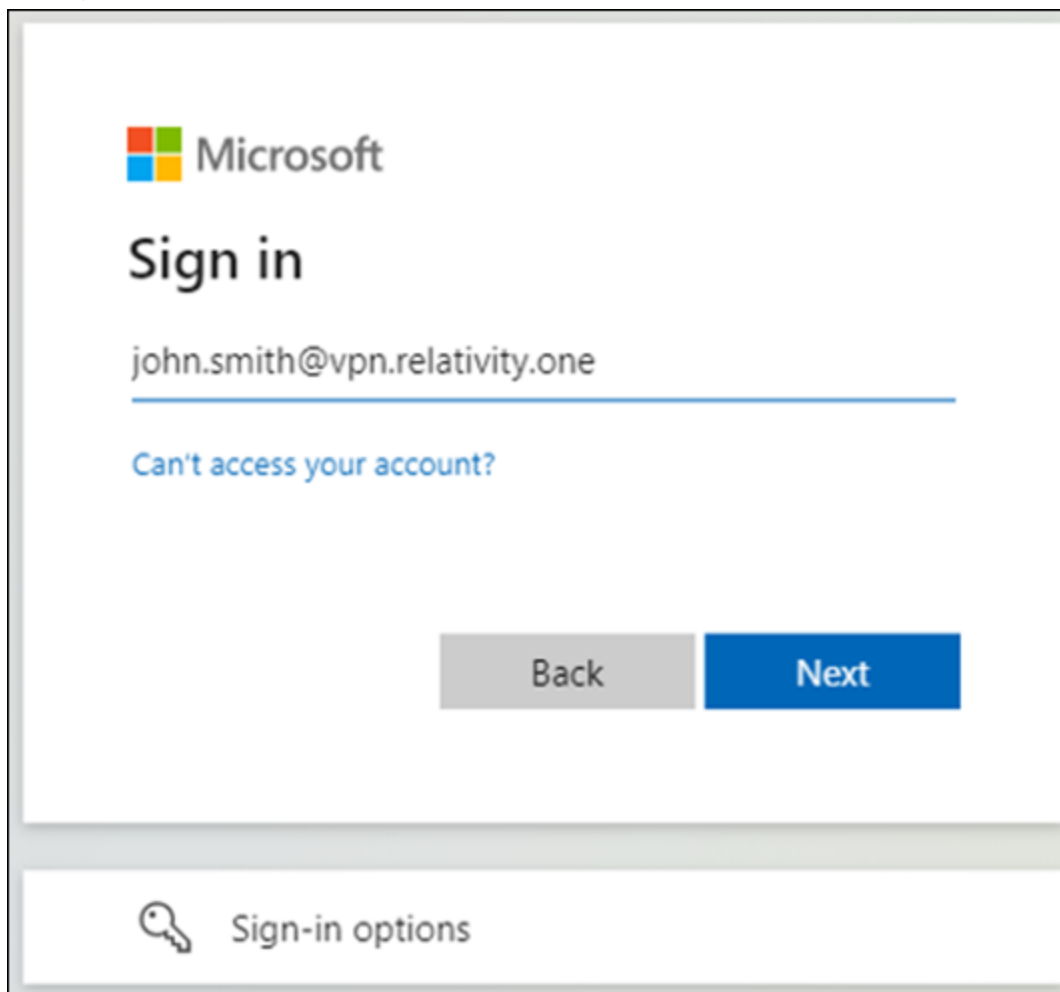
3.8.4 Downloading and installing the GlobalProtect VPN client

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

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

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

1. Navigate to the portal for the geographic region you use RelativityOne in. The correct portal address for you to use can be found in the table listed under [Current VPN portal URL on page 17](#) section above.
2. In the Microsoft *Pick an account* prompt, click the **Use another account** option.
3. Enter your own credentials.



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

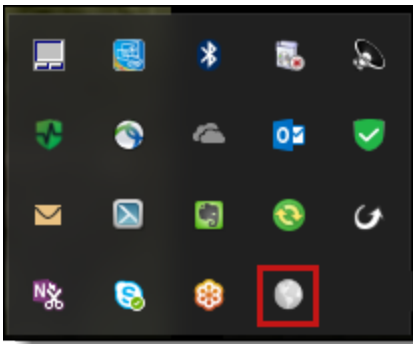


5. Install the GlobalProtect VPN client you just downloaded. Follow the default prompts.

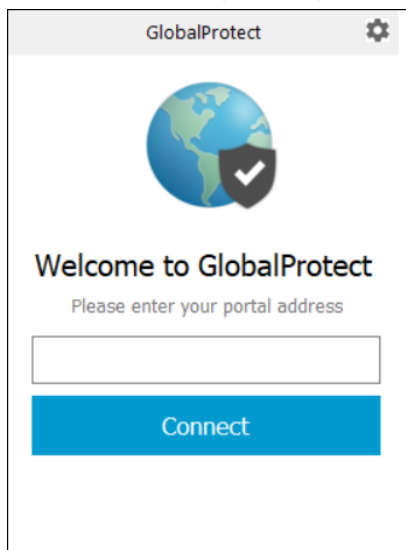
Note: If you are using macOS and are unable to use GlobalProtect after installing, review the General tab in your Security and Privacy settings and ensure that system software from **PanGPS** is not blocked from loading.

3.8.5 Logging in using your GlobalProtect VPN client

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

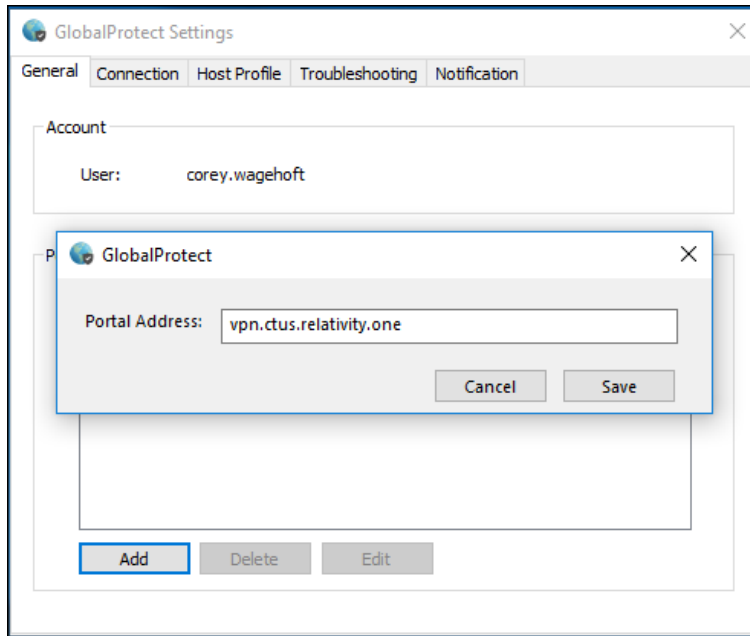


2. Click the **gear icon** in the upper right-hand corner of the toolbar menu, and then select **Settings** to access the Settings dialog window and configure the VPN client.

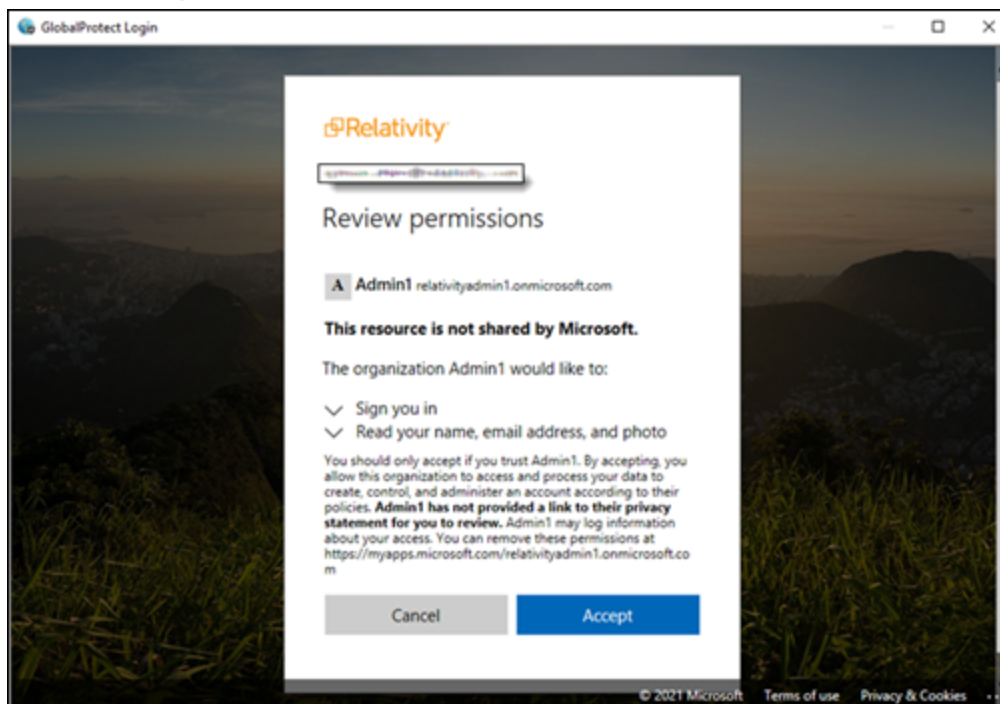


3. Under the General tab, click the **Add** button to add the RelativityOne **Portal Address**. Ensure you enter the correct portal. This depends on which geographic region your RelativityOne instance

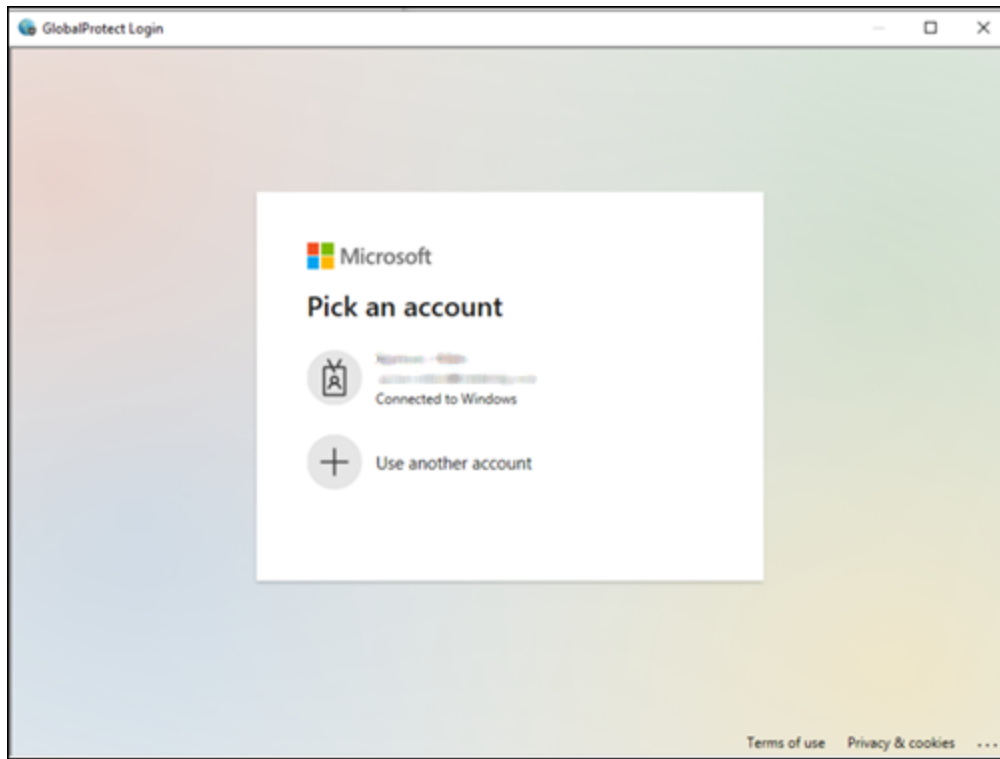
resides in. You should not enter the "http://" preceding the portal address.



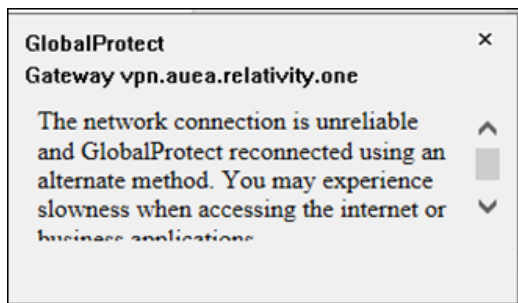
4. Click **Save**.
5. Close the Settings dialog.
6. Click on the GlobalProtect icon in your tray, and then click the blue **Connect** button. A pop-up window for reviewing permissions displays.
7. After reviewing the terms, click **Accept**.



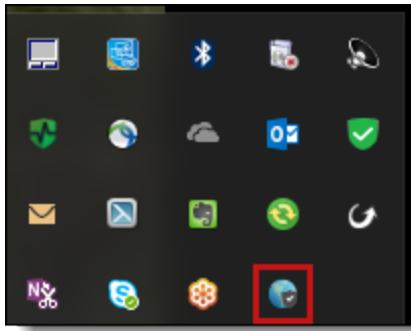
8. A prompt for your VPN user credentials displays. Choose the appropriate VPN user credentials to sign in with in the Microsoft *Pick an account* screen. This prompt might appear twice depending on your organization's settings. A window will display momentarily while you are connected to the VPN.



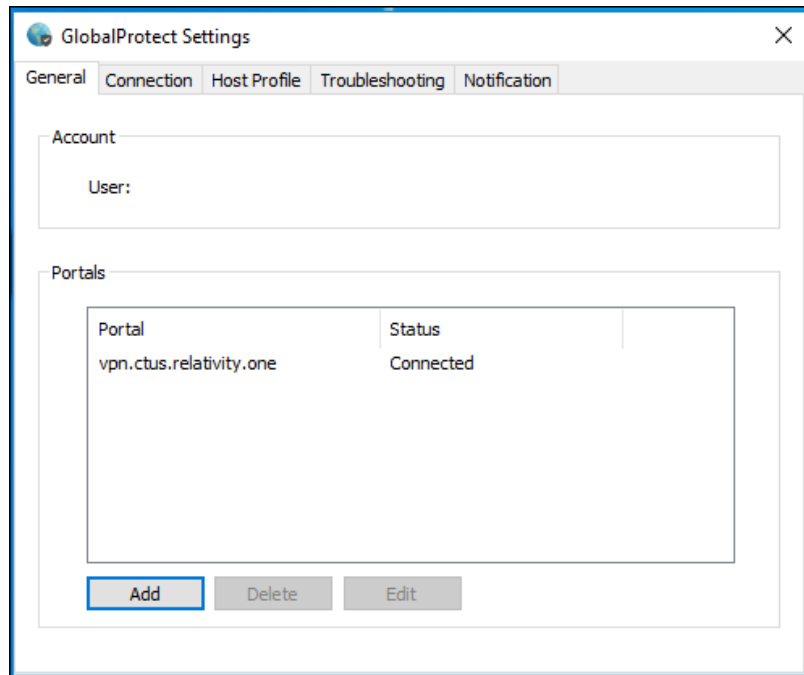
9. If the GlobalProtect warning displayed below appears, dismiss the window. This is a known issue with the GlobalProtect client itself and will be addressed in future versions.



10. Check your connection status by viewing the GlobalProtect icon in your system tray. When connected, it will display a check mark.



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



3.8.6 Changing your VPN password

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

To change your expiring or expired passwords, perform the following steps:

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

1. Access <https://login.microsoftonline.com>. Log in using your Relativity credentials.
2. Change your password by access your account settings in the upper right corner menu containing your initials by clicking **View Account**, and then clicking **Change Password** in the Password tile to change your password. You will be redirected to new password form. Please enter your old, expired, password and new one, and then click **Submit**.

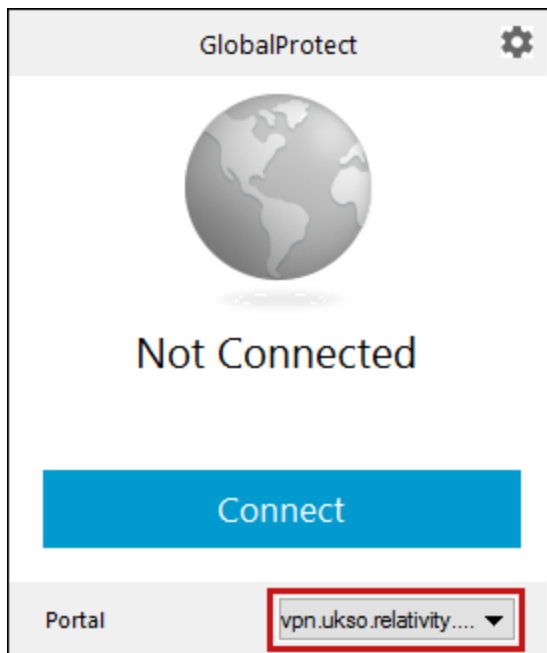
Note: After changing your password, you must wait 30 minutes before attempting to log in with your new password.

3.8.7 Adding an additional VPN region to GlobalProtect

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

To add an additional VPN region to your client:

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



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

4 Import/Export overview

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

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

Notes:

- As of July 1, 2024 the Relativity Desktop Client (RDC) is no longer operational for any RelativityOne customers. Import/Export should be used for all RelativityOne importing and exporting workflows. See the Community article [RDC Deprecation FAQ](#) for additional information.
 - For customers whose file shares haven't been fully migrated to ADLS yet, Import/Export offers a solution where the import process utilizes the primary file share to store the uploaded data. See the Community article [Import/Export uses ADLS if one is present on the tenant](#) for details.
 - After documents are imported using Import/Export, you can automate creating a dtSearch index or run a search terms report with those documents using Automated Workflows
-

4.1 Getting started with Import/Export checklist

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

Overview Sessions:

Take a deeper dive by watching our recorded [Import/Export Foundations: Comprehensive Overview](#) webinar, in addition to other Import/Export self-paced webinars on the [Relativity Learning site under Data Ingestion & Management](#).

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?

- Email Solutions@Relativity.com for workflow assistance.
- Visit our [What's New](#) page, [Relativity Documentation](#) or our [Community Site](#).
- Contact [Relativity Customer Support](#).

4.2 Available import and export workflows

The following workflows can be performed using Import/Export .

- **Import workflows:**
 - Raw (Unprocessed/Unstructured) Data
 - Unstructured data workflow with Processing
 - Structured (Processed) Data —Structured data includes natives, text, image, and PDF files, and load files containing metadata.
 - Document load file import
 - Image load file import
 - Production load file import
 - Relativity Dynamic Object load file import
- **Export workflows:**
 - Folder export
 - Production set export
 - Saved Search export
 - RDO export

4.3 Import/Export transfer modes

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

- **Import/Export with Express Transfer**

This refers to activating Express Transfer within Import/Export to transfer data into and out of RelativityOne. This mode is the recommended method for data transfer. Express Transfer is a

separately installed desktop application that sits outside of the RelativityOne browser software and handles the data transfer process. See [Express Transfer overview](#) and [Installing Express Transfer](#) for more information.

- **Import/Export only**

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

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

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

- data file size is greater than 20GB (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 20GB.
- 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 20GB limit for the zip file size applies). Import/Export will transfer and extract the top-level zip file, preparing your encrypted materials for Processing. Then, Processing will utilize Password Bank to decrypt materials.

4.5 Supported file types

Import/Export supports the following file types. Refer to [Import/Export load file specifications](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 46](#).

- **ZIP and PST files**—for transferring data to the server-side.
- **Native files for processing**—see the list of supported file types for processing within the Processing guide.

- **Document Load File import**—.dat, .csv and .txt load files.
- **Image Load File import**—Opticon-formatted page-level files. Formats supported: single page TIFF (Group IV) files, single page JPG files, and single and multiple PDF files.

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

4.6 Data upload size limitation

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

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

4.7 Concurrent and consecutive jobs

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

4.8 Import/Export overview

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

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 - After documents are imported using Import/Export, you can automate creating a dtSearch index or run a search terms report with those documents using Automated Workflows
-

4.8.1 Getting started with Import/Export checklist

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

Overview Sessions:

Take a deeper dive by watching our recorded [Import/Export Foundations: Comprehensive Overview](#) webinar, in addition to other Import/Export self-paced webinars on the [Relativity Learning site under Data Ingestion & Management](#).

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](#)

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The following workflows can be performed using Import/Export .

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 - Raw (Unprocessed/Unstructured) Data
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 - Document load file import
 - Image load file import
 - Production load file import
 - Relativity Dynamic Object load file import
- **Export workflows:**
 - Folder export
 - Production set export
 - Saved Search export
 - RDO export

4.8.3 Import/Export transfer modes

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

- **Import/Export with Express Transfer**

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

- **Import/Export only**

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

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

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

- data file size is greater than 20GB (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 20GB.
- 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 20GB limit for the zip file size applies). Import/Export will transfer and extract the top-level zip file, preparing your encrypted materials for Processing. Then, Processing will utilize Password Bank to decrypt materials.

4.8.5 Supported file types

Import/Export supports the following file types. Refer to [Import/Export load file specifications](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 46](#).

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

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

4.8.6 Data upload size limitation

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

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

4.8.7 Concurrent and consecutive jobs

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

4.9 Installing Import/Export

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

4.9.1 Requirements

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

4.9.1.1 Workspace requirements

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

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

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

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.

4.9.1.2 Port Access

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

4.9.2 Installing Import/Export

To manually install Import/Export in the workspace:

1. Log into RelativityOne as an Admin user.
2. Navigate to the **Application Library**.
3. Type **Import/Export** in the Name field's filter and press **Enter**.
4. Click the **Import/Export** application name to go to the **Application Information** tab.

5. Click **Select** in the Workspaces Installed pane.
6. Find and select your workspace(s) and click the **right arrow** button to move it to the right-hand pane.
7. Click **Apply**.

If you want to use Import/Export with Express Transfer, which is recommended in most cases, you must activate Express Transfer within the Import/Export application. Refer to [Express Transfer overview on page 48](#) and [Activating Express Transfer on page 60](#) for more information.

4.10 Permissions

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

All permissions are set in Workspace security.

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

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

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

Object security	Tab visibility	Other Settings
<ul style="list-style-type: none"> ▪ Entity - Add, Edit ▪ OCR Language - View ▪ Processing Data Source - Add, Edit, View ▪ Processing Error - Add, Edit ▪ Processing Set - Add, Edit, View ▪ Quick Create Set - Add, Edit 		Mass operations <ul style="list-style-type: none"> ▪ Allow Import

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

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

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

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

4.11 Import/Export load file specifications

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

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

Below are the load file specifications for Import/Export.

4.11.1 Supported file types

Import/Export supports the following file types.

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

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

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

For Unstructured Processing Jobs

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

For Load Files and Structured Data Sets

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

4.11.2 Metadata, extracted text, and native files

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

4.11.2.1 Encoding

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

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

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

4.11.2.2 Header row

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

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

4.11.2.3 Fields

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

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

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

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

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

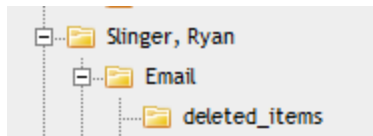
backslash (\), as in: \MainFolder\SubFolder\File.extension.

Notes:

- To avoid import errors, run a load file precheck via the Precheck Load File button to validate whether the native file paths are correct and that linked native files exist and are accessible.
 - Currently, the application does not check if duplicate native file paths are in the load file. Therefore, you may want to manually review your load file data to ensure there are no duplicated file paths before starting an import job. Duplicated native file paths do not cause import errors, but they may lead to billing consequences.
-

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



Each document with the above entry would be stored in the “deleted_items” folder.

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

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

4.11.2.4 Accepted date formats

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

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

The table below lists the date formats recognized by Import/Export and Import Service (IAPI). 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 AM	4/20/2023 0:00	
4/9/2023 16:13	4/9/2023 16:13	
4/9/2023 8:49	4/9/2023 8:49	
9-Apr-23	4/9/2023 0:00	
Apr. 9, 23	4/9/2023 0:00	
4.9.2023	4/9/2023 0:00	
4.9.23	4/9/2023	

Entry in Load File	Object Type	Definition
	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.

4.11.2.5 Delimiters

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

The delimiter characters have the following functions:

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

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

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

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

appears as:

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

4.11.2.6 Default delimiters

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

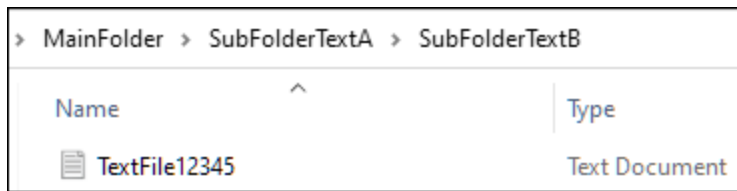
- **Column**—Unicode 020 (ASCII 020 in the application)
- **Quote**—Unicode 254 (ASCII 254 in the application)
- **Newline**—Unicode 174 (ASCII 174 in the application)
- **Multi-Value**—Unicode 059 (ASCII 059 in the application)
- **Nested Values**—Unicode 092 (ASCII 092 in the application)

4.11.2.7 ZIP archive with extracted text and natives

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

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

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



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

^DOCUMENT_12345^|^MainFolder\SubFolderTextA\SubFolderTextB\TextFile12345.txt^|^MainFolder\SubFolderNatives\NativeFile12345.xls^

4.11.3 Image and extracted text files

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

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

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

4.11.3.1 Supported image file formats

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

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

4.11.3.2 Load file format

The Opticon load file is a page-level load file in which each line represents one image.

A sample of Opticon load file is the following:

```
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)—page identifier.
- Field Two (REL01)—volume identifier; not required and not used in Import/Export.

- Field Three (D:\IMAGES\001\REL00001.TIF)—path to the image to be loaded.
- Field Four (Y)—document marker: “Y” indicates the start of a unique document.
- Field Five (blank)—used to indicate a folder; not required and not used in Import/Export.
- Field Six (blank)—used to indicate a box; not required and not used in Import/Export.
- Field Seven (3)—used to store page count; not required and not used in Import/Export.

4.11.3.3 ZIP archive with images

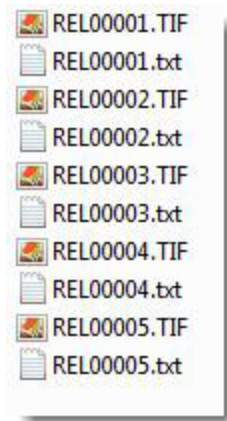
To import images when not using Express Transfer, you need to zip the image files and upload the zip file in the Choose Load File And Location dialog in Import/Export.

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

4.11.3.4 Importing extracted text during an image load

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

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



4.11.4 Processed data

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

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

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

```
pControl NumberpAttachmentpAttachment Parent IDpAuthorpCategorizationpCategorization F
pAMEYERS_0000001p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000003pK Petersonp0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000004pJ Calzasp0.64pResponsive;TAG #22872p0.69pNon Responsive;TAG 25883p
pAMEYERS_0000005pdeal 539246.1 RELiant HLP dms 7634/7636p
pAMEYERS_0000006p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000007p0.69pNon Responsive;Info on some cuts for 05
pAMEYERS_0000008p0.64pResponsive;TAG #22872p0.69pNon Responsive;TAG 25883p
pAMEYERS_0000009pNEW PAC Numbersp0.69pNon Responsive;TAG 25883p
pAMEYERS_0000010pDates to Keep in mindp0.69pNon Responsive;TAG 25883p
pAMEYERS_0000011p0.76pResponsive;Accomplishments and Goals 20
pAMEYERS_0000012p0.77pResponsive;LV Cogen cut for HE 19p
pAMEYERS_0000013p0.83pNon Responsive;Cut on TAG 23841p0.69pNon Responsive;TAG 25883p
pAMEYERS_0000014p0.89pNon Responsive;TAG 25883p
pAMEYERS_0000015p0.75pNon Responsive;TAG 26235p
pAMEYERS_0000016pFrontier Unit Outage for 07/21/01p
pAMEYERS_0000017pTag #27652 & 27656p
pAMEYERS_0000018pLV COGEN for 07/21/01p
```

4.11.5 Transcript file types supported

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

4.12 General recommendations for structured data import and export jobs

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

4.12.1 Load file import recommendations

- When using Import/Export in [web only mode](#), ensure that the full path listed in the load file is captured in the ZIP file.
- Try to limit the number of fields in a single import job to 100 to minimize risk of job failure due to SQL exception related issues.
- When importing new choice fields, you may experience the unexpected behaviors, such as errors occurring when importing choice fields or slow import jobs for choice fields. To help prevent these issues, 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 are 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 improves when extracted text files use UTF-16 encoding.

4.12.2 Load file export recommendations

- Depending on the exported data structure, a Workspace folder structure can degrade performance significantly, up to 30 times slower in edge cases, so we recommend using the File Type folder structure.
- Setting too high value of the volume and sub-directory files can also cause significant performance degradation. We recommend using the default settings: Max Volume size=6000MB, Max number of files per folder=2000.
- Exporting images as PDFs or multi-page TIFFs is slower than exporting them as single page images.
- Exporting to a ZIP archive using Import/Export in web only mode is significantly slower than exporting data with Express Transfer or exporting data to the Staging only.
- Exporting text files in Unicode (UTF-16) encoding is faster than in other encodings.

4.13 Express Transfer overview

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

Using Import/Export with Express Transfer active 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 62](#).

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 (upload and download) process in the background to and from RelativityOne and the staging area or local disk. It uploads (imports) a single job at a time and downloads (exports) up to five concurrent jobs at a time on a single client machine. You can have multiple users running jobs on multiple machines without conflict.

Monitoring import and export job transfers is done [through the Express Transfer application](#) as well as from the [Import/Export Jobs page](#).

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

4.13.1 Prerequisites

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

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

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

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

- data file size is greater than 20GB (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 20GB.
- 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 20GB 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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3. Express Transfer must be activated within Import/Export. Refer to Activating Express Transfer for more information.

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- processing multiple import jobs. The jobs will be queued and executed when the previous job is complete.
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- data is in ZIP files.

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4.13.4 Installing and updating Express Transfer desktop application

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

For additional information on performance considerations when transferring data using desktop applications, see [Data transfer performance considerations on page 62](#)

4.13.4.1 Requirements

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

System requirements

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

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

Port access

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

4.13.4.2 Prerequisites

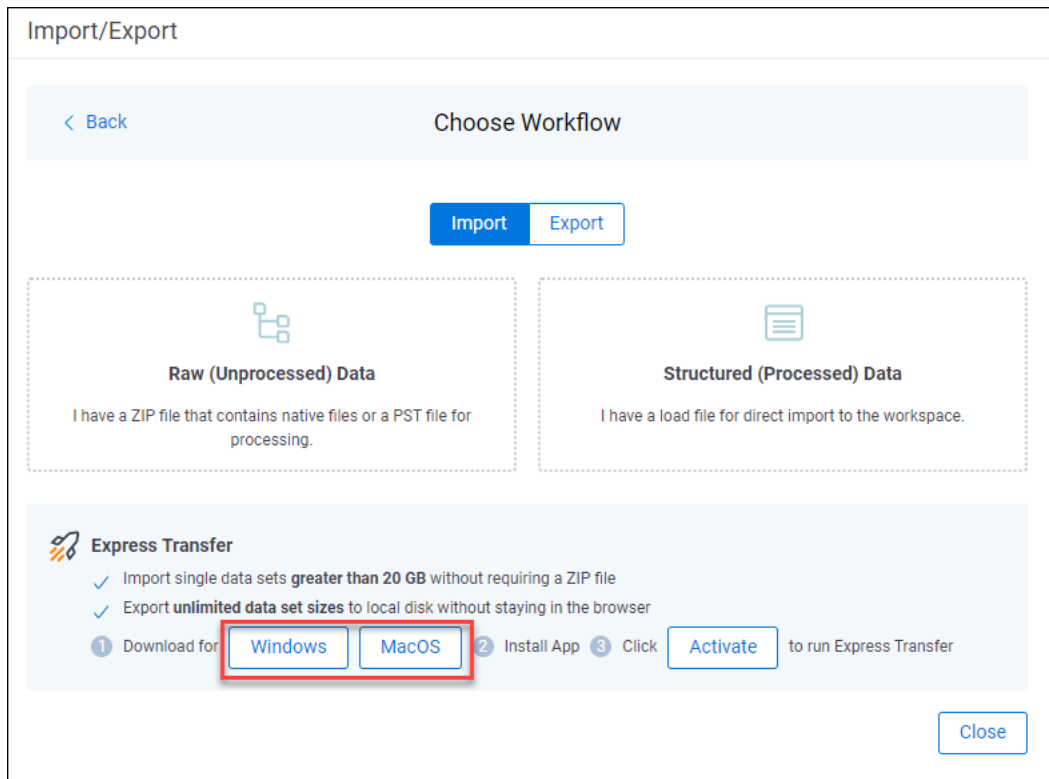
To use Express Transfer, the following must be completed in this order:

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

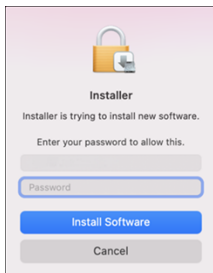
4.13.4.3 Installing Express Transfer

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

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

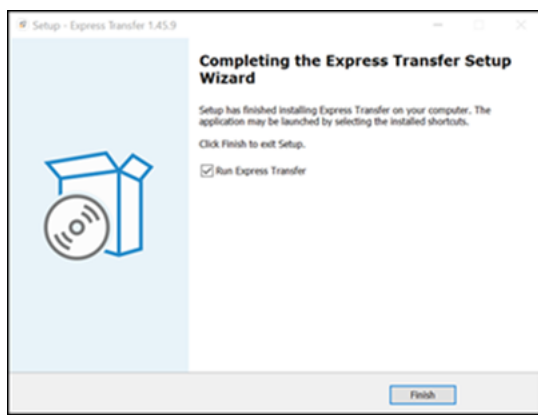


4. For macOS systems, you need to have administrative privileges to use and install the software, as well as to receive automatic software updates. On the Installer dialog, enter your user name and password, then click **Install Software**.




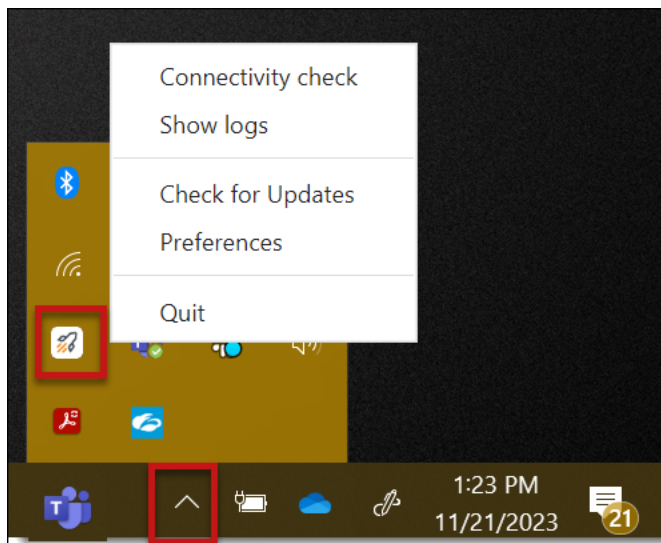
5. Navigate to the folder on your computer where the installer file was downloaded. Depending on the operation system, double-click one of the following files to begin the installation process:
 - For Windows OS: **Express Transfer Setup.exe**
 - For macOS: **Express Transfer Setup.pkg**
6. Click one 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.
7. Click **Next**.

8. Use the default destination folder already displayed or click **Browse** to select a different location for the Express Transfer application.
9. Click **Next**.
10. (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.
11. Click **Next**.
12. Click **Install** on the Ready to Install dialog to begin the installation process.
13. When the installation is complete, click **Finish** to close the installation wizard. Express Transfer is now installed. 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 59](#) for more information.
- **Preferences**—choose this option to modify the application settings. You can also view the software version number from this dialog.
- **Quit**—choose this option to completely exit the Express Transfer application. The Express Transfer icon will no longer display in the system tray. To reopen Express Transfer, double-click on its desktop shortcut, if you saved one for it, or select it from your computer's list of programs.

4.13.4.4 Silent installation of Express Transfer

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

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

- **/silent**—this option displays the installation wizard as it goes through the installation process. All the default options are automatically selected.

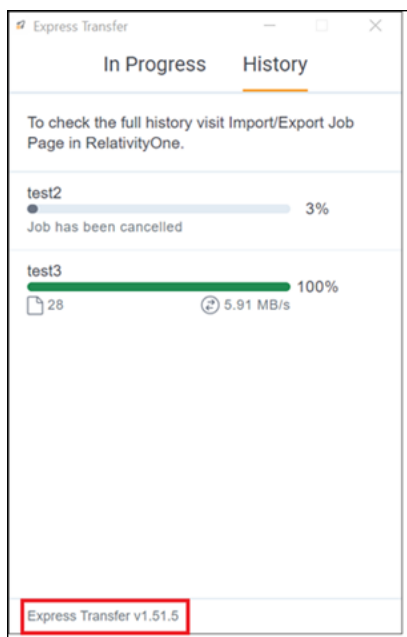
- **/verysilent**—this option does not display the installation wizard as it goes through the installation process. All default options are selected automatically.

Prerequisites


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

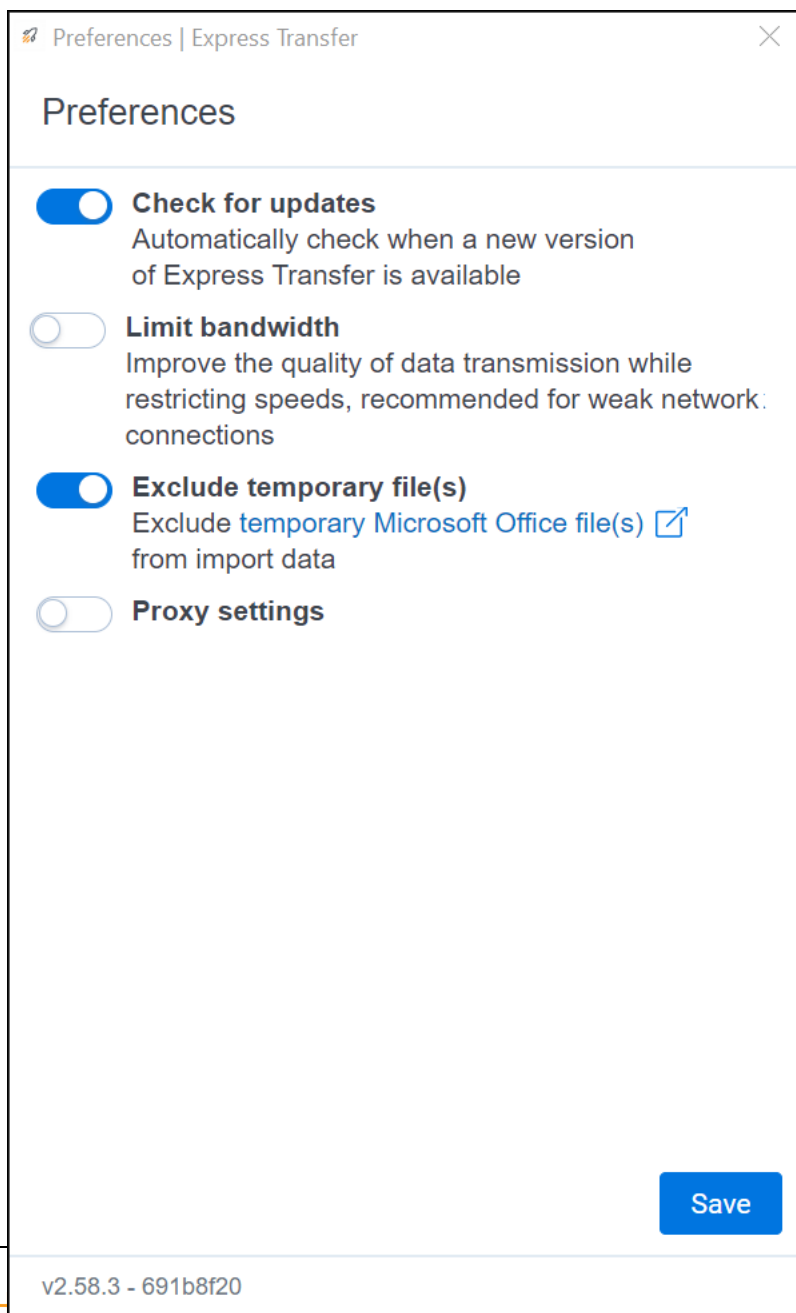
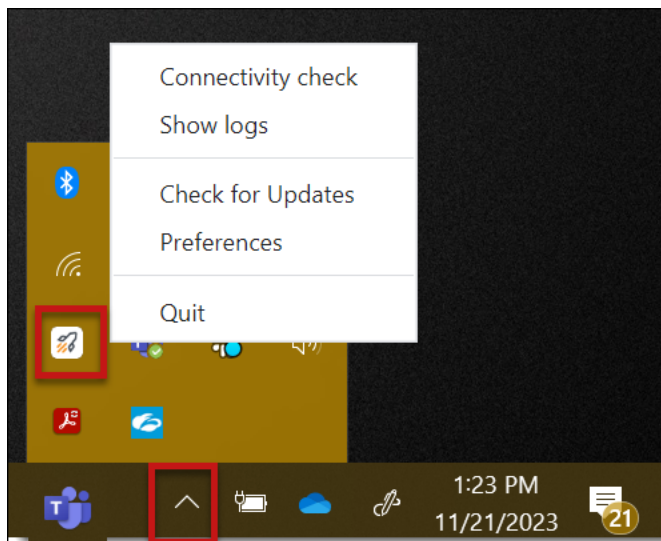
4.13.4.5 Locating the Express Transfer version number

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



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

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



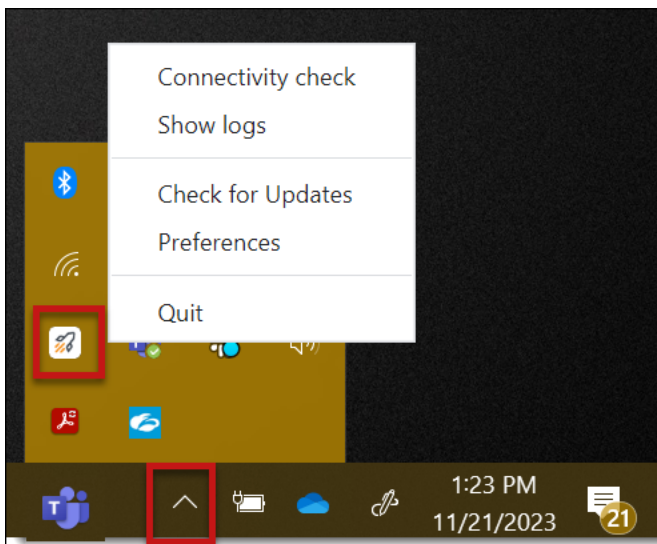
The Express Transfer software version number is contained in the first few numbers after the "v", for example "v2.49.0." The numbers after the hyphen are session identifiers that change each time you launch Express Transfer after quitting the application. These numbers may be used by Customer Support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

4.13.4.6 Automatically checking for software updates

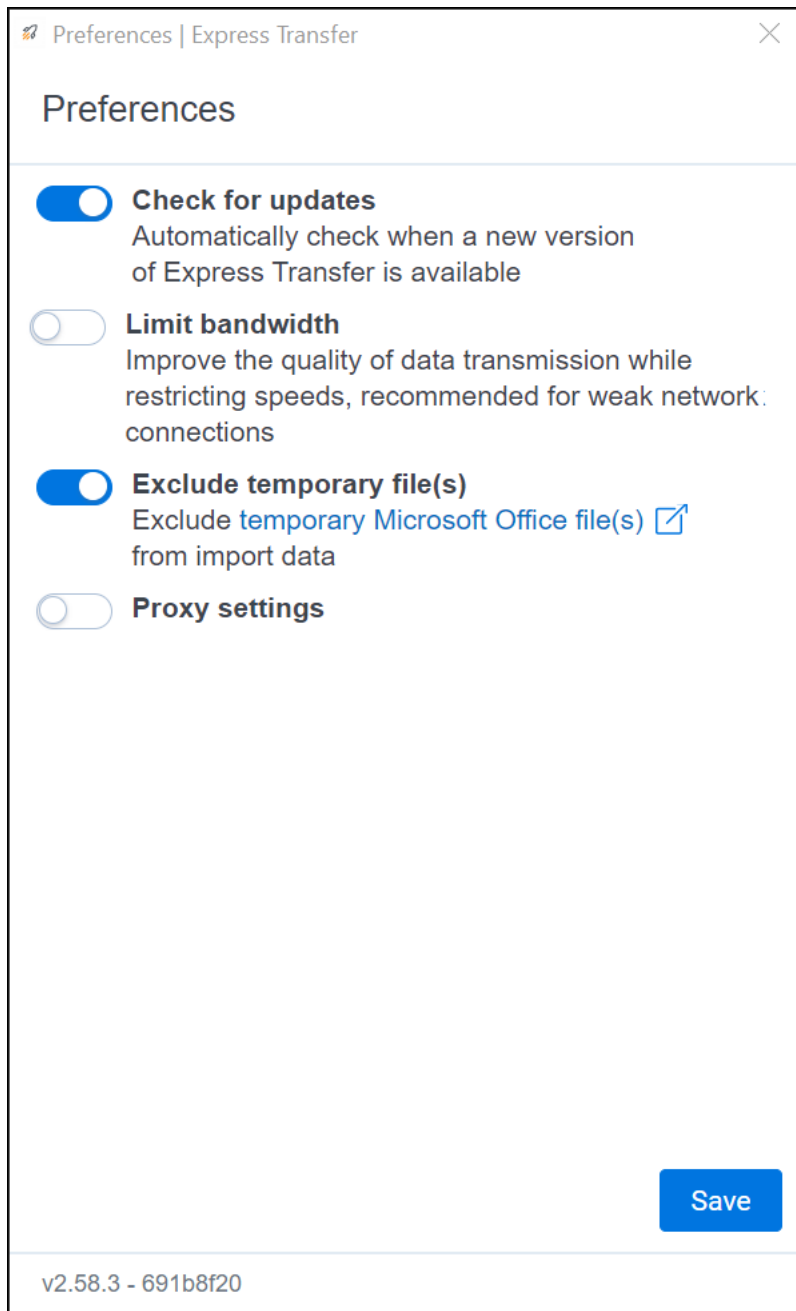
You can configure whether or not you want the system to automatically check for new software versions of Express Transfer each time it opens and notify you with a message box. By default, this feature is enabled in Express Transfer Preferences. We recommend that you keep it enabled to ensure your system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

To automatically check for software updates:

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




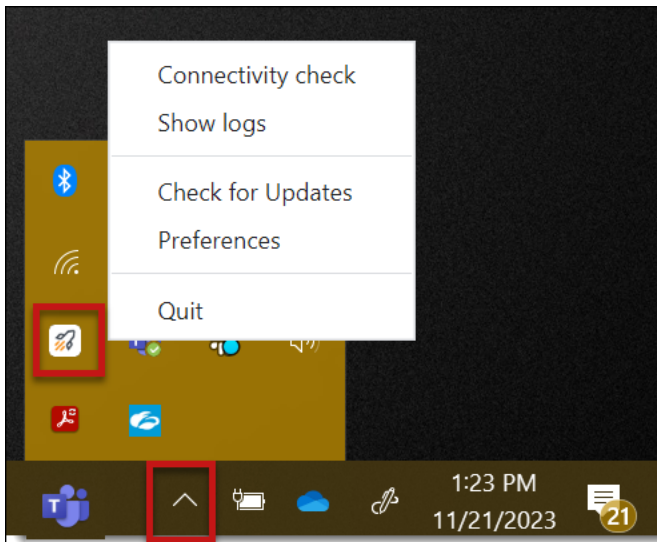
2. Click **Preferences**.



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

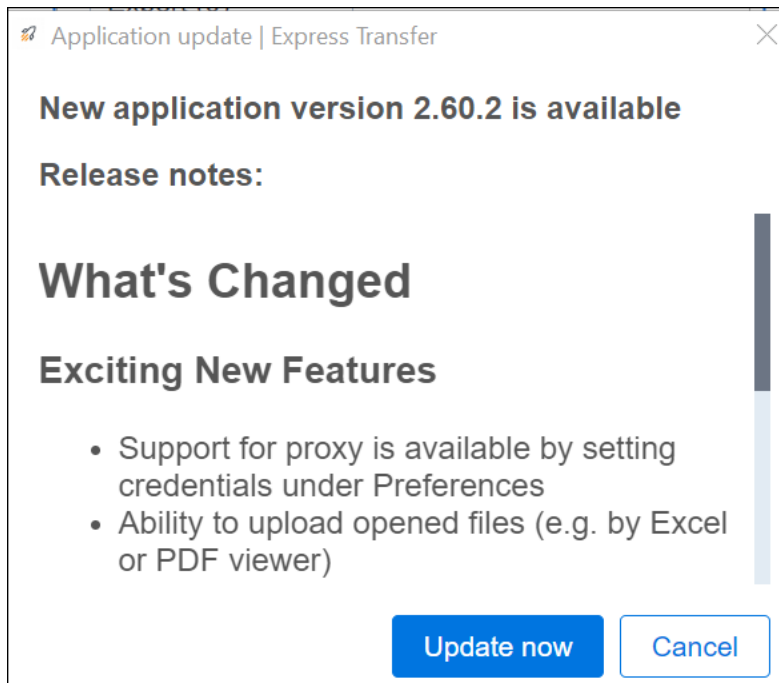
Note: We do not recommend turning this option off. If it is off, your Express Transfer version may not contain the latest features. If it is off, you will need to regularly use the Check for Updates option in the Express Transfer system tray to determine if your software version is current. See [Manually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

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**.




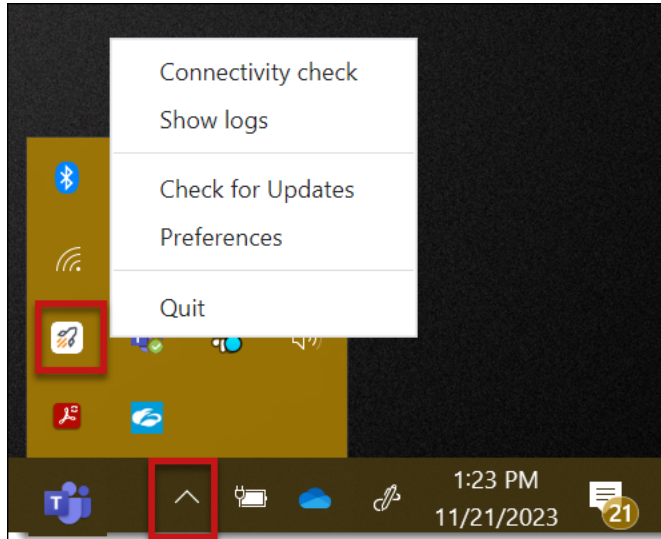
6. Reopen the application by double-clicking on its desktop shortcut, if you saved one for it, or select it from your computer's list of programs.

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

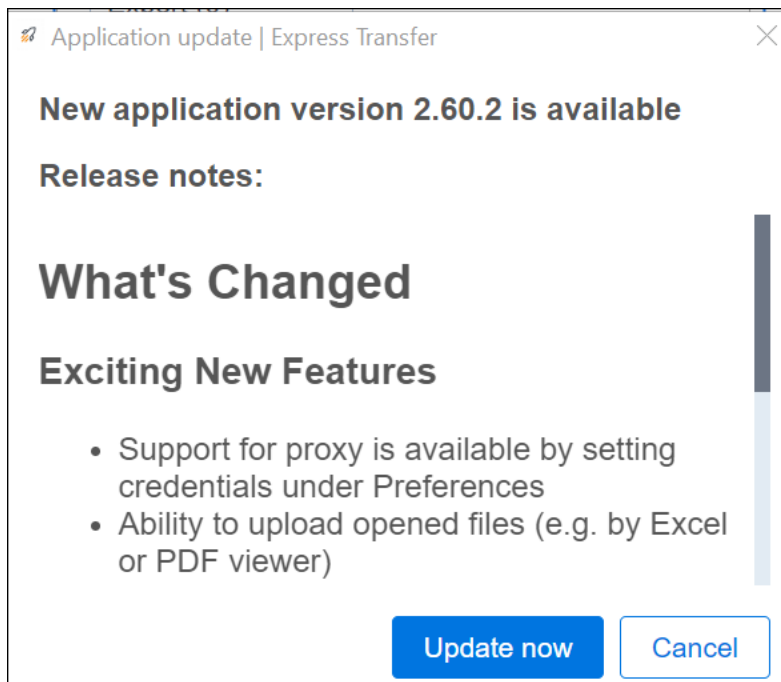


4.13.4.7 Manually checking for software updates

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



If a new version is available, the Application update window displays the new version number available and release notes for it. Click **Update now** to download the new version's executable file, and then follow the [Installing Express Transfer on page 50](#) steps to finish installing the update.



4.13.5 Activating and deactivating Express Transfer

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

4.13.5.1 Prerequisites

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

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

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

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

- data file size is greater than 20GB (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 20GB.
- data is in ZIP files.

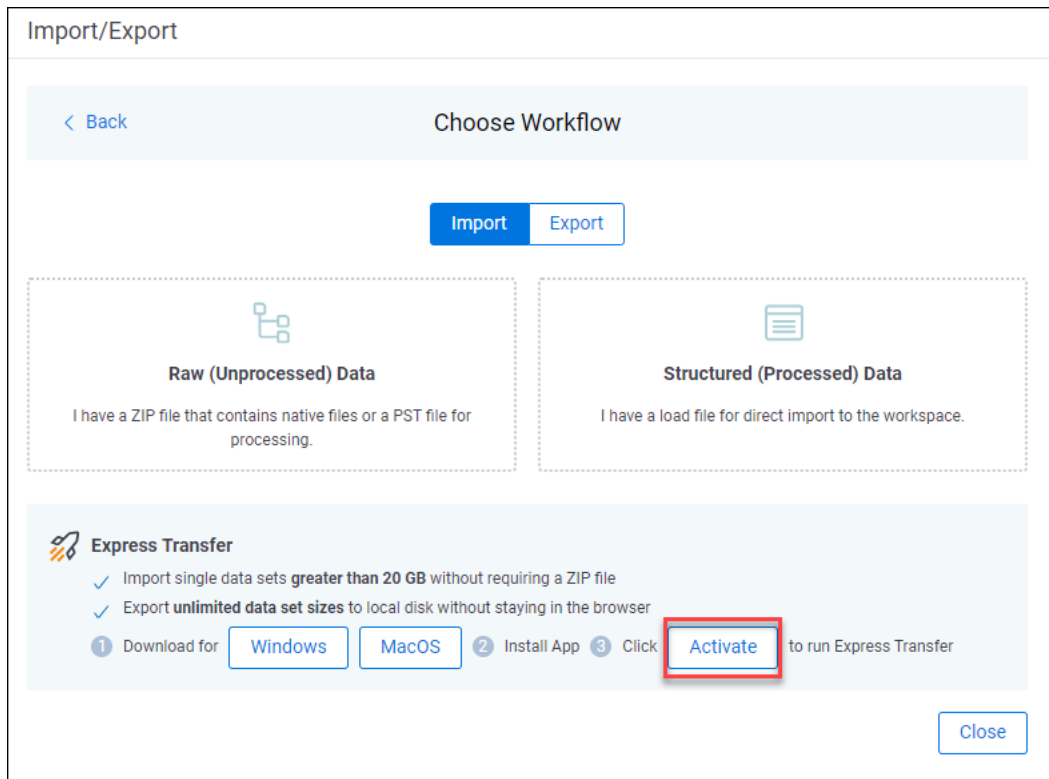
Note: You need to use Express Transfer to upload and process encrypted materials, such as password-protected zip files or Case files (L01/N01) that require Password Bank functionality. If you cannot use Express Transfer for such imports, zip your encrypted materials in a single unencrypted ZIP container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

4.13.5.3 Activating Express Transfer

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

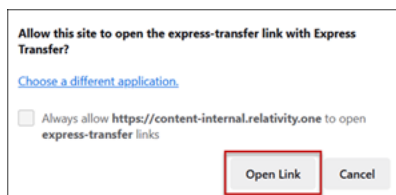
To activate Express Transfer for use with Import/Export:

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



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

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.



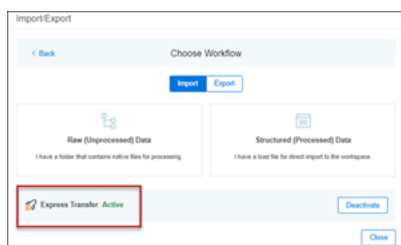
Note: If the activation process fails, click the **Complete activation** button on the message that displays to initiate the activation process. Refer to [Express Transfer Connectivity check on page 75](#) for more information on connection status information.

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



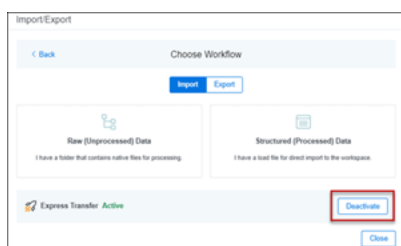
- Return to the Import/Export application. The Express Transfer status will change to **Active** on the Choose Workflow dialog.

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



4.13.5.4 Deactivating Express Transfer

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



In order to use Express Transfer again with Import/Export, you will need to reactivate it.

4.13.5.5 Data transfer performance considerations

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

Review the list of performance considerations below before beginning to use Express Transfer.

If you experience issues despite following the information below, please contact Support for assistance. For additional information, refer to the Community article [Performance considerations for data transfers](#).

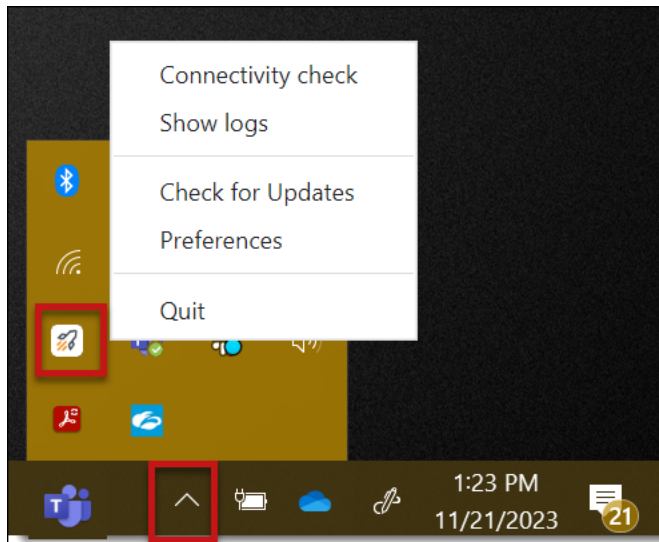
- **Run on local machine:** Express Transfer has been designed and tested as a desktop application being run on a user's local machine.
- **Read access:** Ensure that Express Transfer has read access to all files/folders (remove system / hidden attributes).
- **Port 443:** Ensure that port 443 is open to the public internet and is not blocked or traffic is restricted to it. See the Community article [Performance considerations for data transfers](#) for more information.
- **Internet connection:** Use a strong and stable internet connection for data transmission. Wi-Fi is not recommended.
- **Internet speed:** Transfer speeds are dependent on your internet speeds. Check your internet connection using [Speedtest](#) or any other bandwidth testing website. Make note of the upload speed in megabits per second. Also refer to Express Transfer [Limit bandwidth](#) setting if needed.
- **Local storage speed:** Transfers from network drives or external disks (such as thumb drives/USB drives) will degrade performance and/or cause issues maintaining a connection. It is most effective to copy data to and from a fast local storage.
- **Local machine specs:** Ensure your local machine and browser adheres to the Express Transfer minimum [system requirements](#) and is operating the latest version of the software.
- **Level of data fragmentation:** Due to bandwidth sharing, avoid performing large and fragmented transfers in parallel. The more fragmented the dataset, the lower the transfer performance.
- **Concurrent transfers:** Number of concurrent transfers that are happening at the same time within the network by various tools, services, and users.
- **Concurrent utilization:** Level of concurrent utilization of the user's computer resources (CPU, RAM, I/Os) by other processes on that computer.
- **Compressed datasets:** Avoid compressing datasets (with ZIP, 7z, etc.). The faster transfer time due to fewer multi-part files is negated by the time and effort to compress and decompress data. However, compressing datasets without decompressing in the destination folder (staging directory) can be considered when all the following are true:
 - Dataset consist of fragmented data
 - Destination folder is a Processing source location
 - The dataset uploaded is going to be processed by Relativity Processing
- **VPN usage:** Using a VPN can potentially slow down internet traffic. When workstations use a VPN session, it can interfere with transfers from that workstation. RelativityOne is hosted in a public cloud and does not require VPN to use. See the Community article [Performance considerations for data transfers](#) for more information.
- **Traffic monitoring and data protection software:** These types of software tools influence data transfer. See the Community article [Performance considerations for data transfers](#) for more information on each of these:

- **Firewall:** Firewall configuration may require special tuning to use the Express Transfer.
- **Antivirus software:** Antivirus software may disrupt the transfer protocol in Express Transfer.
- **Anti-malware software:** An exception should be created for Express Transfer in Windows Defender or in other anti-malware software installed on the user's machine.

4.13.6 Express Transfer system tray menu



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



- **Connectivity check**—click this option to check if Express Transfer is successfully accessing the Internet and the Import/Export application. See [Express Transfer Connectivity check](#) for more information.
- **Show logs**—click this option if instructed to do so by Relativity Support to investigate or troubleshoot an issue with Express Transfer transaction logs and text files. File explorer will open the logs folder on your local drive (for example, C:\Users\\AppData\Local\Express Transfer\logs). With Express Transfer open, you can also press the F8 key on your keyboard to display the logs folder.
- **Check for Updates**—click this option if you want to manually check to see if your version is up-to-date or if a new version of Express Transfer is available. See [Manually checking for software updates on page 59](#) for more information. If you do not have Express Transfer Preferences set to automatically check for updates, you will need to use this option frequently to ensure your version of Express Transfer is the most current one available. We recommend keeping the Check for updates option in Express Transfer Preferences toggled on. See [Installing and updating Express Transfer desktop application on page 50](#) for more information.

- **Preferences**—click this option to modify the application settings. You can also view the software version number from this dialog. See [Express Transfer Preferences below](#) for more information.
- **Quit**—choose this option to completely exit the Express Transfer application. The Express Transfer icon will no longer display in the system tray. To reopen Express Transfer, double-click on its desktop shortcut, if you saved one for it, or select it from your computer's list of programs.

4.13.7 Express Transfer Preferences

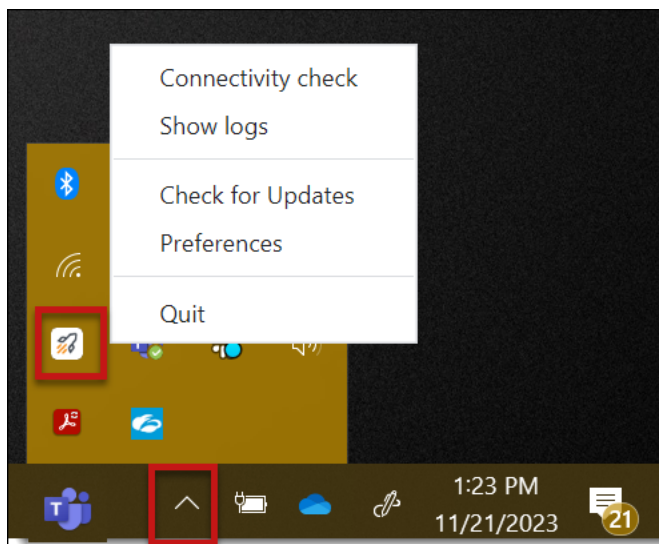
Use Express Transfer Preferences to modify the Check for Updates setting, to limit bandwidth, to exclude temporary Microsoft Office files from data import, and to configure proxy settings.

4.13.7.1 Automatically checking for software updates

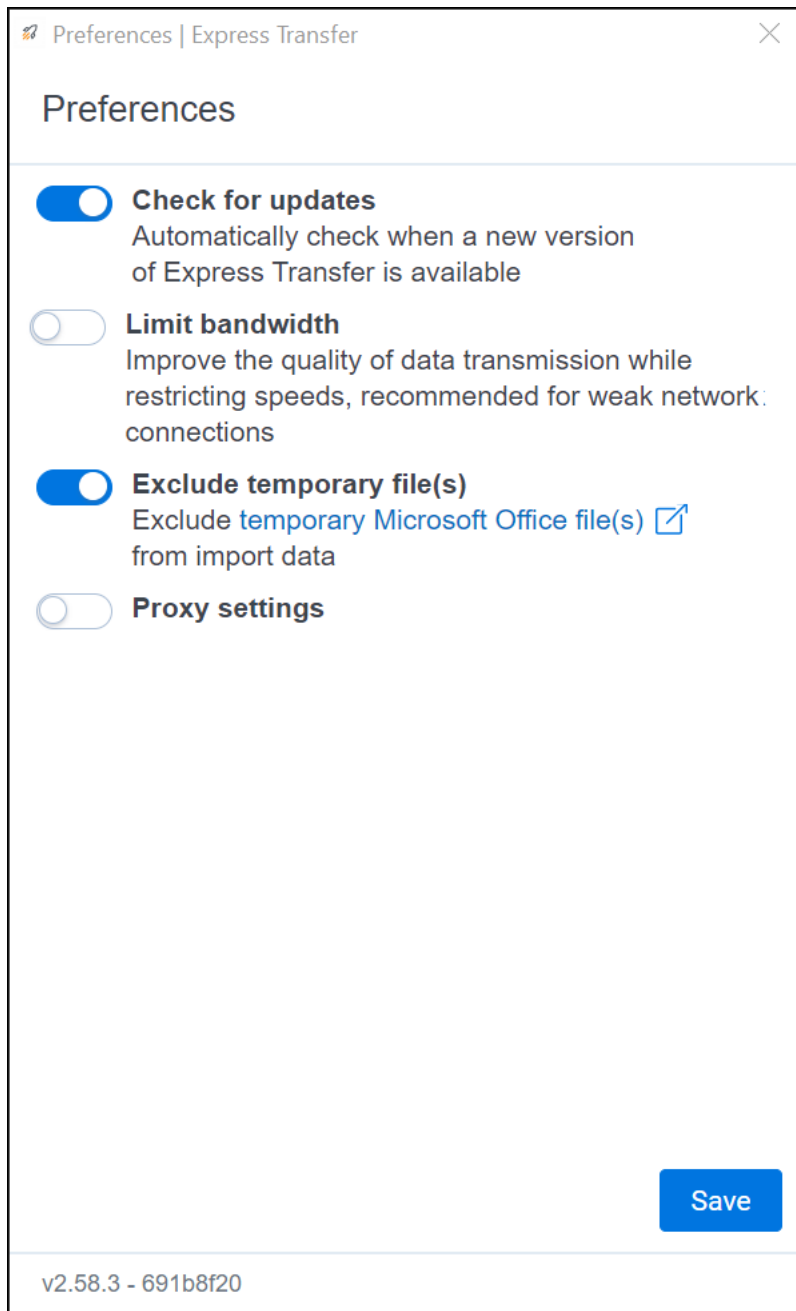
You can configure whether or not you want the system to automatically check for new software versions of Express Transfer each time it opens and notify you with a message box. By default, this feature is enabled in Express Transfer Preferences. We recommend that you keep it enabled to ensure your system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

To automatically check for software updates:

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




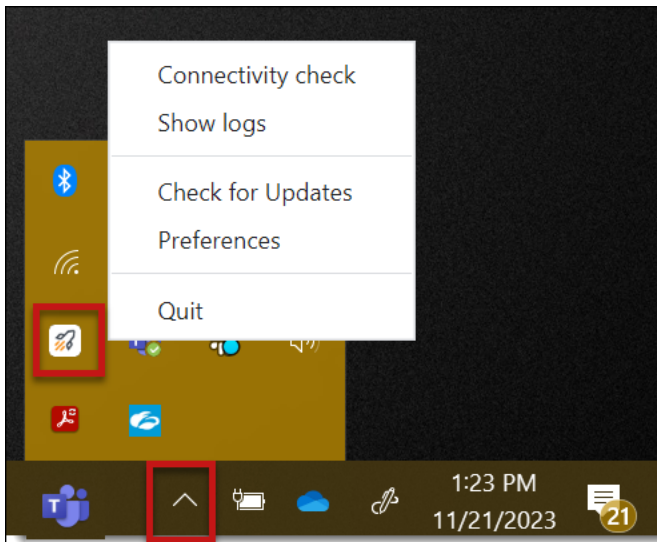
2. Click **Preferences**.



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

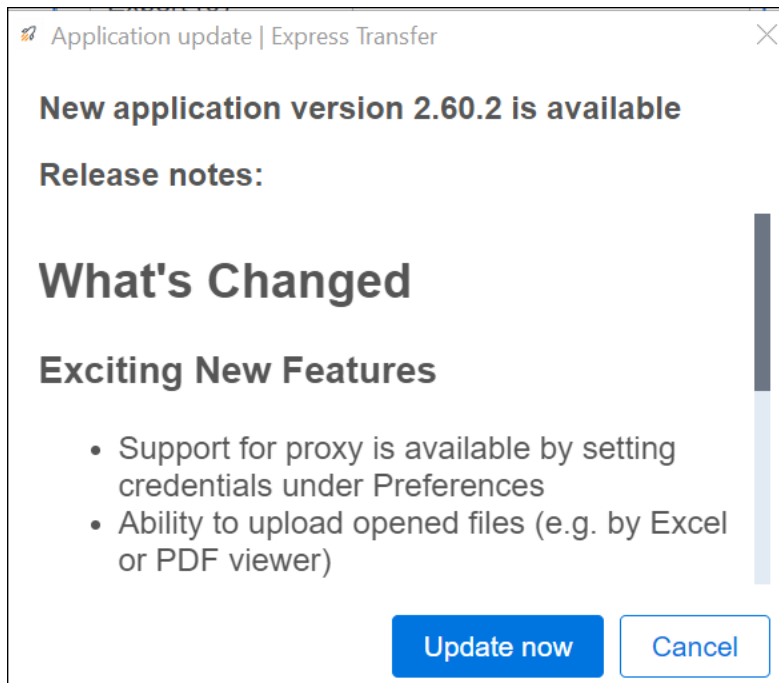
Note: We do not recommend turning this option off. If it is off, your Express Transfer version may not contain the latest features. If it is off, you will need to regularly use the Check for Updates option in the Express Transfer system tray to determine if your software version is current. See [Manually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

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



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

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

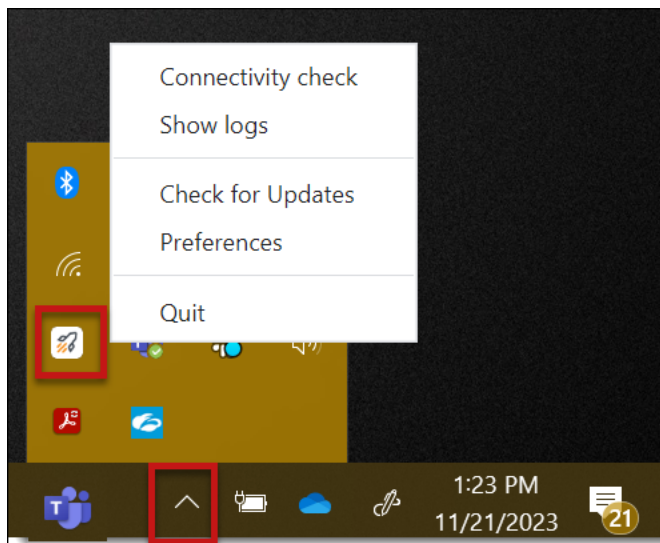


4.13.7.2 Limit bandwidth

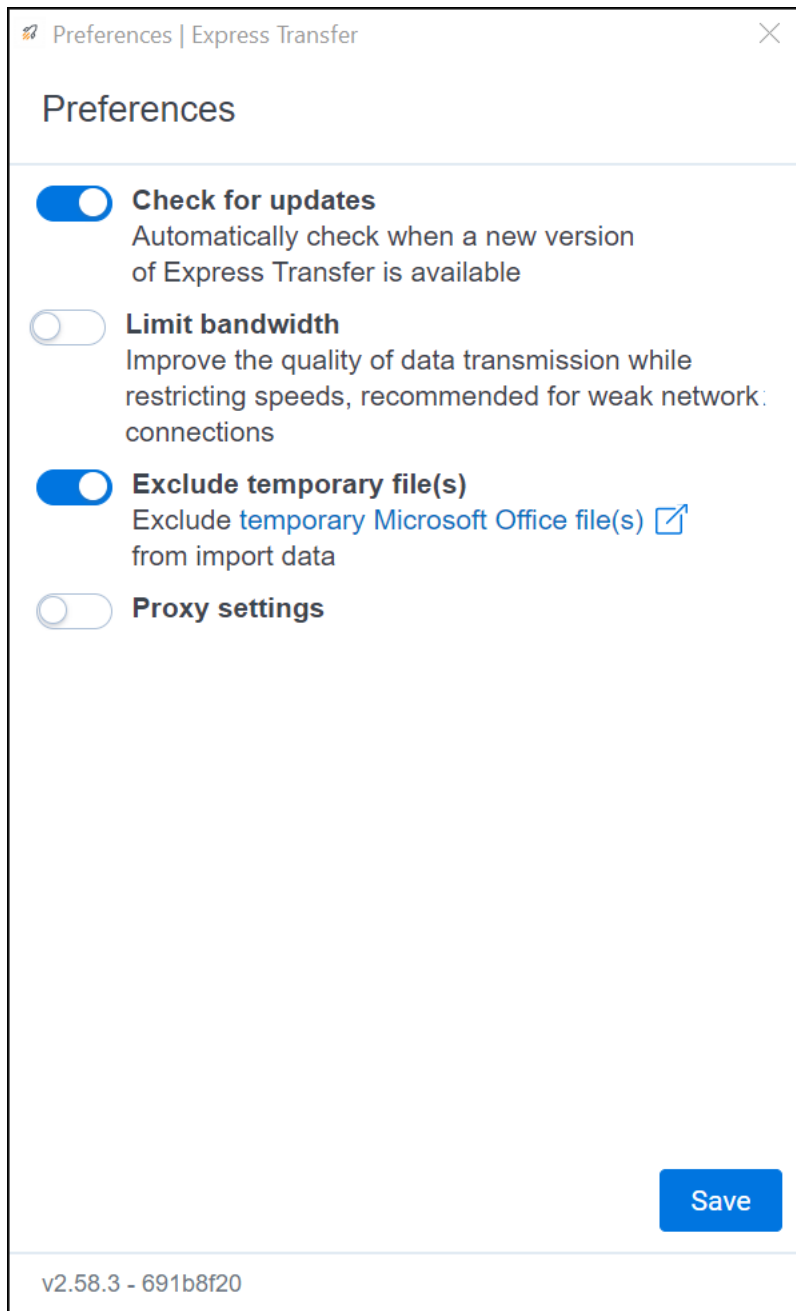
Some organizations may have slow internet speeds and experience issues with transfer job stability causing jobs to fail due to connection timeouts. In this situation, the organization may want to limit bandwidth so that it's shared with Import/Export transfers and other business activities. This may help improve the efficiency and stability of job transfers. Limiting bandwidth can be configured in Express Transfer by turning on the **Limit bandwidth** option in Preferences. When this option is on, Express Transfer job transfers will be slower, but more stable.


To configure Limit bandwidth:

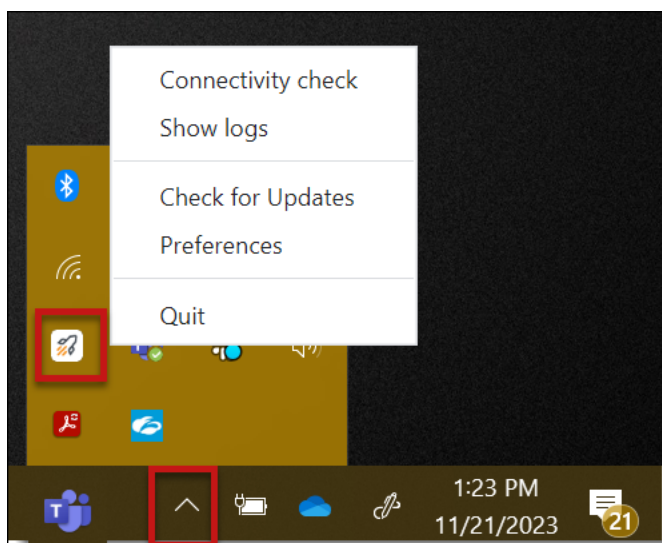
1. Right-click on the **Express Transfer**  icon in your system tray.



2. Click **Preferences**.



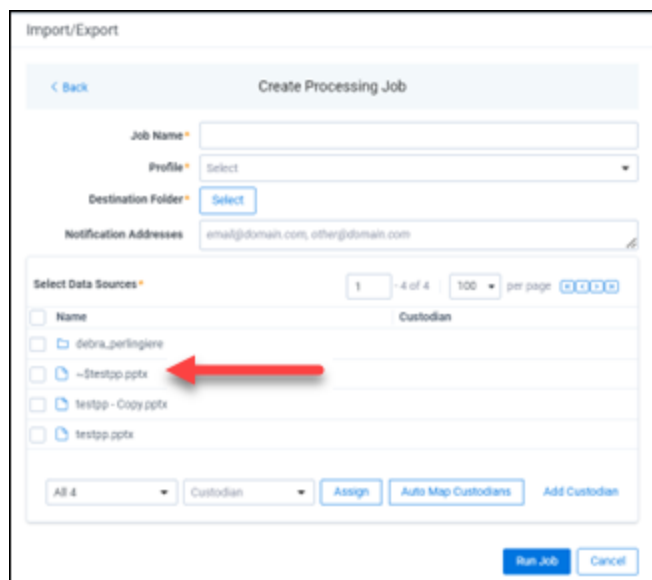
3. The **Limit bandwidth** option is off by default. If you wish to turn the option on, click the toggle.
4. Click **Save** after updating the setting.
5. To apply any changes made to Preferences, quit the Express Transfer application by right-clicking on the **Express Transfer**  icon in your system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



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

4.13.7.3 Exclude temporary Microsoft Office files from data import

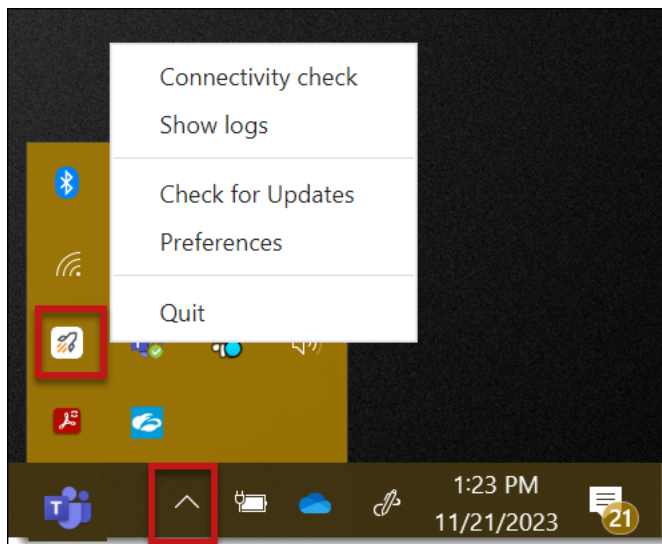
Whenever you open a Microsoft Office file, a temporary file is created which contains a ~ (tilde) sign at the beginning of the file name. When you're [importing unprocessed data for Processing](#) and selecting the data source on the [Create Processing Job dialog](#), these temporary files will display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



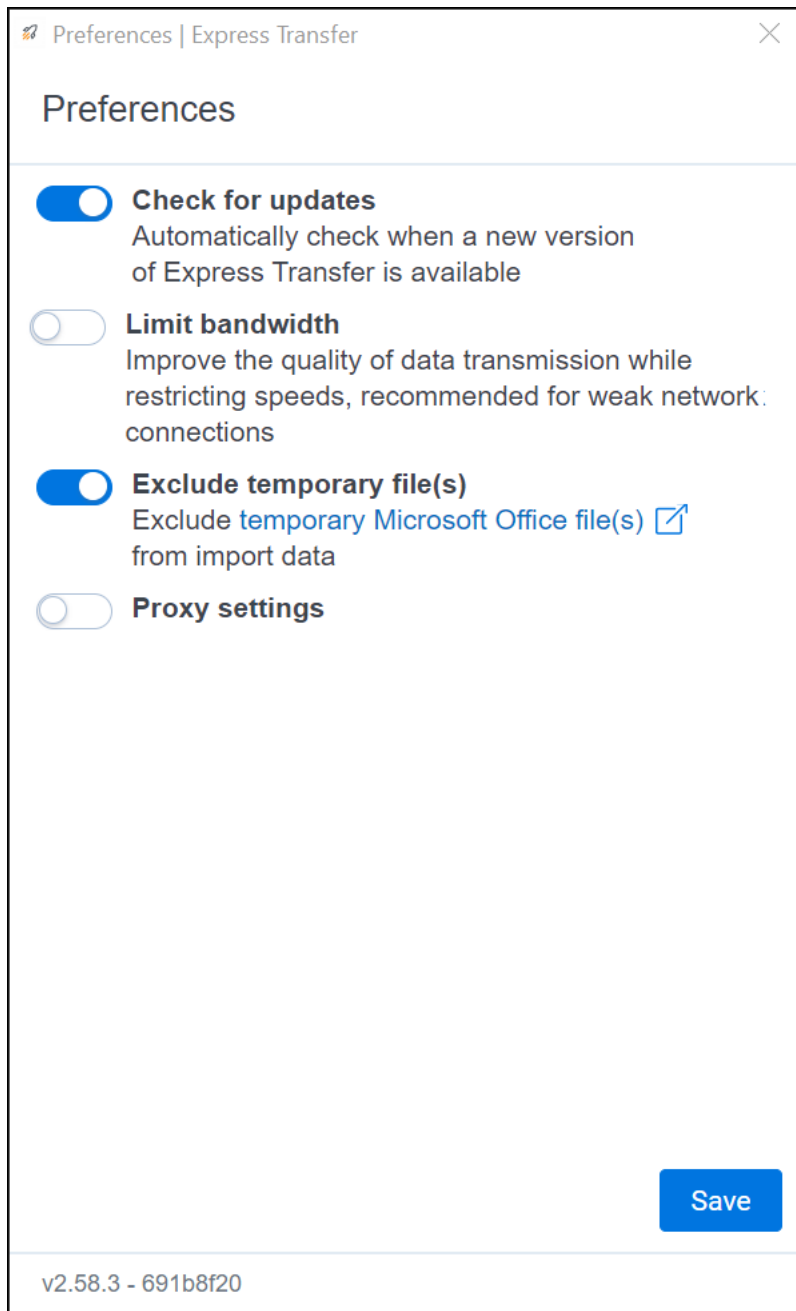
To prevent these temporary files from being included in the import process, the **Exclude temporary file(s)** option defaults to the On position in Express Transfer Preferences. If you wish to change that setting and include those temporary files, refer to the steps below.


To include temporary Microsoft Office files in import jobs:

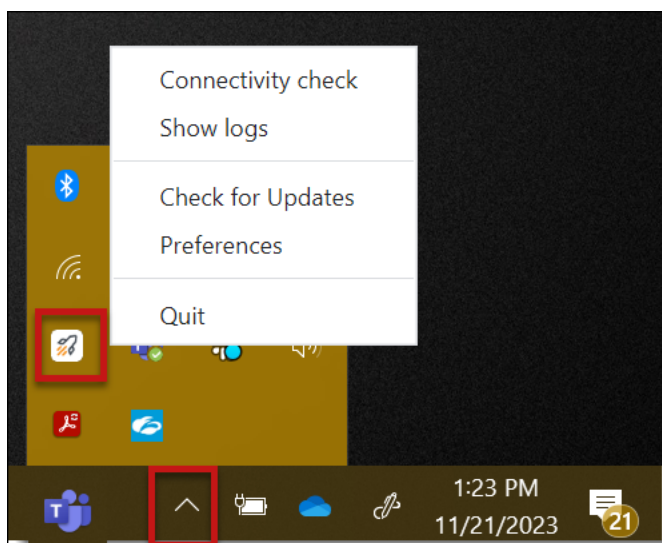
1. Right-click on the **Express Transfer**  icon in your system tray.



2. Click **Preferences**.



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



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

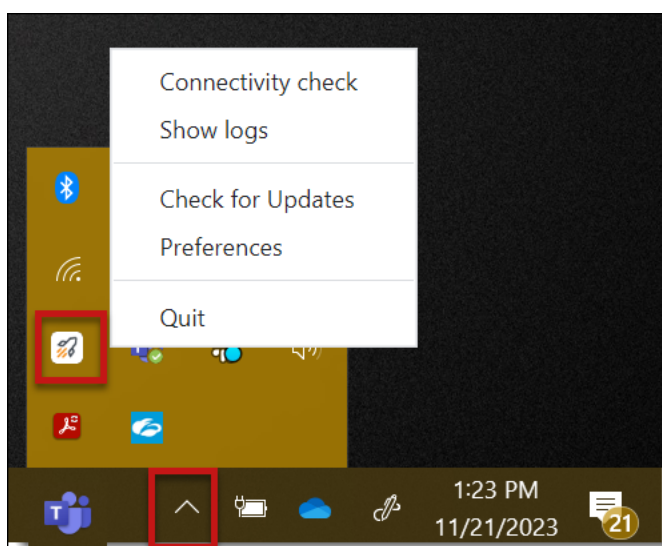
4.13.7.4 Configuring proxy settings

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

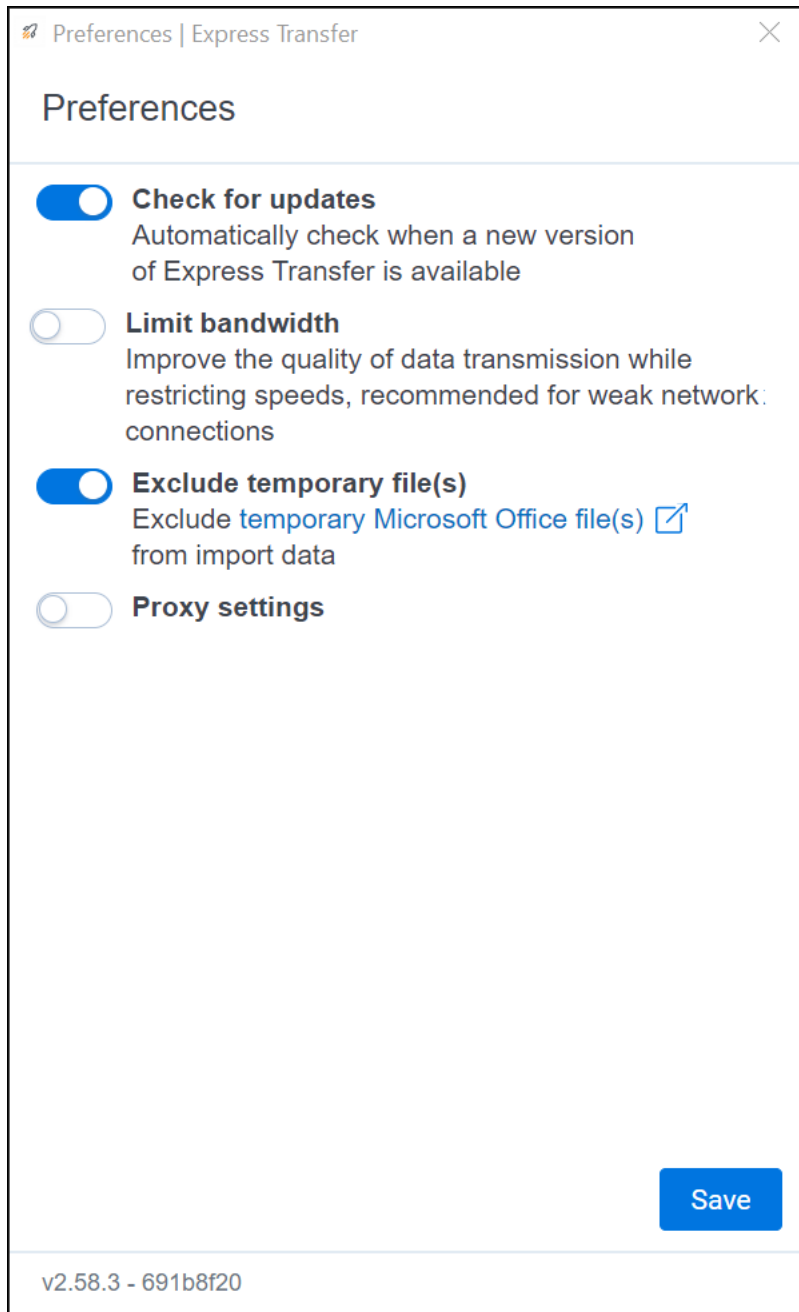
Note: The port number used in the steps below will be different from Port 443, which is still required to be open to the public Internet regardless of this proxy configuration. See [Port access on page 50](#) for more information.

To configure proxy settings:


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

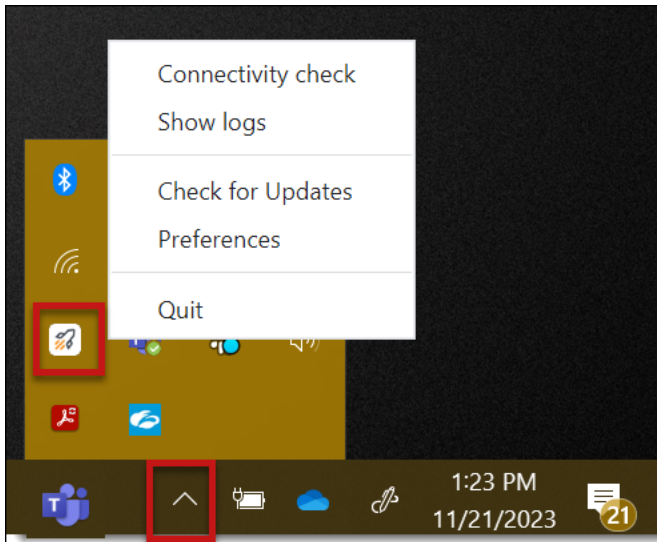


2. Click **Preferences**.



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

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



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

4.13.8 Express Transfer Connectivity check


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

The following checks occur during the connectivity check process:

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

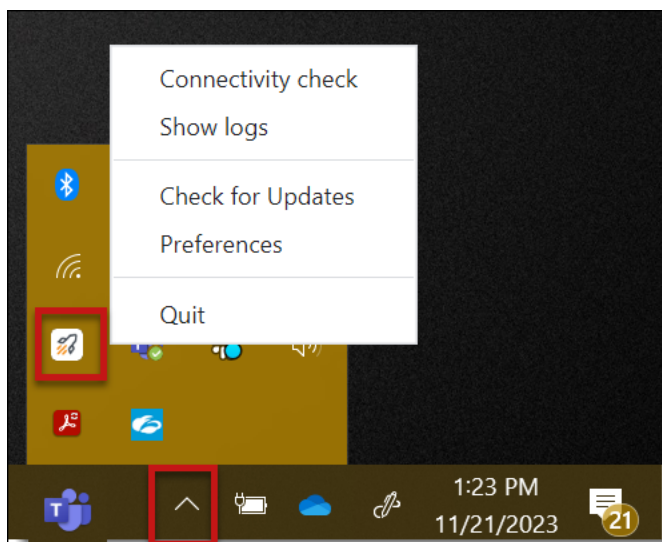
Connectivity Check	Description
fer gateway	
Connection with Express Transfer infrastructure	This step confirms Express Transfer successfully connected to the infrastructure specific to your RelativityOne region. If this step fails, please contact your IT department so they can verify the correct port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

Note: If you perform a connectivity check before activating Express Transfer in Import/Export, only the

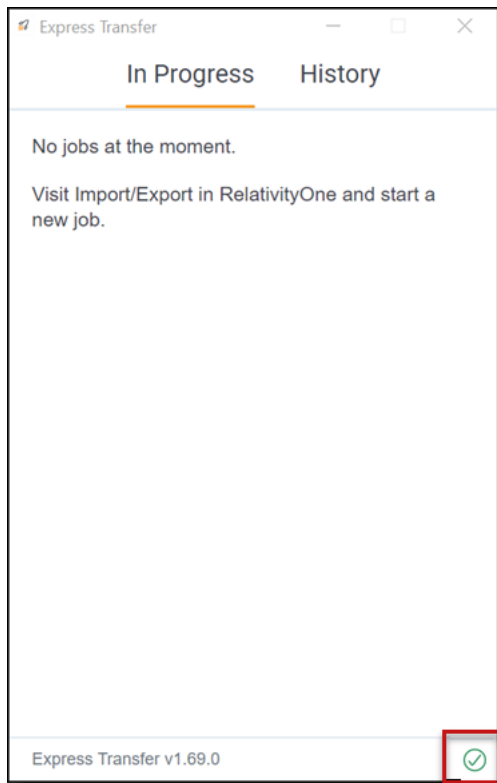
Internet connection is checked and the others display the no connectivity  icon. Express Transfer must be [active](#) to perform the full connectivity check.

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

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



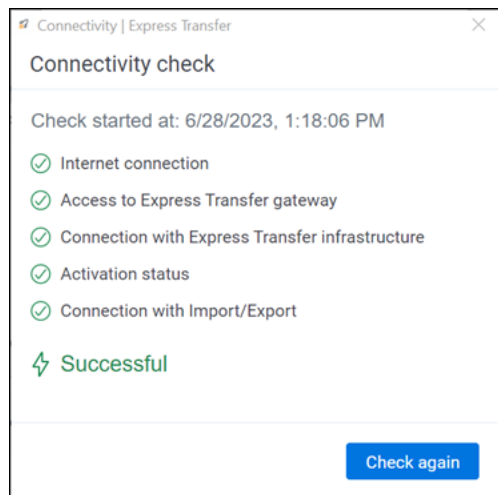
- **From within Express Transfer:** Click the circled check mark icon at the bottom of the Express Transfer application.



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

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

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



Icon legend:



icon indicates the connectivity test was successful.



icon indicates the connectivity test failed.



icon indicates the connectivity test is in progress.



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

4.13.8.1 Network Throughput Check

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

4.13.9 Express Transfer Job tracking and history

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

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

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

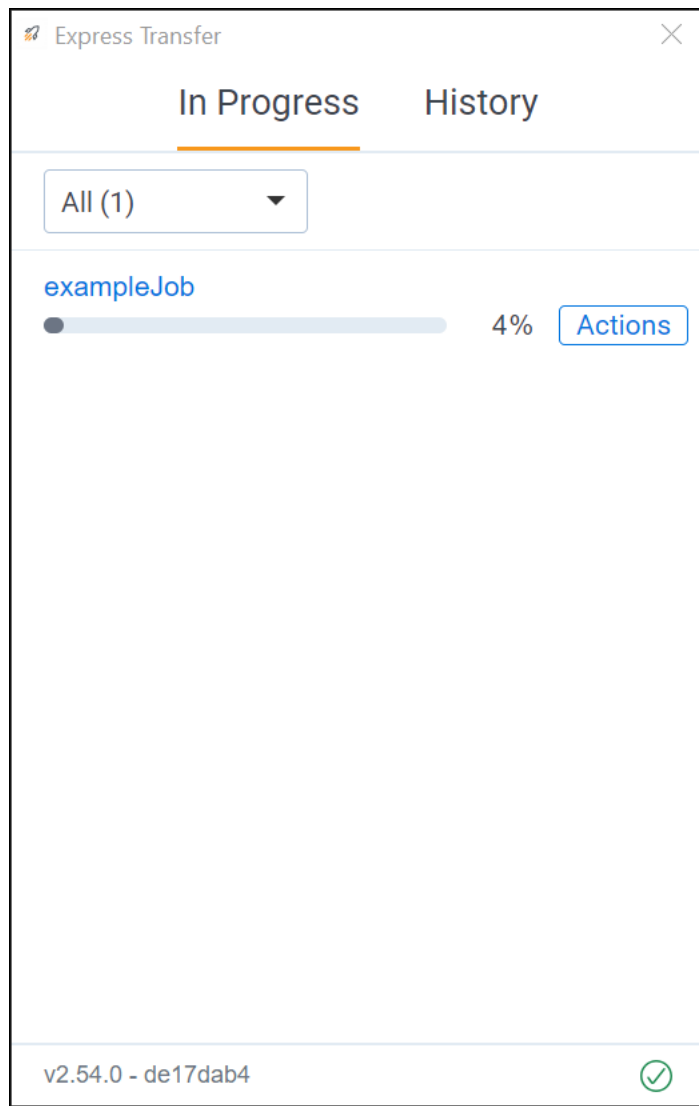
Prerequisites

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

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

In Progress Tab

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

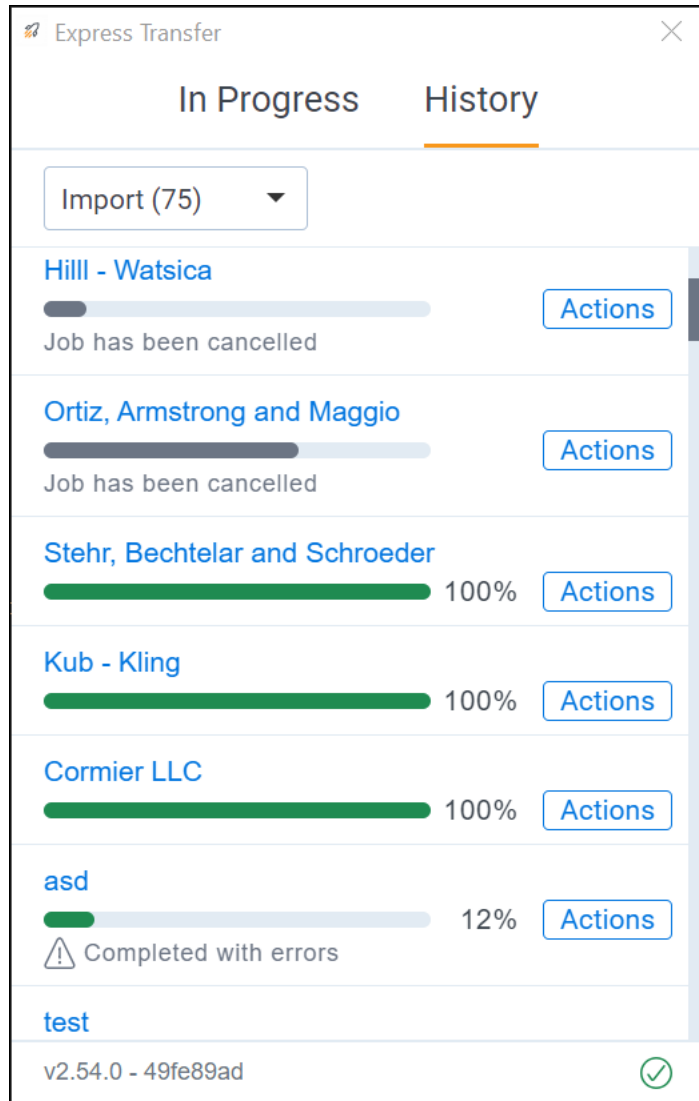


- **Job Name**—displays the name of the job. Click the job name to view more information about the job on the Job Details window. Or, click the **Actions** button next to the transfer line, then click **View details**. See [Viewing and copying details of Express Transfer jobs](#).
- **Transfer progress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

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

History tab

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



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

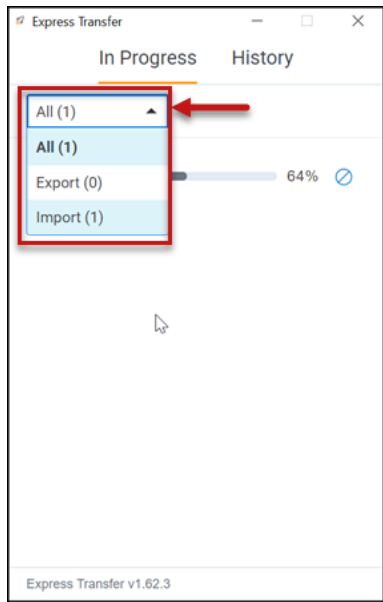
the **Actions** button next to the transfer line and then clicking **Skip failed files**. See [Express Transfer reporting jobs failed or completed with errors](#) for more information. To view job details, click the **Actions** button next to the transfer line and then click **View details**.

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

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

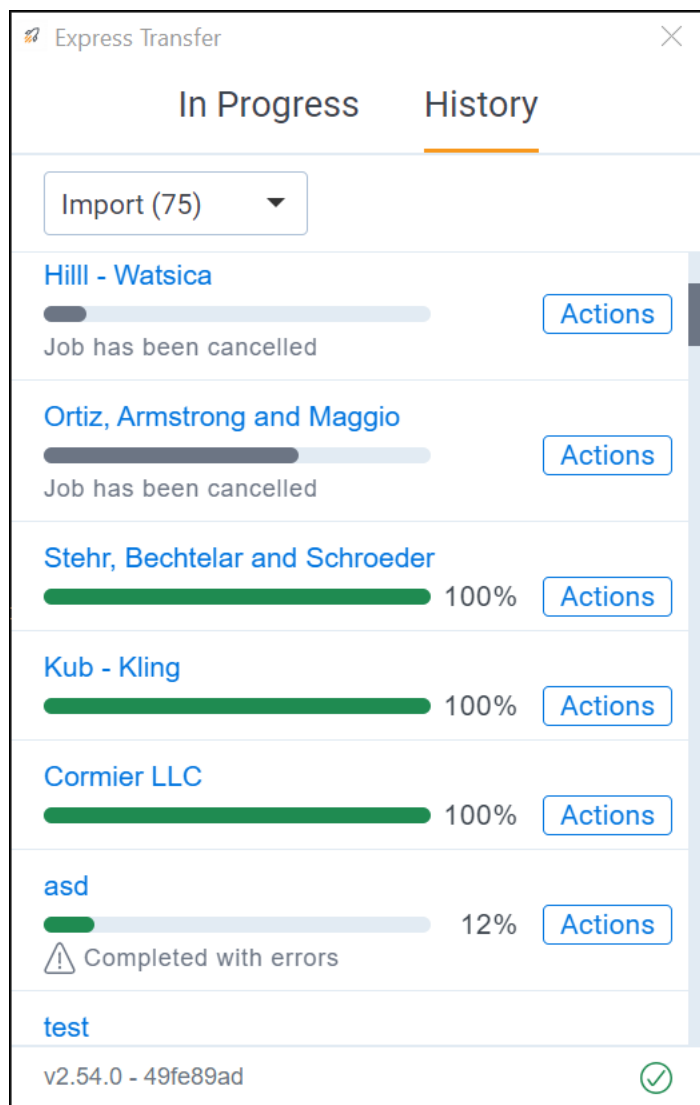
Filtering Express Transfer jobs

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



Viewing and copying details of Express Transfer jobs

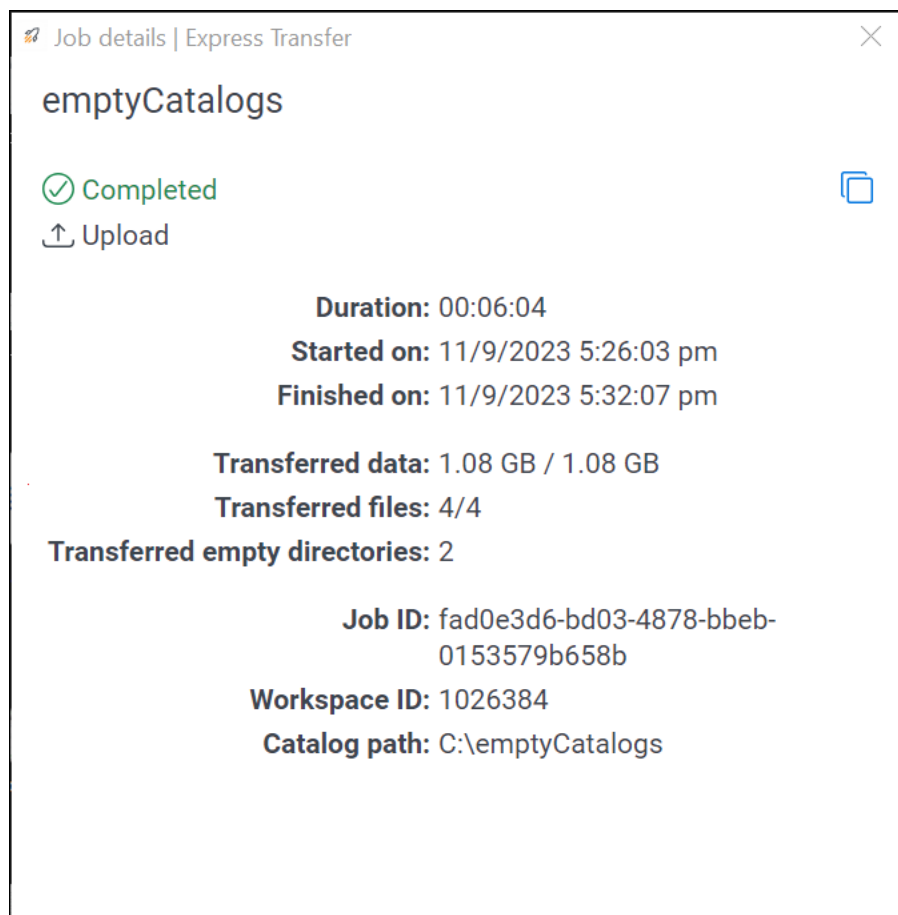
To obtain information about a particular Express Transfer job, click the **Actions** button next to the transfer line and then click **View details**.



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



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

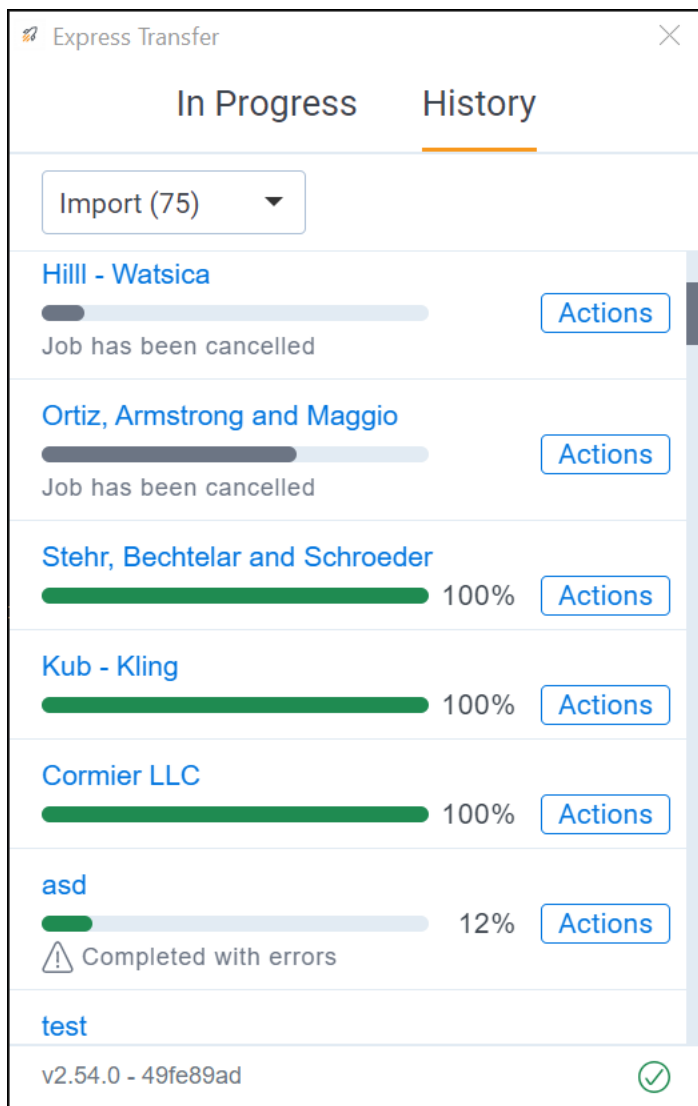


4.13.10 Express Transfer reporting jobs failed or completed with errors

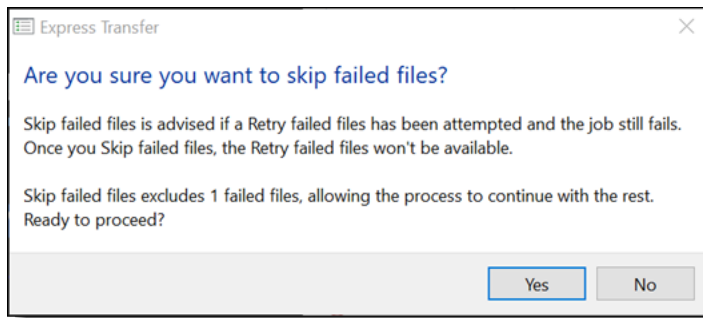
When using Express Transfer with Import/Export, if a job fails to finish or completes with errors, you can generate a report from Express Transfer Job Details that includes information such as the time stamp, file status, file name, error message, and file path. You also have a few options on how to handle the failed or errored jobs, such as retrying or skipping failed files. For more information about job tracking and history, see [Express Transfer Job tracking and history on page 78](#).

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

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



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



4.14 Importing data using Import/Export

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

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 33](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 46](#).

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.

- 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 and PDFs 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.
- Unstructured data workflow with Processing—use this workflow to import raw (unprocessed) native files that require processing in Relativity.

4.14.1 Importing data using Import/Export

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

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 33](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 46](#).

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.

- 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 and PDFs 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.
- Unstructured data workflow with Processing—use this workflow to import raw (unprocessed) native files that require processing in Relativity.

4.14.2 Importing a document load file

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

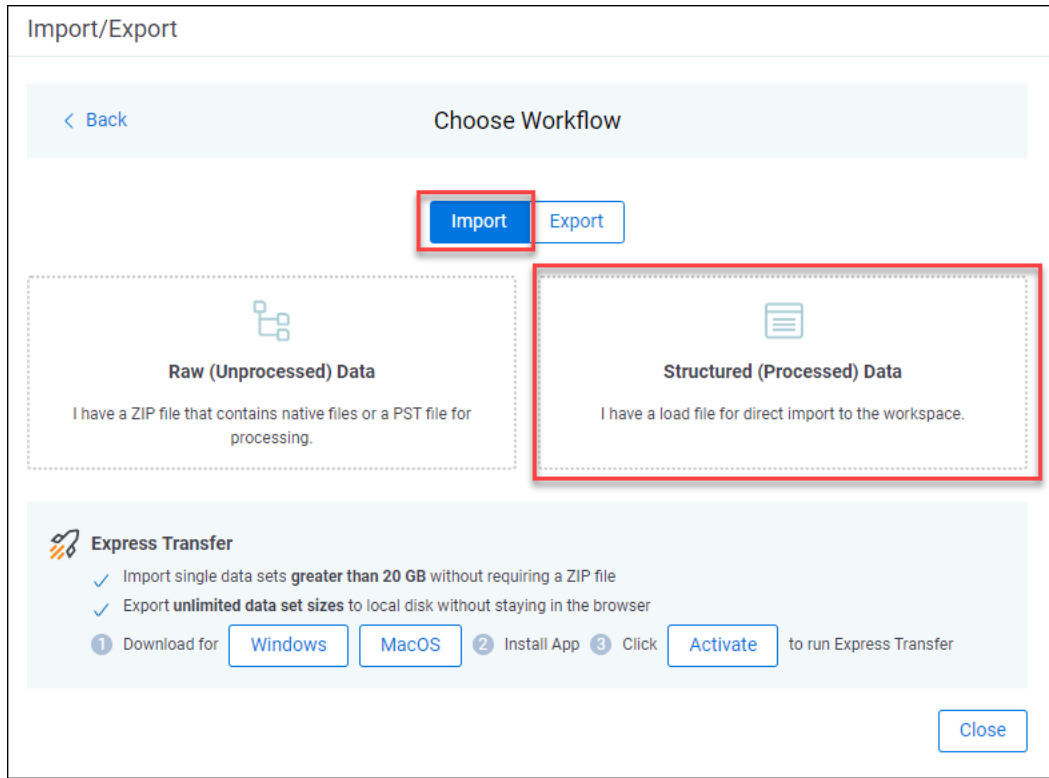
You can use Import/Export to import document load files (.dat, .csv, and .txt) into RelativityOne that contain document metadata, native files, or extracted text. You're also able to use saved job profiles to expedite the configuration process.

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 48](#) for more information.

Refer to [Import/Export load file specifications](#) and [Data upload size limitation on page 33](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 46](#).

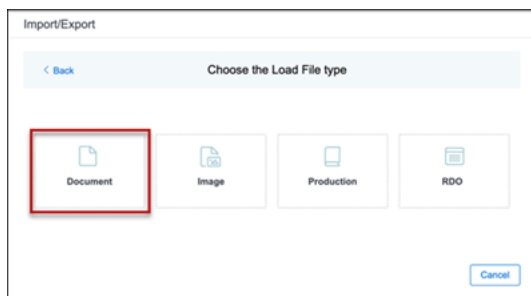
To import a document load file:

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

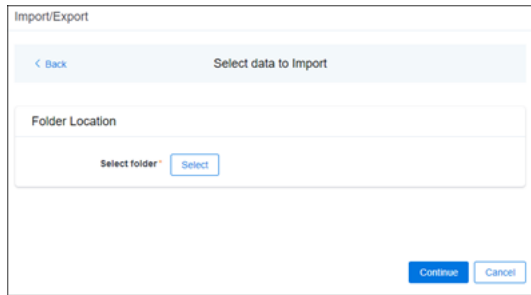


Note: If Express Transfer has been activated, the Express Transfer section will display a status of **Active**. See [Activating and deactivating Express Transfer on page 60](#) for more information.

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



5. If Express Transfer is not Active, skip this step. If it is Active, click **Select** on the Select data to Import dialog to browse to your local drive and select the folder with the files that you want to upload. In the case of universal naming convention (UNC) paths (for example, \\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 a load file 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 62](#).
 - When Express Transfer is active, you should not zip data for importing.
 - When Express Transfer is active, it uploads only files linked in the selected load file, regardless of their location.
 - When Express Transfer is active, it ignores mismatches in upper and lower case between file paths in the load file and the actual file names.
 - When Express Transfer is active, it supports load files with relative paths, absolute paths, and UNC paths. It is possible to mix different path types in a single load file.
-
6. On the Choose Load File and Location dialog, complete the following fields, then click **Continue**. Refer to [Import/Export load file specifications](#) for more information regarding load files.

Import/Export

< Back Choose Load File And Location

Job Name *

Destination Folder * [Select](#)

Profile * ☒ None ☐ From Local Disk

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

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

Include Native & Text ☐

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

Continue Cancel

- **Job Name**—provide a descriptive job name so that you can quickly identify and track that job on the Import/Export Job Page. The Job name field accepts up to 50 characters.
- **Destination folder**—click the **Select** button, and do one of the following:
 - Choose an existing folder.
 - Create a new workspace folder by right-clicking on an existing folder, click **Create**, enter a new folder name, click out of the new folder to save it, then click **Select**.
- **Profile**—are job configuration settings that were previously saved to a profile file (.ie or .kw*) so they can be reused when creating future jobs with the same or similar settings in RelativityOne, which saves time and effort as well as helps prevent data entry errors when you're mapping fields, for example. Profiles with the ".ie" extension can only be used in Import/Export.
 - **None**—select this option if you do not desire to use a profile for this import or if you intend to create a new profile based on the settings entered in the upcoming steps. You will be able to save the profile settings later to an .ie file via the **Download Profile (.ie)** button.
 - **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 43](#)
 - **(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
	Document Extension	Choose	+ Choose
VOL001\NATIVES\NATIVE001\SBECK_0048460.docx	Extracted text	Example Long text	+ Choose
VOL001\NATIVES\NATIVE001\	Message	Choose	+ Choose
	Email BCC	Choose	+ Choose
Martin, Lawrence	Email CC	Choose	+ Choose

Continue Cancel

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

Consider the following when auto-mapping fields:

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

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

Other options and fields on this dialog:

- **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.
- **Mapped to the top** toggle—when toggled on, this option groups all mapped fields on the top of the listing.
- **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 path, absolute path, or UNC path to a text file, and then select the **File Encoding** type for the file. If using absolute or UNC paths, Express Transfer must be activated prior to starting the import job.

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 path, absolute path, or UNC path to the native files. If using absolute or UNC paths, Express Transfer must be activated prior to starting the import job.

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

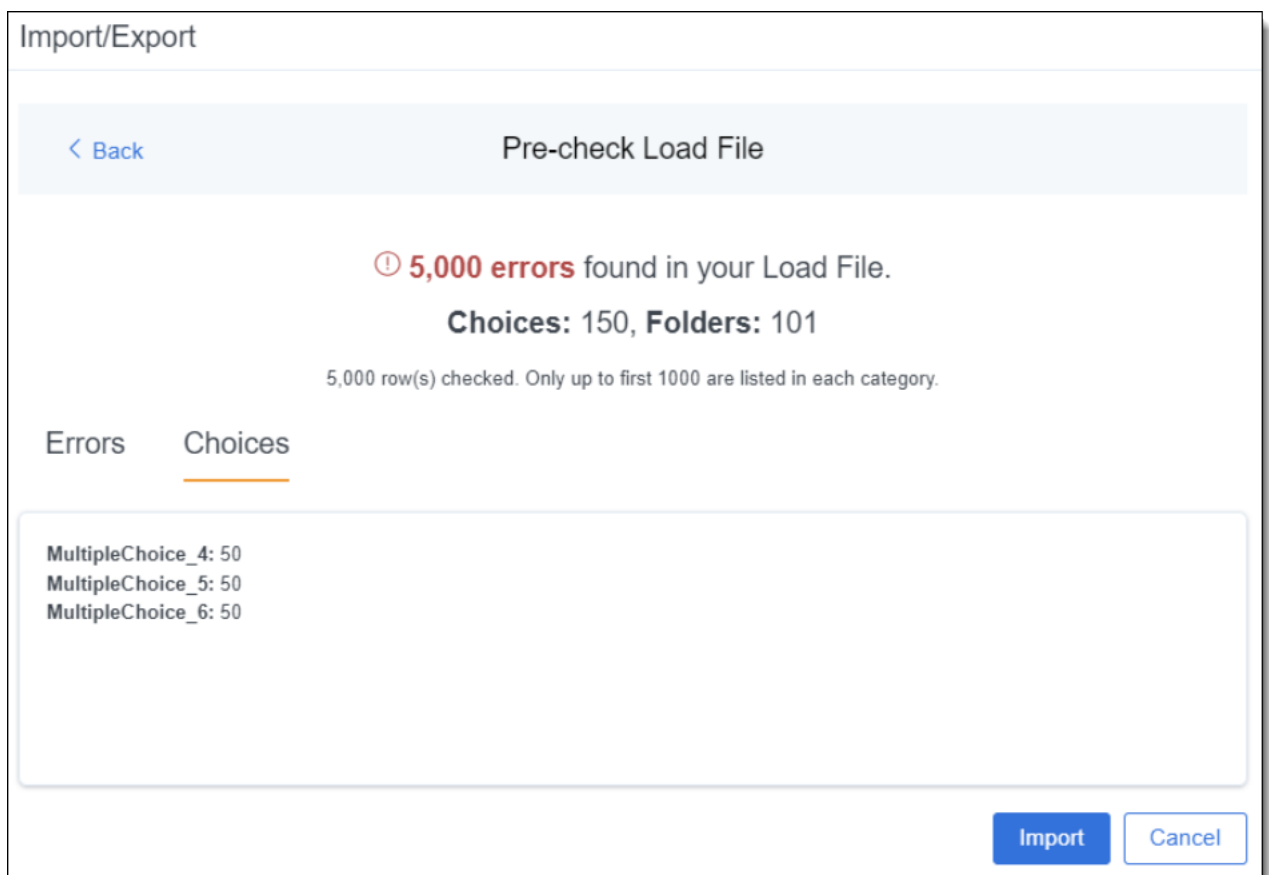
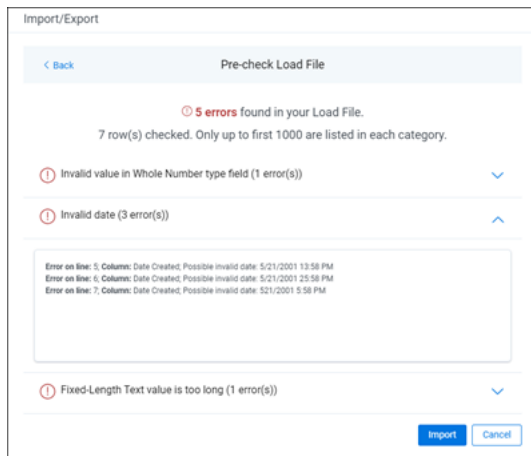
- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is set to 0, which results in loading the entire load file.

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

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

- **Multi-Select Field Overlay Behavior**—this field displays if you selected Overlay Only or Append/Overlay as the Import Mode and have mapped at least one Multiple Choice or Multiple Object field. Choose one of the following options:
 - **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the load file with corresponding multi-choice and multi-option fields in the workspace. The fields are merged according to the overlay behavior settings in the environment.
 - **Merge Values**—merges all values for multi-choice and multi-object fields in the load file with corresponding multi-choice and multi-option fields in the workspace. The fields are merged regardless of the overlay behavior settings in the environment.
 - **Replace Values**—replaces all values for multi-choice and multi-object fields in the load file with corresponding multi-choice and multi-option fields in the workspace. The fields are merged regardless of the overlay behavior settings in the environment.
10. (Optional) Click **Download Profile (.ie)** on the Import Settings dialog to download the job configuration settings entered thus far to an .ie file on your computer so that they can be reused for other jobs.
 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)

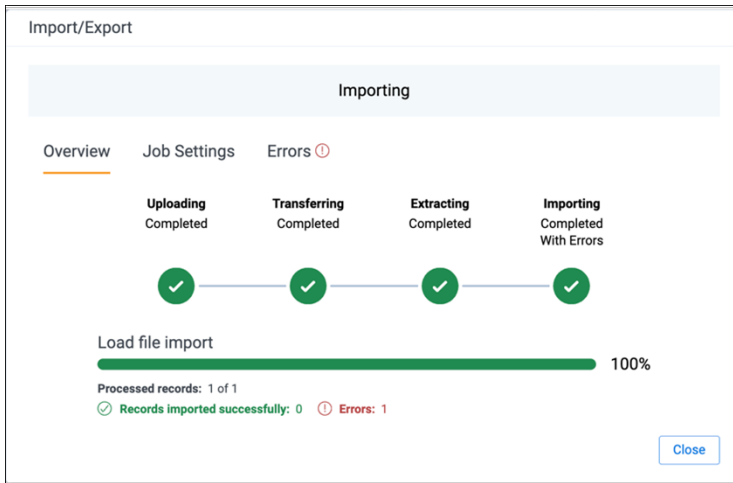
The Precheck Load File summary dialog displays a maximum of 1,000 errors for each error category. For example, if an error category has 2,000 errors, only the first 1,000 will display in the drop-down list.



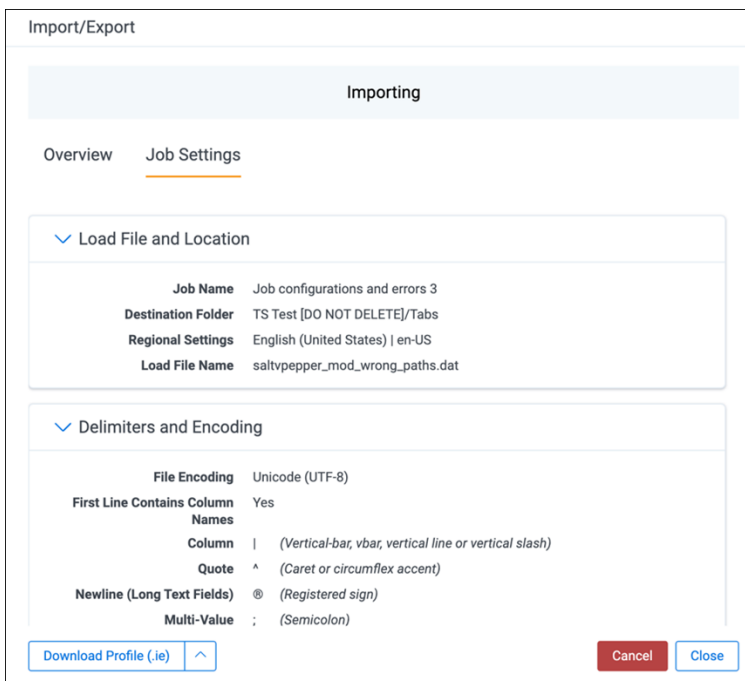
12. Click the **Import** button to start the importing process.
13. Review the importing progress on the **Overview** tab on the Importing dialog. Real-time details regarding the number of transferred files and data size being processed displays during the Uploading and

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. Go to the **Job Settings** tab on the Importing dialog to review the job configuration settings. If desired, click **Download Profile (.ie)** to download the job configuration settings entered thus far to an .ie file on your computer so that they can be reused for other jobs.

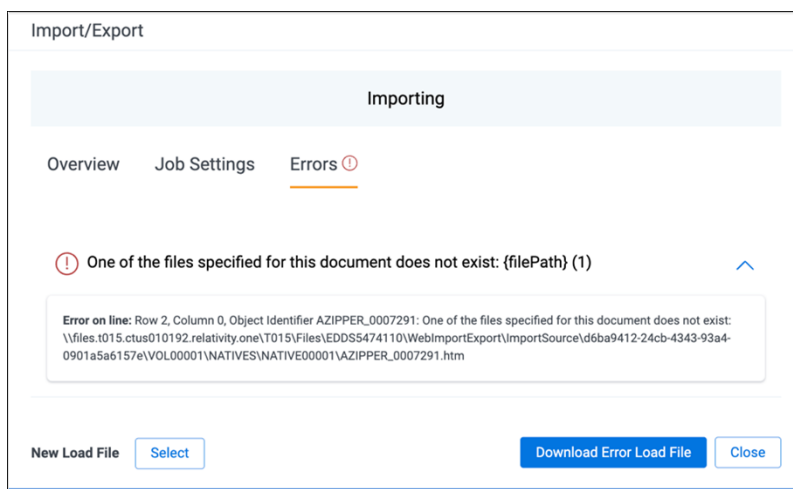


15. If no errors were found in the load file, go to the next step. If errors were found, click the **Errors** tab on the Importing dialog to view them, then do either of the following:

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

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

Note: You can only correct documents included in the original load file. If you need to add missing documents, create a new import job.



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

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

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

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

4.14.3 Importing an image load file

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

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. When you import PDFs, they are visible in the PDF Viewer and Extracted Text view, if you included text files. To import PDFs as images, they must be converted to an image file type (.tiff or .jpg) before you run the import job.

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)
-

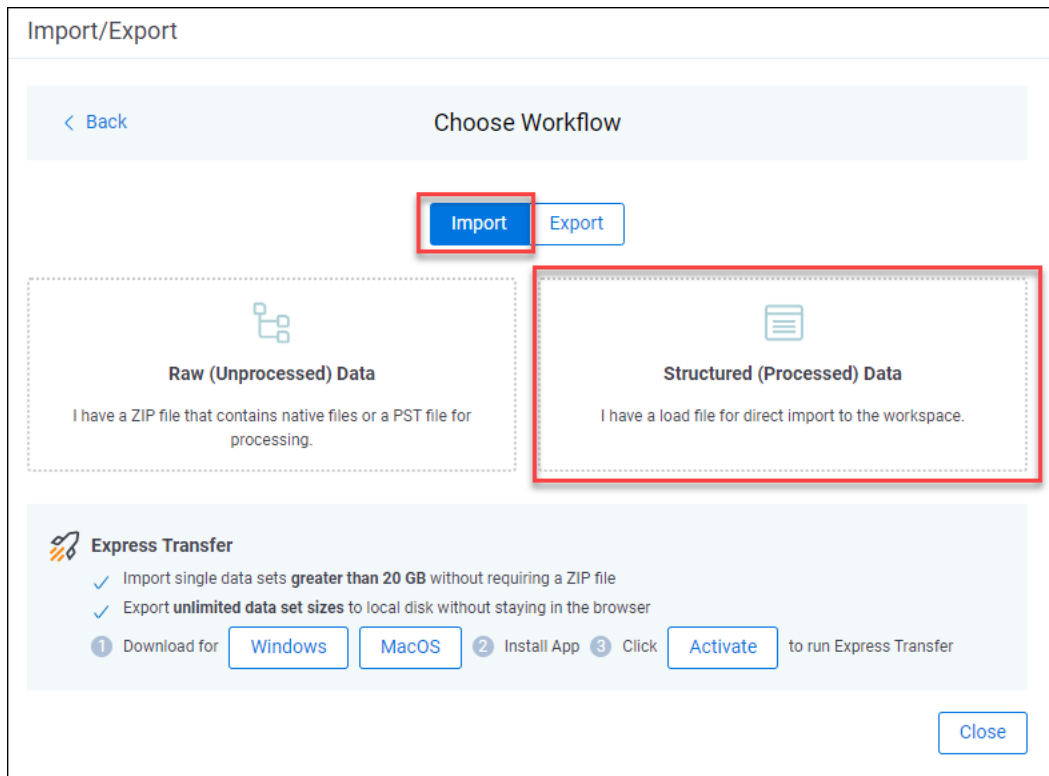
Note: Import/Export expects all the files in the OPT load files to be of the same type. This means you cannot mix image and PDF files in the same load file.

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 48](#) for more information.

Refer to [Import/Export load file specifications](#) and [Data upload size limitation on page 33](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 46](#).

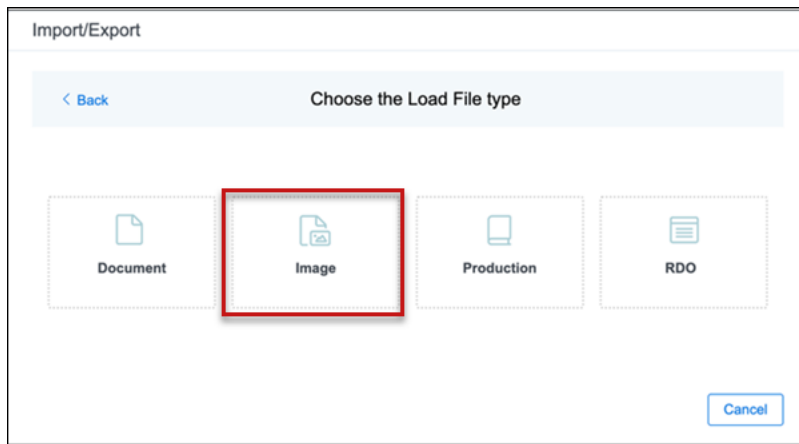
To import an image load file:

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



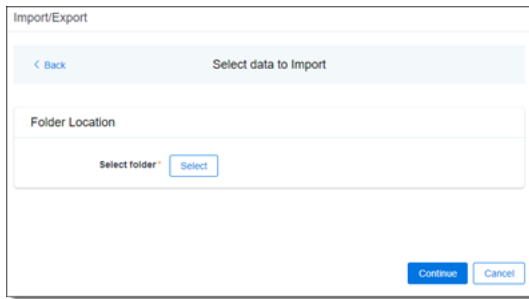
Note: If Express Transfer has been activated, the Express Transfer section will display a status of **Active**. See [Activating and deactivating Express Transfer on page 60](#) for more information.

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



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

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



Notes:

- You can choose only one folder with a load file 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 62](#).
- When Express Transfer is active, you should not zip data for importing.
- When Express Transfer is active, it uploads only files linked in the selected load file, regardless of their location.
- When Express Transfer is active, it ignores mismatches in upper and lower case between file paths in the load file and the actual file names.
- When Express Transfer is active, it supports load files with relative paths, absolute paths, and UNC paths. It is possible to mix different path types in a single load file.

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

Import/Export

< Back Choose Load File And Location

Job Name*

Destination Folder*

Profile* ☒ None
☐ From Local Disk

Load File*

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

Images*

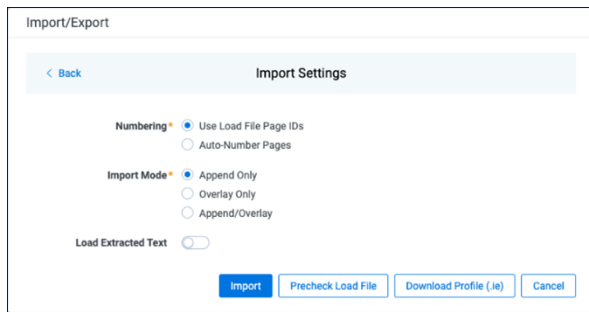
Drop your .zip file here or [browse for a file.](#)

Notification Addresses

- **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 to an .ie file via the **Download Profile (.ie)** button.
 - **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.

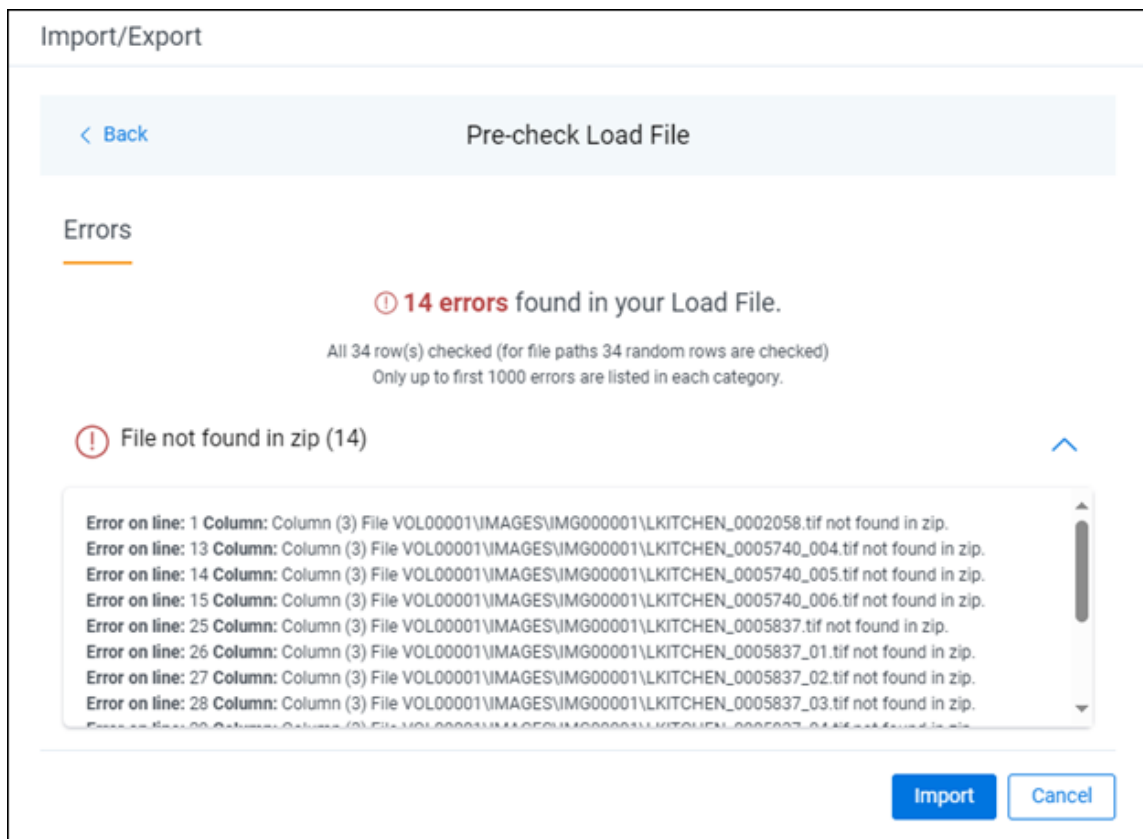
- **Load file**—drag and drop or use **browse for a file** to select the load file from your local drive.
 - **Images**—drag and drop or use **browse for a file** to select a zipped image file from your local drive. See [Image and extracted text files on page 44](#).
 - **(Optional) Notification Addresses**—enable email notifications by providing the email addresses of those who should get notified once the job completed, failed, or canceled.
7. On the Import Settings dialog, configure your import job by selecting the numbering and choosing the import mode.



- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is set to 0, which results in loading the entire load file.
- **Numbering**—select one of the following options:
 - **Use load file page IDs**—default setting.
 - **Auto-number pages**—select this option if page IDs in the production are not unique. For example, you might import a set of .tiff files that share a page identifier for each record. The page identifiers are shared per document and are not unique. The Auto-number pages option appends the 01, 02, and so on to the page-level identifier, creating a unique number per page.
- **Import Mode**—choose how you want the records to be imported:
 - **Append Only**—load only new records.
 - **Overlay Only**—update existing records only. If selected, then you must assign a unique identifier in the **Overlay Identifier** field 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:

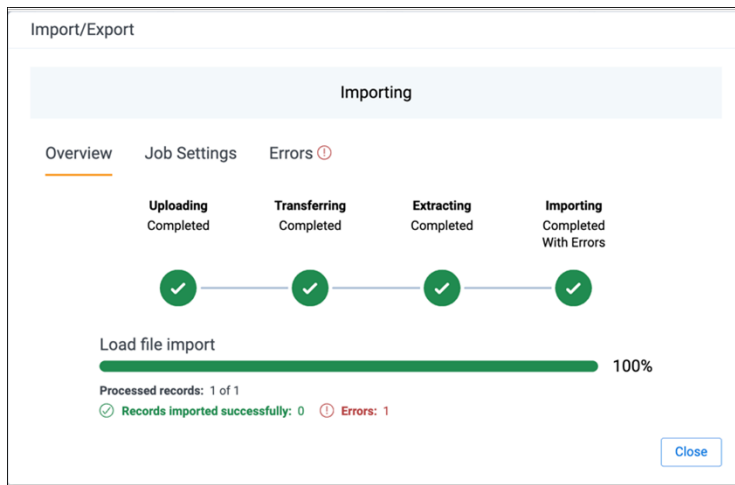
- Have .txt extensions
 - Stored in the same directory as image files
 - Named in the same way as the image files
- **Files encoding**—this field displays if the Load Extracted Text option is selected. Choose the encoding format for the text file:
 - **Western European (Windows)**—indicates the Windows 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 **Download Profile (.ie)** on the Import Settings dialog to download the job configuration settings entered thus far to an .ie file on your computer so that they can be reused for other jobs.
 9. (Optional) Click **Precheck Load File** on the Import Settings dialog to run a validation process on the load file to check for errors prior to importing it. The following validation is performed during precheck: Image file paths (checks 1,000 random lines across the whole load file). All detected errors are displayed in the Precheck window. Click the down arrow next to any error message to view its details. If you want to correct the errors in the source file(s) and repeat the importing steps, click **Cancel** to discontinue importing the file at this time. Otherwise, go to the next step to import the load file with errors and correct them later.

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

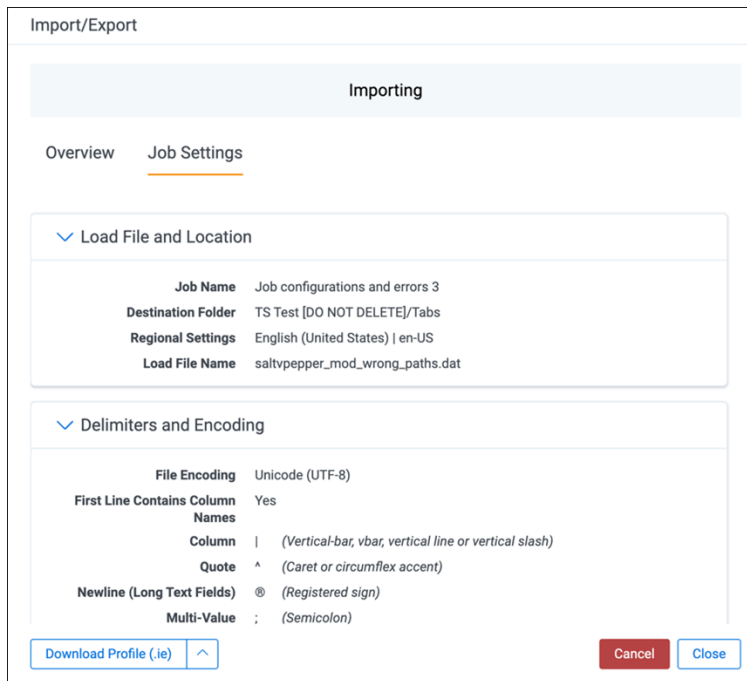


10. Click the **Import** button to start the importing process.
11. Review the importing progress on the **Overview** tab on the Importing dialog. Real-time details regarding the number of transferred files and data size being processed displays during the Uploading and Extracting steps. If needed, click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



- Click the **Job Settings** tab on the Importing dialog to review the job configuration settings. If desired, click **Download Profile (.ie)** to download the job configuration settings entered thus far to an .ie file on your computer so that they can be reused for other jobs.

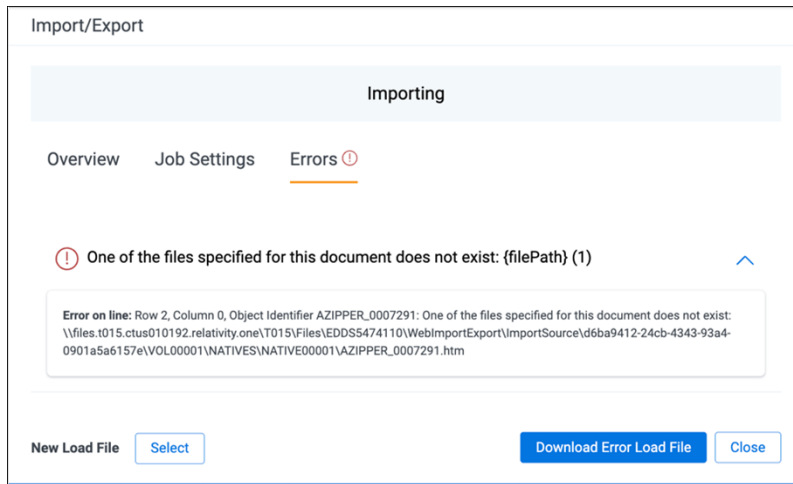


- If no errors were found in the load file, go to the next step. If errors were found, click the **Errors** tab on the Importing dialog to view them, then do either of the following:

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

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

Note: You can only correct documents included in the original load file. If you need to add missing documents, create a new import job.



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.

4.14.4 Importing a production load file

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

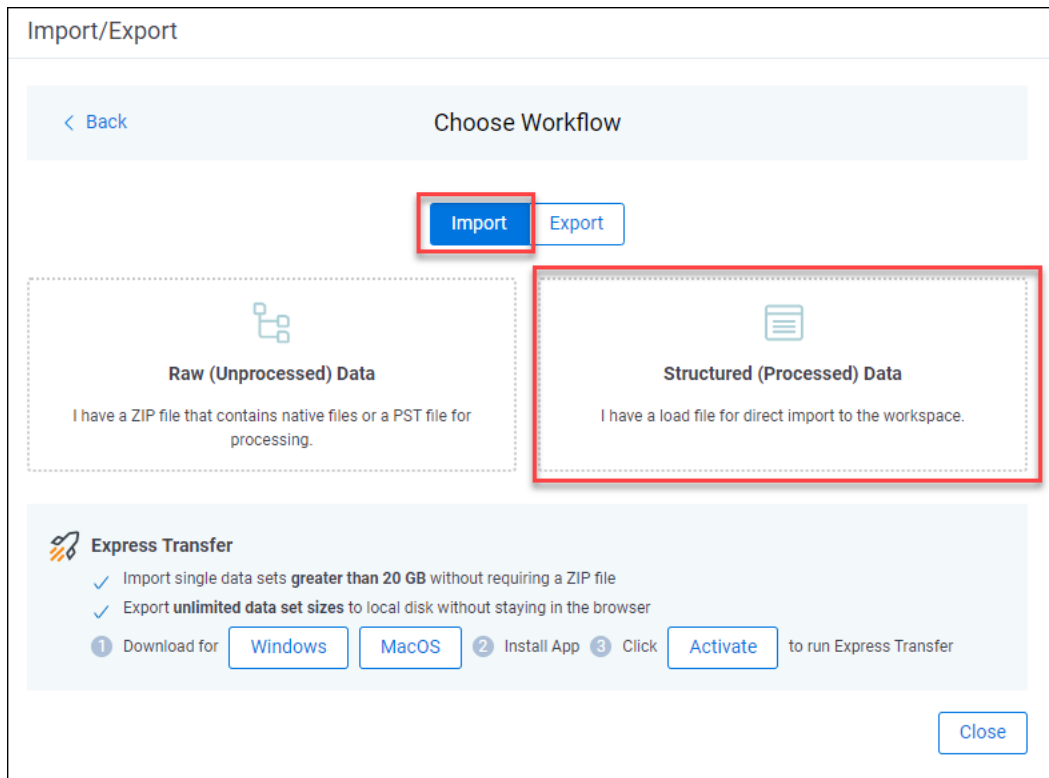
You can use Import/Export to import external productions, including single and multiple PDF files, into RelativityOne with Import/Export. This is useful after a production goes out the door in the event a case team needs access to documents as they were in the production and needs them available for 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 48](#) for more information.

Refer to [Import/Export load file specifications](#) and [Data upload size limitation on page 33](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 46](#).

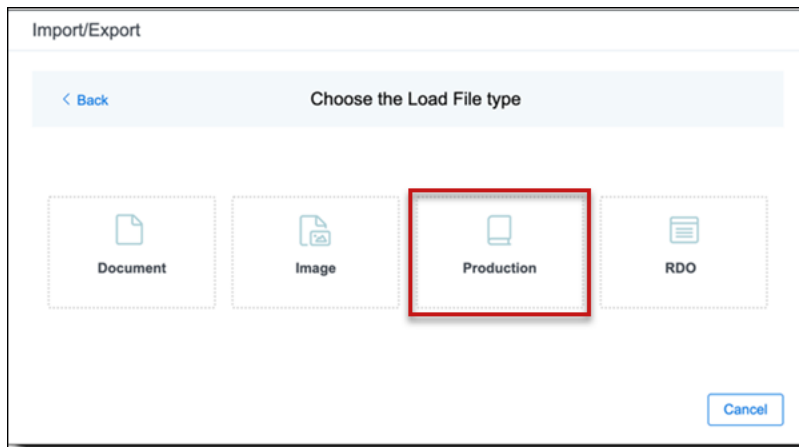
To import a production load file:

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.

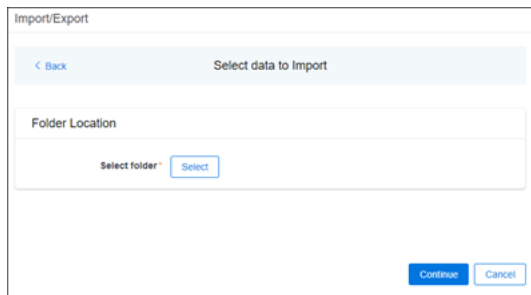


Note: If Express Transfer has been activated, the Express Transfer section will display a status of **Active**. See [Activating and deactivating Express Transfer on page 60](#) for more information.

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



5. If Express Transfer is not Active, skip this step. If it is Active, click **Select** on the Select data to Import dialog to browse to your local drive and select the folder with the files that you want to upload. In the case of universal naming convention (UNC) paths (for example, \\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 a load file 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 62](#).
- When Express Transfer is active, you should not zip data for importing.
- When Express Transfer is active, it uploads only files linked in the selected load file, regardless of their location.
- When Express Transfer is active, it ignores mismatches in upper and lower case between file paths in the load file and the actual file names.
- When Express Transfer is active, it supports load files with relative paths, absolute paths, and UNC paths. It is possible to mix different path types in a single load file.

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

Import/Export

< Back Choose Load File And Location

Job Name*

Destination Folder*

Profile* ☒ None
☐ From Local Disk

Load File*

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

Images*

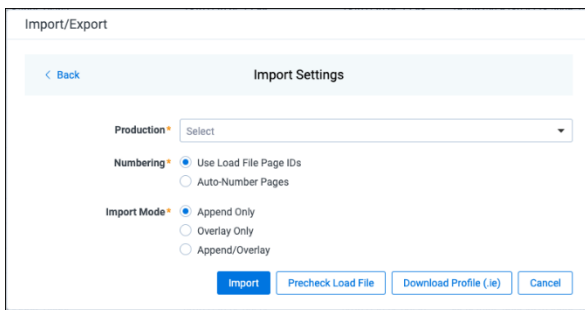
Drop your .zip file here or [browse for a file.](#)

Notification Addresses

- **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 to an .ie file via the **Download Profile (.ie)** button.
 - **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.

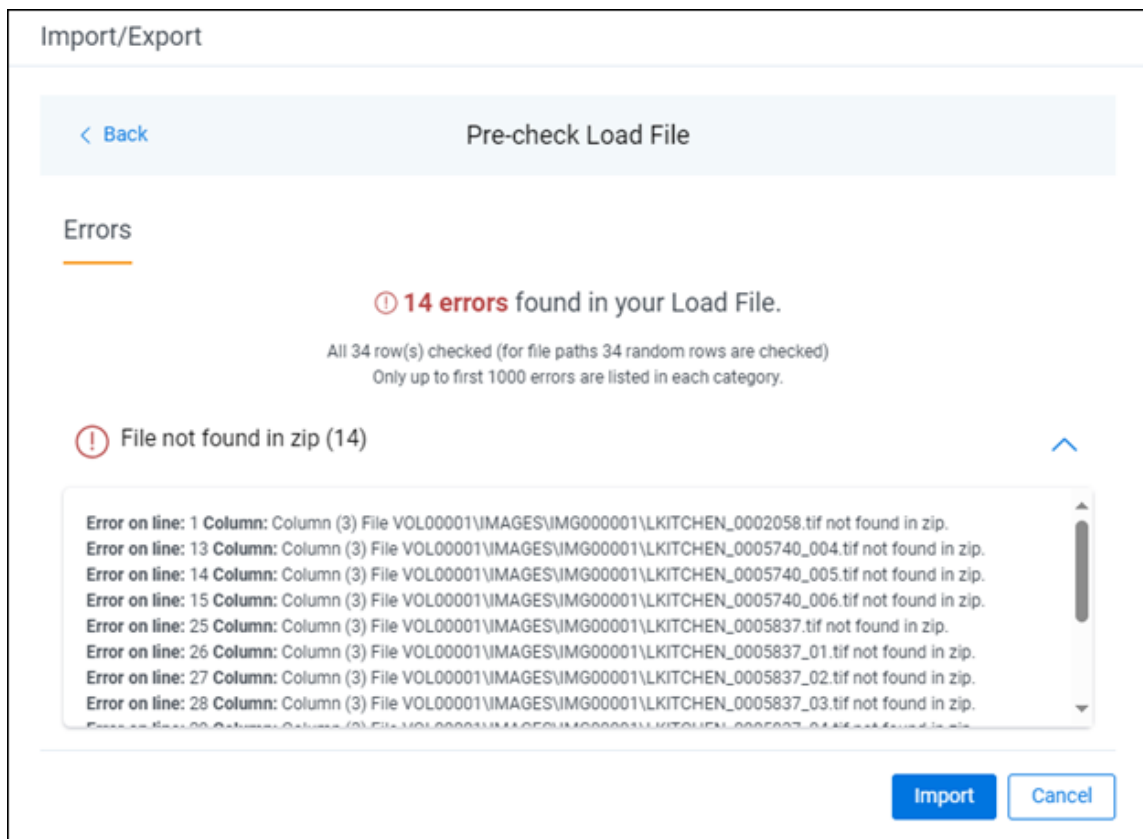
- **Load file**—drag and drop or use **browse for a file** to select the load file from your local drive.
 - **Images**—drag and drop or use **browse for a file** to select a zipped image file from your local drive. See [Image and extracted text files on page 44](#).
 - **(Optional) Notification Addresses**—enable email notifications by providing the email addresses of those who should get notified once the job completed, failed, or canceled.
7. On the 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** field 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.

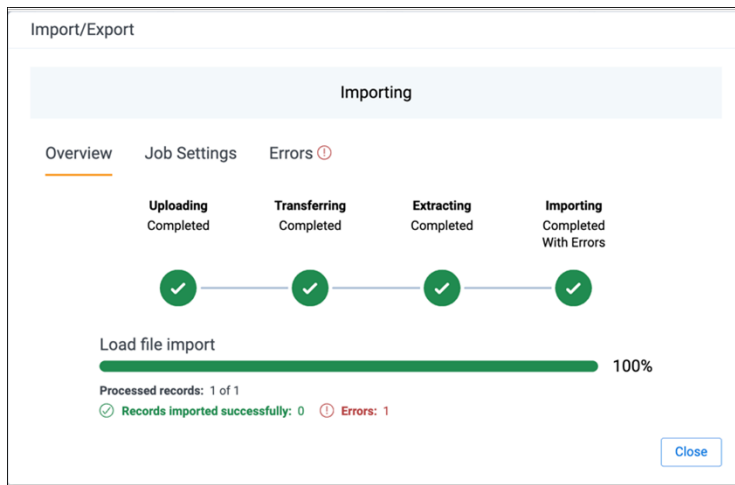
8. If you selected **Overlay Only** or **Append/Overlay** in the previous step, select an **Overlay Identifier** to specify the field that links your overlay load file to the workspace.
 - **Merge Values**—merges all values for multi-choice and multi-object fields in the load file with corresponding 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 **Download Profile (.ie)** on the Import Settings dialog to download the job configuration settings entered thus far to an .ie file on your computer so that they can be reused for other jobs.
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.

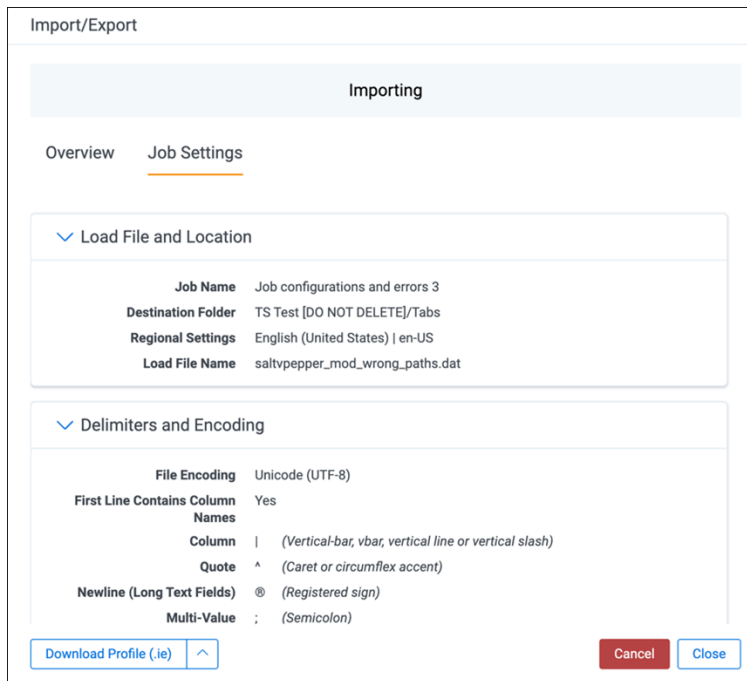


11. Click the **Import** button to start the importing process.
12. Review the importing progress on the **Overview** tab on the Importing dialog. Real-time details regarding the number of transferred files and data size being processed displays during the Uploading and Extracting steps. If needed, click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

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.



- Go to the **Job Settings** tab on the Importing dialog to review the job configuration settings. If desired, click **Download Profile (.ie)** to download the job configuration settings entered thus far to an .ie file on your computer so that they can be reused for other jobs.

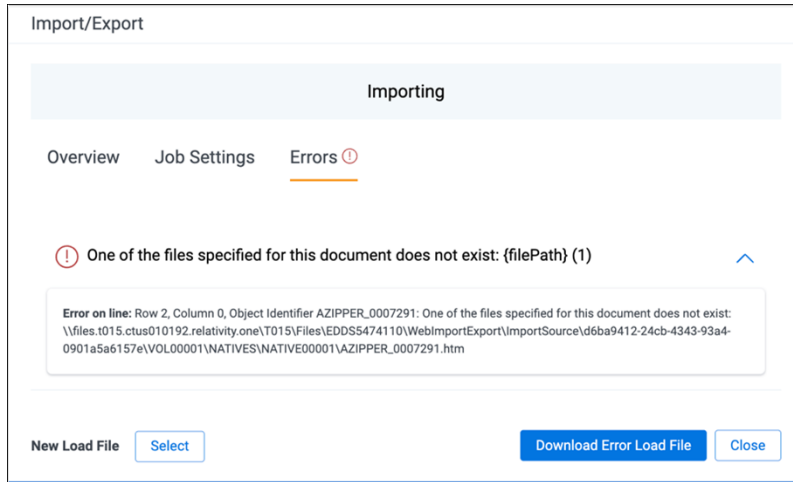


- If no errors were found in the load file, go to the next step. If errors were found, click the **Errors** tab on the Importing dialog to view them, then do either of the following:

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

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

Note: You can only correct documents included in the original load file. If you need to add missing documents, create a new import job.



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

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

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

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

4.14.5 Importing an RDO load file

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

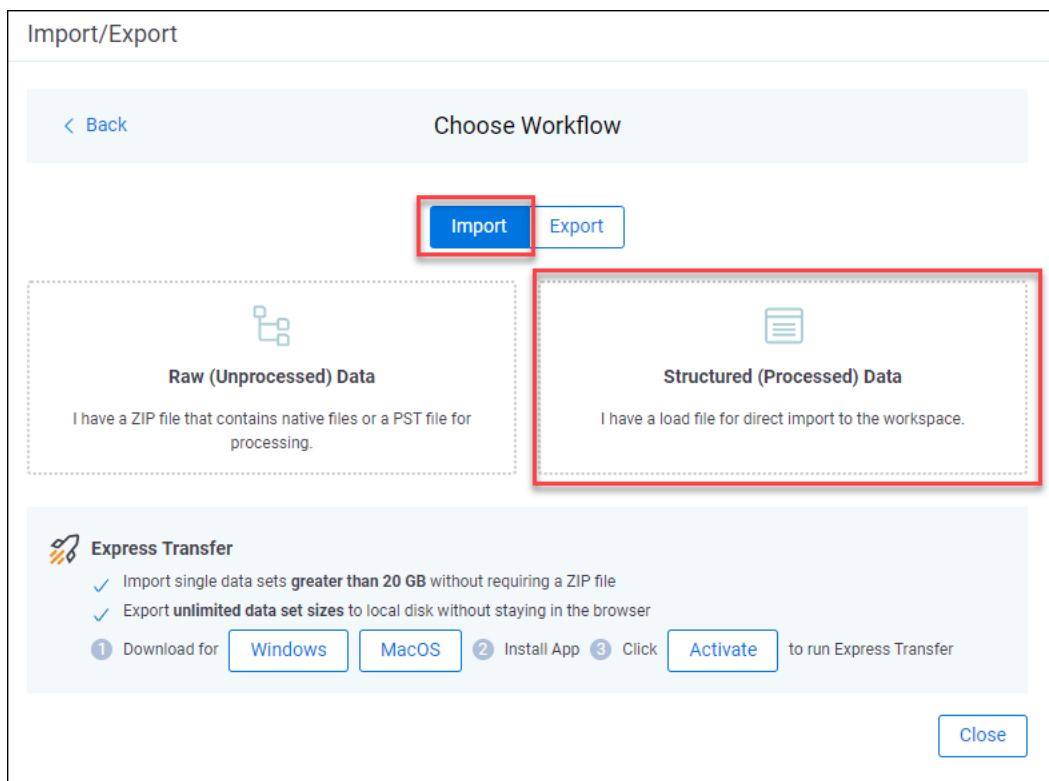
You can import Relativity's dynamic objects (RDO) for use in Relativity applications. The workflow for RDO data import follows the same general guidelines as those for document load file imports.

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 48](#) for more information.

Refer to [Import/Export load file specifications](#) and [Data upload size limitation on page 33](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 46](#).

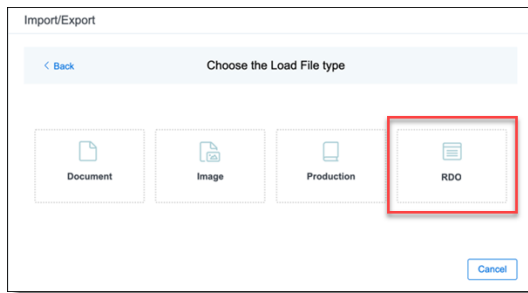
To import RDO data:

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.

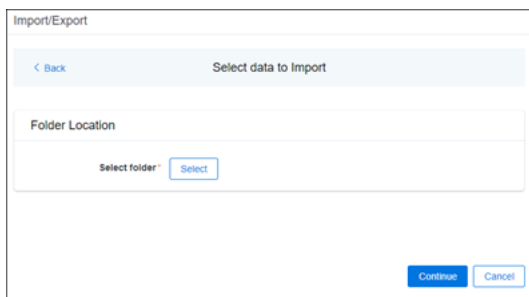


Note: If Express Transfer has been activated, the Express Transfer section will display a status of **Active**. See [Activating and deactivating Express Transfer on page 60](#) for more information.

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



5. If Express Transfer is not Active, skip this step. If it is Active, click **Select** on the Select data to Import dialog to browse to your local drive and select the folder with the files that you want to upload. In the case of universal naming convention (UNC) paths (for example, \\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 a load file 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 62](#).
 - When Express Transfer is active, you should not zip data for importing.
 - When Express Transfer is active, it uploads only files linked in the selected load file, regardless of their location.
 - When Express Transfer is active, it ignores mismatches in upper and lower case between file paths in the load file and the actual file names.
 - When Express Transfer is active, it supports load files with relative paths, absolute paths, and UNC paths. It is possible to mix different path types in a single load file.
-
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 to an .ie file via the **Download Profile (.ie)** button.
 - **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.

- 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.

-
- The screenshot shows the 'ImportExport' application with the 'Load File Settings' panel selected. The 'File Encoding' is set to 'Unicode 3.27.45'. The 'First Line Comment Encoding' is set to 'None'. The 'Column' separator is 'Tabulator'. The 'Quote' character is 'Double quote'. The 'Quote' checkbox is checked, indicating 'Quote all column names'. The 'Readline Long Text Fields' checkbox is unchecked. The 'Multi-Value' checkbox is unchecked. The 'Revised Value' checkbox is unchecked. The 'File Column Headers Presaver' panel is also visible, showing a list of columns to be preserved: Name, Address, City, State, Zip, Country, Telephone, Fax, Email, and Website. The 'Import' and 'Export' buttons are at the bottom right.

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

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

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.

Other options and fields on this dialog:

- **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—currently not supported.
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.

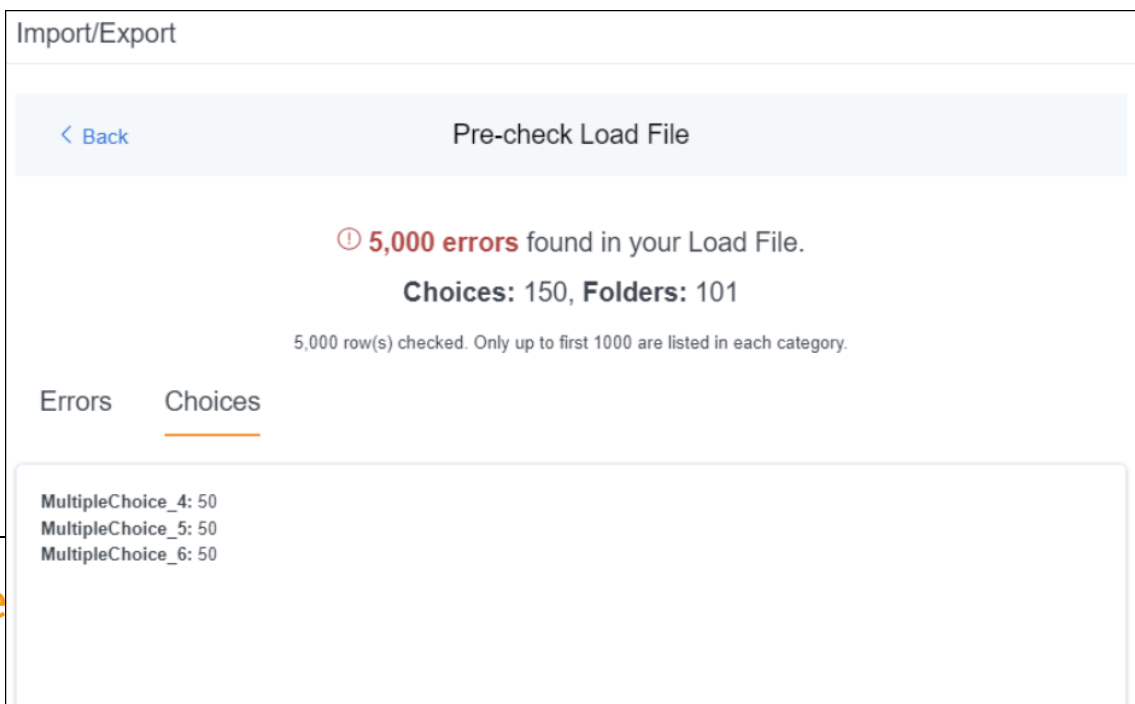
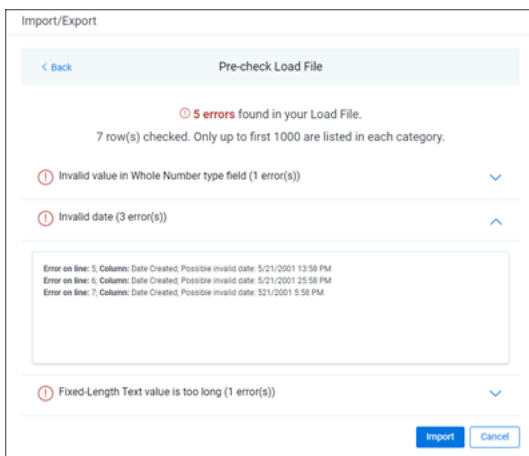
- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is set to 0, which results in loading the entire load file.
 - **Import mode**—Choose how you want the records to be imported.
 - **Append Only**—loads only new records.
 - **Append/Overlay**—adds new records and overlays data on existing records. If selected, then you must assign a unique identifier in the **Overlay Identifier** field that will be used to overlay data in the workspace. This field acts as a link indicating to RelativityOne where to import the data. 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 **Download Profile (.ie)** on the Import Settings dialog to download the job configuration settings entered thus far to an .ie file on your computer so that they can be reused for other

jobs.

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:

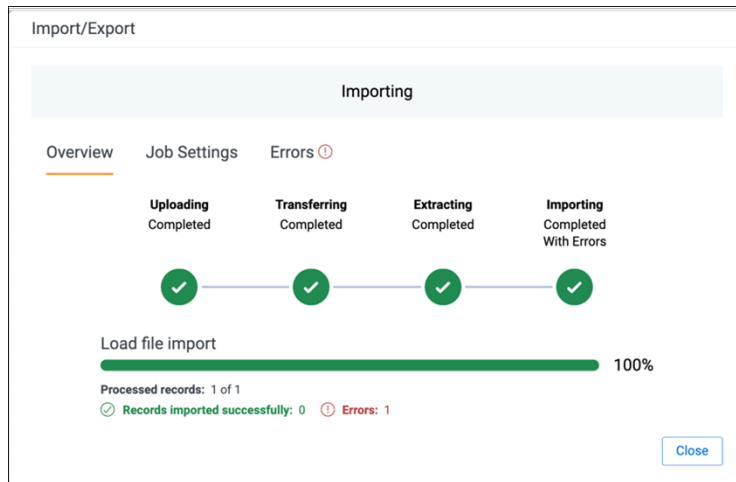
- Date format
- Field type
- Field length
- Number of load file cells
- Number of folders and choice fields
- File paths for natives and extracted text (checks 1,000 random lines across the whole load file)

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.



12. Click the **Import** button to start the importing process.
13. Review the importing progress on the **Overview** tab 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. Go to the **Job Settings** tab on the Importing dialog to review the job configuration settings. If desired, click **Download Profile (.ie)** to download the job configuration settings entered thus far to an .ie file on your computer so that they can be reused for other jobs.

Import/Export

Importing

Overview Job Settings

Load File and Location

Job Name	Job configurations and errors 3
Destination Folder	TS Test [DO NOT DELETE]/Tabs
Regional Settings	English (United States) en-US
Load File Name	saltpepper_mod_wrong_paths.dat

Delimiters and Encoding

File Encoding	Unicode (UTF-8)
First Line Contains Column Names	Yes
Column	(Vertical-bar, vbar, vertical line or vertical slash)
Quote	^ (Caret or circumflex accent)
Newline (Long Text Fields)	@ (Registered sign)
Multi-Value	;(Semicolon)

Download Profile (.ie) ^

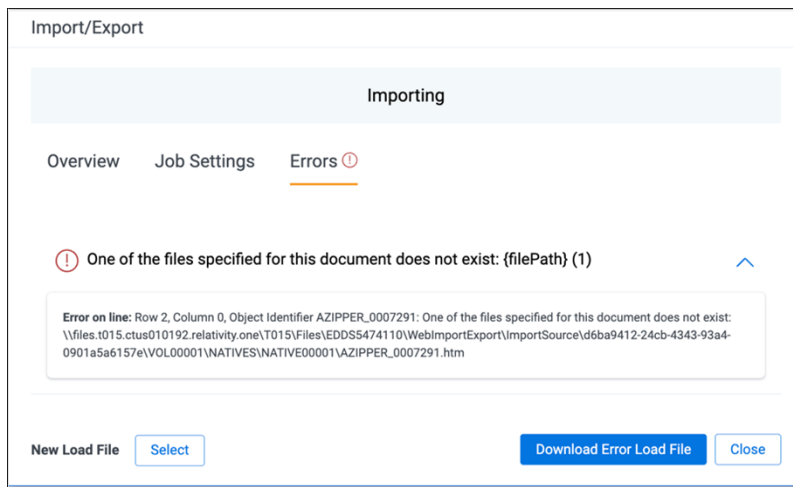
Cancel Close

15. If no errors were found in the load file, go to the next step. If errors were found, click the **Errors** tab on the Importing dialog to view them, then do either of the following:

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

- To proceed without correcting the errors, click **Close**.
- 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 Importing screen next to New Load File and navigating to the load file on your local drive to select it. Once selected, click **Import** to import the job with corrected data.

Note: You can only correct documents included in the original load file. If you need to add missing documents, create a new import job.



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

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

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

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

4.14.6 Importing raw unprocessed data for Processing via Import/Export

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

Note: Effective August 20, 2024, Import/Export uploads raw (unprocessed) data to the ProcessingSource folder and triggers the Processing application. The ProcessingSource folder is included in your Staging threshold. To avoid additional storage costs, you may want to delete the uploaded raw (unprocessed) data from this folder once it is no longer needed.

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

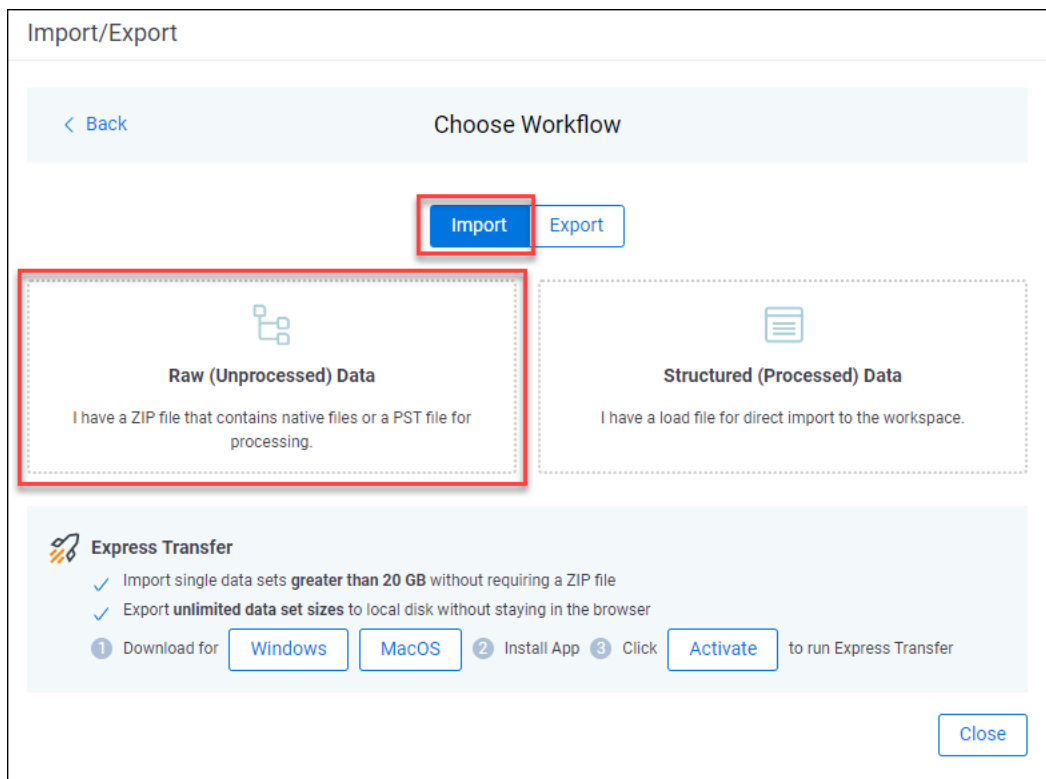
Notes:

- Import/Export is **not** a replacement for the Processing application; however it is a simplified workflow when setting up a processing set. Using the Processing application is recommended when setting up large, complex processing jobs. Also, within the Processing application, you can use Quick Create Sets, Inventory, check and update Processing Profiles, and customize data source options.
 - Processing profiles must already exist in RelativityOne before using them in the steps below.
 - For optimal performance, we recommend using Import/Export with Express Transfer and organizing data in such a way that there are as few Data Sources as possible in a single job.
-

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 48](#) for more information.

To import raw unprocessed/unstructured files for Processing:

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



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

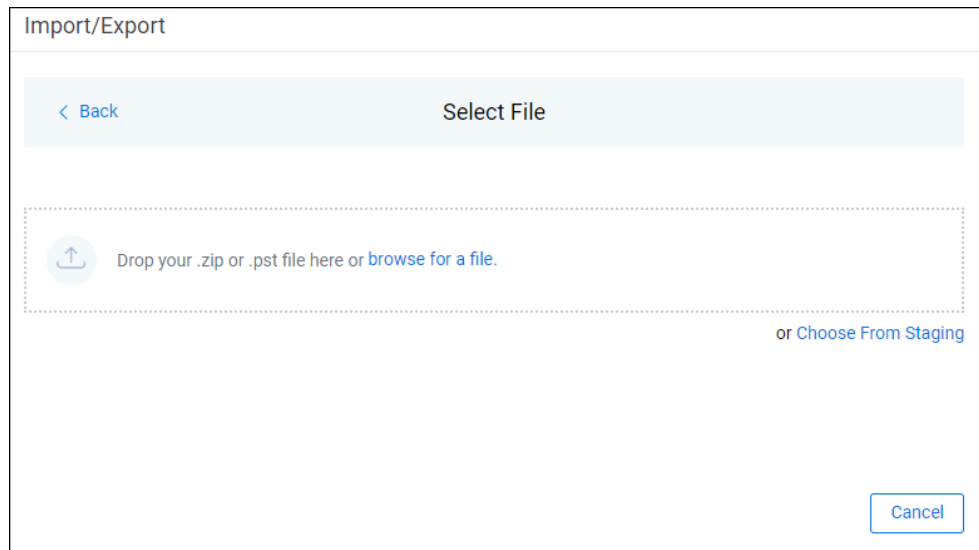
4. Select the data files to import as follows depending on the activation status of Express Transfer:

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

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

The screenshot shows a web-based dialog box titled 'Import/Export'. The main heading is 'Select data to Import'. Below this, there is a section labeled 'Folder Location'. Inside this section, the text 'Select folder *' is followed by two buttons: 'Select' and 'Choose From File Share', separated by the word 'or'. At the bottom right of the dialog, there are two buttons: 'Continue' and 'Cancel'.

- **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.



- 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 Staging** to upload files directly from the Staging Area. Then, select the correct ProcessingSource folder and click **Select**. You do not need to zip files when importing with this option.

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

The screenshot shows the 'Import/Export' interface with the 'Create Processing Job' form. The form has the following fields and controls:

- Job Name***: A text input field.
- Profile***: A dropdown menu with 'Select' as the current value.
- Destination Folder***: A button labeled 'Select'.
- Notification Addresses**: A text input field containing 'email@domain.com, other@domain.com'.
- Select Data Sources***: A section with a table of data sources and custodians.

Name	Custodian
<input type="checkbox"/> Atkins, Roman	
<input type="checkbox"/> McDonald, Roland	
<input type="checkbox"/> Zipper, Adam	
- Below the table are buttons: 'All 3' (dropdown), 'Custodian' (dropdown), 'Assign', 'Auto Map Custodians', and 'Add Custodian'.
- At the bottom right are 'Run Job' 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.
- **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 131](#) 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.

- 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 selected 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 70](#) 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** manually or automatically, or by adding a new custodian now, as described 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:

The screenshot shows a dialog box titled "Add Custodian". Inside, there is a "Type" label followed by two radio buttons: "Person" (which is selected) and "Other". Below these are two text input fields labeled "First Name" and "Last Name". At the bottom right of the dialog are two buttons: "Add Custodian" and "Cancel".

- 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. 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. Then, you can select and assign the custodian to the data source.

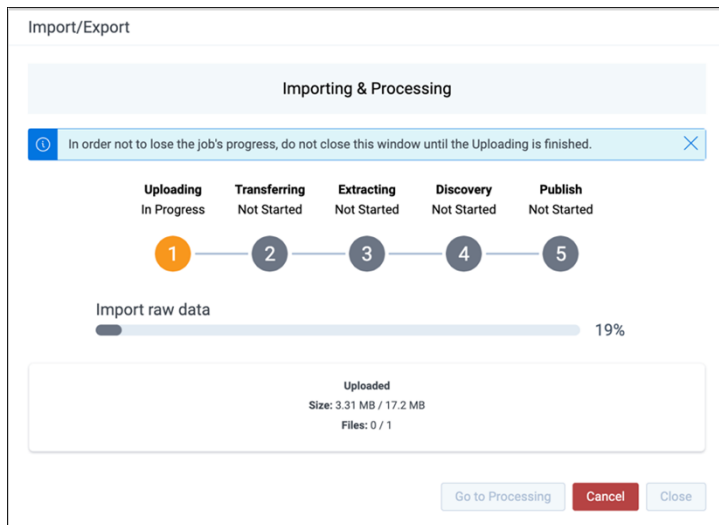
7. Click **Run Job** to start importing data.

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.

Note: Effective August 20, 2024, Import/Export uploads raw (unprocessed) data to the ProcessingSource folder and triggers the Processing application. The ProcessingSource folder is included in your Staging threshold. To avoid additional storage costs, you may want to delete the uploaded raw (unprocessed) data from this folder once it is no longer needed.

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

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



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

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

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

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

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

Notes:

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

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

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

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

Importing Slack short message data for Processing via Import/Export

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

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

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

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

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

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

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

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

4.15 Exporting data using Import/Export

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

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 Relativity's dynamic objects (RDO) load file.

Also see [General recommendations for structured data import and export jobs on page 46](#).

4.15.1 Exporting data using Import/Export

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

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 Relativity's dynamic objects (RDO) load file.

Also see [General recommendations for structured data import and export jobs on page 46](#).

4.15.2 Exporting a folder load file

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

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 48](#) 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 34](#).

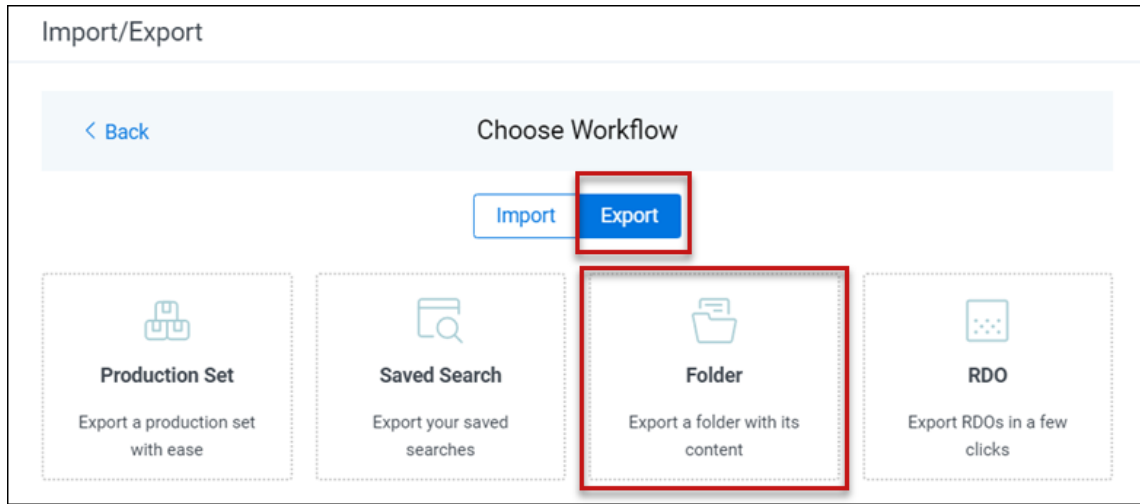
Refer to [Import/Export load file specifications](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 46](#).

To export folders:

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

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

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



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

Folders*

Export Sub-Folders ☐

Views*

Location And Files

Export Location Type* ☒ Local Disk
☐ 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 or both of these options:
 - **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.

Note: This temporary non-Staging Area location is automatically deleted once the download is completed when using Express Transfer or is deleted after 5 days when using web mode for downloads. This data is not included in your Staging Area threshold.

- **Staging Area**—select this option to create a copy of the data in the StructuredData folder in the Staging Area. You will need to use Staging Explorer later to download data. The exported data will not be compressed.
- **Local Disk and Staging Area**—select both options to create a copy of the selected data in the StructuredData folder in the Staging Area, as well as download it to your local disk with Express Transfer or web browser

Note: The StructuredData folder is included in your Staging Area threshold. To avoid additional storage costs, you may want to delete the exported data from that folder once it is no longer needed.

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 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.

- **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

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

Import/Export

< Back

Production Image Type

Production Image Type

Production Images Type * ☐ Original Images
☒ Produced Images

Select Productions

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

Available Productions

Selected Productions

Filter

Filter

Continue Cancel

- **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 existing stored PDFs in the export. No document-to-PDF conversion functionality is performed in this step. The PDFs must already exist as PDF files. If this option is toggled on, then you must set the **Data File Format** for PDF-level load file (Opticon, IPRO, or IPRO (FullText)).
10. On the File And Folders dialog, choose the desired naming convention and folder structure for the exported files, then click **Continue**.

Import/Export

< Back Files And Folders

Text and Native File Names

Named after ☒ Control Number ☐ Custom name

Append original filename ☐

Folder Structure

Group files by ☒ File Type ☐ Workspace Structure

Continue Cancel

Text and Native File Names:

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

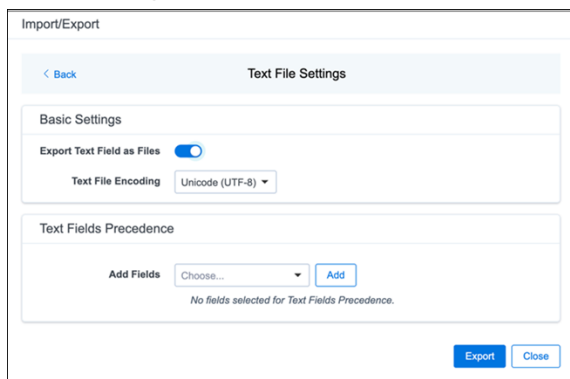
Folder Structure:

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

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

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

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



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

Import/Export

Back

Text File Settings

Basic Settings

Export Text Field as Files
☒

Text File Encoding
Unicode (UTF-8)

Text Fields Precedence

Add Fields *
Production OCR
Add

Extracted Text

Production OCR

Continue
Cancel

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

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

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

Import/Export

[< Back](#)
Advanced Settings

Volume and Subdirectory Information

Set Custom Information ☒

Volume Information

Prefix* VOL

Start* 1

of digits* 2

Max Size (MB)* 650

Subdirectory Information

Image Prefix* IMG

Native Prefix* NATIVE

Text Prefix* TEXT

PDF Prefix* PDF

Start* 1

of digits* 3

Max Files* 500

Continue Cancel

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

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

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

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

- **Text Prefix**—enter the alpha prefix for the sub-directory that stores exported extracted text files.
- **PDF Prefix**—enter the alpha prefix for the sub-directory that stores exported extracted PDF files.
- **Start**—enter the starting number for the sub-directories.
- **# of digits**—select the number of digits of the sub-directory prefix. For example, if you enter 3, the output is IMG001, IMG002, and so on.
- **Max Files**—select the number of files to store in each sub-directory.

14. Click **Continue**.

15. On the Export Job Configuration Summary, review the export job settings and go back to make any corrections as needed.

Import/Export

< Back Export Job Configuration Summary

Data Source

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

Location And Files

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

Data File Settings

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

Export Save Settings Cancel

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

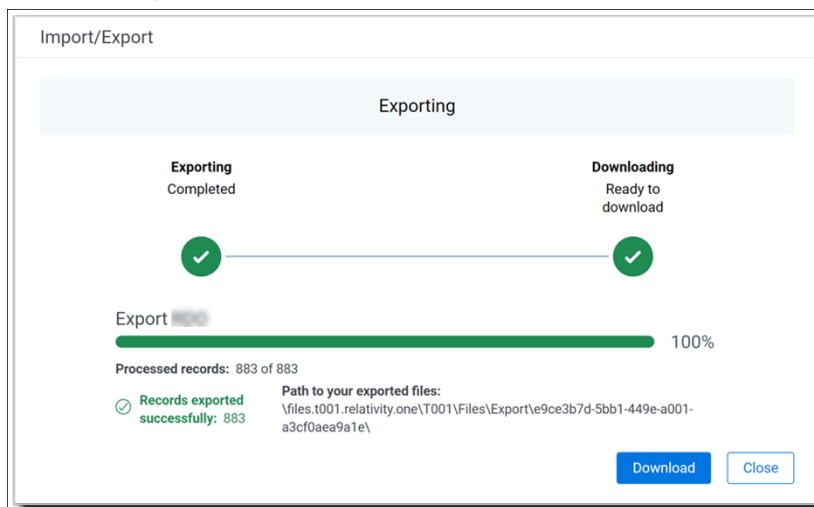
Note: Import/Export saves job configuration settings to its own profile file format (.ie file extension). Comparing to the legacy .kw* standard, it brings more flexibility as you now can apply saved job settings across various workspaces. The .ie profile file format is not supported in other RelativityOne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

17. Click the **Export** button to start the exporting process.

18. When it's complete, the job summary lists the records exported successfully (including Load files containing .dat, opt, etc.), errors found, and path to your exported files.
- If using Import/Export with Express Transfer 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 using Import/Export in web only mode, the application generates a zip file containing the exported data that can be download. Click the **Download** button to save the exported data zip file to your computer, or click the **Close** button to close the dialog without downloading the file.



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

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

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

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

4.15.3 Exporting a production set load file

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

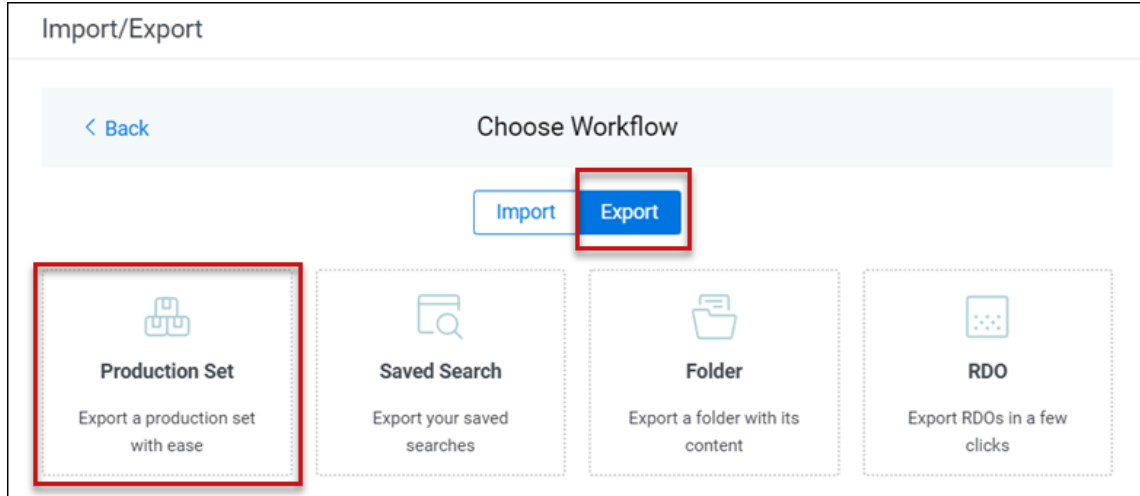
You can use Import/Export to export a production set load file out of RelativityOne.

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 48](#) 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 34](#).

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 46](#).

To export a production load file:

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



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

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

Import/Export

Back

Export Settings

Data Source

Job Name*

Profile*
☒ None
☐ From Local Disk

Production*

Location And Files

Export Location Type*
☒ Local Disk
☐ 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.
- **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 or both of these options:
 - **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.

Note: This temporary non-Staging Area location is automatically deleted once the download is completed when using Express Transfer or is deleted after 5 days when using web mode for downloads. This data is not included in your Staging Area threshold.

- **Staging Area**—select this option to create a copy of the data in the StructuredData folder in the Staging Area. You will need to use Staging Explorer later to download data. The exported data will not be compressed.
- **Local Disk and Staging Area**—select both options to create a copy of the selected data in the StructuredData folder in the Staging Area, as well as download it to your local disk with Express Transfer or web browser

Note: The StructuredData folder is included in your Staging Area threshold. To avoid additional storage costs, you may want to delete the exported data from that folder once it is no longer needed.

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.

Load File Characters

Column*

DC4 (Device control 4)

Quote*

" (Latin Small Letter Thorn)

Newline (Long Text Fields)*

@ (Registered sign)

Multi-Value*

| (Pipe)

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**.

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.

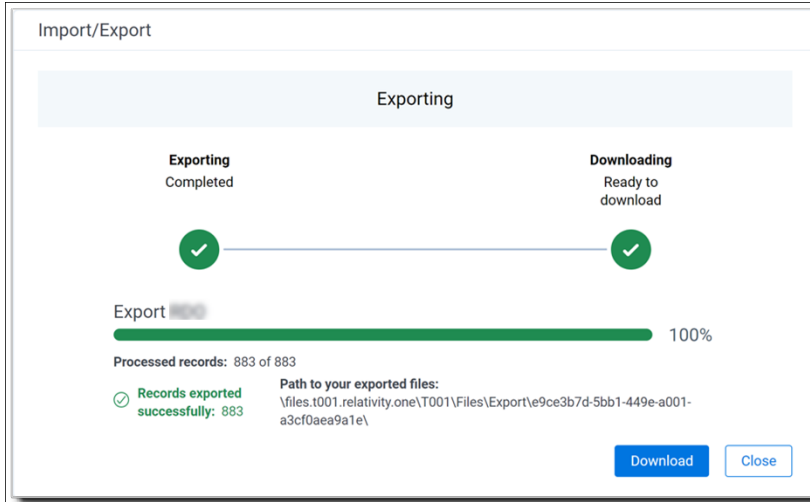
Note: Import/Export saves job configuration settings to its own profile file format (.ie file extension). Comparing to the legacy .kw* standard, it brings more flexibility as you now can apply saved job settings across various workspaces. The .ie profile file format is not supported in other RelativityOne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



- When downloading zip files to your computer, you can configure your browser to allow you save the zip file to a custom file name of your choosing as well as to a specific folder destination instead of using the default file name and destination. In the Settings menu of your browser, select Downloads. Toggle on the option to ask where to save or what to do with each file before downloading. Now, when you click the Download button in the Exporting dialog, your browser will display a dialog that allows you to change the default zip file name and select a destination other than the default one. If needed, you can also create a new folder in the chosen destination for the exported data.
- If you chose to **Export to Staging Area** when setting up your export job on the Export Settings dialog, the application automatically exports data to your RelativityOne file share and skips the downloading process. Go the path listed on the dialog to access the exported data files.

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

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

4.15.4 Exporting an RDO load file

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

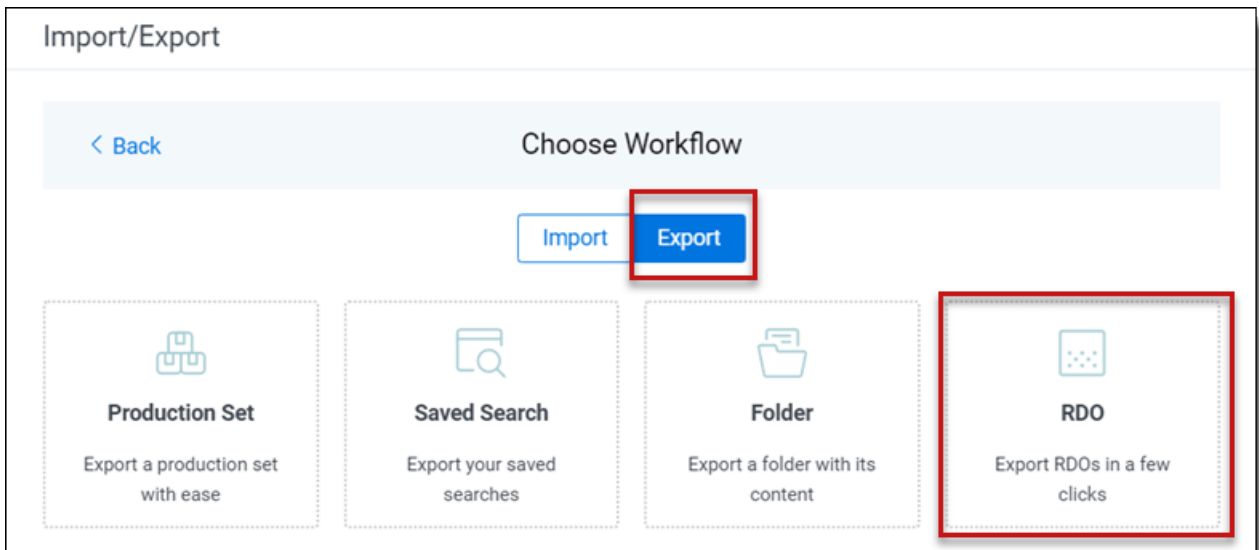
You can use Import/Export to export Relativity's dynamic objects (RDO) load file out of RelativityOne.

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 48](#) 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 34](#).

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 46](#).

To export an RDO load file:

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



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

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

Import/Export

[< Back](#)Export Settings

Data Source

Job Name*

Profile*

☒ None

☐ From Local Disk

Relativity Object Type*

Choose...▼

View*

Choose...▼

Location And Files

Export Location Type*

☒ Local Disk

☐ 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.
- **Relativity Object Type**—select the Object Type you want to export.

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

- **View**—select the View for the selected Object Type.

Note: If exporting translated files, you can use Views if you do not want to export all the translated documents in the workspace. Create a new View on the "Translated Documents Object" and use Conditions to limit it to specific documents. See Mass exporting translated documents and the Community article [Mass Export Native Translated files via Import/Export](#).

- **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 or both of these options:
 - **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.

Note: This temporary non-Staging Area location is automatically deleted once the download is completed when using Express Transfer or is deleted after 5 days when using web mode for downloads. This data is not included in your Staging Area threshold.

- **Staging Area**—select this option to create a copy of the data in the StructuredData folder in the Staging Area. You will need to use Staging Explorer later to download data. The exported data will not be compressed.

- **Local Disk** and **Staging Area**—select both options to create a copy of the selected data in the StructuredData folder in the Staging Area, as well as download it to your local disk with Express Transfer or web browser

Note: The StructuredData folder is included in your Staging Area threshold. To avoid additional storage costs, you may want to delete the exported data from that folder once it is no longer needed.

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**.

The screenshot shows the 'Load File Settings' dialog box. At the top, there's a 'Back' button and the title 'Load File Settings'. Below this is the 'Data File Settings' section. It contains several configuration options: 'Data File Format' with radio buttons for .dat (Concordance), .csv (Comma separated), .html (HTML), and .txt (Custom); 'Start Line' with a text input field set to '1'; 'Data File Encoding' with a dropdown menu set to 'Unicode (UTF-8)'; 'Regional Settings (Date And Time)' with a dropdown menu set to 'English (United States) | en-US'; 'Long time (with seconds)' with a toggle switch turned on, showing a date and time '12/25/2000 12:00:00 AM'; and 'Export Multiple Choice Fields as Nested' with a toggle switch turned off. At the bottom right, there are 'Continue' and 'Cancel' buttons.

- **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.

- **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 Selected Fields column is automatically populated with fields that are included in the selected view. The Workspace Fields box displays all available fields. Only the fields listed in the Selected Fields box will be exported.

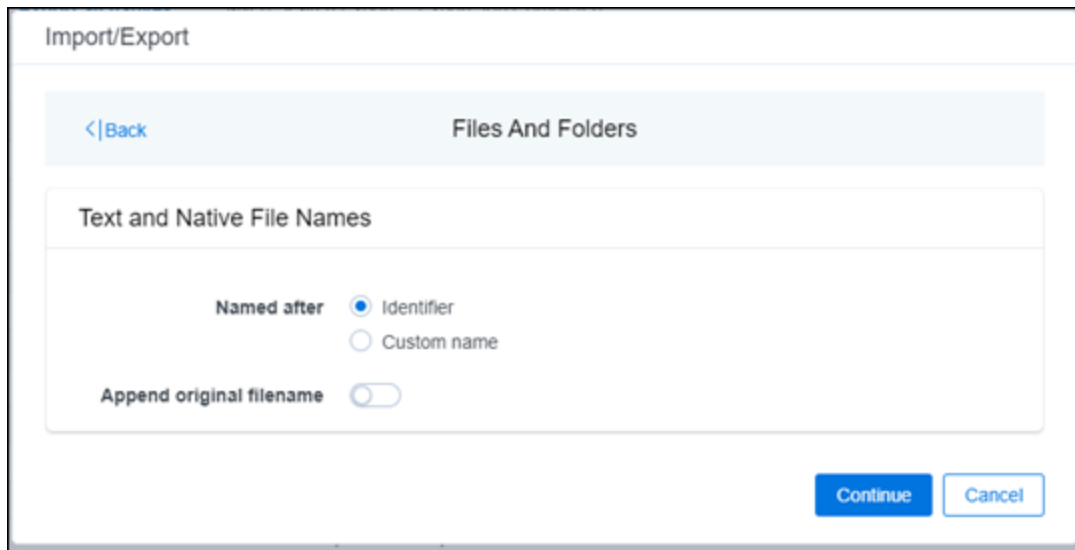
You can do the following to move fields:

- 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

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

8. 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.

- **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.

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

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

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

Import/Export

[< Back](#) Advanced Settings

Volume and Subdirectory Information

Set Custom Information ☒

Volume Information

Prefix * VOL

Start * 1# of digits * 2

Max Size (MB) * 650

Subdirectory Information

Native Prefix * NATIVE

Start * 1# of digits * 3

Max Files * 500

ContinueCancel

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

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

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

- **Native Prefix**—enter the alpha prefix for the sub-directory that stores exported native files.
- **Start**—enter the starting number for the sub-directories.
- **# of digits**—select the number of digits of the sub-directory prefix. For example, if you enter 3, the output is IMG001, IMG002, and so on.
- **Max Files**—select the number of files to store in each sub-directory.

12. Click **Continue**.

13. On the Export Job Configuration Summary, review the export job settings and go back to make any corrections as needed.

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.

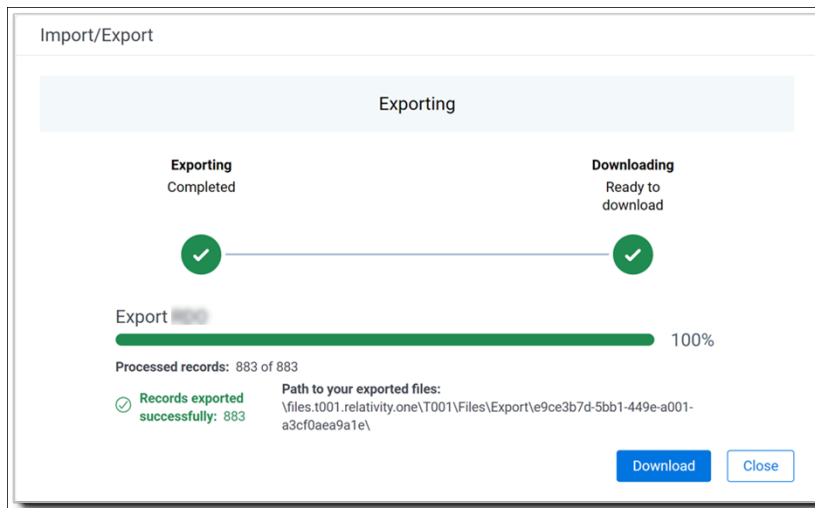
15. Click the **Export** button to start the exporting process.

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 using Import/Export with Express Transfer 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 using Import/Export in web only mode, the application generates a zip file containing the exported data that can be download. Click the **Download** button to save the exported data zip file to your computer, or click the **Close** button to close the dialog without downloading the file.



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

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

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

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

4.15.5 Exporting a saved search load file

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

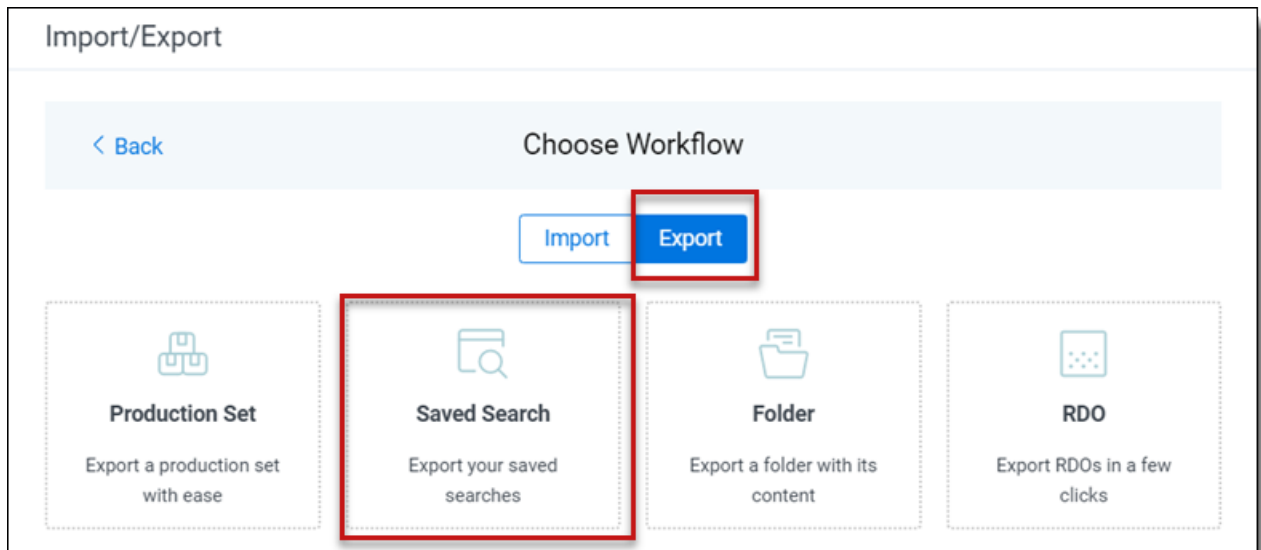
You can use Import/Export to export a saved search load file out of RelativityOne.

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 48](#) 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 34](#).

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 46](#).

To export a saved search load file:

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



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

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

Import/Export

[< Back](#)
Export Settings

Data Source

Job Name*
Profile*
None
From Local Disk
Saved Search*
Choose...

Location And Files

Export Location Type*
☒ Local Disk
☐ 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 or both of these options:
 - **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.

Note: This temporary non-Staging Area location is automatically deleted once the download is completed when using Express Transfer or is deleted after 5 days when using web mode for downloads. This data is not included in your Staging Area threshold.

- **Staging Area**—select this option to create a copy of the data in the StructuredData folder in the Staging Area. You will need to use Staging Explorer later to download data. The exported data will not be compressed.
- **Local Disk and Staging Area**—select both options to create a copy of the selected data in the StructuredData folder in the Staging Area, as well as download it to your local disk with Express Transfer or web browser

Note: The StructuredData folder is included in your Staging Area threshold. To avoid additional storage costs, you may want to delete the exported data from that folder once it is no longer needed.

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 Thorn)

Newline (Long Text Fields)*

@ (Registered sign)

Multi-Value*

| (Pipe)

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

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

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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**.

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 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 existing stored PDFs in the export. No document-to-PDF conversion functionality is performed in this step. The PDFs must already exist as PDF files. If this option is 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.

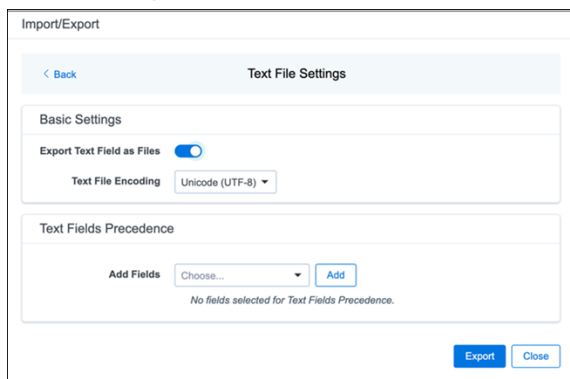
Folder Structure:

- **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.



- **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.

The screenshot shows the 'Import/Export' dialog box with the 'Export Job Configuration Summary' tab selected. The dialog contains the following settings:

Data Source	
Job Name	SavedSearchExport_001
Saved Search	Case-00294
Profile	No

Location And Files	
Export Location Type	Download to local disk

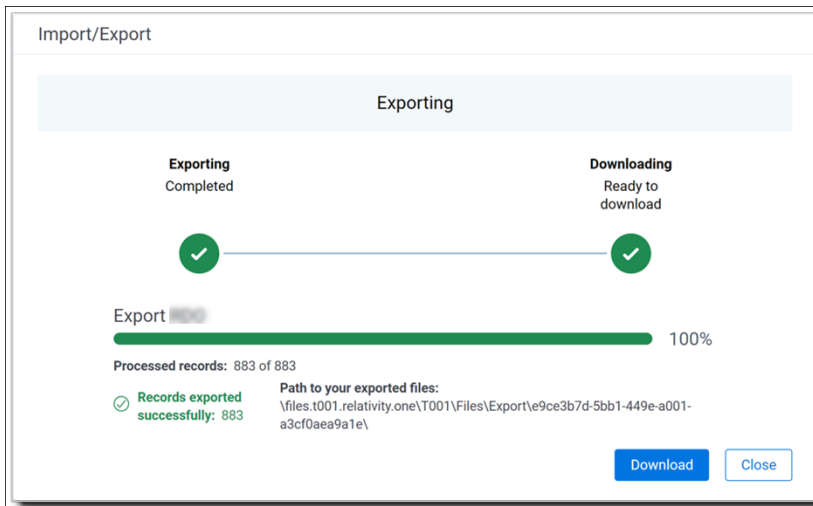
Data File Settings	
Data File Format	.dat (Concordance)
Data File Encoding	Unicode (UTF-8)
Export Multiple Choice	No

At the bottom right of the dialog are three buttons: **Export** (highlighted in blue), **Save Settings**, and **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. 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 using Import/Export with Express Transfer 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 using Import/Export in web only mode, the application generates a zip file containing the exported data that can be download. Click the **Download** button to save the exported data zip file to your computer, or click the **Close** button to close the dialog without downloading the file.



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

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

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

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

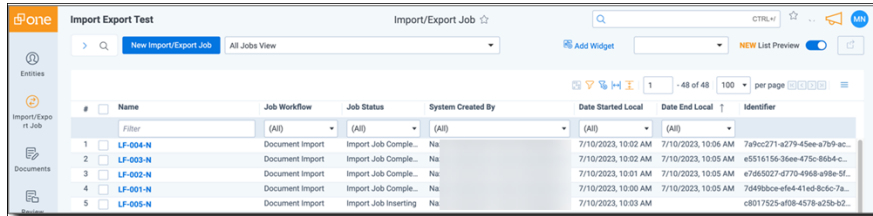
4.16 Import/Export Job tracking and history

The Import/Export Job page enables you to monitor the progress of jobs currently running, review previous jobs that were executed, and view other pertinent job details at the workspace level.

Note: To monitor jobs at the instance level, see [Import/Export queue on page 187](#).

4.16.1 Reviewing the Import/Export Job page

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



The screenshot shows the 'Import/Export Test' page in RelativityOne. It features a table with columns: #, Name, Job Workflow, Job Status, System Created By, Date Started Local, Date End Local, and Identifier. The table lists five jobs, all with 'Document Import' workflow and 'Import Job Complete' status. The jobs are named LF-004-N, LF-003-N, LF-002-N, LF-001-N, and LF-005-N. The table also includes a search bar, a filter dropdown, and a 'NEW List Preview' button.

#	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	7a9ec271-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	e7663027-d770-49a8-a98e-5f...
4	LF-001-N	Document Import	Import Job Complete...	Na	7/10/2023, 10:00 AM	7/10/2023, 10:05 AM	764980ee-e9e4-41e8-8c6c-7a...
5	LF-005-N	Document Import	Import Job Inserting	Na	7/10/2023, 10:00 AM		e8017329-a958-4578-e25b-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.

4.16.2 Support for Mass Operations

The Import/Export Job page only supports the following Mass Operations:

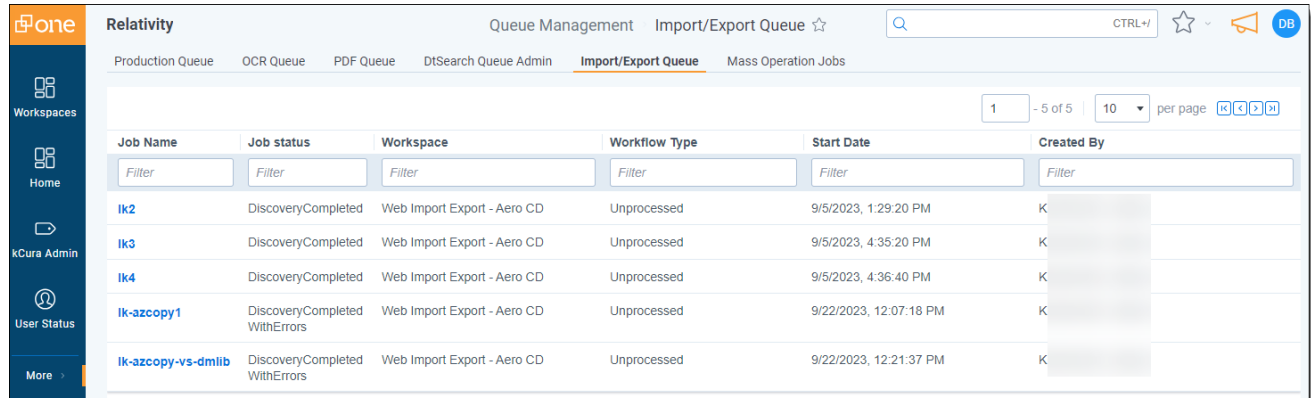
- **Delete**—select the check box next to the desired Import/Export jobs that you want to delete from the Job list. Then, choose **Delete** from the Mass Operations drop-down list at the bottom of the list. This action only removes the job line item from the Job list and does not remove the job data that was already uploaded to or exported from your system. You will need to manually delete those files from your system.
- **Export to a file**—select the check box next to the desired Import/Export jobs in list to export the data in the current view to a text file. Then, choose **Export to File** from the Mass Operations drop-down list at the bottom of the list. The data currently displayed in the rows and columns of the Job list for the selected jobs will be exported. As you change the columns displayed, so will the data that is exported. If no individual records are selected, Relativity will export all records in the current view, regardless of how many records are displayed per page.

4.17 Import/Export queue

Import/Export Queue lists the current Import/Export jobs in progress and their status throughout the RelativityOne instance. You can find the Import/Export Queue under the Queue Management tab.

Notes:

- Users who have been granted permissions to the Queue Management tab in the Tab Visibility section of the Admin Security console automatically have access to the Import/Export Queue tab.
- To monitor jobs at the workspace level, see [Import/Export Job tracking and history on page 185](#).



Job Name	Job status	Workspace	Workflow Type	Start Date	Created By
lk2	DiscoveryCompleted	Web Import Export - Aero CD	Unprocessed	9/5/2023, 1:29:20 PM	K
lk3	DiscoveryCompleted	Web Import Export - Aero CD	Unprocessed	9/5/2023, 4:35:20 PM	K
lk4	DiscoveryCompleted	Web Import Export - Aero CD	Unprocessed	9/5/2023, 4:36:40 PM	K
lk-azcopy1	DiscoveryCompleted WithErrors	Web Import Export - Aero CD	Unprocessed	9/22/2023, 12:07:18 PM	K
lk-azcopy-vs-dmliib	DiscoveryCompleted WithErrors	Web Import Export - Aero CD	Unprocessed	9/22/2023, 12:21:37 PM	K

The Import/Export Queue provides job information for the following fields:

- **Job Name**—the name of the job, as entered during creation. Click on the link to navigate to the Import/Export job details.
- **Job Status**—the current state of the job, as represented by the following status values:
 - Extraction Requested
 - Extraction In Progress
 - Extraction Completed
 - Upload Requested
 - Upload In Progress
 - Upload Retried
 - Upload Completed
 - Import Job Requested
 - Import Job Idle
 - Import Job Scheduled
 - Import Job Inserting
 - Processing Requested
 - Discovery Not Started

- Discovery In Progress
- Discovery Completed
- Publish Not Started
- Publish In Progress
- Transfer Requested
- Transfer In Progress
- Transfer Completed
- Export Job Requested
- Export Job Scheduled
- Export Job In Progress
- **Workspace**—the workspace in which the job was created and run.
- **Workflow Type**—the type of import/export job, as represented by the following values:
 - Unprocessed—job was initiated using the Raw (Unprocessed) Data workflow option within the Import tab.
 - Document Import—job was initiated using the Structured (Processed) Data workflow>Document option within the Import tab.
 - Image Import—job was initiated using the Structured (Processed) Data workflow>Image option within the Import tab.
 - Production Import—job was initiated using the Structured (Processed) Data workflow>Production option within the Import tab.
 - RDO Import—job was initiated using the Structured (Processed) Data workflow>RDO option within the Import tab.
 - Production Export—job was initiated using the Structured (Processed) Data workflow>Production Set option within the Export tab.
 - Saved Search Export—job was initiated using the Structured (Processed) Data workflow>Saved Search option within the Export tab.
 - Folder Export—job was initiated using the Structured (Processed) Data workflow>Folder option within the Export tab.
 - RDO Export—job was initiated using the Structured (Processed) Data workflow>RDO option within the Export tab.
- **Start Date**—the date on which the job was started.
- **Created By**—the user who started the job.

5 Integration Points

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

Integration Points offers a solution to configure integrations from third party systems to Relativity objects and between Relativity workspaces. For more information, see [Promoting data between workspaces through Integration Points on page 277](#).

Interested developers can create a separate ADS application to pull data from a third party system source provider. Integration Points ingests that application to handle the scheduling, setup, field mapping, and actual import into Relativity. By using the Integration Points platform, developers can reduce the amount of time needed to create these custom integrations while end users receive a consistent and easy setup approach.

In addition to supporting developer-built custom integrations, Integration Points also provides a built-in integration to Lightweight Directory Access Protocol (LDAP) enabled HR servers such as Microsoft Active Directory. Built on the Integration Points platform, the LDAP integration can filter and schedule imports from Active Directory data into a Relativity workspace. For example, the workstations, employee names, and data shares, among others.

Since the Integration Points does not offer Full Name field calculation for Custodian/Entity object, the field is not available as an option for mapping. If you need to update the Entity object, please use the LDAP provider, which allows new records to be added with a field other than Full Name as the identifier. Alternatively, you may consider using Import/Export for Custodians/Entities updates.

Note: You can locate an application's version number by navigating to Applications & Scripts > Application Library tab. You must be a system admin to access this tab.

5.1 Using Integration Points scenarios

Using Integration Points as a developer

You are the lead developer of an organization responsible for building Relativity customizations. One of your clients started tracking all of their litigation-related information outside of Relativity in a new product called Whazootie. They mention to you that they would love to have this same information available in their Relativity workspaces to tie their document review to specific case information.

You use Whazootie's APIs to build a simple Relativity application to connect to a Whazootie website without building any import or setup steps. You give the application to your client along with Integration Points for them to install in a workspace. They can use all the security, scheduling, setup, and import options available in Integration Points along with the Whazootie connection to set up multiple imports that bring Whazootie data into their Relativity workspace.

Using Integration Points as an end user

You are the litigation support professional responsible for setting up workflows and templates to help manage your company's legal hold procedure using Relativity Legal Hold. You want to ensure that all custodian information is kept up-to-date so that holds always go to the correct email address and that the litigation team is aware of custodians who have changed departments or left the company. Unfortunately, all of the custodian information is scattered across multiple company HR servers containing unnecessary computer and network data.

To solve this problem, you use the Integration Points setup wizard to configure new integrations to each HR server, mapping items to specific Relativity fields. You work with your team to configure a filter in each setup so that only the appropriate employees are brought in as Custodians and schedule the import to occur automatically each night during off-hours. As a result, your custodian address book is always up-to-date, ensuring that proper litigation workflows are followed with every custodian.

5.2 Installing Integration Points

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

To successfully use Integration Points, you need to install the Integration Points application to at least one workspace.

5.2.1 Installing Integration Points

Since Integration Points uses the ADS framework, you have the following options available for installing Integration Points in your environment.

- **Install Integration Points from the Application Library** - If you add the Integration Points application to the Application Library, you can install it to the current workspace, or to multiple workspaces at once, from the Application Library.
- **Install Integration Points from an external file** - You can import the Integration Points application into your workspace from an external file if it has not been added to the Application Library.

Once you install Integration Points application, the necessary Integration Points agents will be deployed automatically.

5.2.2 Security permissions

The following tables provide detailed breakdowns of the security permissions required to use Integration Points.

To submit a job for a non-Relativity source provider (FTP, LDAP, or Load File) and display console errors for that job, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Workspace	View, Edit, Add
Source	Integration point	View
Source	Job History	View, Edit, Add
Source	Destination Provider	View
Source	Source Provider	View
Source	Integration Point Type	View
Destination	Destination RDO	View, Edit, Add
Destination	Allow Import	Admin operation

To submit a job with Relativity as the source provider and display console errors for that job, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Workspace	View, Edit, Add
Source	Integration point	View
Source	Job History	View, Edit, Add
Source	Destination Provider	View
Source	Source Provider	View
Source	Integration Point Type	View
Source	Document	View, Edit
Source	Search	View, Edit, Add
Source	Advanced & Saved Searches <ul style="list-style-type: none"> ▪ The saved search that you use for the integration point must have an owner of Public. 	Browser
Source	Tab Visibility	Workspace Details
Destination	Destination Workspace	View, Edit, Add
Destination	Allow Export	Admin operation
Destination	Tab Visibility	Workspace Details

If you are creating an integration point for a non-Relativity source provider (FTP, LDAP, or Load File), Relativity assumes you have the following system admin permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration point	View, Edit <ul style="list-style-type: none"> ▪ Edit is required for adding Job History

Workspace	Object/operation/tab	Permission type
		RDO's.
Source	Job History	View, Edit, Add
Source	Job History Error	View, Edit, Add <ul style="list-style-type: none"> Edit is required to mark errors as new and expired

If you are creating an integration point with Relativity as the source provider, Relativity assumes you have the following system admin permissions:

Workspace	Object/operation/tab	Permission type
Source	Destination workspace	View, Edit, Add <ul style="list-style-type: none"> Edit is required to rename destination workspaces.
Destination	Manage Object Types <ul style="list-style-type: none"> This is required to create new object types. 	Admin operation
Destination	Source workspace	Add, Edit <ul style="list-style-type: none"> Edit is required for situations when Relativity renames the destination workspace upon a source workspace name change.
Destination	Source job	Add

To view an integration point with any source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Job History	View
Source	Integration point	View
Source	Integration point type	View

To create and edit an integration point with any source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration point	View, Edit, Add <ul style="list-style-type: none"> Edit is only required if you're editing the integration point. Add is only required if you're creating the integration point.
Source	Integration point type	View

Workspace	Object/operation/tab	Permission type
Destination	Allow Import	Admin operation

To create an integration point with a Relativity source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Allow Import	Admin operation

To create an integration point with any source provider from an integration point profile, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration point profile	View

To view any integration point profile, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration point profile	View
Source	Source provider	View
Source	Destination provider	View
Source	Integration point type	View

To create and edit an integration points profile with any source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration Point Profile	View, Edit, Add <ul style="list-style-type: none"> Edit is only required if you're editing the integration point profile. Add is only required is you're creating the integration point profile.
Source	Integration Point Type	View
Source	Source Provider	View
Source	Destination Provider	View
Destination	Allow Import	Admin operation

To create and edit an integration points profile with a Relativity source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Allow Import	Admin operation

If you do not have sufficient permissions and you attempt to perform either of the following actions, you will see an error message stating "You do not have sufficient permissions. Please contact your system administrator." In each case, Relativity creates an error listing all missing permissions.

- Loading the integration points console or clicking Run Now or Retry:
 - If the error occurs after a button click, the message is prefixed with, "Failed to submit integration job."
 - If the job is a retry job, the prefix reads, "Failed to submit the retry job."
- Saving an integration point after creating a new one or editing an existing one.

Note: Integration points is tenant-aware. This means that workspace admins within a tenancy receive an error if they attempt to push to a workspace they do not have permissions to. This error occurs when they click Run Now on the integration point that they create to push documents to review.

5.3 Integration Points profiles

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

You have the option of creating and saving Integration Points profiles, which can be used to run future common import or export jobs through Integration Points without having to recreate them each time. The profiles can be specific to each data source so that you can reuse the settings and avoid having to remap fields multiple times.

5.3.1 Creating Integration Point profiles

You can create in Integration Point profile through the Integration Point Profile tab. Or, if you are in the process of creating or editing an Integration Point job, you can save it as a profile for future use from the Transfer Options console. Both methods are described below.

To save a newly created or edited integration point as a profile, follow the steps below:

1. While on the create or edit Integration Points window, click the **Save as Profile** button on the Transfer Options console.

Integration Point Details

Buttons: Edit, Delete, Back, Edit Permissions, View Audit

1 of 1

General		Scheduling	
Name	Natives Only	Log Errors	Yes
Overwrite	Append/Overlay	Has Errors	No
Export Type	Workspace; Natives	Email Notification Recipients	
Source Details	Saved Search: Sample		
Source Workspace	JJG - Source	Total of Documents	Press 'Calculate statistics' button
Source Relativity Instance	This Instance(RelativityOne US)	Total of Natives	Press 'Calculate statistics' button
Transferred Object	Document	Create Saved Search	Yes
Destination Workspace	JJG - Data v. Transfer	Tag Documents	Yes (Source and Destination Workspaces)
Destination Folder	JJG - Data v. Transfer		
Multi Select Overlay	Use Field Settings		
Use Folder Path Info	No		
Move Existing Docs	No		

Transfer Options

Buttons: Run, Retry Errors, Calculate statistics, Save as Profile

2. Enter a descriptive name to help identify the profile in the **Integration Point Profile Name** field and click **Ok**. Note that the Integration Point Profile Name field defaults to the name you originally gave the integration point you created. You can change it, if desired, or keep it as is.

Save Integration Point as Profile

Integration Point Profile Name* Documentation export

Buttons: Ok, Cancel

To create a profile through the Integration Point Profile tab, follow the steps below:

1. Select the **Integration Point Profile** tab.
2. Click **New Integration Point Profile**.
3. Complete the required fields as needed. The fields and layouts for creating a profile here are identical to those for creating any integration point that you intend to run. For more information, see [Importing data through Integration Points on page 200](#) or [Exporting data through Integration Points on page 236](#).

Integration Points Job History Job History Errors Destination Workspaces **Integration Point Profile**

Create Integration Point Profile Cancel ⓘ

Setup 1 Complete the Setup 2 ← Back Next →

General

Name:

Type: ☐ Import ☒ Export

Source: ▼

Destination: ▼

Transferred Object: ▼

Profile: ▼

Advanced

Email Notification Recipients:
Separate by semi-colon

Log Errors: ☒ Yes ☐ No

Scheduling

Enable Scheduler: ☐ Yes ☒ No

4. Once the profile is saved, you do not have the option to run it. Instead, you see a detailed layout of the profile you just created.

Integration Point Profile Layout
Edit
Delete
Back
Edit Permissions
View Audit
1 of

General
Scheduling

Name	Documentation export	Log Errors	Yes
Overwrite Fields	Append/Overlay	Email Notification Recipients	
Source Provider	Relativity	Promote Eligible	No
Destination Configuration	<pre>{ "artifactTypeID": 10, "destinationArtifactTypeID": 10, "caseArtifactId": 27535753, "copyFilesToDocumentRepository": false, "entityManagerFieldContainsLink": false, "destinationFolderArtifactId": 1003697, "extractedTextFieldContainsFilePath": false, "extractedTextFileEncoding": "utf-16", "fieldOverlayBehavior": "Use Field Settings", "useDynamicFolderPath": false, "identityFieldId": 0, "importNativeFile": true, "importNativeFileCopyMode": "Copy Files", "importOverwriteMode": "Append Overlay", "longTextColumnThatContainsPathToFullText": null, "provider": "relativity", "destinationProviderType": "74A863B9-00EC-4BB7-9B3E-1E22323010C6", "selectedCaseFileRepoPath": null, "autoNumberImages": false, "productionImport": false, "imageImport": false, "moveExistingDocuments": false, "productionPrecedence": 0, "includeOriginalImages": false, "imagePrecedence": [], "productionArtifactId": 0, "createSavedSearchForTagging": true, "taggingOption": "Enabled", "useFolderPathInformation": false, "folderPathSourceField": 0, "useSmartOverwrite": false, "overlayIdentifier": "Control Number", "artifactTypeName": "Document" }</pre>		
Source Configuration	<pre>{ "savedSearchArtifactId": 1075881, "typeOfExport": 3, "productionImport": false, "sourceWorkspaceArtifactId": 27715332, "targetWorkspaceArtifactId": 2753575 }</pre>		

5. Once a profile is saved, it's visible in the Integration Point Profiles tab.

Integration Points
Job History
Job History Errors
Destination Workspaces
Integration Point Profile

>
New Integration Point Profile
All Profiles
Add Widget

1

#	Name	Type	Source Provider	Destination Provider
	Filter	Filter	Filter	Filter
1	Documentation Exp...	Export	Relativity	Relativity

Note: To configure an Integration Point profile that can be copied to another workspace, see [Configuring an Integration Point Profile for copying on the next page](#).

Once the profile is created, you have the option of applying it to a new Integration Point by selecting it in the **Profile** field on the Setup layout.

The screenshot shows the 'Create Integration Point' dialog box. At the top, there's a title bar 'Create Integration Point'. Below it is a progress bar with two steps: 'Setup' (step 1, active) and 'Complete the Setup' (step 2). The 'Setup' step is highlighted with a blue circle and the number '1'. The 'Complete the Setup' step is highlighted with a grey circle and the number '2'. Below the progress bar is the 'General' tab. The 'General' tab contains the following fields: 'Name' (text input with 'New export'), 'Type' (radio buttons for 'Import' and 'Export', with 'Export' selected), 'Source' (dropdown menu with 'Relativity'), 'Destination' (dropdown menu with 'Relativity'), 'Transferred Object' (dropdown menu with 'Document'), and 'Profile' (dropdown menu with 'Select...'). The 'Profile' field is highlighted with a red rectangle.

If the Destination workspace is changed after the fields have been mapped, the fields will automatically be remapped. The artifacts are mapped based on their names only if the ArtifactIDs are different in the new destination workspace. This mapping occurs so that the integration points job will not fail. Therefore, if the source workspace fields cannot match to the new destination workspace fields, those unmatched fields are presented at the end of the mappings list for easy identification. Relativity also displays a message to inform you that the original source fields from the profile were mapped with corresponding fields from the destination workspace.

5.3.2 Copying Integration Point profiles

You can copy the configuration of a Relativity Integration Point profile from a template workspace to a new workspace as long as the profile's Type field is set to **Export** and the Source and Destination fields are set to **Relativity**. This profile configuration is considered a non-document object. For a list of non-document objects that can be copied, see the Admin Guide. Once copied to the new workspace, the profile's fields are mapped and are editable.

Note: If the Integration Point Profile configuration has the Type field set to Import or Export and the Destination field set to Loadfile, it will not be copied to the new workspace.

5.3.2.1 Configuring an Integration Point Profile for copying

In order to copy a profile to another Relativity workspace, it has to be configured a certain way.

To properly configure an Integration Point profile so that can be copied to another Relativity workspace, set the fields as shown below.

5.3.2.2 For Setup

- **Name**—enter a profile name of your choice.
- **Type**—select **Export**. This field must be set to Export for the profile to be copied.
- **Source**—select **Relativity**. This field must be set to Relativity for the profile to be copied.
- **Destination**—select **Relativity**. This field must be set to Relativity for the profile to be copied.
- **Transferred Object**—select the Document or non-document object meta data you want to sync to the destination workspace. The non-document object must already exist in the destination workspace.
- **Profile**—select a profile of your choice.

5.3.2.3 For Connect to Source

- **Source**—defaults to saved search.

Notes: When updating the connection to source for the copied profile, the Source field defaults to Saved Search. The Saved Search field is empty and you need to select the saved search of your choice whether it's the same saved search as the original profile or a different saved search.

- **Saved Search**—select the saved search of your choice.
- **Destination Workspace**—select the destination workspace of your choice.
- **Location**—select a location of your choice.
- **Create Saved Search**—select Yes or No.

The screenshot shows a configuration window with two main sections: 'Source' and 'Destination'. The 'Source' section has a 'Source:' dropdown set to 'Saved Search' and a 'Saved Search:' dropdown set to 'Select...' with a blue button to its right. The 'Destination' section has a 'Destination Workspace:' dropdown set to 'Copy Profiles'. Below this, the 'Location:' section has two radio buttons: 'Folder' (selected) and 'Production Set'. The 'Folder' option has a 'Select...' dropdown, and the 'Production Set' option has a 'Select...' dropdown with a plus icon to its right. At the bottom, the 'Create Saved Search:' section has two radio buttons: 'Yes' and 'No' (selected).

Once the above fields are configured, the profile is ready to use for copying.

When you are ready to create a new workspace using the profile, go to Workspaces and click the **New Workspace** button. Then, click **Select** next to Template Workspace and select the workspace in the list with

the Integration Points profile that you want to use. For more information on creating a workspace template, see the Admin Guide.

5.4 Importing data through Integration Points

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

Integration Points provides you with the ability to import a CSV file, LDAP, or load file directly into your workspace, and schedule future or recurrent import jobs.

Note: Although importing and exporting a load file is possible in Integration Points, Import/Export is the main application recommended for a stable and efficient load file import and export.

All Integration Points jobs are fully editable after run.

Note: Changing root folder permissions during import is not a supported workflow.

5.4.1 Creating an import Integration Point

The general workflow for creating Integration Points to import data are listed below. For specific details and parameters surrounding each type of integration point you need to create, refer to the other sections in this topic:

1. Navigate to **Integration Points** in your workspace.
2. On the Integration Points tab, click **New Integration Point**.
3. Set up the new integration point parameters.
4. Connect to the data source by setting up the connection parameters.
5. Map the import fields.
6. Click **Save**.

Once you save the integration point, you can run the import job. For more information, see [Manually running the import job on page 232](#).

5.4.2 Importing a CSV file

Note: Opening a new port for your RelativityOne instance will require a Security assessment.

5.4.2.1 Setup

To create an integration point for importing an FTP (CSV file), begin by configuring the Setup parameters.

1. Complete the fields in the **Setup** layout:

Create Integration Point

Cancel ⓘ

Setup Complete the Setup

1 2

← Back Next →

General

Name:

Type: ☒ Import ☐ Export

Source:

Destination:

Transferred Object:

Profile:

Advanced

Email Notification Recipients:
Separate by semi-colon

Log Errors: ☒ Yes ☐ No

Scheduling

Enable Scheduler: ☐ Yes ☒ No

General:

- **Name**—the name of your integration for reference purposes.
- **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
- **Source**—select **FTP (CSV File)** to sync to a Custodian list on an FTP Server to automatically update custodian information in your workspace. We strongly recommend using a secured FTP server and not using anonymous authentication.
- **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type, since you have already designated that you want to import into a Relativity workspace. You will select the specific workspace on a subsequent layout.
- **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. If you are importing the entity object, select **Entity** here.
- **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you have already created, select it from the drop-down list. For more information, see the Integration Points guide.

Advanced:

- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity doesn't log these item level errors.
 - Regardless of your selection, job-level errors are always recorded in Relativity.

Scheduling:

- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available:
 - **Frequency** —the interval at which Relativity syncs this integration point. Select one of the options below:
 - **Daily**—select this option to sync once every day.
 - **Weekly**—select this option to sync on a weekly basis. Then, enter data in the following fields:
 - **Reoccur**—enter a numeric value in the **Every # week(s)** field for how often you want it to occur weekly.
 - **Send On**—specify on which day of the week (Monday through Sunday) the sync will take place by selecting any of the days of the week listed.
 - **Monthly**—select this option to sync on a monthly basis. Then, enter data in the following fields:
 - **Reoccur**—enter a numeric value in the **Every # month(s)** field for how often you want it to occur monthly.
 - **Send On**—select the **Day # of the month** that you want this integration point to sync.
 - **Start Date**—the date that you want Integration Points to start syncing the data.
 - **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
 - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.
 - **Time Zone**—select the appropriate time zone.

2. Click **Next** to advance to the Connect to Source layout.

5.4.2.2 Connect to source

Continue to create your import integration point by connecting Relativity to the data source by following the steps below.

1. In the **Connect to Source** layout, complete the following fields:

The screenshot shows a 'Create Integration Point' dialog box with three steps: Setup, Connect to Source (current), and Map Fields. The 'Connect to Source' step contains two sections: 'Connection Information' and 'File Information'. The 'Connection Information' section has fields for Host, Protocol (FTP), Port (21), Username, and Password. The 'File Information' section has a CSV Filepath field with the example value: e.g. /export/nightlyexport/yyyy-MM-dd*_HRIS_export.

Connection Information:

- **Host**—the FTP (File Transfer Protocol) or SFTP (SSH File Transfer Protocol) server address. For example, *filetransfer.example.com*. If Relativity cannot locate this address, you will receive an error stating that the remote could not be resolved, and you will not be able to proceed.
- **Protocol**—select the FTP or SFTP protocol.
- **Port**—the server port to which you want to connect. The FTP protocol default Port number is 21. The SFTP protocol default Port number is 22. The standard network ports 21 or 22 should be open on both RelativityOne and FTP server for outgoing connections from RelativityOne's Web and Agent servers and for listening (FTP server). Some firewall solutions may impact the connectivity between RelativityOne and the FTP server.

Note: If you need to open any port, please contact [Relativity Support](#) and allow at least three days to respond. Opening a new port for your RelativityOne instance requires a Security assessment. To successfully import an FTP (CSV file), the standard network ports should be open on both RelativityOne and FTP server for outgoing connections from RelativityOne's Web and Agent servers and for listening (FTP server). Note that the firewall solutions may impact the connectivity between RelativityOne and the FTP server.

- **Username**—(Optional) the username to use for authentication. If left blank, Integration Points will use "anonymous."
- **Password**—(Optional) the associated password to use for authentication. If left blank, Integration Points will use "anonymous."

File Information:

- **CSV Filepath**—the location of the CSV file that Integration Points imports from the FTP/SFTP server. If you set the generated CSV file to always include the date, you can specify this file path value to use date wildcards so that Integration Points always imports the latest file. For

example, the following file path will import the most recently dated file:

`/export/nightlyexport/*yyyy*-*MM*-*dd*_HRIS_export.csv`

- Wildcards are case sensitive.
 - The wildcard feature only pulls data from a file name with the current date.
 - You can also use hh:MM:ss for hours, minutes, and seconds, with capital M's for minutes. When using times, only file names within the last hour are found.
2. Click **Next** to advance to the Map Fields layout, which contains a list of Relativity fields from their destination RDO as well as attributes that the source provider pulled back.

5.4.2.3 Map fields

Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields.

1. In the **Map Fields** wizard, you have the following options for mapping fields:
 - Click the **Map All Fields** button to automatically map all Source fields with matching Destination field names, except single/multiple object fields.
 - Use the Shift+click and Ctrl+click method to select multiple fields at a time.
 - Use the single and double arrow buttons or double-click a field to move the selected fields between columns.
 - If you have Destination Fields that are mapped to fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.
 - The field names in the Destination columns include the type of each field listed.

When mapping fields, here are some issues to note:

- If the WebAPIPath instance setting in kCura.IntegrationPoints is not configured correctly after upgrade or installation, the Source Fields list will be empty because it cannot return any attributes. As a result, you cannot map fields.
- When importing the Entity object:
 - You need to map the First Name and Last Name fields. In case the Full Name field is not being mapped, those two fields are combined for the Full Name value, which is then written to the Entity object.
 - You can link the imported entity to a manager if the manager also exists in the entity database. To proceed with linking them, you must map the Manager field on the Field Mappings page. Previously this was done via the Entity Manager Contains Link option, which has been deprecated.

2. Complete the following import Settings on the **Map Fields** layout:

- **Overwrite**—determines how the system overwrites records once you promote data to the review workspace. This field provides the following choices:
 - **Append Only**—promote only new records into the review workspace.
 - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. This field acts as a link indicating to Relativity where to import the data. When you select this or Append/Overlay, you must complete the Multi-Select Field Overlay Behavior field described below.
 - **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this or Overlay Only, you must complete the Multi-Select Field Overlay Behavior field described below.
- **Multi-Select Field Overlay Behavior**—determines how the system overlays records when you promote documents to the review workspace. This field is only available if you have selected either Overlay Only or Append/Overlay above. This field provides the following choices:
 - **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
 - **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.

- **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.
- **Unique Identifier**—this option is only available when the Overwrite mode is set to Overlay Only. Enter a unique value that no other item in the workspace contains. For example, use the GUID or distinguishedName attribute. If the value is not unique in the workspace, it may lead to unintentional overwriting of existing data.

3. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see the Integration Points guide.

5.4.3 Importing LDAP

Before importing LDAP (Lightweight Directory Access Protocol), the Integration Points LDAP Provider needs to be connected to the LDAP server. To connect successfully, open the standard network ports for both RelativityOne and the LDAP Server for outgoing connections from RelativityOne's Web and Agent servers and for listening (LDAP Server). To connect these ports, contact [Relativity Support](#).

Note: To successfully connect Integration Points LDAP Provider to the LDAP server, the standard network ports should be open on both RelativityOne and the LDAP Server for outgoing connections from RelativityOne's Web and Agent servers and for listening (LDAP Server). LDAP connection requires using 636 (Secure Socket Layer) network ports. Custom ports are not supported and may not work correctly. Please be aware that firewall solutions may impact the connectivity between RelativityOne and LDAP server.

5.4.3.1 Setup

To create an integration point for importing LDAP:

1. In the **Setup** layout, complete the following fields:

The screenshot shows the 'Create Integration Point' dialog box. At the top, there's a progress bar with two steps: 'Setup' (1) and 'Complete the Setup' (2). The 'Setup' step is currently active. Below the progress bar, there are three sections: 'General', 'Advanced', and 'Scheduling'. The 'General' section contains the following fields: 'Name' (text input), 'Type' (radio buttons for 'Import' and 'Export', with 'Import' selected), 'Source' (dropdown menu with 'LDAP' selected), 'Destination' (dropdown menu with 'Relativity' selected), 'Transferred Object' (dropdown menu with 'Entity' selected), and 'Profile' (dropdown menu with 'Select...' selected). The 'Advanced' section contains 'Email Notification Recipients' (text input with a note 'Separate by semi-colon') and 'Log Errors' (radio buttons for 'Yes' and 'No', with 'Yes' selected). The 'Scheduling' section contains 'Enable Scheduler' (radio buttons for 'Yes' and 'No', with 'No' selected). At the top right of the dialog, there are 'Cancel' and 'Next' buttons. The 'Next' button is highlighted in blue.

General:

- **Name**—the name of your integration for reference purposes.
- **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
- **Source**—select **LDAP** here, since you want to import data from a Lightweight Directory Access Protocol source. For example, use this source provider to import an organization's people directory.
- **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type.
- **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. It is typical to use the LDAP source to sync the Entity object.
- **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you have already created, select it from the drop-down list. For more information on profiles, see the Integration Points guide.

Advanced:

- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity doesn't log these item level errors.
 - Regardless of your selection, job-level errors are always recorded in Relativity.

Scheduling:

- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available:
 - **Frequency** —the interval at which Relativity syncs this integration point. Select one of the options below:
 - **Daily**—select this option to sync once every day.
 - **Weekly**—select this option to sync on a weekly basis. Then, enter data in the following fields:
 - **Reoccur**—enter a numeric value in the **Every # week(s)** field for how often you want it to occur weekly.
 - **Send On**—specify on which day of the week (Monday through Sunday) the sync will take place by selecting any of the days of the week listed.
 - **Monthly**—select this option to sync on a monthly basis. Then, enter data in the following fields:
 - **Reoccur**—enter a numeric value in the **Every # month(s)** field for how often you want it to occur monthly.
 - **Send On**—select the **Day # of the month** that you want this integration point to sync.
 - **Start Date**—the date that you want Integration Points to start syncing the data.
 - **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
 - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.
 - **Time Zone**—select the appropriate time zone.

2. Click **Next** to advance to the Connect to Source layout.

5.4.3.2 Connect to source

Continue create your import integration point by connecting Relativity to the data source. Follow the steps below.

1. In the **Connect to Source** layout complete the following fields:

The screenshot shows the 'Create Integration Point' window with the 'Connect to Source' tab selected. The 'Setup' tab is marked with a checkmark, and the 'Map Fields' tab is marked with a '3'. The 'Connect to Source' tab contains the following fields:

- Connection Path:** A text input field.
- Object Filter String:** A text input field with the placeholder text 'Leave blank to filter (objectClass=*)'.
- Authentication:** A dropdown menu with 'Select...' as the current selection.
- Username:** A text input field.
- Password:** A text input field.
- Import Nested Items:** Two radio buttons, 'Yes' and 'No', with 'No' selected.

Navigation buttons 'Back' and 'Next' are located at the top right of the dialog.

- **Connection Path**—the URL used to locate the directory. For example, “Relativity.com.” You will need to add **636** to the URL to access that port. Also, note that you can optionally include specific organizational unit references by adding a forward slash (/) after the server. The following example looks up items in the Relativity.com domain within the Employees organizational unit:
`ldap.Relativity.com:636/OU=Employees,OU=Accounts,OU=Relativity,DC=Relativity,DC=C=corp`

Note: Contact [Relativity Support](#) to open port 636.

- **Object Filter String**—this string specifies certain attributes that the requested LDAP entries must contain that Integration Points considers for import. For example, if you want to import users, you would use an object filter string such as *(objectClass=user)*. For more information on search filter syntax, refer to this Microsoft article: [Search Filter Syntax](#).
- **Authentication**—Secure Socket Layer is the only applicable authentication type for port 636.
- **Username**—if required by the server’s authentication, enter a username to connect to the server (connection path). For external SaaS LDAP instances, the username may need to include user ID (UID), organization unit (ou), organization’s distinguished name (o) and the connection path:
`uid=johndoe,ou=Users,o=6065d44947314c4eb10ca904,dc=somesaasldap,dc=com`
- **Password**—if required by the server’s authentication, you can enter a password to connect to the server (connection path).
- **Import Nested Items**—select **Yes** for the import to include all sub directories in the specified connection path. Select **No** for the import to include only the first level items brought back in the connection path.

2. Click **Next** to advance to the Map Fields layout, which contains a list of Relativity fields from their destination RDO as well as attributes that the source provider pulled back.

5.4.3.3 Map fields

Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields.

1. In the **Map Fields** wizard, you have the following options for mapping fields:

- Click the **Map All Fields** button to automatically map all Source fields with matching Destination field names, except single/multiple object fields.
- Use the Shift+click and Ctrl+click method to select multiple fields at a time.
- Use the single and double arrow buttons or double-click a field to move the selected fields between columns.
- If you have Destination Fields that are mapped to fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.
- The field names in the Destination columns include the type of each field listed.

When mapping fields, here are some issues to note:

- If the WebAPIPath instance setting in kCura.IntegrationPoints is not configured correctly after upgrade or installation, the Source Fields list will be empty because it cannot return any attributes. As a result, you cannot map fields.
- When importing the Entity object:
 - You need to map the First Name and Last Name fields. In case the Full Name field is not being mapped, those two fields are combined for the Full Name value, which is then written to the Entity object.
 - You can link the imported entity to a manager if the manager also exists in the entity database. To proceed with linking them, you must map the Manager field on the Field Mappings page. Previously this was done via the Entity Manager Contains Link option, which has been deprecated.

2. Complete the following import Settings on the **Map Fields** layout:

- **Overwrite**—determines how the system overwrites records once you promote data to the review workspace. This field provides the following choices:
 - **Append Only**—promote only new records into the review workspace.
 - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. This field acts as a link indicating to Relativity where to import the data. When you select this or Append/Overlay, you must complete the Multi-Select Field Overlay Behavior field described below.
 - **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this or Overlay Only, you must complete the Multi-Select Field Overlay Behavior field described below. You are able to create folders or re-folder documents when you select Append/Overlay.
- **Multi-Select Field Overlay Behavior**—determines how the system will overlay records when you push documents to the review workspace. This field is only available if you have selected either Overlay Only or Append/Overlay above. This field provides the following choices:
 - **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
 - **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.

- **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.
- **Unique Identifier**—this option is only available when the Overwrite mode is set to Overlay Only. Enter a unique value that no other item in the workspace contains. For example, use the GUID or distinguishedName attribute. If the value is not unique in the workspace, it may lead to unintentional overwriting of existing data.

3. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see the Integration Points guide.

5.4.4 Importing a document load file

Note: Before creating an integration point to import a load file, you must first place the load data in the \\Fileshare\\StructuredData folder. Otherwise, you will not be able to select that data for the Import Source field.

5.4.4.1 Setup

To create an integration point for importing a document load file, follow the steps below.

1. In the **Setup** layout, complete the following fields:

The screenshot shows the 'Create Integration Point' dialog box with the 'Setup' tab selected. The dialog has a progress bar at the top with two steps: '1' (Setup) and '2' (Complete the Setup). The 'General' section contains the following fields: 'Name' (text input), 'Type' (radio buttons for 'Import' and 'Export'), 'Source' (dropdown menu with 'Load File' selected), 'Destination' (dropdown menu with 'Relativity' selected), 'Transferred Object' (dropdown menu with 'Document' selected), and 'Profile' (dropdown menu with 'Select...' selected). The 'Advanced' section contains 'Email Notification Recipients' (text input with a note 'Separate by semi-colon'), 'Log Errors' (radio buttons for 'Yes' and 'No'), and 'Scheduling' (radio buttons for 'Enable Scheduler' with 'Yes' and 'No' options).

General:

- **Name**—the name of your integration for reference purposes
- **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
- **Source**—select **Load File** here, since you want to import a load file into a workspace. On the Connect to Source layout, you'll have the option of specifying whether you're importing a document, image, or production load file.
- **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type, since you've already designated that you want to import into a Relativity workspace. You'll select the specific workspace on a subsequent layout.
- **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. Since you're importing the document object, select **Document** here.
- **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 194](#).

Advanced:

- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity doesn't log these item level errors.
 - Regardless of your selection, job-level errors are always recorded in Relativity.

Scheduling:

- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available:
 - **Frequency** —the interval at which Relativity syncs this integration point. Select one of the options below:
 - **Daily**—select this option to sync once every day.
 - **Weekly**—select this option to sync on a weekly basis. Then, enter data in the following fields:
 - **Reoccur**—enter a numeric value in the **Every # week(s)** field for how often you want it to occur weekly.
 - **Send On**—specify on which day of the week (Monday through Sunday) the sync will take place by selecting any of the days of the week listed.
 - **Monthly**—select this option to sync on a monthly basis. Then, enter data in the following fields:
 - **Reoccur**—enter a numeric value in the **Every # month(s)** field for how often you want it to occur monthly.
 - **Send On**—select the **Day # of the month** that you want this integration point to sync.
 - **Start Date**—the date that you want Integration Points to start syncing the data.
 - **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
 - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.
 - **Time Zone**—select the appropriate time zone.

2. Click **Next** to advance to the Connect to Source layout.

5.4.4.2 Connect to source

Continue to create your import integration point by connecting Relativity to the data source. Follow the steps below.

1. In the **Connect to Source** layout complete the following fields.

The screenshot shows the 'Create Integration Point' window with the 'Connect to Source' tab selected. The progress bar indicates the current step is 2 of 3. The 'Load File Settings' section is partially visible, showing the 'Import Type' dropdown set to 'Document Load File'.

Load File Settings:

- **Import Type**—select the type of load file you'd like to import to the workspace. Select **Document Load File** from the drop-down list.
- **Workspace Destination Folder**—select the specific folder within the destination workspace in which you want to place the documents you are importing. The folder tree you see when you click this drop-down menu is identical to the folder structure in the destination workspace.
- **Import Source**—click the down arrow and select a load file from the workspace's DataTransfer import location in the fileshare.
 - These locations are hard-coded into Relativity and cannot be changed. You cannot load or export data to a different location than is listed here.
 - For reference purposes, the folder(s) displayed in the Import Source field actually reside in the following generic path: \\Fileshare\\StructuredData. Accordingly, when an admin adds data to the Import folder inside the DataTransfer folder inside the folder displaying the workspace's artifact ID, that data then becomes available for selection in the Import Source field.
- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is 1, which results in loading the entire file.

File Encoding:

The following fields are only available if you selected Document Load File for the Import Type field above.

- **File Encoding**—select an encoding for the document load file. (Consult your processing vendor or department to determine the correct encoding option, if necessary.) If your file contains a language other than English, choose a Unicode option. Note the following details about encoding:
 - Relativity immediately applies any changes that you make to the encoding of a load file, and displays these changes in the column header preview.
 - Relativity provides you with the ability to audit the encoding of a load file.
- **Column**—select the character used to separate columns.
- **Quote**—select the character used as the text qualifier.
- **Newline**—select the character used to indicate the end of a line in any extracted text or long text field.
- **Multi-Value**—select the character used to separate choices within a field.
- **Nested Value**—select the character used to separate the different levels of a multi-choice hierarchy. For example, you might import a field with following values: “Hot\\Really Hot\\Super Hot; Look at Later”. Using a semi-colon (;) as a multi-value delimiter, and a backslash (\) as a nested value delimiter, Relativity displays the choices
- **File Column Headers**—displays the load file's column headers. Relativity automatically updates this section of the Load File tab when you select the file encoding. Note the following details about file column headers:

- After you select an encoding, this section displays the fields in the load file. The column headers in the file display as vertical list. The fields display in alphanumeric order. The numeric value in parentheses indicates the position of the field within the file.
2. Click **Next** to advance to the Map Fields layout, which contains a list of Relativity fields from their destination RDO as well as attributes that the source provider pulled back.

5.4.4.3 Map fields

Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields.

1. In the **Map Fields** wizard, you have the following options for mapping fields:
 - Click the **Map All Fields** button to automatically map all Source fields with matching Destination field names, except single/multiple object fields.
 - Use the Shift+click and Ctrl+click method to select multiple fields at a time.
 - Use the single and double arrow buttons or double-click a field to move the selected fields between columns.
 - If you have Destination Fields that are mapped to fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.
 - The field names in the Destination columns include the type of each field listed.

When mapping fields, here are some issues to note:

- If the WebAPIPath instance setting in the kCura.IntegrationPoints section is not configured correctly after upgrade or installation, the Source field list is empty because it cannot return any attributes, and you are not able to map fields.
- When the load file data is being imported to Entity RDO, then **Full Name**, **First Name** and **Last Name** fields in the destination workspace must be mapped.

Field Mappings

Map All Fields

Source Fields (12):

- Type to Filter Fields
- Author
- Conversation
- Conversation ID
- Custodian
- Filename
- Filesize
- Folder Path
- number of attachments
- Parent Document ID
- Priv
- Source File
- Subject

Selected Source Fields (16):

- Control Number [Object Identifier]
- Date Created
- Date Last Modified
- Date Received
- Date Sent
- Document Extension
- Email BCC
- Email CC
- Email From
- Email Subject
- Email To
- Extracted Text
- Group Identifier
- MD5 Hash
- Title
- FILE_PATH

Selected Destination Fields (15):

- Control Number [Object Identifier]
- Date Created [Date]
- Date Last Modified [Date]
- Date Received [Date]
- Date Sent [Date]
- Document Extension [Fixed-Length Text]
- Email BCC [Long Text]
- Email CC [Long Text]
- Email From [Fixed-Length Text]
- Email Subject [Long Text]
- Email To [Long Text]
- Extracted Text [Long Text]
- Group Identifier [Fixed-Length Text]
- MD5 Hash [Fixed-Length Text]
- Title [Fixed-Length Text]

Destination Fields (74):

- Type to Filter Fields
- Control Number End Attach [Fixed-Length Text]
- Conversation Family [Fixed-Length Text]
- Conversation Index [Long Text]
- Custodian - Single Choice [Single Choice]
- Data Load Date [Date]
- Data Load Volume [Multiple Choice]
- Date Last Printed [Date]
- Delivery Receipt [Yes/No]
- Deponent / Witness Kit [Multiple Choice]
- Document Folder Path [Long Text]
- Domains (Email BCC) [Multiple Object]
- Domains (Email CC) [Multiple Object]
- Domains (Email From) [Multiple Object]
- Domains (Email To) [Multiple Object]
- Duplicate Indicator [Yes/No]
- Email Identifier [Yes/No]
- Embedded Data Info [Long Text]
- Exemptions [Fixed-Length Text]
- Extracted Text Size [Decimal]
- File Name [Fixed-Length Text]
- File Size [Decimal]
- File Type [Fixed-Length Text]
- Has PDF [Single Choice]

Settings

Overwrite:

Multi-Select Field Overlay Behavior:

Copy Native Files: ☒ Physical files
☐ Links Only
☐ No

Native File Path:

Use Folder Path Information: ☒ Yes
☐ No

Folder Path Information:

Move Existing Documents: ☒ Yes
☐ No

EXTRACTED TEXT

Cell Contains File Location: ☒ Yes
☐ No

Encoding for undetectable files:

2. Complete the following import Settings on the **Map Fields** layout:

- **Overwrite**—determines how the system overwrites records once you promote data to the review workspace. This field provides the following choices:
 - **Append Only**—promote only new records into the review workspace.
 - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. This field acts as a link indicating to Relativity where to import the data. When you select this or Append/Overlay, you must complete the Multi-Select Field Overlay Behavior field described below.
 - **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this or Overlay Only, you must complete the Multi-Select Field Overlay Behavior field described below. You are able to create folders or re-folder documents when you select Append/Overlay.
- **Multi-Select Field Overlay Behavior**—determines how the system will overlay records when you push documents to the review workspace. This field is only available if you've selected either Overlay Only or Append/Overlay above. This field provides the following choices:
 - **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.

- **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
- **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.
- **Copy Native Files**—this Yes/No field is only visible when you select the Documents RDO, and lets you indicate whether Integration Points should import any native files in the sync.
 - **Native File Path**—this field appears if you select Yes to import the native files. From the drop-down menu, select the source provider attribute containing the file path links to the natives that you want to import.
- **Use Folder Path Information**—use a metadata field to build the folder structure for the documents that you promote to the review workspace.
 - Select **Yes** to use a metadata field to build the folder structure for the documents that you promote to the review workspace. Selecting Yes makes the Folder Path Information field required below.
 - Select **No** if you do not want to build a folder structure based on metadata. In this case, Relativity loads all documents directly into the folder indicated by the promote destination, and you create no new folders in the destination workspace.
 - You have the option of creating folders or re-folding documents when you select Append/Overlay for the Overwrite field.
 - You have the option of re-folding documents for the Overwrite field through the Move Existing Documents field below.
- **Folder Path Information**—specify a metadata field to build the folder structure for the documents that you promote to the review workspace. For the purposes of ECA and Investigation, select the **Processing Folder Path** option.
- **Move Existing Documents**—re-folder documents that were previously imported into the destination workspace, but were only placed in the root case folder and not to any subfolders. This field is useful for situations in which you want to add new data to the destination workspace while overlaying existing data.
 - Select **Yes** to move existing documents into the folders provided in the previous **Folder Path Information** field. For example, you previously imported custodian Sally Smith's files into the destination workspace's root folder. Now, in addition to placing the documents from the saved search specified in this integration point in their subfolder, you also want to move those previously migrated documents into Sally Smith's subfolder, so you would select Yes.
 - Select **No** if you do not want to re-folder existing documents.
- **Extracted Text**—select the destination field that is mapped to a path to Extracted Text files. The content of these files will be read into the selected field. Note that only Long Text destination fields that are mapped will show up as options in the Extracted Text drop-down. You can select an encoding type for the extracted text files as well.

- **Cell contains file location**—select this option if your extracted text is in document-level text files, and your load file contains a path to those text files.
- **Encoding for undetectable files**—select an encoding for the text file.
- **Entity Manager Contains Link**—this Yes/No field is visible for all import sources when the Entity RDO is selected as the destination of the imported data. Some import sources populate the manager field with a link to the manager's profile on their internal system. Set this field to **No** if the Document Load File source is selected.

3. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see [Manually running the import job on page 232](#).

5.4.5 Importing an image load file

Note: Before creating an integration point to import a load file, you must first place the load data in the \\Fileshare\\StructuredData folder. Otherwise, you will not be able to select that data for the Import Source field.

5.4.5.1 Setup

To create an integration point for importing an image load file, perform the following steps:

1. In the **Setup** layout, complete the following fields:

The screenshot shows the 'Create Integration Point' dialog box. At the top, there's a progress bar with two steps: 'Setup' (1) and 'Complete the Setup' (2). The 'Setup' step is currently active. Below the progress bar, there are three sections: 'General', 'Advanced', and 'Scheduling'. The 'General' section contains fields for 'Name', 'Type' (with 'Import' selected), 'Source' (set to 'Load File'), 'Destination' (set to 'Relativity'), 'Transferred Object' (set to 'Document'), and 'Profile' (set to 'Select...'). The 'Advanced' section contains 'Email Notification Recipients' (a text area with a note 'Separate by semi-colon'), 'Log Errors' (with 'Yes' selected), and the 'Scheduling' section contains 'Enable Scheduler' (with 'No' selected). Navigation buttons 'Back' and 'Next' are visible on the right side of the dialog.

General:

- **Name**—the name of your integration for reference purposes
- **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
- **Source**—select **Load File** here, since you want to import a load file into a workspace. On the Connect to Source layout, you'll have the option of specifying whether your importing a document, image, or production load file.
- **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type, since you've already designated that you want to import into a Relativity workspace. You'll select the specific workspace on a subsequent layout.
- **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. Since you're importing the document object, select **Document** here.
- **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 194](#).

Advanced:

- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity doesn't log these item level errors.
 - Regardless of your selection, job-level errors are always recorded in Relativity.

Scheduling:

- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available:
 - **Frequency** —the interval at which Relativity syncs this integration point. Select one of the options below:
 - **Daily**—select this option to sync once every day.
 - **Weekly**—select this option to sync on a weekly basis. Then, enter data in the following fields:
 - **Reoccur**—enter a numeric value in the **Every # week(s)** field for how often you want it to occur weekly.
 - **Send On**—specify on which day of the week (Monday through Sunday) the sync will take place by selecting any of the days of the week listed.
 - **Monthly**—select this option to sync on a monthly basis. Then, enter data in the following fields:
 - **Reoccur**—enter a numeric value in the **Every # month(s)** field for how often you want it to occur monthly.

- **Send On**—select the **Day # of the month** that you want this integration point to sync.
- **Start Date**—the date that you want Integration Points to start syncing the data.
- **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
- **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.
- **Time Zone**—select the appropriate time zone.

2. Click **Next** to advance to the Source Information layout.

5.4.5.2 Source information

Continue create your import integration point by connecting adding the source information. Follow the steps below.

1. In the **Source Information** layout, complete the following fields.

Load File Settings:

- **Import Type**—select the type of load file you'd like to import to the workspace. Select **Image Load File** from the drop-down list.
- **Workspace Destination Folder**—select the specific folder within the destination workspace in which you want to place the documents you're importing. The folder tree you see when you click this drop-down menu is identical to the folder structure in the destination workspace.
- **Import Source**—click the down arrow and select a load file from the workspace's DataTransfer import location in the fileshare.

- These locations are hard-coded into Relativity and cannot be changed. You cannot load or export data to a different location than is listed here.
 - For reference purposes, the folder(s) displayed in the Import Source field actually reside in the following generic path: \\Fileshare\\StructuredData. Accordingly, when an admin adds data to the Import folder inside the DataTransfer folder inside the folder displaying the workspace's artifact ID, that data then becomes available for selection in the Import Source field.
- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is 1, which results in loading the entire file.

Import Settings:

The following fields are only available if you selected Image or Production Load File for the Import Type field above.

- **Numbering**—determines the numbering scheme of the images you're importing.
 - **Use load file page IDs**—select this to use the default setting to number the images, which is the control number.
 - **Auto-number pages**—select this option if page IDs in the production or image load file are not unique. For example, you might import a set of TIFFs that share a page identifier for each record. The page identifiers are shared per document and are not unique. The Auto-number pages option appends the 01, .02, and so on to the page-level identifier, creating a unique number per page.
Auto-numbering pages is useful if you are importing productions or image load files that use document-level numbering without page numbers, and include documents that contain multiple pages.
- **Import Mode**
 - **Append Only**—select this to load only new records. Select this option to import the extracted text and natives from a .dat file.
 - **Overlay Only**—select this to update existing records only. When you select this, the required Overlay Identifier field appears below This field acts as a link indicating to Relativity where to import the data. Select this option when overlaying production images onto the existing documents.
 - **Append/Overlay**—select this to add new records and overlay data on existing records.
- **Overlay Identifier**—select a field that stores overlaid document-level Bates information on the document. This is only available if you selected Overlay Only for the import mode. The fields in the drop-down menu are fixed-length fields with a manually-applied SQL index. Note that this is NOT the same as adding the field to the full-text index. Contact your SQL database administrator to apply an index to a field.
- **Copy Files to Document Repository**—determines whether or not Relativity will copy files from the location in the image load file field to a selected document repository.
 - **Yes**—select this to copy files to a document repository that you select in the File Repository field below.

- **No**—select this if the native files already reside in their final location, which is accessible by Relativity. This option is not available for selection in RelativityOne because all files must be copied to a selected File Repository.
- **File Repository**—select the file repository to which you want to copy the files in the image load file. This field is only visible if you selected Yes for the Copy Files to Document Repository field above. Click **Default** to switch this value to the default file repository used by the workspace.
- **Load Extracted Text** - determines whether or not Relativity will load new text for Production documents that may be revised based on redactions.
 - The text files must have .txt extensions, be stored in the same directory as the TIFF files, and be named in the same as the TIFF files.
 - This field is only available for image load files.
 - When you select this, the required Encoding for undetectable files field appears below.
- **Encoding for undetectable files**—select an encoding for the new text file that Relativity loads, per your enabling of the Load Extracted Text field above.

2. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see [Manually running the import job on page 232](#).

5.4.6 Importing a production load file

Note: Before creating an integration point to import a load file, you must first place the load data in the \\Fileshare\\StructuredData folder. Otherwise, you will not be able to select that data for the Import Source field.

5.4.6.1 Setup

To create an integration point specifically for importing a production load file, follow the steps below.

1. In the **Setup** layout, complete the following fields:

The screenshot shows the 'Create Integration Point' dialog box. At the top, there's a title bar 'Create Integration Point' with a 'Cancel' button and an information icon. Below the title bar is a progress bar with two steps: '1' (Setup) and '2' (Complete the Setup). The 'Setup' step is currently active. The dialog is divided into three main sections: 'General', 'Advanced', and 'Scheduling'. The 'General' section contains the following fields: 'Name' (text input), 'Type' (radio buttons for 'Import' and 'Export'), 'Source' (dropdown menu with 'Load File' selected), 'Destination' (dropdown menu with 'Relativity' selected), 'Transferred Object' (dropdown menu with 'Document' selected), and 'Profile' (dropdown menu with 'Select...' selected). The 'Advanced' section contains 'Email Notification Recipients' (text input with a note 'Separate by semi-colon') and 'Log Errors' (radio buttons for 'Yes' and 'No'). The 'Scheduling' section contains 'Enable Scheduler' (radio buttons for 'Yes' and 'No'). Navigation buttons 'Back' and 'Next' are located at the top right of the dialog.

General:

- **Name**—the name of your integration for reference purposes
- **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
- **Source**—select **Load File** here, since you want to import a load file into a workspace. On the Connect to Source layout, you'll have the option of specifying whether you're importing a document, image, or production load file.
- **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type, since you've already designated that you want to import into a Relativity workspace. You'll select the specific workspace on a subsequent layout.
- **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. Since you're importing the document object, select **Document** here.
- **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 194](#).

Advanced:

- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity doesn't log these item level errors.
 - Regardless of your selection, job-level errors are always recorded in Relativity.

Scheduling:

- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available:
 - **Frequency** —the interval at which Relativity syncs this integration point. Select one of the options below:
 - **Daily**—select this option to sync once every day.
 - **Weekly**—select this option to sync on a weekly basis. Then, enter data in the following fields:
 - **Reoccur**—enter a numeric value in the **Every # week(s)** field for how often you want it to occur weekly.
 - **Send On**—specify on which day of the week (Monday through Sunday) the sync will take place by selecting any of the days of the week listed.
 - **Monthly**—select this option to sync on a monthly basis. Then, enter data in the following fields:
 - **Reoccur**—enter a numeric value in the **Every # month(s)** field for how often you want it to occur monthly.
 - **Send On**—select the **Day # of the month** that you want this integration point to sync.
 - **Start Date**—the date that you want Integration Points to start syncing the data.
 - **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
 - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.
 - **Time Zone**—select the appropriate time zone.

2. Click **Next** to advance to the Connect to Source layout.

5.4.6.2 Source information

Continue create your import integration point by connecting adding the source information. Follow the steps below.

1. In the **Source Information** layout complete the following fields.

The screenshot shows the 'Create Integration Point' dialog box with the 'Source Information' tab selected. The 'Load File Settings' section contains the following fields:

- Import Type:** A dropdown menu, currently highlighted with a red box.
- Workspace Destination Folder:** A dropdown menu.
- Import Source:** A dropdown menu.
- Start Line:** A text input field.

The 'Import Settings' section contains the following fields:

- Numbering:** Radio buttons for 'Use load file page IDs' (selected) and 'Auto-number pages'.
- Import Mode:** A dropdown menu set to 'Append Only'.
- Copy Files to Document Repository:** Radio buttons for 'Yes' (selected) and 'No'.
- File Repository:** A dropdown menu showing '\\files\T001\Files\'. A 'Default' button is next to it.
- Production:** A dropdown menu set to 'Select...'.

Load File Settings:

- **Import Type**—select the type of load file you'd like to import to the workspace. Select **Production Load File** from the drop-down list.
- **Workspace Destination Folder**—select the specific folder within the destination workspace in which you want to place the documents you are importing. The folder tree you see when you click this drop-down menu is identical to the folder structure in the destination workspace.
- **Import Source**—click the down arrow and select a load file from the workspace's DataTransfer import location in the fileshare.
 - These locations are hard-coded into Relativity and cannot be changed. You cannot load or export data to a different location than is listed here.
 - For reference purposes, the folder(s) displayed in the Import Source field actually reside in the following generic path: \\Fileshare\\StructuredData. Accordingly, when an admin adds data to the Import folder inside the DataTransfer folder inside the folder displaying the workspace's artifact ID, that data then becomes available for selection in the Import Source field.
- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is 1, which results in loading the entire file.

Import Settings:

The following fields are only available if you selected Image or Production Load File for the Import Type field above.

- **Numbering**—determines the numbering scheme of the production you're importing.
 - **Use load file page IDs**—select this to use the default setting to number the production, which is the control number.

- **Auto-number pages**—select this option if page IDs in the production or image load file are not unique. For example, you might import a set of TIFFs that share a page identifier for each record. The page identifiers are shared per document and are not unique. The Auto-number pages option appends the 01, .02, and so on to the page-level identifier, creating a unique number per page. Auto-numbering pages is useful if you are importing productions or image load files that use document-level numbering without page numbers, and include documents that contain multiple pages.
- **Import Mode**
 - **Append Only**—select this to load only new records. Select this option to import the extracted text and natives from a .dat file.
 - **Overlay Only**—select this to update existing records only. When you select this, the required Overlay Identifier field appears below This field acts as a link indicating to Relativity where to import the data. Select this option when overlaying production images onto the existing documents.
 - **Append/Overlay**—select this to add new records and overlay data on existing records.
- **Overlay Identifier**—if you selected Overlay Only for the import mode, select a field that stores overlaid document-level Bates information on the document. The fields in the drop-down menu are fixed-length fields with a manually-applied SQL index. Note that this is NOT the same as adding the field to the full-text index. Contact your SQL database administrator to apply an index to a field.
- **Copy Files to Document Repository**—determines whether or not Relativity will copy files from the location in the image load file field to a selected document repository.
 - **Yes**—select this to copy files to a document repository that you select in the File Repository field below.
 - **No**—select this if the native files already reside in their final location, which is accessible by Relativity.
- **File Repository**—select the file repository to which you want to copy the files in the image load file. This field is only visible if you selected Yes for the Copy Files to Document Repository field above. Click **Default** to switch this value to the default file repository used by the workspace.
- **Production**—select a Relativity production that you want to upload images to. Only new production sets without a production source appear in this list.

2. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see [Manually running the import job on page 232](#).

5.4.7 Importing from Microsoft Entra ID

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

The Integration Points Microsoft Entra ID Provider is a separate and standalone application that is not in the Relativity Application Library. For assistance in getting the Microsoft Entra ID Provider installed into your workspace, contact [Relativity Support](#). For more information, see the Integration Points guide.

You will need the following to complete the setup in Integration Points:

- Application ID from Microsoft Azure
- Application Secret Value from Microsoft Azure
- Domain address of Microsoft Azure instance
- Any filtering requirements that will be used to filter imported data
- Field Mappings to map fields between Relativity and Microsoft Entra ID.

5.4.7.1 Setup

To create an integration point for importing from Microsoft Entra ID:

1. Complete the following fields in the Setup layout:

General:

- **Name**—the name of your integration for reference purposes.

Note: Name the application in Integration Points the same as you did in Microsoft Entra ID for easy location of application when needing to make updates.

- **Type**—select Import to designate the job as a data import. Selecting Import makes all the possible import sources available for selection in the Source field below.
- **Source**—all possible third-party systems that you can import data from. Select Microsoft Entra ID.
- **Destination**—by default, this is set to Relativity and is not editable when you select Import as the type, since you've already designated that you want to import into a Relativity workspace. You'll select the specific workspace on a subsequent layout.
- **Transferred Object**—the Relativity Dynamic Object (RDO) to which you want to import the data. Select the Entity object.
- **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list.

Advanced:

- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity doesn't log these item level errors.
 - Regardless of your selection, job-level errors are always recorded in Relativity.

Scheduling:

- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available:
 - **Frequency**—the interval at which Relativity syncs this integration point. Select one of the options below:
 - **Daily**—select this option to sync once every day.
 - **Weekly**—select this option to sync on a weekly basis. Then, enter data in the following fields:
 - **Reoccur**—enter a numeric value in the **Every # week(s)** field for how often you want it to occur weekly.
 - **Send On**—specify on which day of the week (Monday through Sunday) the sync will take place by selecting any of the days of the week listed.
 - **Monthly**—select this option to sync on a monthly basis. Then, enter data in the following fields:
 - **Reoccur**—enter a numeric value in the **Every # month(s)** field for how often you want it to occur monthly.
 - **Send On**—select the **Day # of the month** that you want this integration point to sync.
 - **Start Date**—the date that you want Integration Points to start syncing the data.
 - **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
 - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.
 - **Time Zone**—select the appropriate time zone.

2. Click **Next** to continue to the Connect to Source layout.

5.4.7.2 Connect to source

Continue to create your import integration point by connecting Relativity to your Microsoft Entra ID data source. You can select to import from your commercial or government Microsoft Entra ID profile. Follow the steps below.

1. Complete the following fields in the Connect to Source layout:
 - **Version**—select either a Commercial or Government Microsoft Entra ID version to import from.
 - **Application ID**—the ID of the application was created in the Azure Portal. For more information, see the Integration Points guide.
 - **Password**—The associated Application Secret Value (not the Secret ID) is the password for the application that was created in the Azure Portal. For more information, see the Integration Points guide.
 - **Directory ID**—The Microsoft Entra ID tenant domain the Azure application resides in.

- **Filter By**—You can limit the records imported by limiting import to specific users or groups.
- **Filter**—The filter condition used to identify Users or Groups that should be imported. Filters must be written using the Graph query syntax (for example, department eq 'Engineering'). For more information on using Graph query syntax, see Microsoft's Graph REST API documentation.

Notes:

- A list of filterable User properties can be found in Microsoft's documentation under Support for filter by properties of Microsoft Entra ID (directory) objects - User properties.
 - A list of filterable Group properties can be found in Microsoft's documentation under Support for filter by properties of Microsoft Entra ID (directory) objects - Group properties.
 - Advanced query parameters are not currently supported by the Relativity Integration Points Microsoft Entra ID (formerly Azure AD) provider.
-

- **MS-Graph Version**—Determines which version of the Graph API Integration Points will be used when interfacing with Azure AD. Defaults to version 1.0 of the Graph API if left blank. Another available option is Beta.

2. Click **Next** to continue to the Map Fields layout.

Note: A warning message appears at the top of page if information is not valid, and you will not be able to continue to the next step until the error is resolved.

5.4.7.3 Map fields

Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields.

1. In the **Map Fields** wizard, you have the following options for mapping fields:
 - Click the **Map All Fields** button to automatically map all Source fields with matching Destination field names, except single/multiple object fields.
 - Use the Shift+click and Ctrl+click method to select multiple fields at a time.
 - Use the single and double arrow buttons or double-click a field to move the selected fields between columns.
 - If you have Destination Fields that are mapped to fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.
 - The field names in the Destination columns include the type of each field listed.

When mapping fields, here are some issues to note:

- If the WebAPIPath instance setting in kCura.IntegrationPoints is not configured correctly after upgrade or installation, the Source Fields list will be empty because it cannot return any attributes. As a result, you cannot map fields.
- When importing the Entity object:

- You need to map the First Name and Last Name fields. In case the Full Name field is not being mapped, those two fields are combined for the Full Name value, which is then written to the Entity object.
- You can link the imported entity to a manager if the manager also exists in the entity database. To proceed with linking them, you must map the Manager field on the Field Mappings page. Previously this was done via the Entity Manager Contains Link option, which has been deprecated.

2. Complete the following import Settings on the **Map Fields** layout:

- **Overwrite**—determines how the system overwrites records once you promote data to the review workspace. This field provides the following choices:
 - **Append Only**—promote only new records into the review workspace.
 - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. This field acts as a link indicating to Relativity where to import the data. When you select this or Append/Overlay, you must complete the Multi-Select Field Overlay Behavior field described below.
 - **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this or Overlay Only, you must complete the Multi-Select Field Overlay Behavior field described below.
- **Multi-Select Field Overlay Behavior**—determines how the system overlays records when you promote documents to the review workspace. This field is only available if you have selected either Overlay Only or Append/Overlay above. This field provides the following choices:

- **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
- **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
- **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.
- **Unique Identifier**—this option is only available when the Overwrite mode is set to Overlay Only. Enter a unique value that no other item in the workspace contains. For example, use the GUID or distinguishedName attribute. If the value is not unique in the workspace, it may lead to unintentional overwriting of existing data.

3. Click **Save** to save the Integration Point.

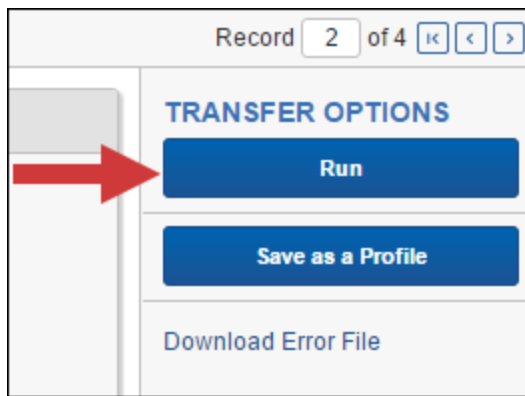
Once all of the settings have been entered the Integration Points job will run according to the schedule that was set. If you would like to run the job ahead of that time. For more information, see the Integration Points guide.

5.4.7.4 Reporting on Microsoft Entra ID imports

Reporting on Microsoft Entra ID imports can be done in Integration Points. For more information, see the Integration Points guide.

5.4.8 Manually running the import job

Once you have created an Integration Point, you can manually run an integration point by selecting the Integration Point, and clicking **Run** from the console. This lets you run an integration point instantly, as opposed to scheduling an integration point to run.



Click **OK** on the run confirmation message.

The Run button turns to red and gives you the option of stopping the job you just kicked off, as long as that job has a status of Pending or Processing.

If necessary, monitor the progress of the promote job by viewing the **Status** field in the **Status** view at the bottom of the layout. You will see any of the following status values:

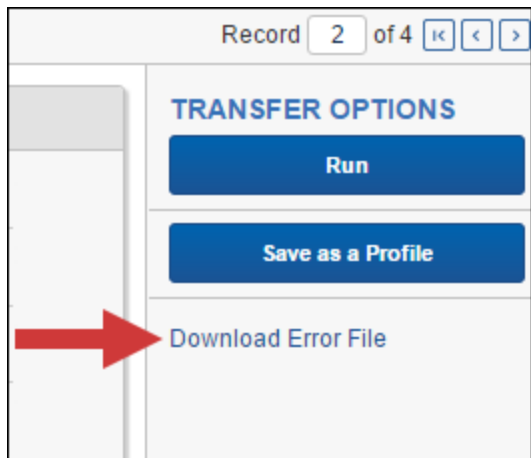
- **Pending**—the job has yet to be picked up by an agent.
- **Validation**—an agent is validating the job to make sure it has the required settings, such as access to the source and destination objects (saved searches, workspaces, etc.). If validation fails, the status changes to "Validation failed," and Relativity logs an error. If the validation succeeds, the job moves on to a status of "Processing."
- **Validation failed**—the job validation has failed, resulting in an error, the details of which are saved in the Job History Errors tab.
- **Processing**—the agent has picked up the job and is in the process of completing it.
- **Completed**—the job is complete, and no errors occurred.
- **Completed with errors**—the job is complete and errors have occurred.
- **Error - job failed**—a job-level error occurred and the job did not complete because it failed.
- **Stopping**—you clicked the Stop button, and the stop job has yet to be picked up by an agent.
- **Stopped**—the job has been stopped.

5.4.9 Downloading the error file

If your integration point encounters any errors during its run, the Download Error File link on the Transfer Options console is activated. This gives you the option of downloading an Excel (csv) file containing all the errors found in the integration point.

Note: This option is available for load file imports only and is not visible for other providers.

1. To download this file, click the **Download Error File** link in the Transfer Options console.

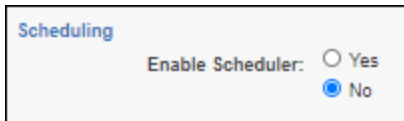


2. Open the downloaded Excel file to review the errors.
3. If desired, manually fix the errors. Once fixed, save the modified file and create a new integration point to import the fixed files, since they were not imported during the original transfer. Be sure that the Import Source field of the new integration point refers to the file you just added.

5.4.10 Disabling a scheduled Integration Point job

To disable a scheduled integration point , simply turn off the scheduler.

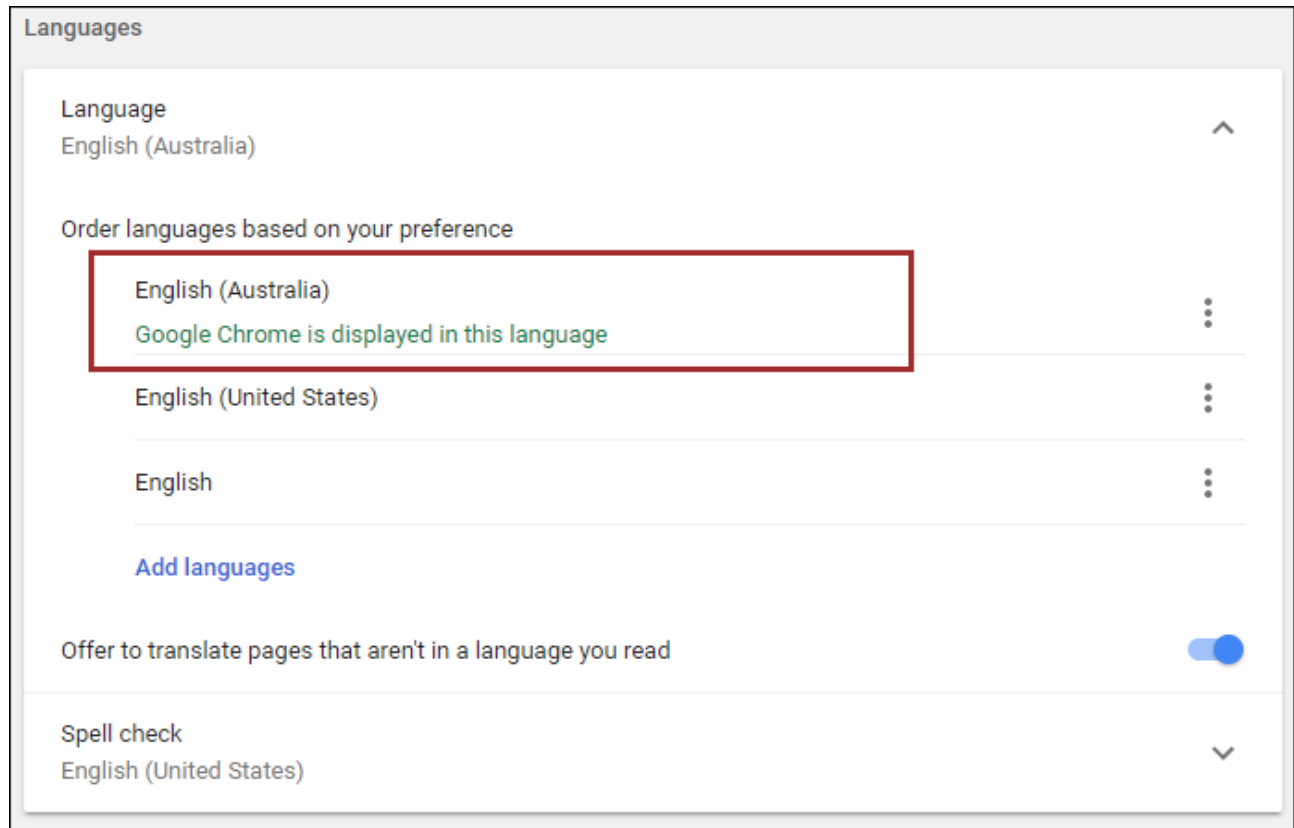
1. From the Integration Points landing page, click the **Integration Point Name** that you wish to disable.
2. Click **Edit**.
3. In the Scheduling section, select **No** for Enable Scheduler. The integration point is no longer scheduled to run.



5.4.11 Scheduler date format considerations

The integration points scheduler accepts U.S. and non-U.S. date formats based off the default language setting in your browser settings.

For example, if the language setting is English (Australian), the date format would be Day/Month/Year instead of Month/Day/Year.



Relativity properly displays the date for the Start and End Date fields when setting up Scheduling.

Scheduling

Enable Scheduler: ☒ Yes
☐ No

Frequency:

Start Date:

End Date:

Scheduled Time:

Time Zone:

This date format appears in Relativity wherever a date is displayed, such as on the saved Integration Point Details layout and the Date Last Modified field on the Document list.

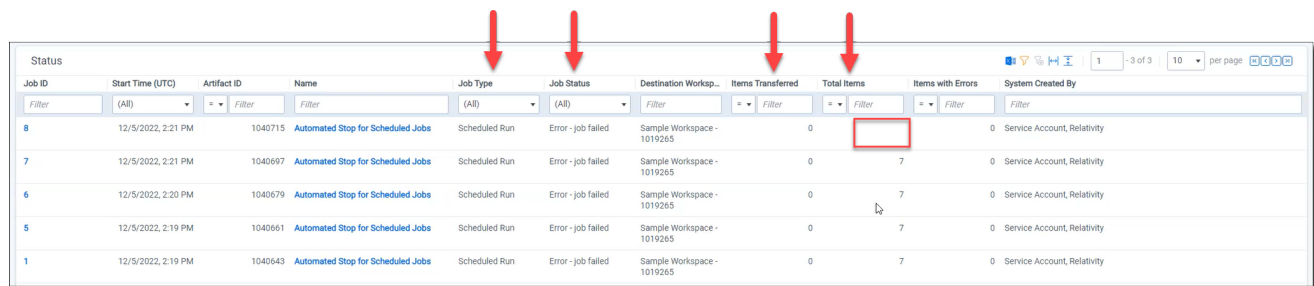
5.4.12 Automatically stopping a scheduled job that repeatedly fails

In some cases, a scheduled job may fail each time it is executed, and it may take some time before you become aware of the failed attempts. To mitigate this situation, you can configure an instance setting to specify the maximum number of consecutive failed attempts encountered before the job is automatically stopped. For example, you may want to stop the scheduled job after four consecutive failed attempts at running.

1. Navigate to the **Instance Settings** page.
2. Create a new instance setting with the following settings.
 - **Name**—enter **MaxFailedScheduledJobsCount**.
 - **Section**—enter **kcura.IntegrationPoints**.
 - **Value Type**—select **Integer 32-bit**.
 - **Value**—enter the number of consecutive failed attempts to be executed before the scheduled job is stopped.

<input type="checkbox"/>	<input type="text" value="MaxFailedScheduledJobsCount"/>	4	kcura.IntegrationPoints	No
--------------------------	--	---	-------------------------	----

The integration point's Scheduling tab displays the failed jobs with a Job Type of "Scheduled Run," Job Status of "Error - job failed," Items Transferred of "0," and Total Items based on the number of items in that job. The system will attempt one more run after the configured maximum number of consecutive failed attempts before it stops the scheduled job. The Total Items column will be blank.



Job ID	Start Time (UTC)	Artifact ID	Name	Job Type	Job Status	Destination Worksp...	Items Transferred	Total Items	Items with Errors	System Created By
8	12/5/2022, 2:21 PM	1040715	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0	7	0	Service Account, Relativity
7	12/5/2022, 2:21 PM	1040697	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0	7	0	Service Account, Relativity
6	12/5/2022, 2:20 PM	1040679	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0	7	0	Service Account, Relativity
5	12/5/2022, 2:19 PM	1040661	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0	7	0	Service Account, Relativity
1	12/5/2022, 2:19 PM	1040643	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0	7	0	Service Account, Relativity

The "Next Scheduled Runtime (UTC)" field on the Scheduling tab will be blank to let you know that the job is not scheduled to run again. You must correct the error(s) before it will run again as scheduled.



General Scheduling

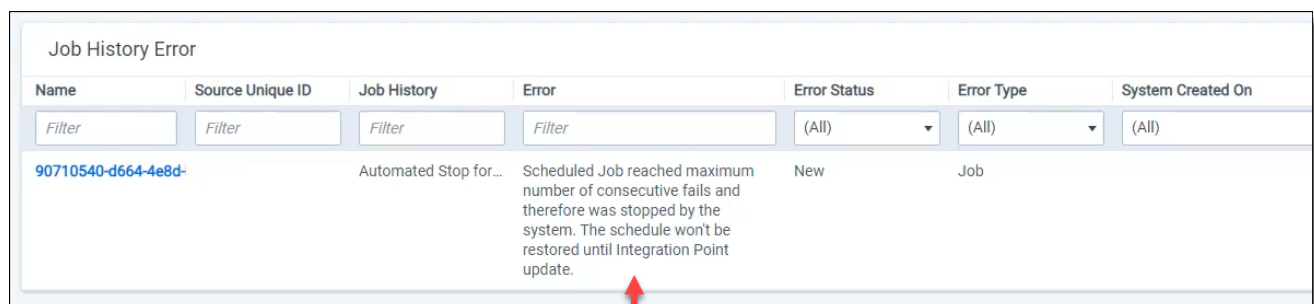
Enable Scheduler Yes

Schedule Rule

Next Scheduled Runtime (UTC)

Last Runtime (UTC) 12/5/2022 2:21 PM

The Job History page displays the system-generated error description explaining why the scheduled job was stopped.



Name	Source Unique ID	Job History	Error	Error Status	Error Type	System Created On
90710540-d664-4e8d-		Automated Stop for...	Scheduled Job reached maximum number of consecutive fails and therefore was stopped by the system. The schedule won't be restored until Integration Point update.	New	Job	

5.5 Exporting data through Integration Points

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

Integration Points provides you with the ability to export data directly from your workspace. This includes exporting saved searches, case folders, and productions directly from your workspace, and scheduling future or recurrent export jobs.

Notes:

- Although importing and exporting a load file is possible in Integration Points, Import/Export is the main application recommended for a stable and efficient load file import and export.
- When you export data to a load file through Integration Points, your files are saved to a \StructuredData folder on the fileshare. To access this file share, look at the AppID in the URL of your Relativity environment and locate the folder on the fileshare.

5.5.1 Exporting a folder to load file

To create an integration point specifically for exporting a folder, perform the following steps:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.
3. Complete the following fields in the **Setup** category of the Create Integration Point layout:

The screenshot shows the 'Create Integration Point' dialog box. At the top, there's a title bar 'Create Integration Point' with a 'Cancel' button and an info icon. Below the title bar is a progress bar with two steps: '1' (Setup) and '2' (Complete the Setup). The 'Setup' step is currently active. The dialog is divided into three sections: 'General', 'Advanced', and 'Scheduling'.
General Section:
- Name: 'Doc Export'
- Type: Radio buttons for 'Import' and 'Export'. 'Export' is selected.
- Source: A dropdown menu showing 'Relativity'.
- Destination: A dropdown menu showing 'Load File'.
- Transferred Object: A dropdown menu showing 'Document'.
- Profile: A dropdown menu showing 'Select...'.
- Include in ECA Promote List: Radio buttons for 'Yes' and 'No'. 'No' is selected.
Advanced Section:
- Email Notification Recipients: A text box with the placeholder 'Separate by semi-colon'.
- Log Errors: Radio buttons for 'Yes' and 'No'. 'Yes' is selected.
Scheduling Section:
- Enable Scheduler: Radio buttons for 'Yes' and 'No'. 'No' is selected.

- **Name**—the name of your integration for reference purposes.
- **Type**—select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.

- **Source**—this is automatically set to **Relativity** since you are exporting data out of a Relativity workspace.
- **Destination**—select **Load File**.
- **Transferred Object**—select **Document**.
- **Profile**—use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you previously created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 194](#).
- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity does not log these item level errors.
 - Regardless of your selection, job-level errors are always recorded in Relativity.
- **Enable Scheduler**—gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
 - **Frequency**—the interval at which Relativity promotes data using this integration point.
 - **Daily**—select this option to promote data once every day.
 - **Weekly**—select this option to promote data on a weekly basis. You can specify how often in the **Reoccur** field, in which you will provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the data promotion will take place by checking any of the days of the week listed.
 - **Monthly**—select the day of the month that you want this integration point to promote data once every month.
 - **Reoccur**—enter the number of month(s) in which this integration point recurrently promotes data.
 - **Send On**
 - **Day __ the month**—select the day of the month that you want this integration point to promote data.
 - **The __ of the Month**—select this option for this integration point to promote data on the chosen day of every month. For example, "The **Second Friday** of the month."
 - **Start Date**—the date that you want Integration Points to start promoting the data.
 - **End Date**—(Optional) the date that you want Integration Points to stop promoting the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.

- **Scheduled Time**—the time at which this integration point promotes date. This time is local to your PC, not to the server.
4. Click **Next** to advance to the Source Information layout.
 5. Complete the following fields on the **Source Information** layout:

The screenshot shows the 'Create Integration Point' dialog box with the 'Source Information' tab selected. The 'Source Detail' section includes a 'Source' dropdown set to 'Folder', a 'Folder' dropdown set to 'SempergerCara', and a 'Views' dropdown set to 'Documents'. Below these is a 'Start Export at Record' field with the value '1'. The 'Columns To Export' section has three panes: 'Source Fields' (a long list of fields), 'Selected Fields' (a list of selected fields including Confidential Designation, Control Number, etc.), and 'Renamed Fields' (an empty list). Navigation buttons like '>', '<', and '<<' are between the panes, and a 'Rename' button is above the 'Renamed Fields' pane.

- **Source**—select **Folder** from the drop-down list. Specify that you want to select a folder, from which you want export the data in your load file. You will select this folder below from the folder structure in the Folder field. You will also need to select a View from the Views field.
- **Folder**—click on the down arrow and expand the folder structure, locate the folder from which you want to export the data, and select it. This field is only available if you selected Folder + Subfolders as the source above.

Note: When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to create the integration point, these fields are updated to reflect the newly selected source.

- **Views**—click on the down arrow and select a view for the data that you want to export. This is only available if you selected Folder or Folder + Subfolders as the source above.

- **Start Export at Record**—select a record number that identifies the initial document for export. Integration Points exports the document with this record number and continues exporting documents with subsequent record numbers.
- **Source Fields | Selected Fields| Renamed Fields**—choose the fields that you want to export by moving them to the Selected Fields box. The box on the left displays all available source fields. The fields listed in the Selected Fields column are determined by what you select for the Source field above, as well by the folder, production set, or saved search that you select. Only the fields in the Selected Fields box on the right will be exported when you run the integration point. If you wish to rename the fields in your load file before exporting them, you can do so through the Rename option described below. The fields whose names you change are displayed in the Renamed Fields column.
- **Rename**—gives you the option of renaming the fields in your load file before exporting them. When you click this button, you are presented with the following settings and buttons in the Rename Fields window:

- **Selected Field**—displays the current name of the field that you selected from the Source Fields column. To change its name, use the Renamed Field below.
- **Renamed Field**—enter the new name for the Selected Field. This name will appear in the Renamed Fields column of the layout once you click the Update or Update and Next button below. If you do not change the original name of the selected field, then the Renamed Fields column contains an empty row for that field.
- **Update** button—click this button to update the selected field to the name you entered in the Renamed Field setting. When you do this, the renamed field appears in the Renamed Field column.
- **Update and Next** button—click this button to update the selected field to the name you entered in the Renamed Field setting and then move to the next field in the Selected Field column. When you do this, the renamed field appears in the Renamed Field column and the next field appears in the Selected Field setting.
- **Cancel** button—click this to exit the Rename Fields window without applying any changes to current field names.

6. Click **Next** to advance to the Destination Information layout.

7. Complete the following fields on the **Destination Information** layout:

The screenshot shows the 'Create Integration Point' dialog box with the 'Destination Information' tab selected. The dialog is divided into three main sections: Export Detail, Output Settings, and Volume & Subdirectory Detail.

Export Detail:

- Export Type: ☐ Load File, ☒ Images, ☒ Natives, ☒ Text Fields As Files
- Overwrite Files: ☒
- Destination Folder:
- Create Export Folder: ☒

Output Settings:

LOAD FILE OPTIONS

- Image File Format:
- Data File Format:
- Data File Encoding:
- File Path: ☒ Relative, ☐ Absolute, ☐ User Prefix
- Include Native Files Path: ☒
- Export Multiple Choice Fields As Nested: ☐

FILE NAMING OPTIONS

- Name Output Files After:
- Append Original File Name: ☐

IMAGE

- File Type:
- Image Precedence:
- Subdirectory Prefix: 001

NATIVE

- Subdirectory Prefix: 001

TEXT

- Text File Encoding:
- Text Precedence:
- Subdirectory Prefix: 001

Volume & Subdirectory Detail:

VOLUME

- Prefix:
- Start Number:
- Number Of Digits:
- Max Size (MB):

SUBDIRECTORY

- Start Number:
- Number Of Digits:
- Max Files:

Load File Options

- **Export Type**—this field reflects the type of export job you are running, which you specified on the Setup layout. By default, Load File is selected as the base configuration for your export job. You also have the option of enhancing the load file by selecting **Images**, **Natives**, and **Text Fields as Files**, depending on the makeup of your data. Selecting any of these options makes additional corresponding output settings available, which are described below.
 - The Text Fields as Files option determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Integration Points includes text as part of your load file if you deselect this option and if a long text field is included in the selected fields that you mapped in the Source Information layout.

- **Destination Folder**—specify the folder into which you want to export the data from the load file. This reads the Default File Repository and lets you select a subfolder of that location.
- **Create Export Folder**—check this box to create an export folder named after the existing Relativity Integration Point job and the timestamp in your export folder. This will prevent the overwriting of any previous Relativity Integration Point exports to your export folder. When you check this box, the value displayed in the Destination Folder field is updated to reflect the [JobName]_[RunTimeStampUTC] information.
- **Image File Format**—select one of these formats for image-level load file:
 - Opticon
 - IPRO
 - IPRO (Full Text)
- **Data File Format**—select the format for the document-level load file you are exporting:
 - **Relativity (.dat)**—load file exports with the standard Concordance delimiters.
 - **HTML (.html)**—load file is in HTML and contains hyperlinks to launch any exported files.
 - **Comma-separated (.csv)**—load file exports as delimited text file that uses a comma to separate values.
 - **promote data**—load file exports with the custom delimiters that you select.
- **Data File Encoding**—select an encoding for the document-level load file from the drop-down box.
- **File Path**—controls how the export path for the files is referenced. Select one of the following options:
 - **Use absolute paths**—paths to exported files are represented as absolute paths. For example, C:\Desktop\VOL001\NATIVE001\AS000001.msg
 - **Use relative paths**—paths to exported files are represented as relative paths. For example, .\VOL001\NATIVE001\AS000001.msg
 - **Use prefix**—a prefix is added to the relative path, such as a CD drive letter. For example, D:\VOL001\NATIVE001\AS000001.msg
- **Include Native Files Path**—check this box if you want to include the native file path in your data once you export it. Note that in the load file, for example a Relativity.dat file, there will be file path information added for every record you are exporting.
- **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.
- **Name Output Files After**—select one of the following naming convention for exported files:
 - **Identifier**—select this option to name the files after the identifier for your workspace.
 - **Begin production number**—select this option to name the files after the production number. (This number may be the Bates number for a production.) Relativity names files

after the production number only if you select Produced Images as the Production Precedence below.

- **Append Original File Name**—select this option to append the original name of the file to the end of the exported file name.

Image—the following fields are only available if you selected Images for the Export Type field above.

- **File Type**—select one of these file types:
 - Single-page TIF/JPG
 - Multi-page TIF
 - PDF
- **Production Precedence**—select one of the following groups of produced documents for export instead of the original images:
 - **Original Images**—exports only the original, non-produced images.
 - **Produced Images**—exports a produced version of the images. When you select this, the following fields become available:

IMAGE

File Type: Single page TIFF/JPEG

Production Precedence: Produced Images

Image Productions: November Production

Include Original Images If Not Produced: ☐

Subdirectory Prefix: IMG 001

- **Image Productions**—select the produced images that you want to act as the precedence.
- **Include Original Images If Not Produced**—exports only the original images in the event that they have not been produced.
- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported images. By default, this is set to IMG.

Native

- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported native files. By default, this is set to NATIVE. This field is only available if you selected Natives for the Export Type field above.

Text—the following fields are only available if you selected text Fields As Files for the Export Type field above.

- **Text File Encoding**—select the encoding for the document-level text files
- **Text Precedence**—select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click the ellipsis to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the Right or Left single or double arrows. Use the Up and Down arrows to order the precedence of the fields.

- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported text files. By default, this is set to TEXT.

Volume

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

Subdirectory

- **Start Number**—select the starting number for the subdirectories.
- **Number of Digits**—select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
- **Max Files**—select the number of files to store in each subdirectory.

8. Click **Save** to save this integration point with these export settings.
Once Relativity saves the integration point, you will be able to run it and export the data based on the settings you specified. See [Running the export job on page 271](#) for details.

5.5.2 Exporting a folder and subfolders to a load file

To create an integration point specifically for exporting a folder and subfolders, perform the following steps:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.
3. Complete the following fields in the **Setup** category of the Create Integration Point layout:

Create Integration Point [Cancel] [i]

Setup 1 ————— 2 Complete the Setup [← Back] [Next →]

General

Name:

Type: ☐ Import ☒ Export

Source:

Destination:

Transferred Object:

Profile:

Include in ECA Promote List: ☐ Yes ☒ No

Advanced

Email Notification Recipients:
Separate by semi-colon

Log Errors: ☒ Yes ☐ No

Scheduling

Enable Scheduler: ☐ Yes ☒ No

- **Name**—the name of your integration for reference purposes.
- **Type**—select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.
- **Source**—this is automatically set to **Relativity** since you are exporting data out of a Relativity workspace.
- **Destination**—select **Load File**.
- **Transferred Object**—select **Document**.
- **Profile**—use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply an existing profile, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 194](#).
- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semicolons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors. Regardless of your selection, job-level errors are always recorded in Relativity.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity does not log these item level errors.
- **Enable Scheduler**—gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
 - **Frequency**—the interval at which Relativity promotes data using this integration point.
 - **Daily**—select this option to promote data once every day.
 - **Weekly**—select this option to promote data on a weekly basis. You can specify how often in the **Reoccur** field, in which you will provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the data promotion will take place by checking any of the days of the week listed.
 - **Monthly**—select the day of the month that you want this integration point to promote data once every month.
 - **Reoccur**—enter the number of month(s) in which this integration point recurrently promote data.
 - **Send On**
 - **Day __ the month**—select the day of the month that you want this integration point to promote data.
 - **The __ of the Month**—select this option for this integration point to promote data on the chosen day of every month. For example, "The **Second Friday** of the month."
 - **Start Date**—the date that you want Integration Points to start promoting the data.

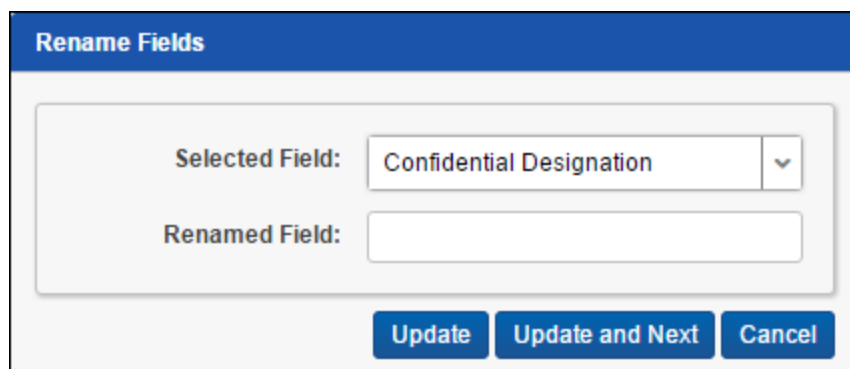
- **End Date**—(Optional) the date that you want Integration Points to stop promoting the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
 - **Scheduled Time**—the time at which this integration point promotes data. This time is local to your PC, not to the server.
4. Click **Next** to advance to the Source Information layout.
 5. Complete the following fields on the **Source Information** layout:

The screenshot shows the 'Create Integration Point' dialog box. At the top, there are three tabs: 'Setup', 'Source Information' (which is selected and highlighted with a blue circle and the number 2), and 'Destination Information'. Below the tabs is a progress bar with three steps: 1 (Setup, with a checkmark), 2 (Source Information, with a blue circle and the number 2), and 3 (Destination Information, with a blue circle and the number 3). To the right of the progress bar are 'Back' and 'Next' buttons. Below the tabs is the 'Source Detail' section. It contains a 'Source' dropdown menu set to 'Folder + Subfolders'. Below that is a 'Folder + Subfolders' dropdown menu set to 'Select...'. Below that is a 'Views' dropdown menu set to 'Select...'. Below these is a 'Start Export at Record' field set to '1'. Below the 'Source Detail' section is the 'Columns To Export' section. It contains three columns: 'Source Fields' (a list of fields), 'Selected Fields' (an empty list), and 'Renamed Fields' (an empty list). Between the 'Selected Fields' and 'Renamed Fields' columns is a 'Rename' button. The 'Source Fields' list includes: Alert, Analytics Index, Artifact ID, Attachment Name, Attorney Review Comments, Batch, Batch::Assigned To, Batch::Batch Set, Batch::Status, Bates Beg, Bates Beg Attach, Bates End, Bates End Attach, Case Admin - Production Volume, Case Admin Saved Searches, Confidential Designation, Control Number, Control Number Beg Attach, Control Number End, Control Number End Attach, Conversation Family, Conversation Index, Custodian - Single Choice, Data Load Date, Data Load Volume, Date Created, and Date Last Modified.

- **Source**—select **Folder + Subfolders** from the drop-down list and specify that you want to select a folder and subfolders from which you want export the data in your load file. You will select this folder below from the folder structure in the Folder + Subfolders field. You will also need to select a View from the Views field.
- **Folder + Subfolders**—click on the down arrow and expand the folder structure, locate the folder and subfolders from which you want to export the data, and select it. This field is only available if you selected Folder + Subfolders as the source above.

Note: When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to create the integration point, these fields are updated to reflect the newly selected source.

- **Views**—click on the down arrow and select a view for the data that you want to export. This is only available if you selected Folder or Folder + Subfolders as the source above.
- **Start Export at Record**—select a record number that identifies the initial document for export. Integration Points exports the document with this record number and continues exporting documents with subsequent record numbers.
- **Source Fields | Selected Fields | Renamed Fields**—choose the fields that you want to export by moving them to the Selected Fields box. The box on the left displays all available source fields. The fields listed in the Selected Fields column are determined by what you select for the Source field above, as well by the folder, production set, or saved search that you select. Only the fields in the Selected Fields box on the right will be exported when you run the integration point. If you wish to rename the fields in your load file before exporting them, you can do so through the Rename option described below. The fields whose names you change are displayed in the Renamed Fields column.
- **Rename**—gives you the option of renaming the fields in your load file before exporting them. When you click this button, you are presented with the following settings in the Rename Fields window:



- **Selected Field**—displays the field that you have selected from the Source Fields column, the name of which you can change in the Renamed Field below.
- **Renamed Field**—enter the desired new name for the field. This name will appear in the Renamed Fields column of the layout once you click the Update or Update and Next button below. If you do not change the original name of the selected field, then the Renamed Fields column contains an empty row for that field.
- **Update** button—click this button to update the selected field to the name you entered in the Renamed Field setting. When you do this, the renamed field appears in the Renamed Field column.
- **Update and Next** button—click this button to update the selected field to the name you entered in the Renamed Field setting and then move to the next field in the Selected

Field column. When you do this, the renamed field appears in the Renamed Field column and the next field appears in the Selected Field setting.

- **Cancel** button—click this button to exit the Rename Fields window without applying any changes to current field names.

- Click **Next** to advance to the Destination Information layout.
- Complete the following fields on the **Destination Information** layout:

Create Integration Point

Setup Source Information **Destination Information** 3

Export Detail

Export Type: ☐ Load File ☒ Images ☒ Natives ☒ Text Fields As Files

Overwrite Files: ☒

Destination Folder: \\StructuredData\\export_(TimeStamp)

☒ Create Export Folder

Output Settings

LOAD FILE OPTIONS

Image File Format: Select...

Data File Format: Relativity (.dat)

Data File Encoding: Unicode

File Path: ☒ Relative ☐ Absolute ☐ User Prefix

Include Native Files Path: ☒

Export Multiple Choice Fields As Nested: ☐

FILE NAMING OPTIONS

Name Output Files After: Identifier

Append Original File Name: ☐

IMAGE

File Type: Single page TIFF/JPEG

Image Precedence: Original Images

Subdirectory Prefix: IMG 001

NATIVE

Subdirectory Prefix: NATIVE 001

TEXT

Text File Encoding: Unicode

Text Precedence: Select...

Subdirectory Prefix: TEXT 001

Volume & Subdirectory Detail

VOLUME

Prefix: VOL

Start Number: 1

Number Of Digits: 2

Max Size (MB): 4400

SUBDIRECTORY

Start Number: 1

Number Of Digits: 3

Max Files: 500

Load File Options

- **Export Type**—this field reflects the type of export job you are running, which you specified on the Setup layout. By default, Load File is selected as the base configuration for your export job. You also have the option of enhancing the load file by selecting **Images**, **Natives**, and **Text**

Fields as Files, depending on the makeup of your data. Selecting any of these makes additional corresponding output settings available, which are described below.

- The Text Fields as Files option determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Integration Points includes text as part of your load file if you deselect this option and if a long text field is included in the selected fields that you mapped in the Source Information layout.
- **Destination Folder**—specify the folder into which you want to export the data from the load file. This reads the Default File Repository and lets you select a subfolder of that location.
- **Create Export Folder**—check this box to create an export folder named after the existing Relativity Integration Point job and the timestamp in your export folder. This will prevent the overwriting of any previous Relativity Integration Point exports to your export folder. When you check this box, the value displayed in the Destination Folder field is updated to reflect the [JobName]_[RunTimeStampUTC] information.
- **Image File Format**—select one of these formats for image-level load file:
 - Opticon
 - IPRO
 - IPRO (Full Text)
- **Data File Format**—select a the format for the document-level load file you are exporting:
 - **Relativity (.dat)**—load file exports with the standard Concordance delimiters.
 - **HTML (.html)**—load file is in HTML and contains hyperlinks to launch any exported files.
 - **Comma-separated (.csv)**—load file exports as delimited text file that uses a comma to separate values.
 - **Custom (.txt)**—load file exports with the custom delimiters that you select.
- **Data File Encoding**—select an encoding for the document-level load file from the drop-down box.
- **File Path**—controls how the export path for the files is referenced. Select one of the following options:
 - **Use absolute paths**—paths to exported files are represented as absolute paths. For example, C:\ Desktop\VOL001\NATIVE001\AS000001.msg
 - **Use relative paths**—paths to exported files are represented as relative paths. For example, .\VOL001\NATIVE001\AS000001.msg
 - **Use prefix**—a prefix is added to the relative path, such as a CD drive letter. For example, D:\VOL001\NATIVE001\AS000001.msg
- **Include Native Files Path**—check this box if you want to include the native file path in your data once you export it. Note that in the load file, for example a Relativity.dat file, there will be file path information added for every record you are exporting.

- **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.
- **Name Output Files After**—select one of the following naming convention for exported files:
 - **Identifier**—select this option to name the files after the identifier for your workspace.
 - **Begin production number**—select this option to name the files after the production number. (This number may be the Bates number for a production.) Relativity names files after the production number only if you select Produced Images as the Production Precedence below.
- **Append Original File Name**—select this option to append the original name of the file to the end of the exported file name.

Image—the following fields are only available if you selected Images for the Export Type field above.

- **File Type**—select one of these file types:
 - Single-page TIF/JPG
 - Multi-page TIF
 - PDF
- **Production Precedence**—select one of the following groups of produced documents for export instead of the original images:
 - **Original Images**—exports only the original, non-produced images.
 - **Produced Images**—exports a produced version of the images. When you select this, the following fields become available:

The screenshot shows a configuration window titled "IMAGE". It contains several fields:

- File Type:** A dropdown menu currently showing "Single page TIFF/JPEG".
- Production Precedence:** A dropdown menu currently showing "Produced Images".
- Image Productions:** A field showing "November Production" with a blue button containing three dots to its right. This section is highlighted with a red rectangular border.
- Include Original Images If Not Produced:** A checkbox that is currently unchecked.
- Subdirectory Prefix:** A text field containing "IMG", followed by a separate field containing "001".

- **Image Productions**—select the produced images that you want to act as the precedence.
- **Include Original Images If Not Produced**—exports only the original images in the event that they have not been produced.
- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported images. By default, this is set to IMG.

Native

- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported native files. By default, this is set to NATIVE. This field is only available if you selected Natives for the Export Type field above.

Text—the following fields are only available if you selected text Fields As Files for the Export Type field above.

- **Text File Encoding**—select the encoding for the document-level text files
- **Text Precedence**—select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click the ellipsis to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the Right or Left single or double arrows. Use the Up and Down arrows to order the precedence of the fields.

- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported text files. By default, this is set to TEXT.

Volume

- **Prefix**—enter the alpha prefix for the volume identifier. By default, this is set to VOL.
- **Start Number**—select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
- **Number of Digits**—select the number of digits attached to the prefix. (For example, if you select 2, the output is VOL001, VOL002, and so on.)
- **Max Size (MB)**—select the maximum size allowed for each volume in MBs.

Subdirectory

- **Start Number**—select the starting number for the subdirectories.
- **Number of Digits**—select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
- **Max Files**—select the number of files to store in each subdirectory.

8. Click **Save** to save this integration point with these export settings.

Once Relativity saves the integration point, you will be able to run it and export the data based on the settings you specified. See [Running the export job on page 271](#) for details.

5.5.3 Exporting a production to a load file

To create an integration point specifically for exporting a production set, perform the following steps:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.

3. Complete the following fields in the **Setup** category of the Create Integration Point layout:

Create Integration Point

Cancel ⓘ

Setup Complete the Setup

1 2

← Back Next →

General

Name:

Type: ☐ Import ☒ Export

Source:

Destination:

Transferred Object:

Profile:

Include in ECA Promote List: ☐ Yes ☒ No

Advanced

Email Notification Recipients:
Separate by semi-colon

Log Errors: ☒ Yes ☐ No

Scheduling

Enable Scheduler: ☐ Yes ☒ No

- **Name**—the name of your integration for reference purposes.
- **Type**—select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.
- **Source**—this is automatically set to **Relativity** since you are exporting data out of a Relativity workspace.
- **Destination**—select **Load File**.
- **Transferred Object**—select **Document**.
- **Profile**—use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply an existing profile, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 194](#).
- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between

addresses.

- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors. Regardless of your selection, job-level errors are always recorded in Relativity.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity does not log these item level errors.
 - **Enable Scheduler**—gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
 - **Frequency**—the interval at which Relativity promotes data using this integration point.
 - **Daily**—select this option to promote data once every day.
 - **Weekly**—select this option to promote data on a weekly basis. You can specify how often in the **Reoccur** field, in which you will provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the data promotion will take place by checking any of the days of the week listed.
 - **Monthly**—select the day of the month that you want this integration point to promote data once every month.
 - **Reoccur**—enter the number of month(s) in which this integration point recurrently promotes data.
 - **Send On**
 - **Day __ the month**—select the day of the month that you want this integration point to promote data.
 - **The __ of the Month**—select this option for this integration point to promote data on the chosen day of every month. For example, "The **Second Friday** of the month."
 - **Start Date**—the date that you want Integration Points to start promoting the data.
 - **End Date**—(Optional) the date that you want Integration Points to stop promoting the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
 - **Scheduled Time**—the time at which this integration point promotes data. This time is local to your PC, not to the server.
4. Click **Next** to advance to the Source Information layout.

5. Complete the following fields on the **Source Information** layout:

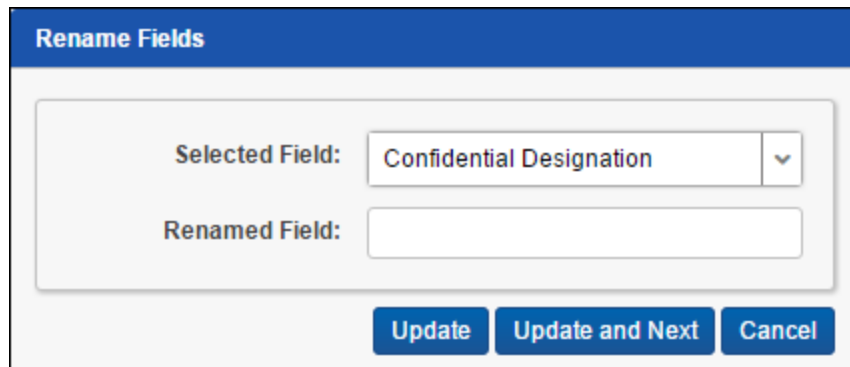
- **Source**—select **Production** from the drop-down list. specify that you want to select a production set, from which you want export the data in your load file. You will select this folder below from the folder structure in the Folder + Subfolders field. You will also need to select a View from the Views field.
- **Production Set**—click on the down arrow and select the production set that you want to act as the source for the load file. This field is only available if you have selected Production as the source above.

Note: When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to create the integration point, these fields are updated to reflect the newly selected source.

- **Start Export at Record**—select a record number that identifies the initial document for export. Integration Points exports the document with this record number and continues exporting documents with subsequent record numbers.
- **Source Fields | Selected Fields| Renamed Fields**—choose the fields that you want to export by moving them to the Selected Fields box. The box on the left displays all available

source fields. The fields listed in the Selected Fields column are determined by what you select for the Source field above, as well by the folder, production set, or saved search that you select. Only the fields in the Selected Fields box on the right will be exported when you run the integration point. If you wish to rename the fields in your load file before exporting them, you can do so through the Rename option described below. The fields whose names you change are displayed in the Renamed Fields column.

- **Rename**—gives you the option of renaming the fields in your load file before exporting them. When you click this button, you are presented with the following settings in the Rename Fields window:



- **Selected Field**—displays the field that you have selected from the Source Fields column, the name of which you can change in the Renamed Field below.
- **Renamed Field**—enter the desired new name for the field. This name will appear in the Renamed Fields column of the layout once you click Update or Update and Next below. If you do not change the original name of the selected field, then the Renamed Fields column contains an empty row for that field.
- **Update** button—click this button to update the selected field to the name you entered in the Renamed Field setting. When you do this, the renamed field appears in the Renamed Field column.
- **Update and Next** button—click this button to update the selected field to the name you entered in the Renamed Field setting and then move to the next field in the Selected Field column. When you do this, the renamed field appears in the Renamed Field column and the next field appears in the Selected Field setting.
- **Cancel** button—click this button to exit the Rename Fields window without applying any changes to current field names.

6. Click **Next** to advance to the Destination Information layout.
7. Complete the following fields on the **Destination Information** layout:

Create Integration Point

Setup Source Information **Destination Information 3**

Export Detail

Export Type: ☐ Load File ☒ Images ☒ Natives ☒ Text Fields As Files

Overwrite Files: ☒

Destination Folder: \\StructuredData\\export_(TimeStamp)

☒ Create Export Folder

Output Settings

LOAD FILE OPTIONS

Image File Format: Select...

Data File Format: Relativity (.dat)

Data File Encoding: Unicode

File Path: ☒ Relative ☐ Absolute ☐ User Prefix

Include Native Files Path: ☒

Export Multiple Choice Fields As Nested: ☐

FILE NAMING OPTIONS

Name Output Files After: Identifier

Append Original File Name: ☐

IMAGE

File Type: Single page TIFF/JPEG

Image Precedence: Original Images

Subdirectory Prefix: IMG 001

NATIVE

Subdirectory Prefix: NATIVE 001

TEXT

Text File Encoding: Unicode

Text Precedence: Select...

Subdirectory Prefix: TEXT 001

Volume & Subdirectory Detail

VOLUME

Prefix: VOL

Start Number: 1

Number Of Digits: 2

Max Size (MB): 4400

SUBDIRECTORY

Start Number: 1

Number Of Digits: 3

Max Files: 500

Load File Options

- **Export Type**—this field reflects the type of export job you are running, which you specified on the Setup layout. By default, Load File is selected as the base configuration for your export job. You also have the option of enhancing the load file by selecting **Images**, **Natives**, and **Text Fields as Files**, depending on the makeup of your data. Selecting any of these makes additional corresponding output settings available, which are described below.
 - The Text Fields as Files option determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Integration Points includes text as part of your load file if you

deselect this option and if a long text field is included in the selected fields that you mapped in the Source Information layout.

- **Destination Folder**—specify the folder into which you want to export the data from the load file. This reads the Default File Repository and lets you select a subfolder of that location.
- **Create Export Folder**—check this box to create an export folder named after the existing Relativity Integration Point job and the timestamp in your export folder. This will prevent the overwriting of any previous Relativity Integration Point exports to your export folder. When you check this box, the value displayed in the Destination Folder field is updated to reflect the [JobName]_[RunTimeStampUTC] information.
- **Image File Format**—select one of these formats for image-level load file:
 - Opticon
 - IPRO
 - IPRO (Full Text)
- **Data File Format**—select a the format for the document-level load file you are exporting:
 - **Relativity (.dat)**—load file exports with the standard Concordance delimiters.
 - **HTML (.html)**—load file is in HTML and contains hyperlinks to launch any exported files.
 - **Comma-separated (.csv)**—load file exports as delimited text file that uses a comma to separate values.
 - **Custom (.txt)**—load file exports with the custom delimiters that you select.
- **Data File Encoding**—select an encoding for the document-level load file from the drop-down box.
- **File Path**—controls how the export path for the files is referenced. Select one of the following options:
 - **Use absolute paths**—paths to exported files are represented as absolute paths. For example, C:\ Desktop\VOL001\NATIVE001\AS000001.msg
 - **Use relative paths**—paths to exported files are represented as relative paths. For example, .\VOL001\NATIVE001\AS000001.msg
 - **Use prefix**—a prefix is added to the relative path, such as a CD drive letter. For example, D:\VOL001\NATIVE001\AS000001.msg
- **Include Native Files Path**—check this box if you want to include the native file path in your data once you export it. Note that in the load file, for example a Relativity.dat file, there will be file path information added for every record you are exporting.
- **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.

- **Name Output Files After**—select one of the following naming convention for exported files:
 - **Identifier**—select this option to name the files after the identifier for your workspace.
 - **Begin production number**—select this option to name the files after the production number. (This number may be the Bates number for a production.) Relativity names files after the production number only if you select Produced Images as the Production Precedence below.
- **Append Original File Name**—select this option to append the original name of the file to the end of the exported file name.

Image—the following fields are only available if you selected Images for the Export Type field above.

- **File Type**—select one of these file types:
 - Single-page TIF/JPG
 - Multi-page TIF
 - PDF
- **Production Precedence**—select one of the following groups of produced documents for export instead of the original images:
 - **Original Images**—exports only the original, non-produced images.
 - **Produced Images**—exports a produced version of the images. When you select this, the following fields become available:

The screenshot shows a configuration window titled "IMAGE". It contains the following fields:

- File Type:** A dropdown menu showing "Single page TIFF/JPEG".
- Production Precedence:** A dropdown menu showing "Produced Images".
- Image Productions:** A field showing "November Production" with a blue dropdown arrow icon to its right.
- Include Original Images If Not Produced:** A checkbox that is currently unchecked.
- Subdirectory Prefix:** A text field containing "IMG", followed by a separate field containing "001".

A red rectangular box is drawn around the "Image Productions" and "Include Original Images If Not Produced" fields.

- **Image Productions**—select the produced images that you want to act as the precedence.
- **Include Original Images If Not Produced**—exports only the original images in the event that they have not been produced.
- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported images. By default, this is set to IMG.

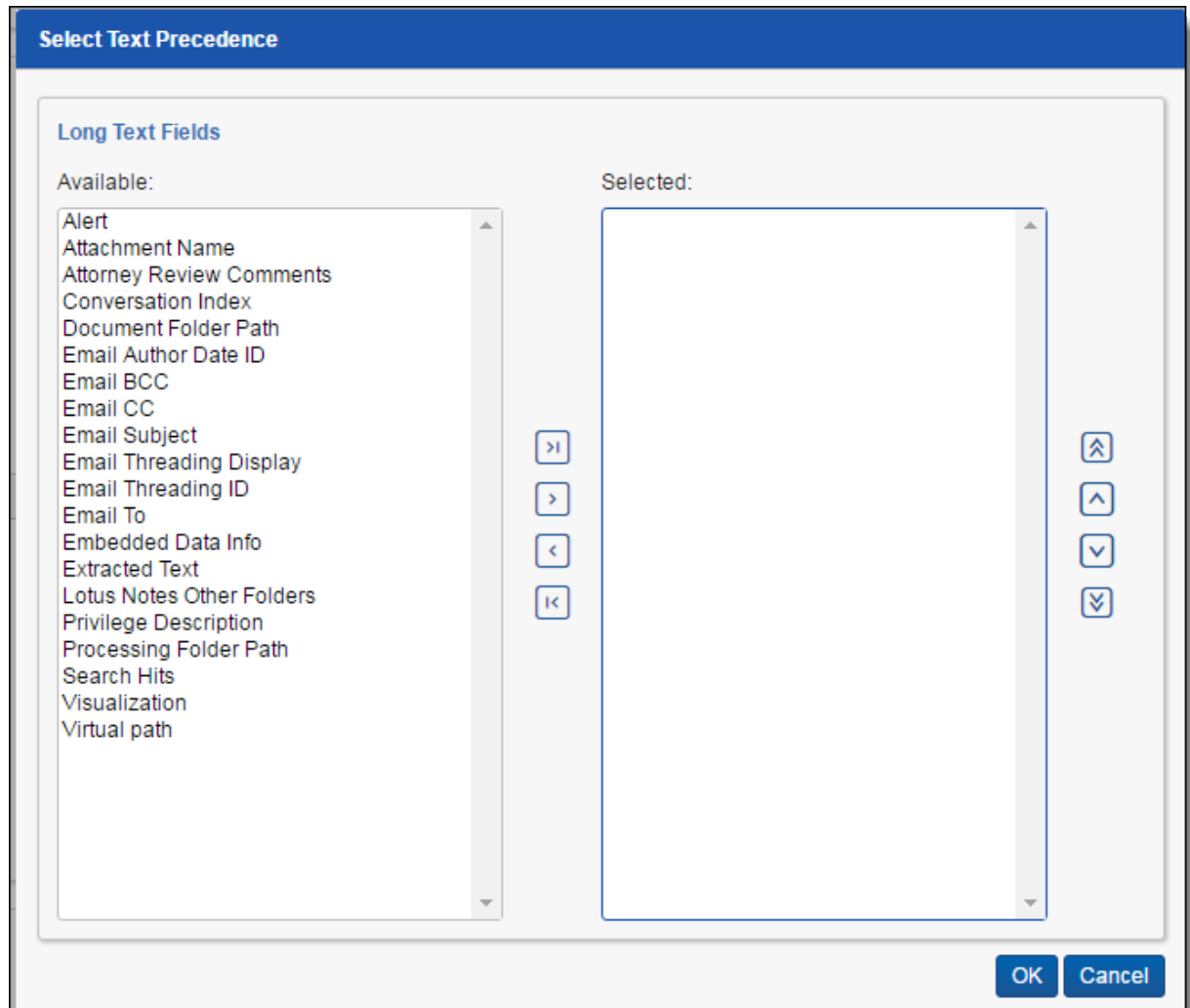
Native

- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported native files. By default, this is set to NATIVE. This field is only available if you selected Natives for the

Export Type field above.

Text—the following fields are only available if you selected text Fields As Files for the Export Type field above.

- **Text File Encoding**—select the encoding for the document-level text files
- **Text Precedence**—select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click the ellipsis to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the Right or Left single or double arrows. Use the Up and Down arrows to order the precedence of the fields.



- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported text files. By default, this is set to TEXT.

Volume

- **Prefix**—enter the alpha prefix for the volume identifier. By default, this is set to VOL.
- **Start Number**—select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.

- **Number of Digits**—select the number of digits attached to the prefix. (For example, if you select 2, the output is VOL001, VOL002, and so on.)
- **Max Size (MB)**—select the maximum size allowed for each volume in MBs.

Subdirectory

- **Start Number**—select the starting number for the subdirectories.
- **Number of Digits**—select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
- **Max Files**—select the number of files to store in each subdirectory.

8. Click **Save** to save this integration point with these export settings.

Once Relativity saves the integration point, you will be able to run it and export the data based on the settings you specified. See [Running the export job on page 271](#) for details.

5.5.4 Exporting a saved search to a load file

To create an integration point specifically for exporting a saved search, perform the following steps:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.

3. Complete the following fields in the **Setup** category of the Create Integration Point layout:

Create Integration Point

Cancel ⓘ

Setup Complete the Setup

1 2

← Back Next →

General

Name: Doc Export

Type: ☐ Import ☒ Export

Source: Relativity

Destination: Load File

Transferred Object: Document

Profile: Select...

Include in ECA Promote List: ☐ Yes ☒ No

Advanced

Email Notification Recipients:
Separate by semi-colon

Log Errors: ☒ Yes ☐ No

Scheduling

Enable Scheduler: ☐ Yes ☒ No

- **Name**—the name of your integration for reference purposes.
- **Type**—select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.
- **Source**—this is automatically set to **Relativity** since you are exporting data out of a Relativity workspace.
- **Destination**—select **Load File**.
- **Transferred Object**—select **Document**.
- **Profile**—use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you previously created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 194](#).
- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between

addresses.

- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors. Regardless of your selection, job-level errors are always recorded in Relativity.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity does not log these item level errors.
 - **Enable Scheduler**—gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
 - **Frequency**—the interval at which Relativity promotes data using this integration point.
 - **Daily**—select this option to promote data once every day.
 - **Weekly**—select this option to promote data on a weekly basis. You can specify how often in the **Reoccur** field, in which you will provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the data promotion will take place by checking any of the days of the week listed.
 - **Monthly**—select the day of the month that you want this integration point to promote data once every month.
 - **Reoccur**—enter the number of month(s) in which this integration point recurrently promote data.
 - **Send On**
 - **Day __ the month**—select the day of the month that you want this integration point to promote data.
 - **The __ of the Month**—select this option for this integration point to promote data on the chosen day of every month. For example, "The **Second Friday** of the month."
 - **Start Date**—the date that you want Integration Points to start promoting the data.
 - **End Date**—(Optional) the date that you want Integration Points to stop promoting the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
 - **Scheduled Time**—the time at which this integration point promote data. This time is local to your PC, not to the server.
4. Click **Next** to advance to the Source Information layout.
 5. Complete the following fields on the **Source Information** layout:

Create Integration Point

Cancel ⓘ

Setup Source Information Destination Information

← Back Next →

Source Detail

Source: Saved Search

Saved Search: SBeck

Start Export at Record: 1

Columns To Export

Source Fields:

- Alert
- Analytics Index
- Artifact ID
- Attachment Name
- Attorney Review Comments
- Batch
- Batch::Assigned To
- Batch::Batch Set
- Batch::Status
- Bates Beg
- Bates Beg Attach
- Bates End
- Bates End Attach
- Case Admin - Production Volume
- Case Admin Saved Searches
- Confidential Designation
- Control Number
- Control Number Beg Attach
- Control Number End
- Control Number End Attach
- Conversation Family
- Conversation Index
- Custodian - Single Choice
- Data Load Date
- Data Load Volume
- Date Created
- Date Last Modified

Selected Fields:

Renamed Fields:

Rename

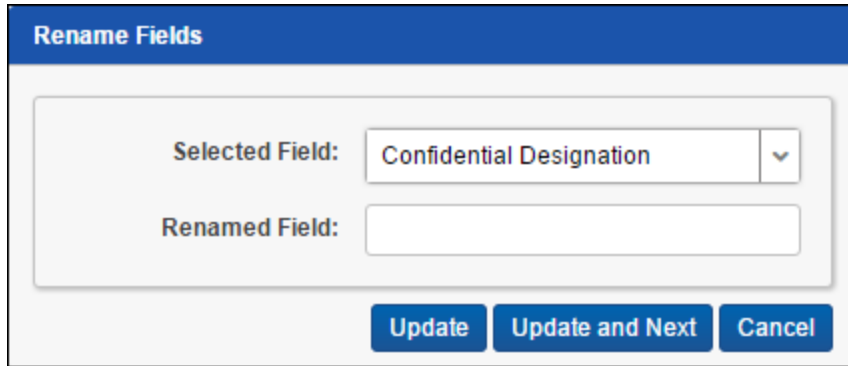
- **Source**—select **Saved Search** from the drop-down list. specify that you want to select a saved search, from which you want export the data in your load file. You will select this folder below from the folder structure in the Folder + Subfolders field. You will also need to select a View from the Views field.
- **Saved Search**—click on the down arrow and select the saved search that you want to act as the source for the load file. This field is only available if you selected Saved Search as the source above.

Note: When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to create the integration point, these fields are updated to reflect the newly selected source.

- **Start Export at Record**—select a record number that identifies the initial document for export. Integration Points exports the document with this record number and continues exporting documents with subsequent record numbers.
- **Source Fields | Selected Fields| Renamed Fields**—choose the fields that you want to export by moving them to the Selected Fields box. The box on the left displays all available source fields. The fields listed in the Selected Fields column are determined by what you select

for the Source field above, as well by the folder, production set, or saved search that you select. Only the fields in the Selected Fields box on the right will be exported when you run the integration point. If you wish to rename the fields in your load file before exporting them, you can do so through the Rename option described below. The fields whose names you change are displayed in the Renamed Fields column.

- **Rename**—gives you the option of renaming the fields in your load file before exporting them. When you click this button, you are presented with the following settings in the Rename Fields window:



- **Selected Field**—displays the field that you selected from the Source Fields column, the name of which you can change in the Renamed Field below.
- **Renamed Field**—enter the desired new name for the field. This name will appear in the Renamed Fields column of the layout once you click Update or Update and Next below. If you do not change the original name of the selected field, then the Renamed Fields column contains an empty row for that field.
- **Update** button—click this button to update the selected field to the name you entered in the Renamed Field setting. When you do this, the renamed field appears in the Renamed Field column.
- **Update and Next** button—click this button to update the selected field to the name you entered in the Renamed Field setting and then move to the next field in the Selected Field column. When you do this, the renamed field appears in the Renamed Field column and the next field appears in the Selected Field setting.
- **Cancel** button—click this to exit the Rename Fields window without applying any changes to current field names.

- Click **Next** to advance to the Destination Information layout.
- Complete the following fields on the **Destination Information** layout:

Create Integration Point

Setup Source Information **Destination Information** 3

Export Detail

Export Type: ☐ Load File ☒ Images ☒ Natives ☒ Text Fields As Files

Overwrite Files: ☒

Destination Folder: \\StructuredData\\export_(TimeStamp)

☒ Create Export Folder

Output Settings

LOAD FILE OPTIONS

Image File Format: Select...

Data File Format: Relativity (.dat)

Data File Encoding: Unicode

File Path: ☒ Relative ☐ Absolute ☐ User Prefix

Include Native Files Path: ☒

Export Multiple Choice Fields As Nested: ☐

FILE NAMING OPTIONS

Name Output Files After: Identifier

Append Original File Name: ☐

IMAGE

File Type: Single page TIFF/JPEG

Image Precedence: Original Images

Subdirectory Prefix: IMG 001

NATIVE

Subdirectory Prefix: NATIVE 001

TEXT

Text File Encoding: Unicode

Text Precedence: Select...

Subdirectory Prefix: TEXT 001

Volume & Subdirectory Detail

VOLUME

Prefix: VOL

Start Number: 1

Number Of Digits: 2

Max Size (MB): 4400

SUBDIRECTORY

Start Number: 1

Number Of Digits: 3

Max Files: 500

Load File Options

- Export Type**—this field reflects the type of export job you are running, which you specified on the Setup layout. By default, Load File is selected as the base configuration for your export job. You also have the option of enhancing the load file by selecting **Images**, **Natives**, and **Text Fields as Files**, depending on the makeup of your data. Selecting any of these makes additional corresponding output settings available, which are described below.
 - The Text Fields as Files option determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Integration Points includes text as part of your load file if you

deselect this option and if a long text field is included in the selected fields that you mapped in the Source Information layout.

- **Destination Folder**—specify the folder into which you want to export the data from the load file. This reads the Default File Repository and lets you select a subfolder of that location.
- **Create Export Folder**—check this box to create an export folder named after the existing Relativity Integration Point job and the timestamp in your export folder. This will prevent the overwriting of any previous Relativity Integration Point exports to your export folder. When you check this box, the value displayed in the Destination Folder field is updated to reflect the [JobName]_[RunTimeStampUTC] information.
- **Image File Format**—select one of these formats for image-level load file:
 - Opticon
 - IPRO
 - IPRO (Full Text)
- **Data File Format**—select a the format for the document-level load file you are exporting:
 - **Relativity (.dat)**—load file exports with the standard Concordance delimiters.
 - **HTML (.html)**—load file is in HTML and contains hyperlinks to launch any exported files.
 - **Comma-separated (.csv)**—load file exports as delimited text file that uses a comma to separate values.
 - **Custom (.txt)**—load file exports with the custom delimiters that you select.
- **Data File Encoding**—select an encoding for the document-level load file from the drop-down box.
- **File Path**—controls how the export path for the files is referenced. Select one of the following options:
 - **Use absolute paths**—paths to exported files are represented as absolute paths. For example, C:\ Desktop\VOL001\NATIVE001\AS000001.msg
 - **Use relative paths**—paths to exported files are represented as relative paths. For example, .\VOL001\NATIVE001\AS000001.msg
 - **Use prefix**—a prefix is added to the relative path, such as a CD drive letter. For example, D:\VOL001\NATIVE001\AS000001.msg
- **Include Native Files Path**—check this box if you want to include the native file path in your data once you export it. Note that in the load file, for example a Relativity.dat file, there will be file path information added for every record you are exporting.
- **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.

- **Name Output Files After**—select one of the following naming convention for exported files:
 - **Identifier**—select this option to name the files after the identifier for your workspace.
 - **Begin production number**—select this option to name the files after the production number. (This number may be the Bates number for a production.) Relativity names files after the production number only if you select Produced Images as the Production Precedence below.
- **Append Original File Name**—select this option to append the original name of the file to the end of the exported file name.

Image—the following fields are only available if you selected Images for the Export Type field above.

- **File Type**—select one of these file types:
 - Single-page TIF/JPG
 - Multi-page TIF
 - PDF
- **Production Precedence**—select one of the following groups of produced documents for export instead of the original images:
 - **Original Images**—exports only the original, non-produced images.
 - **Produced Images**—exports a produced version of the images. When you select this, the following fields become available:

The screenshot shows a configuration window titled "IMAGE". It contains the following fields and values:

- File Type:** Single page TIFF/JPEG
- Production Precedence:** Produced Images
- Image Productions:** November Production (with a dropdown arrow)
- Include Original Images If Not Produced:** (unchecked checkbox)
- Subdirectory Prefix:** IMG (with a "001" suffix)

A red rectangular box highlights the "Image Productions" and "Include Original Images If Not Produced" fields.

- **Image Productions**—select the produced images that you want to act as the precedence.
- **Include Original Images If Not Produced**—exports only the original images in the event that they have not been produced.
- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported images. By default, this is set to IMG.

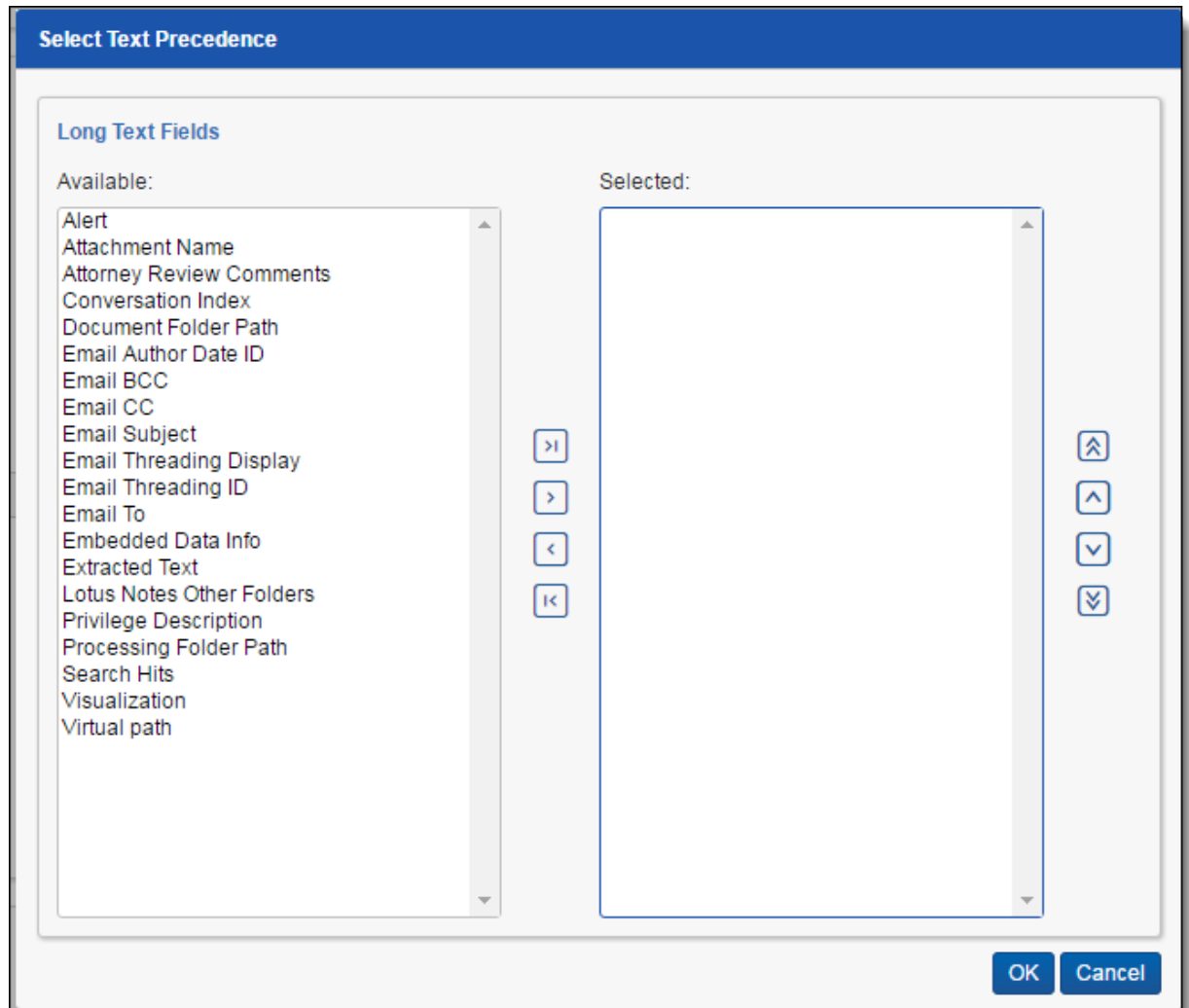
Native

- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported native files. By default, this is set to NATIVE. This field is only available if you selected Natives for the

Export Type field above.

Text—the following fields are only available if you selected text Fields As Files for the Export Type field above.

- **Text File Encoding**—select the encoding for the document-level text files
- **Text Precedence**—select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click the ellipsis to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the Right or Left single or double arrows. Use the Up and Down arrows to order the precedence of the fields.



- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported text files. By default, this is set to TEXT.

Volume

- **Prefix**—enter the alpha prefix for the volume identifier. By default, this is set to VOL.
- **Start Number**—select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.

- **Number of Digits**—select the number of digits attached to the prefix. (For example, if you select 2, the output is VOL001, VOL002, and so on.)
- **Max Size (MB)**—select the maximum size allowed for each volume in MBs.

Subdirectory

- **Start Number**—select the starting number for the subdirectories.
- **Number of Digits**—select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
- **Max Files**—select the number of files to store in each subdirectory.

8. Click **Save** to save this integration point with these export settings.

Once Relativity saves the integration point, you will be able to run it and export the data based on the settings you specified. See [Running the export job below](#) for details.

5.5.5 Exporting to a Relativity workspace

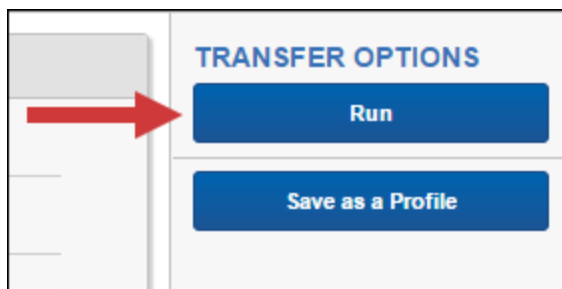
In addition to exporting to a CSV and load file, you have the option of exporting data from one Relativity workspace to another Relativity workspace. For more information on this capability, see [Promoting data between workspaces through Integration Points on page 277](#).

5.5.6 Running the export job

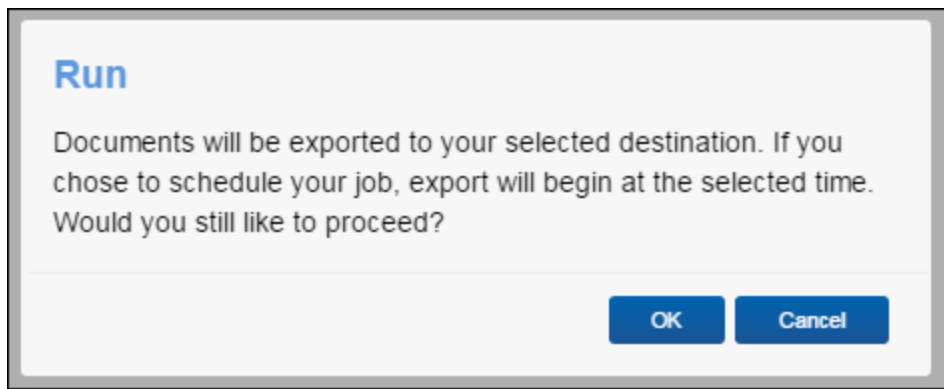
To export your load file based on the export settings you specified above, click **Run** on the Transfer Options console on the saved integration point.

Note: All Integration Points jobs are fully editable after run.

Note that you also have the option of saving this integration point as a profile through the Save as Profile button on the Transfer Options console. For more information on profiles, see [Integration Points profiles on page 194](#).



Click **OK** on the run confirmation message, which informs you of where your documents will be placed.



The Run button turns to red and gives you the option of stopping the job you just kicked off, as long as that job has a status of Pending or Processing.

If necessary, monitor the progress of the promote job by viewing the **Status** field in the **Status** view at the bottom of the layout. You will see any of the following status values:

- **Pending**—the job has yet to be picked up by an agent.
- **Validation**—an agent is validating the job to make sure it has the required settings, such as access to the source and destination objects (saved searches, workspaces, etc.). If validation fails, the status changes to "Validation failed," and Relativity logs an error. If the validation succeeds, the job moves on to a status of "Processing."
- **Validation failed**—the job validation has failed, resulting in an error, the details of which are saved in the Job History Errors tab.
- **Processing**—the agent has picked up the job and is in the process of completing it.
- **Completed**—the job is complete, and no errors occurred.
- **Completed with errors**—the job is complete and errors have occurred. You can view error details in the Job History Errors tab. See [Monitoring job history and errors on page 290](#) for details.
- **Error—job failed**—a job-level error occurred and the job did not complete because it failed. You can view error details in the Job History Errors tab. See [Monitoring job history and errors on page 290](#) for details.
- **Stopping**—you clicked the Stop button, and the stop job has yet to be picked up by an agent.
- **Stopped**—the job has been stopped.

5.5.6.1 Stopping and restarting an export job

Relativity gives you the option of stopping an export job from proceeding in the event that you need to re-prioritize it or because you made a mistake when creating it. You can only do so when that job has a status of Pending or Processing.

Note the following about stopping an Integration Points job:

- You can also stop a scheduled job if it has a status of Pending or Processing.
- A job is cannot be stopped if it has any status other than Pending or Processing, or the point at which Relativity starts promoting documents with such as information as the user who tagged them and the source workspace.
- When you click Stop, Relativity immediately stops creating new errors for that job.

- When you click Stop on a run-now job, Relativity marks all errors associated with the current job history as Expired.
- When you click Stop on a retry job, Relativity marks all errors associated with the current job history and the previous job as Expired.
- You can start a scheduled job after you have already stopped it.
- The item counts on the Integration Points layout reflect all items promoted before the agent received the signal to stop the job.

To stop an export job, follow the steps below.

1. Click **Stop** on the console.

The screenshot shows the 'Integration Point Details' console for a job named 'Export Load File'. The 'General' tab is selected. On the right side, under 'TRANSFER OPTIONS', the 'Stop' button is highlighted with a red arrow. Below the details, there is a 'Status' section with a table showing the job's progress.

Start Time (U...)	Artifact ID	Name	Integration Po...	Job Type	Job Status	Destination W...	Destination In...	Items Transfe...	Total Items	Items with Err...
3/22/2017 1:58 P	1042609	Export Load File	Export Load File	Run	Pending	ECA Dashboard - 1017022	This Instance	0	0	0

Relativity then informs you that you will not be removing any data by stopping the transfer and that you should check to make sure that the overwrite setting you previously entered is still appropriate for the re-run.

2. Click **Stop Transfer** to proceed.

The screenshot shows a dialog box titled 'Stop Transfer'. The text inside reads: 'Stopping this transfer will not remove any data that was transferred. When re-running this transfer, make sure that your overwrite settings will return expected results.' At the bottom, there are two buttons: 'Stop Transfer' and 'Cancel'.

Once Relativity stops the job, the Job Status field on the Status view reflects the stopped job.

Status

Items 1 - 2 (of 2)

<input type="checkbox"/>	Start Time (UTC)	Artifact ID	Name	Integration Point	Job Type	Job Status	Destination Worksp...	Items Transferred	Total Items	Items with Errors
<input type="checkbox"/>	9/21/2016 7:33 PM	1043050	ECA integration points	ECA integration points	Run	Stopped	Documentation Destination - 2934933	200	733	0
<input type="checkbox"/>	9/21/2016 7:32 PM	1043048	ECA integration points	ECA integration points	Run	Stopped	Documentation Destination - 2934933	0		0

0 Selected Item(s)

Select Page Size: 10

To re-start a stopped job, click **Run**. When you do this, Relativity begins to transfer data again from the beginning but does not remove any data already transferred.

5.5.7 Stopping (disabling) an Integration Point from promoting data

To stop, or disable, an integration point from promoting data, simply disable, or turn off, the scheduler option.

1. From the Integration Points landing page, click the Integration Point **Name** that you wish to disable.
2. Click **Edit**.
3. From the Import Scheduling section under Enable Scheduler, select **No**. This disables the scheduling mechanism for that integration point.

Scheduling

Enable Scheduler: ☐ Yes ☒ No

5.5.8 Scheduler date format considerations

The integration points scheduler accepts non-U.S. date formats to further accommodate, for example, users in Australia.

In this case, the default language in your browser settings is set to English (Australian) or any other language that would display a non-U.S. date format of Day/Month/Year instead of Month/Day/Year.

Languages

Language
English (Australia) ^

Order languages based on your preference

English (Australia) Google Chrome is displayed in this language	⋮
English (United States)	⋮
English	⋮

[Add languages](#)

Offer to translate pages that aren't in a language you read ☒

Spell check
English (United States) v

Relativity then properly displays the date when you select it for the Start and End Date fields in the Scheduling category.

Scheduling

Enable Scheduler: ☒ Yes ☐ No

Frequency: Select... v

Start Date:	24/08/2017
End Date:	30/08/2017

Scheduled Time: hh:mm 12hr AM v

Time Zone: (UTC-06:00) Central Time (US ... v

This date format will also appear anywhere else in Relativity where a date is displayed, such as on the saved Integration Point Details layout and the Date Last Modified field on the Document list.

5.5.9 Automatically stopping a scheduled job that repeatedly fails

In some cases, a scheduled job may fail each time it is executed, such as when a job needs reconfiguring, and it may take some time before you become aware of these failed attempts. To mitigate this situation, you can configure an instance setting which will specify the maximum number of consecutive failed attempts encountered before the job is automatically stopped. For example, you may want to stop the scheduled job after four consecutive failed attempts at running.

1. Navigate to the **Instance Settings** page.
2. Create a new instance setting with the following settings.
 - **Name**—enter **MaxFailedScheduledJobsCount**.
 - **Section**—enter **kcura.IntegrationPoints**.
 - **Value Type**—select **Integer 32-bit**.
 - **Value**—enter the number of consecutive failed attempts to be executed before the scheduled job is stopped.

			MaxFailedScheduledJobsCount	4	kcura.IntegrationPoints	No
---	---	---	------------------------------------	---	-------------------------	----

The integration point's Scheduling tab will display the failed jobs with a Job Type of "Scheduled Run," Job Status of "Error - job failed," Items Transferred of "0," and Total Items based on the number of items in that job. The system will attempt one more run after the configured maximum number of consecutive failed attempts before it stops the scheduled job and the Total Items column will be blank.


Job ID	Start Time (UTC)	Artifact ID	Name	Job Type	Job Status	Destination Worksp...	Items Transferred	Total Items	Items with Errors	System Created By
8	12/5/2022, 2:21 PM	1040715	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0		0	Service Account, Relativity
7	12/5/2022, 2:21 PM	1040697	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0	7	0	Service Account, Relativity
6	12/5/2022, 2:20 PM	1040679	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0	7	0	Service Account, Relativity
5	12/5/2022, 2:19 PM	1040661	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0	7	0	Service Account, Relativity
1	12/5/2022, 2:19 PM	1040643	Automated Stop for Scheduled Jobs	Scheduled Run	Error - job failed	Sample Workspace - 1019265	0	7	0	Service Account, Relativity

The "Next Scheduled Runtime (UTC)" field on the Scheduling tab will be blank, letting you know that job is not scheduled to run again. You will need to correct the error(s) before it will run again as scheduled.

General	Scheduling
Enable Scheduler	Yes
Schedule Rule	
	Next Scheduled Runtime (UTC)
	Last Runtime (UTC) 12/5/2022 2:21 PM

When you go to the Job History page to view the job, you will see the system-generated error description explaining why the scheduled job was stopped.

Job History Error						
Name	Source Unique ID	Job History	Error	Error Status	Error Type	System Created On
<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	(All) ▾	(All) ▾	(All)
90710540-d664-4e8d-		Automated Stop for...	Scheduled Job reached maximum number of consecutive fails and therefore was stopped by the system. The schedule won't be restored until Integration Point update.	New	Job	



5.6 Promoting data between workspaces through Integration Points

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

You can use Integration Points to promote (move) data from one Relativity workspace to another Relativity workspace. This can be thought of as a one-way sync process from a source workspace to a destination workspace and not a back and forth syncing process between them.

Once you have tagged documents for inclusion in or exclusion from the data you want to promote to review, you can access Integration Points to start the job or jobs that will send those documents to the review workspace.

This topic provides details on Integration Points as it is used to promote data between workspaces. For information, see the Integration Points Guide. [Integration Points on page 189](#)

5.6.1 Special considerations for large data promotion workflows

For large data promotion workflows, we recommend configuring integration point jobs into batches. The following suggestions can be used when creating job batches:

- When using Tag Documents with Job Name option, the job document count should be no more than 500,000.
- When Tag Documents with Job Name is not selected, no limit on document count applies.
- The recommended number of fields to be mapped should not exceed 100. Additionally, it is best to map as few long text fields as possible.

5.6.2 Promoting (exporting) to a Relativity workspace

In addition to exporting to a CSV and load file, you have the option of promoting (exporting) data from a source workspace to a destination workspace in Relativity. You can do this by selecting **Relativity** as the destination for the data that you intend to transfer and then selecting a specific workspace where you want

that data to go. This is the most efficient way to move documents from one workspace to another. Since it's a one-step process, it does not require you to export and re-import your data.

Notes:

- You can transfer document objects and non-document object metadata to a destination workspace. The non-document object must already exist in the destination workspace for non-document object metadata to be promoted.
- You can move original images, native documents, or metadata. You are not required to have Integration Points installed on the destination workspace.
- The data promotion process supports transfer of non-document objects linked to the Relativity Applications installed in the destination workspace. For example, if you want to push entities object to another workspace, make sure that the proper application is installed there, for example Legal Hold. You need to have the Relativity Application permission in both the Workspace Security and Object Security sections set to View.
- The export process sorts documents and images by name, which is typically the Control Number. This process takes into account entire names, which means that for names with numbers, it is advised to preserve the number of digits in the names by filling with leading zeros. For example:
 - Test2_1, Test2_2, Test2_10 will be sorted as: Test2_1, Test2_10, Test2_2
 - Test2_01, Test2_10, Test2_02 will be sorted as : Test2_01, Test2_02, Test2_10
- If promoted fields have associative objects, these objects need to be transferred first to ensure successful promotion of fields having references to them.
- The data promotion process will not transfer custom objects created by users in a workspace.
- The data promotion process cannot transfer complex objects that have relationships to other objects, such as Search Terms Report (STR), structured analytic sets, and Integration Points profiles, because related objects' ArtifactIDs may be different in the source and destination workspaces.
- When the Copy Images radio button is selected, the field mapping section is disabled because only the control number is required and available in this scenario. If you want to transfer other field metadata, you must create a new integration point without choosing to copy images.
- Integration Points uses the following delimiters to configure the Import API for the destination workspace. Other delimiters typically configured with the Import API are not utilized:
 - Multi-value delimiter: ASCII 029
 - Nested-value delimiter: ASCII 030

5.6.2.1 Setup

To create an integration point specifically for exporting a workspace, follow the steps below.

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.
3. Complete the following fields in the **Setup** category of the Create Integration Point layout:
 - **Name**—the name of your integration for reference purposes.
 - **Type**—select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.

- **Source**—this is automatically set to **Relativity** since you are exporting data out of a Relativity workspace.
- **Destination**—select **Relativity**.
- **Transferred Object**—select the available Document or non-document object meta data you want to promote to the destination workspace. The non-document object must already exist in the destination workspace. The data promotion process will not transfer custom objects created by users in a workspace. Refer to the Notes above for additional information.

Notes: You will need to create a new integration point for each object type that you want to export to the destination workspace.

- **Profile**—use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you have already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 194](#).
- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons to separate email addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity does not log these item level errors.
 - Regardless of your selection, job-level errors are always recorded in Relativity.
- **Enable Scheduler**—gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
 - **Frequency**—the interval at which Relativity runs this integration point.
 - **Daily**—select this option to promote data once every day.
 - **Weekly**—select this option to promote data on a weekly basis. You can specify how often in the **Reoccur** field, in which you will provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the data promotion will take place by checking any of the days of the week listed.
 - **Monthly**—select the day of the month that you want this integration point to promote data once every month.
 - **Reoccur**—enter the number of month(s) in which this integration point repeatedly promote data.
 - **Send On:**
 - **Day __ the month**—select the day of the month that you want this integration point to promote data.
 - **The __ of the Month**—select this option for this integration point to promote data on the chosen day of every month. For example, "The **Second Friday** of the month."

- **Start Date**—the date that you want Integration Points to start promoting the data.
- **End Date**—(Optional) the date that you want Integration Points to stop promoting the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
- **Scheduled Time**—the time at which this integration point promote data. This time is local to your PC, not to the server.

4. Click **Next** to advance to the Source Information layout.

5.6.2.2 Connect to Source

Continue to create your import integration point by connecting Relativity to the data source by following the steps below.

1. In the **Connect to Source** layout, complete the following fields:

- **Source**—select **Document** as the transferred object during setup, then select **Saved Search** or **Production** from the drop-down list. If you select any other object as the transferred object during setup, this is automatically set to View.
- **Saved Search/Production/View**—depending on the selected Transferred Object, one of the following fields displays:
 - **Saved Search**—elect an existing saved search to use from the drop-down list or click the ellipsis button for an alternative way to select a saved search.
 - **Production Set**—select an existing production set to use from the drop-down list.
 - **View**—select an existing View to use from the drop-down list.
- **Destination Workspace**—select an existing workspace to export your saved search or production to.

Note: Relativity will validate whether the selected object is available in the destination workspace and transfer only objects linked to Relativity Applications installed in the destination workspace. If the selected object is not available in the destination workspace, an error message will display.

- **Location**—select a folder or production set as the destination location.
 - **Folder**—select the drop-down menu to expand the folder structure, locate the folder from which you want to export the data, and select it. This field is only available if you have selected Folder.

Note: When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to create the integration point, these fields are updated to reflect the newly selected source.

- **Production Set**—select a production set to export the data to. Click the plus sign to create a new production set. For successful operation, promote Production Set with Append/Overlay mode.
- **Create Saved Search**—select **Yes** to create a saved search in the destination workspace. This saved search's name will take the name given to the integration point. This choice is enabled only if Yes is selected for the Tag Documents with Job Name field.
- **Tag Documents with Job Name**—select one of the following options below. See [Special considerations for large data promotion workflows on page 277](#) for document count considerations:
 - **Yes (Source and Destination Workspaces)**—to tag all documents in the scope of the job with a unique ID in both the source and destination workspaces, which allows you to easily identify these documents in both workspaces. This is the default option.
 - **Yes (Destination Workspace Only)**—to tag all documents in the scope of the job with a unique ID in the destination workspace only, which allows you to easily identify these documents in the target workspace.
 - **No**—to not tag documents with a unique ID in either workspace.

Note: If you intend to use Smart Overwrite option during the Map Fields process next, you must select **No** or **Yes (Destination Workspace Only)** for document tagging.

2. Click **Next** to advance to the Destination Information layout.

5.6.2.3 Map Fields

Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields by following the steps below.

1. In the **Fields Mapping** wizard, you have the following options for mapping fields:
 - Use the Shift+click and Ctrl+click method to select multiple fields at a time.
 - Use the text search boxes above the Source and Destination lists to find a particular field.
 - Use the single and double arrows or double-click a field to move selected fields between columns.
 - Use the horizontal scroll bar in each column as needed to fully view long field names.
 - Each column displays the total number of fields available in that column. This allows you to quickly compare the number of mapped fields to ensure they match. If they do not match, an error will display when you attempt to save the Integration Point.
 - The field names in the Destination column include the type of each field listed.
 - Click the **Map All Fields** button between the Source and Destination columns to automatically map all fields with matching names, except single/multiple object fields. If you have Destination fields that are mapped to Fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.

Notes:

- The Fields Mapping process excludes certain fields that are used internally by the Integration Points application. The following fields are excluded from the Source and Destination lists: Relativity Source Case, Relativity Source Job, Relativity Destination Case, ErroredDocuments, Job History, and Document.ProcessingFileID.
- If the WebAPIPath instance setting in the kCur.IntegrationPoints section is not configured correctly after upgrade or installation, the Source field list will not be able to display any attributes and will be empty. As a result, you will not be able to map fields.
- You do not need to map all attributes or fields. Only the Unique Identifier and Object Identifier are required. The Unique Identifier should contain a value that no other item in the workspace contains. For example, use the GUID or distinguishedName attribute. The Object Identifier is the specific field on the object that holds the displayed identifier, which might not be unique. For example, the Full Name field is the Object Identifier of the Entity RDO but it might not be unique. These two identifier values can be the same.

-
- Click the **Map Saved Search** button between the Source and Destination columns to automatically map fields that were configured in the Saved Search, which was selected as a data source on the previous screen. If you have Destination fields that are mapped to Fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.

Note: The Map Saved Search functionality only supports searches created with a Keyword Search. Other search conditions, such as dtSearch and Analytics Indexes, are not yet supported for this functionality.

2. Complete the following Import Settings on the Map Fields layout:

- **Overwrite**—determines how the system overwrites records once you promote data to the review workspace.
 - **Append Only**—promote only new records into the review workspace.
 - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. When you select this option, you must complete the Multi-Select Field Overlay Behavior field described below.
 - **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this option, you must complete the Multi-Select Field Overlay Behavior field described below.
- **Multi-Select Field Overlay Behavior**—determines how the system will overlay records when you push documents to the review workspace. This field is only available if you've selected either Overlay Only or Append/Overlay above. This field provides the following choices:
 - **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
 - **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.

- **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.
- **Smart Overwrite** checkbox—select this checkbox if you want to only promote the documents that were modified or added to the saved search since the last time the job ran. The benefit of selecting this option is that it may reduce the job processing time due to the reduction in the number of documents needing to be transferred. If this box is not selected, all documents are promoted regardless of whether they were modified or added.
 - If Smart Overwrite is used with Append Only: only the new documents that have been added to the saved search are promoted.
 - If Smart Overwrite is used with Overlay Only: only documents that have been modified in the source saved search are promoted.
 - If Smart Overwrite is used with Append/Overlay: both new and modified documents are promoted.

Notes:

- Smart Overwrite only works when the Tag Documents with Job Name option under Connect to Source is set to **No** (disabled) or **Yes (Destination Workspace Only)**.
 - Smart Overwrite works for specified conditions of the configured Integration Point, including Saved Search. If the Saved Search conditions are changed, then it is recommended to run the next execution of the Integration Point job with Smart Overwrite disabled in order to create a new baseline for further jobs within this Integration Point.
 - If a Smart Overwrite job results in errors and they are not resolved with the Retry Errors option, then it is recommended to re-run errored documents transfer with Smart Overwrite disabled. Otherwise, the Smart Overwrite job will not pick the errored documents in the next execution.
-

- **Copy Images**—determine whether you want to copy images to the destination workspace:
 - **Yes**—click if you want to copy images to your destination workspace. Then select options in the Image Precedence and Copy Files to Repository fields.
 - **No**—click if you don't want to copy images to the destination workspace. Then select options in Copy Native Files and Use Folder Path Information fields.
- **Image Precedence**—this field appears when Yes is selected for Copy Images. Select **Original Images** or **Produced Images** to copy to the destination workspace.
- **Copy Files to Repository**—determine if you want to copy physical image files to the destination workspace:
 - **Yes**—click if you want to copy physical image files to the destination workspace.
 - **No**—click if you want to add reference links in the destination workspace directing to images located in the source workspace. Links to the images will be accessible in the destination workspace Viewer.

- **Production Precedence**—this field displays when Produced Images is selected for Image Precedence. Use the pop-up screen to select and order the productions, and click OK on the screen to save.
- **Include Original Images If Not Produced**—this field displays when Produced Images is selected for Image Precedence. Select this checkbox to include the original image.
- **Copy Native Files**—if No was selected for Copy Images, determine how to copy native files to the destination workspaces by selecting one of these radio buttons:
 - **Physical files**—select to copy any physical native files from the source workspace to the destination workspace.
 - **Links Only**—select to add only reference links in the destination workspace that direct back to the source workspace documents. No physical files will be copied to the destination workspace, but native files will be accessible in the destination workspace Viewer.

Note: We do not recommend overlaying documents' native files with Links Only option from Review workspace back to Repository workspace. This action may lead to overlaying the original native file with its link, that has been previously sent to Review workspace. And that will result in deleting the native file and the data loss. When choosing this option to promote documents by only using links from repository to review workspace, be aware that the links to the promoted documents will be broken in the review workspace if you delete the native files in the repository workspace or if you delete or archive the repository workspace itself. In this situation, if you wanted to maintain the files in the review workspace, you first need to promote the physical files to that workspace before deleting them from the repository workspace or before deleting or archiving the repository workspace. For details on promoting subsets of data, see the Admin Guide.

Note: Be aware that when a non-administrator user copies native files by selecting the Links Only option, the System Created by column on the Job History tab will list the system administrator's name instead of the non-administrator user's name.

- **No**—select to not create additional copies of your native files. No physical native files or links will be pushed to the destination workspace. You will not be able to look at native files in the Viewer. Only metadata, such as extracted text or coding decisions, will be pushed. For example, if you have a document with native files and coding decisions, and you select the No option, only metadata (the coding decisions) will be promoted to the destination workspace. Refer to additional notes below regarding this choice:
 - Doing this maintains a single copy of that data file no matter how many times you use the document in your workspace.
 - You have the option of selecting No for an initial run of an integration point and then Yes for a subsequent run. Doing this saves you time on the initial job while then retaining copies of the native files on the final job.
 - The benefit of selecting No for this field is that you save on storage and speed.

Use Folder Path Information—use a metadata field to build the folder structure for the documents that you promote to the review workspace.

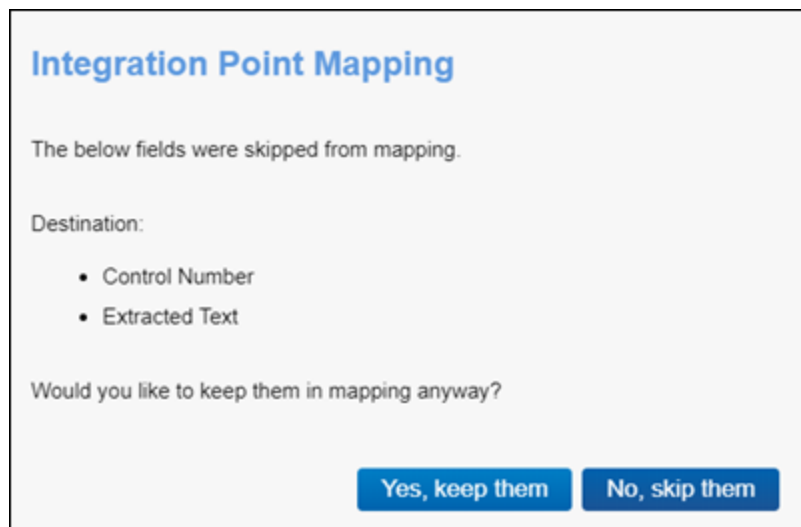
- **No**—select if you do not want to build a folder structure based on metadata. In this case, Relativity loads all documents directly into the folder indicated by the promote destination, and you create no

new folders in the destination workspace.

- **Read From Field or Read From Folder Tree**—select to use a metadata field to build the folder structure for the documents that you promote to the review workspace.
- **Folder Path Information**—specify a metadata field to build the folder structure for the documents that you promote to the review workspace.
 - You have the option of creating folders or re-foldering documents when you select Append/Overlay for the Overwrite field.
 - You have the option of re-foldering documents for the Overwrite field through the Move Existing Documents field.
- **Move Existing Documents**—re-folder documents that were previously imported into the destination workspace, but were only placed in the root case folder and not to any subfolders. This field is useful for situations in which you want to add new data to the destination workspace while overlaying existing data.
 - Select **No** if you don't want to re-folder existing documents.
 - Select **Yes** to move existing documents into the folders provided in the Folder Path Information field. For example, you previously imported custodian Sally Smith's files into the destination workspace's root folder. Now, in addition to placing the documents from the saved search specified in this integration point in their subfolder, you also want to move those previously migrated documents into Sally Smith's subfolder, so you would select Yes.

3. Click **Save** to save this integration point with these export settings.

During the mapping process, Relativity validates whether the selected objects are available in the destination workspace in the final step of the wizard. When fields cannot be mapped from the Source to the Destination, a pop-up modal displays them. You can either choose to keep the fields in the Source column or skip them and remove them.



Another solution that Integration Points data promotion provides is automatically remapping fields when the destination workspace is changed. When you change the destination workspace in either the integration

point or integration point profile, fields can vary between the source and destination workspace. When the destination workspace is changed, the new fields in the workspace are automatically mapped.

The artifacts are mapped based on their names only if the ArtifactIDs are different in the new destination workspace. They are mapped so they the integration points job will not fail. This means that if the source workspace fields cannot match to the new destination workspace fields, those unmatched fields are presented at the end of the mappings list for easy identification. Relativity also informs the you that the original source fields from the profile were mapped with corresponding fields from the destination workspace. The message will be similar to this, "We restored the fields mapping as destination workspace has changed."

5.6.3 Mapping saved searches

The Map Saved Searches button automatically maps the fields from the saved search. It also maps the object identifier fields, even when such field is not selected in the saved search. If any unsupported fields are manually mapped, clicking the Save button displays a pop-up modal stating that the job might fail.

Once Relativity saves the integration point, you will be able to run it and export the data based on the settings you specified. See [Running the export job on page 271](#) for details.

5.6.4 Working with promoted documents

To view the documents you promoted to the review workspace with Tag Documents with Job Name option enabled:

1. Navigate to the destination workspace.
2. Select the **Saved Search browser** and select the search you created to bring back documents that were promoted from the source workspace.
3. Note the following fields on the saved search view:
 - **Relativity Source Case**—the name of the workspace in which you tagged documents for inclusion and exclusion and from which you promoted your tagged documents to the review workspace.
 - **Relativity Source Job**—the name of the Integration Point that you used to promote tagged documents to the review workspace.

You can now review these documents and apply coding decisions for responsiveness and/or issues designation.

5.6.4.1 Reusing coding decisions

You can re-use the coding decisions you made on reviewed documents and promote them back into the source workspace through another Integration Point. For example, you could run another promote job to conduct a privilege overlay on documents in the source workspace.

To do this, follow the steps below.

1. Select the **saved search** you created to promote documents back to the source workspace.
2. Navigate to the **Integration Points** tab.
3. Create a new integration point that specifies the following values, which differ from those you entered for the promote job you ran previously:
 - **Destination Workspace**—select the original source workspace, specifically the workspace from which you previously promoted documents to the review workspace.

- **Saved Search**—select the saved search you created to promote documents back to the source workspace.
- **Field Mappings**—map only **Control Number (Object Identifier)** and **Privilege Designation**.
- **Overwrite**—select **Overlay Only**.

4. Click **Run**.

5.6.5 Calculating integration point job statistics on-demand

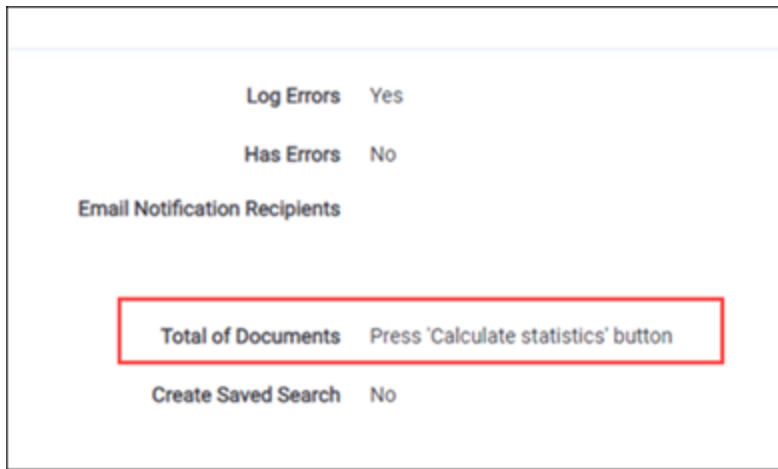
You can calculate the number of documents, as well as images and natives if applicable, to be transferred in the scope of a particular Integration Point.

1. Navigate to the **General** tab of **Integration Points > Integration Points Details** for a particular integration point job.

The screenshot shows the 'Integration Points Details' page for a specific integration point job. The 'General' tab is selected, displaying various configuration fields. On the right, there are buttons for 'Run', 'Retry Errors', 'Calculate statistics', and 'Save as Profile'. At the bottom, there is a table with columns for Job ID, Start Time (UTC), Artifact ID, Name, Job Type, Job Status, and Destination Workspace. The table is currently empty, showing 0 of 0 items per page.

Job ID	Start Time (UTC)	Artifact ID	Name	Job Type	Job Status	Destination Workspace
Filter	(All)	Filter	Filter	(All)	(All)	Filter

Note: Before the first calculation for this integration point, you will see the "Press 'Calculate statistics' button" message in the Total of Documents field.



Log Errors Yes

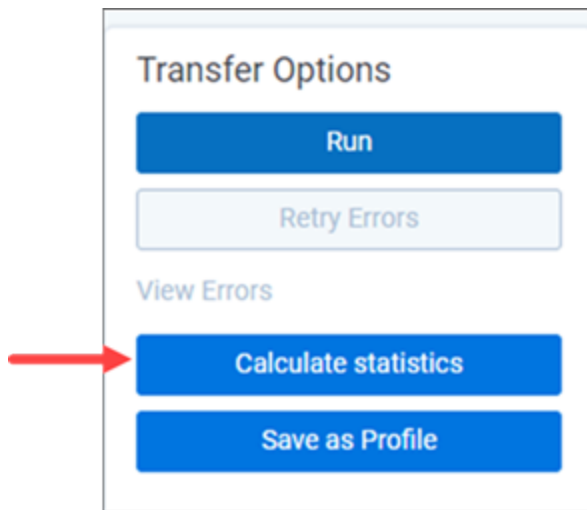
Has Errors No

Email Notification Recipients

Total of Documents Press 'Calculate statistics' button

Create Saved Search No

-
- Click the **Calculate statistics** button under Transfer Options in the right-hand panel.



A message box displays indicating that this action will launch the calculation of Saved Search or Production content, depending on the chosen Integration Point, and that this operation can be time consuming, depending on the size of the content. The statistics calculation will run in the background so you can still use other Transfer Options or leave this page and return to it for the results later.

Calculation results appear on the details page and depend on Integration Point content. The total number of documents with a date/time mark of the last calculation will display. Depending on the promoted content, the total number and size of images or natives may also display.

Total of Documents

25

Calculated on:

12/19/2022 16:18 UTC

Total of Natives

25 (2.56 MB)

5.7 Viewing destination workspaces

Note: As of September 1, 2024, we’ve streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

You can go to the Destination Workspace tab to view all of the workspaces that are designated as destinations for documents that you push through integration points.

All Destination ...		Add Widget		No Dashboard S...		Export	
		1 - 1 of 1		500 per page			
#	<input type="checkbox"/> Name	Destination Instance ...	Destination Instance...	Destination Workspac...	Destination Workspac...	Job History	
	Filter	Filter	= Filter	Filter	= Filter	Filter	
1	<input type="checkbox"/> This Instance - Docum...	This Instance	-1	Documentation [DO NOT DELETE]	3726327	Documentation	

The default All Destination Workspaces view provides the following fields:

- **Name**—the name given to the workspace, plus the artifact ID of the actual destination workspace.
- **Destination Workspace Name**—the name given to the destination workspace.
- **Destination Workspace Artifact ID**—the identifier of the destination workspace.
- **Job History**—a list of all the Job History entries associated with the destination workspace.

An individual destination workspace layout provides the following information in the associated **Document (Relativity Destination Case)** view.

Destination Workspace Layout
Edit
Back
Edit Permissions
View Audit
Record 1 of 1

Destination Workspace
Name: This Instance - Documentation [DO NOT DELETE] - 3726327

Only the first 1000 of 2496 items displayed.

Document (Relativity Destination Case)
Link
Unlink
Items 1 - 10 (of 1,000)

	Artifact ID	Control Number	Relativity Destination Case	Job History
(All)	(All)	(All)	Select...	Select...
<input type="checkbox"/> Edit	1120328	AZIPPER_0007299	This Instance - Documentation [DO NOT DI Documentation	
<input type="checkbox"/> Edit	1120329	AZIPPER_0007300	This Instance - Documentation [DO NOT DI Documentation	
<input type="checkbox"/> Edit	1120333	AZIPPER_0007746	This Instance - Documentation [DO NOT DI Documentation	
<input type="checkbox"/> Edit	1120334	AZIPPER_0007747	This Instance - Documentation [DO NOT DI Documentation	
<input type="checkbox"/> Edit	1120335	AZIPPER_0007748	This Instance - Documentation [DO NOT DI Documentation	
<input type="checkbox"/> Edit	1120336	AZIPPER_0007749	This Instance - Documentation [DO NOT DI Documentation	
<input type="checkbox"/> Edit	1120337	AZIPPER_0007773	This Instance - Documentation [DO NOT DI Documentation	
<input type="checkbox"/> Edit	1120338	AZIPPER_0008358	This Instance - Documentation [DO NOT DI Documentation	
<input type="checkbox"/> Edit	1120339	AZIPPER_0008559	This Instance - Documentation [DO NOT DI Documentation	
<input type="checkbox"/> Edit	1120340	AZIPPER_0008560	This Instance - Documentation [DO NOT DI Documentation	

0 Selected Item(s)
Select Page Size: 10

- **ArtifactID**—the identifier of the document.
- **Control Number**—the control number of the document.
- **Relativity Destination Case**—a list of all the destination workspaces in which the document can be found.
- **Job History**—a list of audited actions associated with the document.

5.8 Monitoring job history and errors

Note: As of September 1, 2024, we’ve streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

After you create an integration point and initiate the import process, you can monitor the job status on the Job History tab and resolve errors on the Job History Errors tab.

5.8.1 Job History

This tab lists an entry for each integration point job, and also provides you with the ability to view additional details for a specific job.

#	Job ID	Start Time (UTC)	Artifact ID	Name	Integration Point	Job Type	Job Status	Destination Workspace	Destination Instance	Items Read	Items Transferred	Total Items	Items with Errors
		(AB)		Filter	Filter	(AB)	Completed, Go...	Filter	Filter				
1	11	02/27/2023 8:21 PM	1040534	AO_testing_SavedSearch	AO_testing_SavedSearch	Run	Completed	AO_Test - 1019436	This Instance	25	25	25	0
2	14	02/27/2023 8:25 PM	1040539	TAG096 wknd	TAG096 wknd	Run	Completed	Destiny - 1019497	This Instance	25	25	25	0
3	19	02/27/2023 8:44 PM	1040561	TAG096 wknd	TAG096 wknd	Run	Completed	Destiny - 1019497	This Instance	25	25	25	0
4	6	02/27/2023 8:16 PM	1040716	AO_Test_scheduler	AO_Test_scheduler	Scheduled Run	Completed	New Case Template - 1014823	This Instance	25	25	25	0

The Job History tab lists the following information that you can use to monitor the status of an integration point job:

- **Start Time (UTC)**—the date and time that a job started running in Coordinated Universal Time (UTC).
- **Artifact ID**—the artifact ID of the workspace.
- **Name**—the name for a specific job run by the integration point.
- **Integration Point**—the name of the integration point used to run the job.
- **Job Status**—the current status of an integration point job. The following job statuses are available:
 - **[blank]**—the job has not started or was not run.
 - **Pending**—the job has been submitted but an agent hasn't picked it up, so the import process hasn't started.
 - **Suspending**—the system is performing the application update. The job prepares for being suspended, completing the current task.
 - **Suspended**—the system is performing the application update. The job has been suspended, and waits for the Integration Points agent to pick it up.
 - **Validation**—an agent is validating the job to make sure it has the required settings, such as access to the source and destination objects (saved searches, workspaces, etc.). If validation fails, the status changes to "Validation failed," and Relativity logs an error. If the validation succeeds, the job moves on to a status of "Processing."
 - **Validation failed**—the job validation has failed, resulting in an error, the details of which are saved in the Job History Errors tab.
 - **Processing**—the job is currently running.
 - **Error - Job Failed**—a job-level error occurred and the import wasn't completed. The integration point may have been able to import some of the records before the error occurred.
 - **Completed with Errors**—the import job completed but at least one item-level error occurred. If you set the Log Errors field to Yes for the integration point, you can view the item-level errors in the section called Job History Errors on the Job Details layout. See [Viewing job history details on the next page](#).

Notes: When transferring custodians and associating them to managers, errors can occur. If transferring custodians and the manager isn't associated with a manager, the custodian transfer is completed successfully. It will show up as Completed with Errors even though the Items Transferred field and Total Items field will match, while the Items with Errors field states zero errors. This is because the custodian has been imported correctly, but the manager wasn't associated correctly.

- **Completed**—the import job completed without any item-level errors.
- **Destination Workspace**—the workspace specified as the destination for the transferred files.
- **Items Read**—the number of records successfully read from the job source and passed for transferring.
- **Items Transferred**—the number of records successfully transferred when the job ran.
- **Total Items**—the total number of items originally designated to be transferred, including those that ended up having errors.
- **Items with Errors**—the number of records that the integration point failed to import due to item-level errors.

5.8.1.1 Viewing job history details

To view additional history information, click the name of a specific job listed on the Job History tab. The Job Details layout displays basic job information, import statistics, and a detailed list of errors.

The Job History Error section always logs job-level errors. If you set the Log Errors field to Yes, then it also logs item-level errors. For more information on setting the Log Errors field, see [Importing data through Integration Points on page 200](#).

Job Details

Edit Back Edit Permissions View Audit

Record 1 of 3

Job Details

Job ID: 1062
Name: Operation 3 - Import by RIP
Integration Point: Operation 3 - Import by RIP
Job Type: Run
Status: Error - job failed
Start Time (UTC): 9/25/2019 11:51 AM
End Time (UTC): 9/25/2019 12:27 PM

Import Statistics

Items Transferred: 5
Items with Errors: 3348

Only the first 1000 of 1501 items displayed.

Job History Error

Items 1 - 10 (of 1,000)

<input type="checkbox"/>	Name	Source Unique ID	Job History	Error	Error Status	Error Type	System Created On
<input type="checkbox"/>	2b63dce2-1369-44b4-b015		Operation 3 - Import by RIP	I API Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	242b9561-2ea8-46f0-8a51-		Operation 3 - Import by RIP	I API Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	4299edfa-9a4f-4138-a699-i		Operation 3 - Import by RIP	I API Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	b12bcf44-7bbc-4fa1-a86c-/		Operation 3 - Import by RIP	I API Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	1b57218d-2a4b-4ab1-a278		Operation 3 - Import by RIP	I API Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	cc5cc432-8b56-4520-a0fa-		Operation 3 - Import by RIP	I API Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	30cd0793-44bc-4ec9-b5a2		Operation 3 - Import by RIP	I API Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	b2cce3df-302d-494a-89a2-		Operation 3 - Import by RIP	I API Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	e89a9af7-4f6b-48d4-a356-i		Operation 3 - Import by RIP	I API Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	9bc0e410-5680-4f14-85c5-		Operation 3 - Import by RIP	I API Identity value not set	New	Item	9/25/2019 12:28 PM GMT

0 Selected Item(s)

Select Page Size: 10

The Job Details layout includes many of the same fields displayed on the Job History tab. The following list includes the additional fields displayed in this layout:

- **End Time (UTC)**—the date and time that a job completed in UTC.
- **Source Unique ID**—the unique identifier for the record in the source that caused an error.
- **Error**—a brief description of the error that occurred.
- **Timestamp**—the date and time that a job error occurred in UTC.
- **Error Type**—indicates whether the error occurred at the job or item level.

5.8.2 Job History Errors

In the Job History Errors tab, you can use the condition lists at the top of the view to find errors based on any error-related metadata fields, such as Artifact ID, Error, Error Status, Error Type, JobHistory, Name, Source Unique ID, Stack Trace, System Created By, System Created On, System Last Modified On, and Timestamp (UTC).

#	Name	Source Unique ID	Job History	Error	Error Status	Error Type	System Created On
1	2b63dce2-1369-44b4-...		Operation 3 - Import by ...	I-API Identity value not set	New	Item	09/25/2019 5:28 AM MST
2	242b9561-2ea8-46f0-...		Operation 3 - Import by ...	I-API Identity value not set	New	Item	09/25/2019 5:28 AM MST
3	4299edfa-9a4f-4138-a...		Operation 3 - Import by ...	I-API Identity value not set	New	Item	09/25/2019 5:28 AM MST
4	b12bcf44-7bbc-4fa1-a...		Operation 3 - Import by ...	I-API Identity value not set	New	Item	09/25/2019 5:28 AM MST

Once you specify your conditions, you can search for the targeted errors by clicking **Search** on the right side of the condition lists.

You can then open any of the individuals errors returned in the list by clicking the **Name** value.

Job History Error Layout
Edit
Back
Edit Permissions
View Audit
Record 1 of 1000

Error Details

Name: 2b63dce2-1369-44b4-b015-235c3080bcb4
Source Unique ID:
Job History: Operation 3 - Import by RIP
Error: I-API Identity value not set
Error Status: New
Error Type: Item
Full Error: I-API Identity value not set

System Created On: 9/25/2019 12:28 PM
System Created By: Service Account, Relativity
System Last Modified By: Service Account, Relativity

The Job History Error Layout provides the following fields:

- **Name**—the system-generated name of the error.
- **Source Unique ID**—the identifier of the item in which the error occurred.

- **Job History**—the name of the integration point containing the file in which the error occurred.
- **Error**—the error message.
- **Error Status**—the current state of the error. You'll see any of the following values for the status field:
 - **New**—the error is new and no action has been taken on it yet.
 - **Expired**—the state assigned to an item level error in either of the following scenarios:
 - You received an item-level error on a job, you didn't retry the error, and the job ran on a schedule, meaning the Enable Scheduler field is set to Yes on the integration point.
 - You received an item-level or a job-level error, you didn't retry the error, and you click Run Now on the integration point, or it is a scheduled job.
 - **In Progress**—the error is currently in the process of being retried.
 - **Retried**—the item level error in a job has been retried, meaning you clicked Retry Errors on the integration point and the retry job is complete.
- **Error Type**—an indicator of whether the error is item or job-level.
- **Full Error**—the error message with details, including a stack trace of the error, when available.
- **System Created On**—the date and time at which the error was created by the agent during the integration point job.
- **System Created By**—the agent that created the error during the integration point job.
- **System Last Modified By**—the agent that last updated the status value of the error.

With the information provided in the Job History Errors Layout, you can identify those files on which errors occurred. You can then access those files to manually address the causes of those errors. From there, you can return to the integration points console and retry the errors.

5.8.2.1 Item-level versus job-level errors

Note the following differences in the way Relativity handles item-level and job-level errors.

Relativity handles a mix of item-level and job-level errors in the following way:

- When you click Run Now on an integration point that contains item and job-level errors, the entire job is re-run and all errors are marked as Expired.
- When you click Retry Errors on an integration point that contains item and job-level errors, the entire job is rerun and Relativity assigns a value of Expired to the item-level errors while job-level errors are marked as In Progress and then Retried.

Relativity handles item-level errors in the following way:

- When you click Run Now, the entire job is re-run, and Relativity assigns a value of Expired to the item-level errors.
- When you click Retry Errors, Relativity assigns a value of Retried to the item-level errors and starts a retry job containing only those error documents.

Relativity handles job-level errors in the following way:

- It registers only one job-level error for the integration point.
- When you click Run Now, the entire job is re-run and Relativity assigns a value of Expired to the job-level error.
- The Retry Errors and Run Now buttons are both available.
- The Retry Error button re-runs the whole job, but the job-level error is marked as In progress and then retried.
- The Run Now button re-runs the whole job, but the job-level error is marked as Expired.

Scheduled job is not inserted and an error is thrown that shows up in the errors tab in Admin mode that a scheduled job did not run for this integration because the job was already running.

Note: When you click Retry Errors, the retry job is automatically set to Append/Overlay mode.

5.8.3 Troubleshooting job history errors

Relativity provides informative and actionable error messages when you attempt to save and run an integration point in any of the following situations:

The screenshot shows the 'Integration Point Details' window. At the top, a red banner displays the error: 'Failed to submit integration job. Integration Point validation failed. 20,005 Destination field(s) mapped may no longer be available or has been renamed. Review the mapping for the following field(s): 'Date Last Modified'.' Below this, the 'General' tab is active, showing fields like Name, Export Type, Source Details, Source Workspace, Transferred Object, Destination Workspace, Destination Folder, Overwrite, Multi-Select Overlay, Use Folder Path Info, and Move Existing Docs. To the right, there are checkboxes for Log Errors, Has Errors, Email Notification Recipients, and Included in ECA Promote List. On the far right, a 'TRANSFER OPTIONS' panel contains buttons for 'Run', 'Retry Errors', 'View Errors', and 'Save as a Profile'.

- The destination workspace is missing.
- The destination field is missing.
- You do not have permissions to a saved search, production, or destination workspace.
- The destination field has missing child object data.
- The production is missing from the destination workspace.

The following table provides some of the errors you could encounter when attempting to run an Integration Points job, along with information on how to resolve them:

Error	Likely resolution
Destination field(s) mapped has different type. Review the map-	Review the fields listed in the error message, and check if you have the same type as expected. If the reason for changing the type was to delete the file and re-create it, then it will be un-mapped. Correct the mapping saved in the Integration Point job, and run the job again.

Error	Likely resolution
ping for the following field(s): field_1, field_2	
Destination field(s) mapped may no longer be available or has been renamed. Review the mapping for the following field(s) [field name].	Review if the failing field(s) still exist in the destination workspace, correct the mapping saved in the Integration Point job, and run the job again.
Destination workspace is not available.	Verify if destination workspace exists.
Failed to copy source field into destination field due to missing child object. Review the following destination field(s): [field names]	Review the list of failing fields, create the child/parent relation in the destination workspace as it is in the source workspace and try again.
Saved search is not available or has been secured from this user. Contact your system administrator.	Verify that you have the required permissions for the saved search, or check to see if the saved search has been deleted. If needed, contact your system administrator to verify the saved search configuration.
User does not have sufficient permissions to access destination workspace. Contact your system administrator.	Confirm that you still have access to the destination workspace. It is also required that a System Admin account is present (used by an Integration Points Agent) and has access to the destination workspace.
Verify if a folder in destination workspace selected in the Integration Point exists or if a user has a proper permission to access it.	Verify that the folder used for the integration point still exists. Also, check the permission settings for the folders in destination workspace to confirm that it's not secured for the user's group.
Verify if a Production Set used as the location in destination workspace exists or if a user has a proper permission to access it.	Verify that the production set used as the location in the destination workspace still exists. Also, check the permission settings for productions in the destination workspace to confirm that it's not secured for the user's group.
Verify if a Production Set used as the location in destination workspace is in New status.	Verify that the production set used as the location in the destination workspace still has a status of New. Only productions with a status of New can be used as a production set in an integration point. If the production set was already staged or run, it isn't eligible to be used for the integration point.

Error	Likely resolution
Verify if production, which is the data source of this Integration Point, still exist or if user has required permissions for it.	Check to see if the production used as the data source of the integration point still exists. Also, verify that you have the required permissions for the production used as the data source. If needed, contact your system administrator to verify your production permissions.
Verify if the user still has permission to create saved search on destination workspace.	Verify that you have the required permissions for creating a saved search in the destination workspace for this integrated point job. If needed, contact your system administrator to verify your production permissions. One of missing permissions could be Search in Object Security and Advanced & Saved Searches in Other Settings, both of which are set in the group permission on destination workspace.

5.9 Microsoft Entra ID provider

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

Relativity can import Entity (Employee/Custodian) data from Microsoft Entra ID (formerly known as Azure Active Directory) through Integration Points. The following prerequisites must be established:

1. In Relativity:
 - a. You will need to install Integration Points into your workspace. See [Installing Integration Points](#) for details.
 - b. Once Integration Points is installed, you will then need to install the Integration Points AD provider application. To do so, go to the **Files** tab in Community, click the **Relativity Applications** library, and locate the appropriate Microsoft Entra ID for Integration Points ZIP file (formerly known as Azure AD for Integration Points ZIP file).

Completing these two installations adds Integration Points to your workspace and adds Microsoft Entra ID as a source within Integration Points.

2. In Microsoft Azure:
 - Set up an application in Microsoft Azure which can be used to configure an Integration Point in Relativity. Only an Application Administrator with access can create an application, find credentials, and delete an application. If you do not have permissions, contact your admin. For more information on Application Administrators, see Microsoft's documentation.
3. The final step is to import Microsoft Entra ID into Relativity. For more information, see [Importing from Microsoft Entra ID on page 227](#).

5.9.1 Registering an Azure application and credentials

To create your application ID and secret, you must have Application Administrator privileges to log into your Azure Portal and register an app.

Start with registering your application in the Azure portal by following the steps below. For more information on registering an application in the Azure portal, refer to documentation on Microsoft's site.

Note: These steps must be completed by a Microsoft 365 administrator.

1. Open your [Azure Portal](#).
2. Click **Microsoft Entra ID** (formerly known as Azure Active Directory).
3. Click **App registrations**.
4. Click **New Registration** to display the Register an application page.
5. Enter an application name in the **Name** field.
6. Accept the default setting, **Accounts in this organizational directory only**, as the supported account type.
7. Click **Register**.
8. Once the application is registered, make note of the **Application (client) ID** and **Directory (tenant) ID** for use later when configuring the data source in RelativityOne Collect.

Next, from the app's page, add permissions to the web API by following the steps below:

1. Click **API Permissions**.
2. Click **Add a permission**.
3. Click **Microsoft Graph**.
4. Select **Application Permissions**.
5. Select the following options from the Application Permissions section:
 - Directory – **Directory.Read.All**
 - Group – **Group.Read.All**
 - User – **User.Read.All**

Notes: This permission is required if Filter by Group functionality is used.

6. Click **Add Permission**.
7. Click **Grant Permission**.

Finally, grant Admin consent for the API by following the steps below:

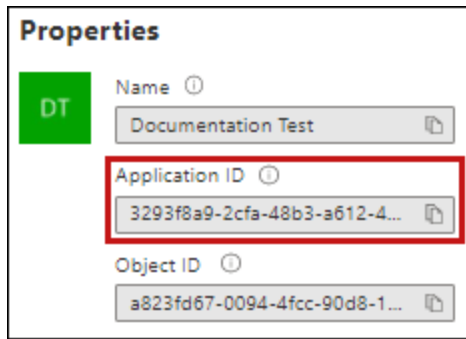
1. Click the **API Permissions** tab.
2. Click **Grant admin consent for [tenant]**.
3. In the pop-up window, click **Accept**.

5.9.2 Finding Azure credentials

If an application is already created and you need to find the application information to complete the Source Connection step, follow the steps below in the Azure Portal. For more information, see relevant Microsoft

documentation on the Microsoft site.

1. Open your [Azure Portal](#).
2. Click **Microsoft Entra ID** (formerly known as Azure Active Directory).
3. Navigate to **Enterprise applications**.
4. In the list of applications, locate and click on your application. The application page displays.
5. Navigate to **Properties**.
6. Click the **copy icon** next to the **Application ID**. The ID is copied to your clipboard to use as needed.



5.9.3 Removing application access

Removing access to an application can be done outside of Relativity in Microsoft Entra ID. To remove access, follow the steps below in the [Azure Portal](#):

1. Click **Microsoft Entra ID** (formerly known as Azure Active Directory).
2. In the navigation menu, click **Enterprise applications**.
3. In the list of applications, locate and open the desired application.
4. In the application, click **Delete**.

6 Staging Explorer

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

Staging Explorer enables you to rapidly transfer large amounts of data to and from RelativityOne to jump-start and sustain the data pipeline for critical projects. Use it to upload files to a staging area for RelativityOne or to download files from your RelativityOne storage location to a local computer.

Below are the top-level directories included in the [Staging Area](#) within each tenant or client domain storage area:

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

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

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

You can view data for a new matter, quickly load newly discovered data, or quickly download produced documents. This makes accessing data in the cloud as quick and seamless as if it was contained within your own environment.

Read a Staging Explorer scenario

Using the Staging Explorer

You set up a new case and need to begin review quickly. Opposing counsel gives you a hard disk drive with 10 GB of files you need to add to RelativityOne. You decide to use the Staging Explorer to upload files from the hard disk drive to RelativityOne. After you finish review of the case, you need to create productions for opposing counsel. When you produce these files to your RelativityOne storage location, you use the Staging Explorer to download the production to your local drive. You then ship the productions to opposing counsel.

Refer to these sections to set up Staging Explorer:

- [Permissions on the next page](#)
- [Installing, launching, and updating Staging Explorer on page 312](#)
- [Navigation on page 318](#)
- [Best practices, limitations, and data transfer performance considerations on page 310](#)

6.1 Staging Explorer

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Refer to these sections to set up Staging Explorer:

- [Permissions below](#)
- [Installing, launching, and updating Staging Explorer on page 312](#)
- [Navigation on page 318](#)
- [Best practices, limitations, and data transfer performance considerations on page 310](#)

6.2 Permissions

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

The following minimum security permissions are required to use the Staging Explorer. All permissions are set in Instance security

Object security	Tab visibility	Admin operations
Not applicable	<ul style="list-style-type: none">■ Data Transfer■ Staging Explorer	<ul style="list-style-type: none">■ Access Staging Explorer■ View Admin Repository*■ Send Email Notification**

* this permission is needed for non-admin users only.

** this permission is not required to run Staging Explorer, but is required to send and receive an email notification when a transfer finishes or fails. For more information, see [Updating Transfer Settings on page 339](#).

Note: If a user has access to multiple client domain workspaces and you only want them to be able to view specific fileshares in the Staging pane of the Staging Explorer, the user must be in a group, other than the System Administrator group, that is added to at least one workspace built on the resource pool with the associated fileshares. Refer to [User access permissions to fileshares on the next page](#) for more information

6.3 User access permissions to fileshares

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

In the default RelativityOne setup, users can access fileshares if they're in a group that is added to a workspace that's associated with a resource pool with fileshares. In some cases, if a user has access to multiple client domains, you may only want that user to see fileshares for his own client domain in the Staging pane and not any fileshares from other client domains to which he has access. Refer to the following sections for more information on each scenario.

6.3.1 Default workflow in RelativityOne for user access to fileshares

The normal workflow in RelativityOne is that a group and its users will inherit access ability to any fileshares within the resource pool that is associated with the workspace to which the group has access, as shown on the Figure 1.

For example, User A is in Group A that is added to Workspace A, which is associated with a Resource Pool containing fileshares. As a result, User A can view and access all fileshares in the Staging pane via the group's access.

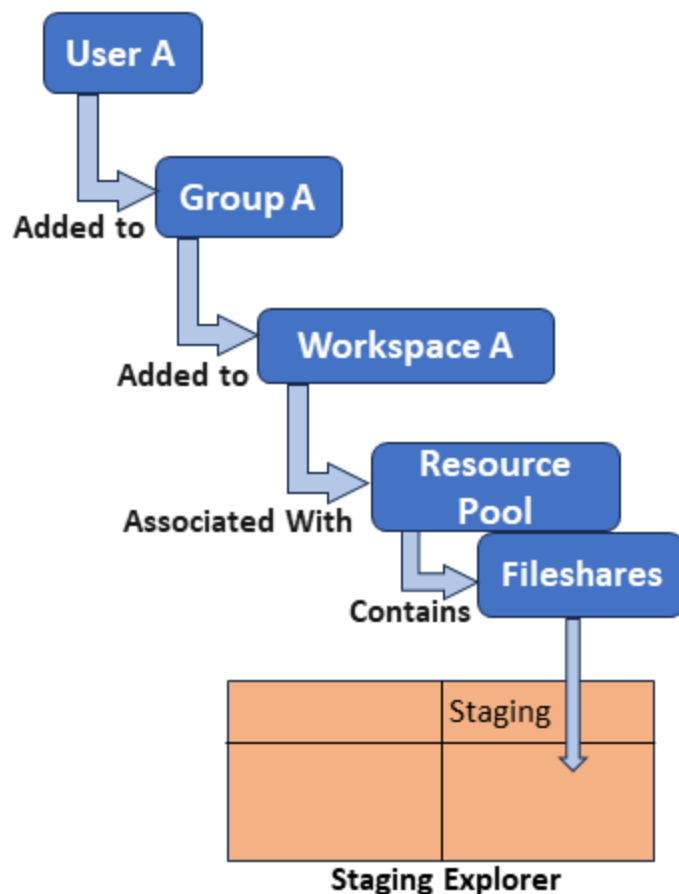


Figure 1: User able to view resource pool fileshares

In this scenario:

- User is in a group, other than ‘System Administrators,’ that is added to at least one workspace that is associated with the resource pool containing the fileshares. Once the user is assigned to the group, they will have access to any fileshares associated with resource pools in the workspace to which the group is associated. For more information on adding users to groups, see Adding users to groups.
- Instance Setting of `StagingPaneOnlyPerClientDomain` either does not exist or, if it exists, it’s set to `False`.

6.3.2 Granting user access to specific fileshares

If you have a user who has access to multiple client domain workspaces and you only want them to be able to access fileshares for his own client domain in the Staging pane, then you must configure the proper permissions. The process involves setting the `StagingPaneOnlyPerClientDomain` instance setting to **True** and configuring groups with *item-level permissions* to the resource pool that contains the fileshares to be accessed.

Based on the default workflow in RelativityOne, as described above, a group and its users will inherit access ability to any fileshares within the resource pool that is associated with the workspace to which the group has access. Therefore in this workflow, if a user has access to multiple client domain workspaces, then that user will be able to view their fileshares.

For example, User A has access to his own Client A Domain, but he can also access the workspace for Client B Domain if he's added to Group B in Client B Domain, as shown below. As a result of being added to Group B, he'll be able to view the fileshares associated with Workspace B in Client B Domain. In this situation, *StagingPaneOnlyPerClientDomain* instance setting either does not exist or it is set to False, and item-level permissions to the resource pool are not configured.

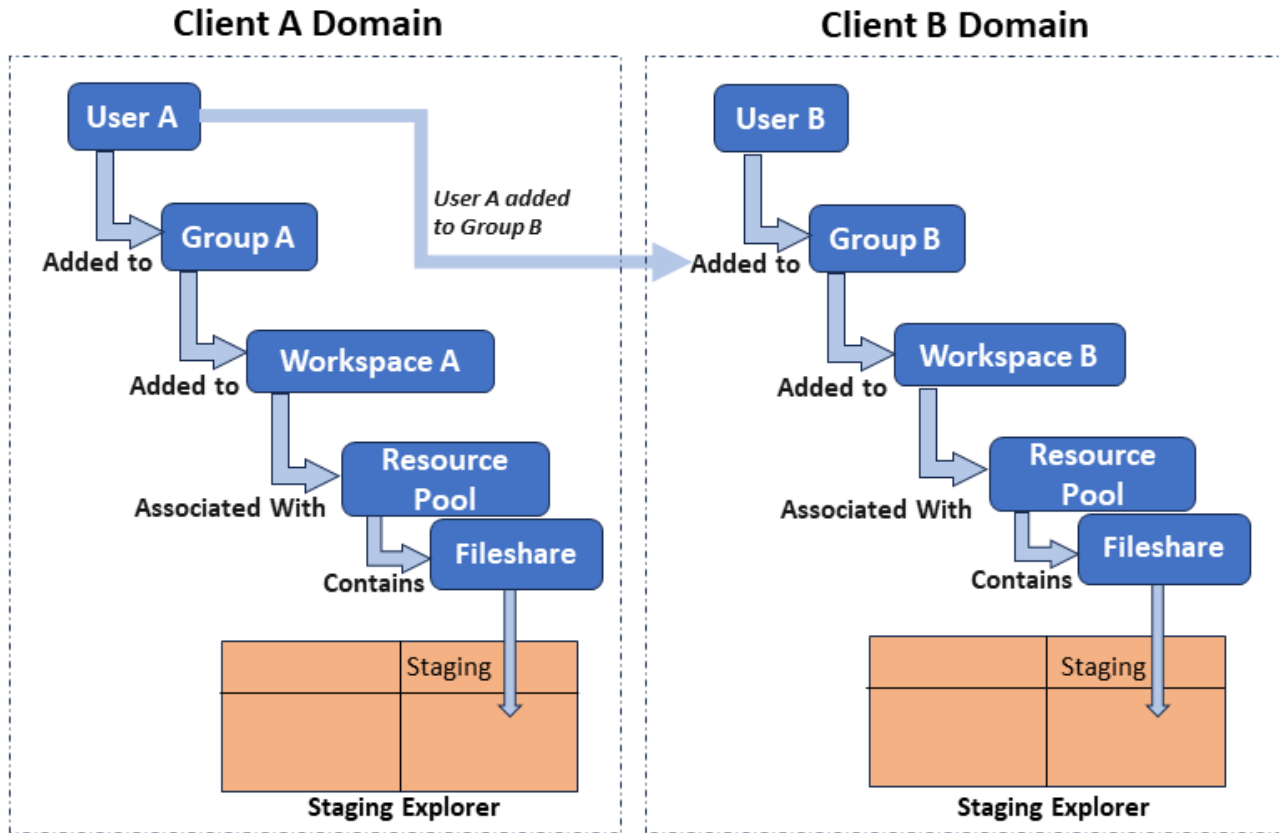


Figure 2: User able to view other client domain fileshares.

To ensure that User A only views and accesses fileshares from his own domain in the Staging pane and still retain access to the workspace for another client domain but not view its fileshares, you must:

1. Set the **StagingPaneOnlyPerClientDomain** Instance Setting to **True**.
2. Add the user to a group that has been given item-level permissions to the resource pool and its associated fileshares, as shown in Figure 3.

In this scenario, User A is added to Group A, which has been given item-level permissions to the resource pool and associated fileshares in their Client A Domain. By being added to Group B2, User A is still able to view Workspace B but cannot view its fileshares. For User B to only view her client domain's fileshares, User B is added to Group B1, which has been given item-level permissions to Client B's resource pool so User B can view her domain's fileshares.

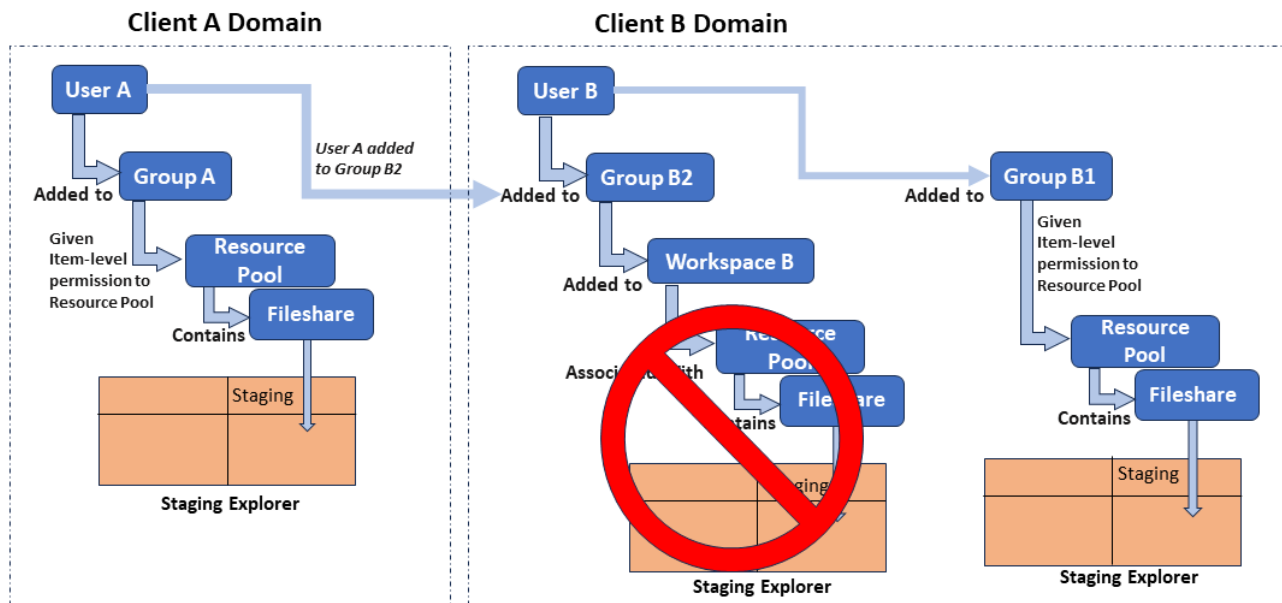


Figure 3: User prevented from viewing other client domain fileshares.

Note: Access to the resource pool does not automatically make the Resource Pool object visible to users. In order to see the resource pool, users must have access granted to the Resource Pool object tab in Admin Mode settings.

For more information on how security and permissions operate in RelativityOne, see Security and permissions.

To grant access to specific fileshares, the user must be in a group, other than the System Administrator group, that is given item-level permissions to the resource pool containing the associated fileshares.

Step 1 Configure the StagingPaneOnlyPerClientDomain Instance Setting

The default RelativityOne set up does not contain the Instance setting StagingPaneOnlyPerClientDomain. Therefore, the application will respond as described in the [Default workflow in RelativityOne for user access to fileshares on page 303](#) section. So, you must add the StagingPaneOnlyPerClientDomain instance setting and configure it as indicated below.

1. Navigate to **Instance Settings**.
2. Click **New Instance Setting**.
3. Enter the following information in the fields specified:

Relativity kCura Admin Instance Settings ☆

Authentication Provider Type Workspace Upgrade Queue Choices Agents Errors Instance Details Resource Files Resource Pools

Save Save and New Save and Back Cancel

Instance Setting Information ?

Name* StagingPaneOnlyPerClientDomain

Section* Relativity.DataTransfer

Machine

Instance Setting Details ?

Value Type* True/False

Value* ☒ True ☐ False

Initial Value ☐ True ☐ False

Description

- **Name**—enter **StagingPaneOnlyPerClientDomain**.
- **Section**—enter **Relativity.DataTransfer**.
- **Value Type**—select **True/False**.
- **Value**—select **True**.

Note: This value must be set to True if you want to prevent users from accessing fileshares in other client domain workspaces. If it is set to False, the opposite occurs and users will inherit access to any fileshares associated with workspaces to which they have access, as shown in Figure 2.

4. Click **Save**.

Step 2 Create the Group

Although you can use any existing group, we recommend creating a new, specific group for these users so you can better manage the fileshare access permissions.

1. Navigate to **Groups**.
2. Click **New Group**.
3. Enter the fields as needed. For more information on creating groups, see Creating and editing groups.
4. Click **Save**. This group will be added to the resource pool in a later step.

Step 3: Add Users to the Group

Next, add users to the group who need to access the fileshares in the Staging pane of the Staging Explorer.

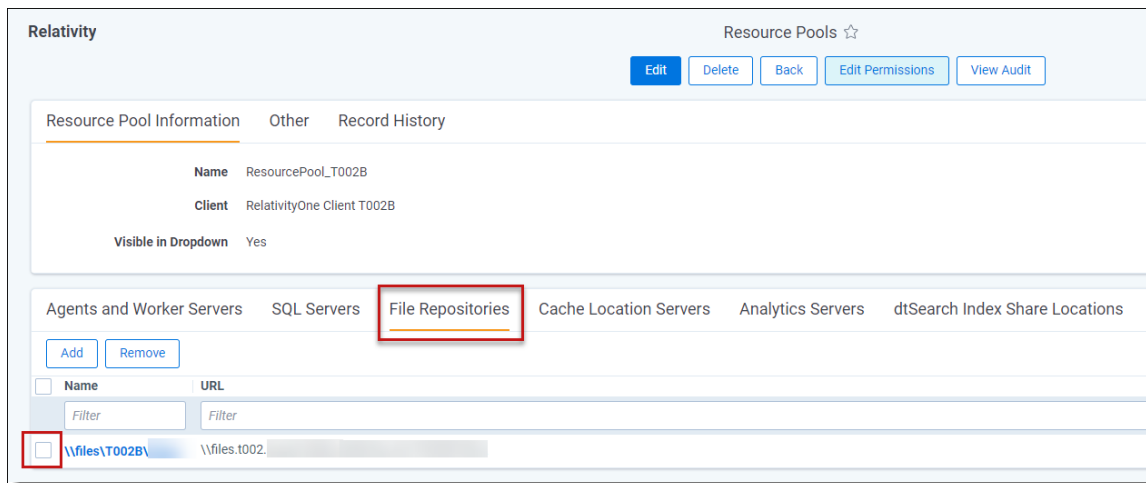
1. From the **Groups** tab, click **Add**.
2. Select one or more **users** to add to the group as needed and click **Apply**. For more information on adding users, see Adding users to groups.
3. Click **Apply**.

Note: If a user belongs to more than one group with item-level access to other resource pools, they will inherit access to all fileshares associated with those resource pools. Review the item-level permissions for each resource pool to ensure only the desired groups have been granted access to the associated fileshares.

Step 4: Add the Group to the Resource Pool with Item-level Permissions

Finally, add the group to the resource pool with item-level permissions.

1. Navigate to **Resource Pools**.
2. Select the **Resource Pool** associated with the client domain that contains the fileshares you want to allow users to access.
3. Click the **File Repositories** tab to review the available fileshares assigned to the selected resource pool and



4. Click the box next to the desired fileshare from the list and click **Edit Permissions**.
5. Click the **Add/Remove Groups** button on the Groups tab of Item Security.

Note: If the Add/Remove Groups button does not display, toggle the **Override Inherited Security** option ON.

Permissions

Item Security

Groups

Object Security

Groups

Selections

Selected Item \\files.t017.esus025

Group List

Override Inherited Security ☒

Group Name	
AEI Administrators	View Users Edit Permissions
Everyone	View Users Edit Permissions
First Level Group	View Users Edit Permissions
Level 2	View Users Edit Permissions
ManagementConsoleServiceGroup	View Users Edit Permissions

Add / Remove Groups [Close](#)

6. Select the group that you added in the previous section and click the arrow to move it to the **Groups in Workspace** pane.

7. Click **Save**.

The group and the users within it now have item-level permission to the resource pool and its associated fileshares. They will only be able to access the specific fileshares configured and will still retain access to workspaces for another client domain but not be able to view their fileshares. See Security and permissions for Item-level permissions for more information.

Notes:

- Access to the resource pool does not automatically make the Resource Pool object visible to the users. To see the resource pool, they will need to also have access granted to the Resource Pool object tab in Admin Mode settings.
- The resource pool will not be assigned to the new workspace if you move the workspace to another client domain or delete the workspace.

6.4 Best practices, limitations, and data transfer performance considerations

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

The following are some good practices, limitations, and performance factors to consider when using Staging Explorer.

6.4.1 Best practices

The following are some best practices to consider when using Staging Explorer:

- Depending on your system and network connection, it may be beneficial to separate substantially large data sets into smaller batches for transmission in order to improve speed and processing workflow.
- When downloading huge data sets, be sure to use a local drive as the destination. External drives are not recommended.
- When transferring huge data sets, we recommend using a local drive where the Staging Explorer is installed as the transfer source and destination to avoid additional transfer steps. Transferring to and from a mapped network drive is not recommended as it introduces an extra connection between it, Staging Explorer, and RelativityOne, which may cause slowness and connection issues.
- Relativity does not store any information about file paths due to privacy concerns.

6.4.2 Limitations

The following are some limitations to consider when using Staging Explorer:

- Only one Windows user can run an instance of Staging Explorer on a machine at a time.
- The maximum number of active transfers for one instance of the Staging Explorer is 3. See [Updating Transfer Settings on page 339](#).
- The Client Domain Admin group does not have Staging Explorer access by default. A System Admin needs to add the correct permissions.
- Enforced FIPS Policy may block some encryption algorithms which may cause errors in applications. We recommend using validated cryptographic algorithms approved by Windows Platform FIPS.
- Transfers from mounted disk images are not supported.

6.4.3 Data transfer performance considerations

There are many variables that can degrade or improve the performance of data transfers for desktop applications, such as Staging Explorer. Transfer rates when using desktop applications are influenced by

several variables and results may vary based on factors such as RAM, CPU, local drive specifications, network drive specifications, and available bandwidth at the time of the transfer.

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

- **Run on local machine:** Staging Explorer should not be run on a RelativityOne Utility VM. See [Utility Server](#) for more information. It has been designed and tested as a desktop application being run on a user's local machine.
- **Read access:** Ensure that Staging Explorer has read access to all files/folders (remove system / hidden attributes).
- **Port 443:** Ensure that port 443 is open to the public internet and is not blocked or traffic is restricted to it. See the Community article [Performance considerations for data transfers](#) for more information.
- **Internet connection:** Use a strong and stable internet connection for data transmission. Wi-Fi is not recommended.
- **Internet speed:** Transfer speeds are dependent on your internet speeds. Check your internet connection using [Speedtest](#) or any other bandwidth testing website. Make note of the upload speed in megabits per second. Also refer to [Updating Transfer Settings on page 339](#) for the Limit bandwidth setting.
- **Local storage speed:** Transfers to and from network drives or external disks (such as thumb drives/USB drives) will degrade performance and/or cause issues maintaining a connection. It is most effective to copy data to and from a fast local storage.
- **Local machine specs:** Ensure your local machine and browser adheres to the Staging Explorer minimum [system requirements](#) and is operating the latest version of the software.
- **Level of data fragmentation:** Due to bandwidth sharing, avoid performing large and highly fragmented transfers in parallel. The more fragmented the dataset, the lower the transfer performance.
- **Concurrent transfers:** Number of concurrent transfers that are happening at the same time within the network by various tools, services, and users.
- **Concurrent utilization:** Level of concurrent utilization of the user's computer resources (CPU, RAM, I/Os) by other processes on that computer.
- **Compressed datasets:** Avoid compressing datasets (with ZIP, 7z, etc.). The faster transfer time due to fewer multi-part files is negated by the time and effort to compress and decompress data. However, compressing datasets without decompressing in the destination folder (staging directory) can be considered when all the following are true:
 - Dataset consist of fragmented data
 - Destination folder is a Processing source location
 - The dataset uploaded is going to be processed by Relativity Processing
- **VPN usage:** Using a VPN can potentially slow down internet traffic. When workstations use a VPN session, it can interfere with transfers from that workstation. RelativityOne is hosted in a public cloud and does not require VPN to use. See the Community article [Performance considerations for data transfers](#) for more information.

- **Traffic monitoring and data protection software:** These types of software tools influence data transfer. See the Community article [Performance considerations for data transfers](#) for more information on each of these:
 - **Firewall:** Firewall configuration may require special tuning to use the Staging Explorer.
 - **Antivirus software:** Antivirus software may disrupt the transfer protocol in Staging Explorer.
 - **Anti-malware software:** An exception should be created for Staging Explorer in Windows Defender or in other anti-malware software installed on the user's machine.

6.5 Installing, launching, and updating Staging Explorer

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

Use the sections below to learn how to install Staging Explorer as well as how to launch and update it.

Before you begin using Staging Explorer, review [Best practices, limitations, and data transfer performance considerations](#) for information to keep in mind.

6.5.1 System requirements

The following minimum system requirements are required to use the Staging Explorer.

Required item	Requirement
Operating system	Windows 8.1 or above
Windows Server operating system	Windows Server 2012 R2, Windows Server 2016, Windows Server 2019, or Windows Server 2022
System memory	4 GB RAM
Software	.NET version 4.7.2
Transport Layer Security	TLS 1.2

6.5.1.1 Recommended browser settings

Ensure the Relativity instance is configured as a trusted site and the following settings are enabled or allowed in the browser on the user's machine running Staging Explorer. Refer to your browser's help documentation or contact your IT department for the specific location of these settings if they differ from these steps.

1. Open the browser's **Control Panel**.
2. Go to **Network and Internet > Internet Options**.

3. For **Security** settings:
 - Enable **File Download**
 - Enable **JavaScript**
 - Add *.**relativity.com** as a Trusted site
4. For **Privacy** settings:
 - Allow **First party Cookies**
 - Allow **Third party Cookies**

6.5.1.2 Port requirements

To ensure that transfers can occur, you must make firewall changes to allow outbound connections to the server on the following port:

- **TCP port 443**—required to be opened to the public internet.
- Staging Explorer does not support proxy servers.

The opening of the required port for the Windows firewall is typically handled on the end user's machine. However, if you use any third party firewalls, you must manually open the port referenced above. Improperly configuring the port results in transfer failures. For more information, contact [Customer Support](#).

See RelativityOne network access in the RelativityOne technical overview for detailed information about all of the network considerations for data transfer in RelativityOne, including firewall privacy considerations and a list of FQDN.

6.5.2 Installing Staging Explorer

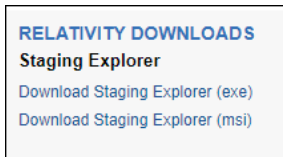
Depending on your organization's requirements, Staging Explorer can be installed via an executable (.exe) file or a Microsoft Software Installer (.msi) file.

To install Staging Explorer, follow these steps.

Notes:

- You must have the minimum security permissions to launch Staging Explorer. See [Permissions](#) for more details.
 - You must be a local admin on your machine to install Staging Explorer or have the installer pushed via a Group Policy Object (GPO) to install the application.
 - Be sure to use the most recent version of the application to maintain optimal performance and security.
-

1. Launch **RelativityOne**, and log in with your RelativityOne credentials.
2. Navigate to **Staging Explorer**.
3. In the Relativity Downloads console, click the appropriate download file format for your organization: **Download Staging Explorer (exe)** or **Download Staging Explorer (msi)**.



4. Once the download is complete, launch the .exe or .msi file to run the installation wizard.
5. Click **Install** to begin the installation wizard and follow the prompts.
6. Accept the default installation Destination Folder displayed.
7. You must select (check) the **Enable firewall rules on this computer** check box on Firewall Settings dialog, and then click **Next**.
8. Click **Install** to begin the installation process.
9. Click **Finish** when the setup is complete.

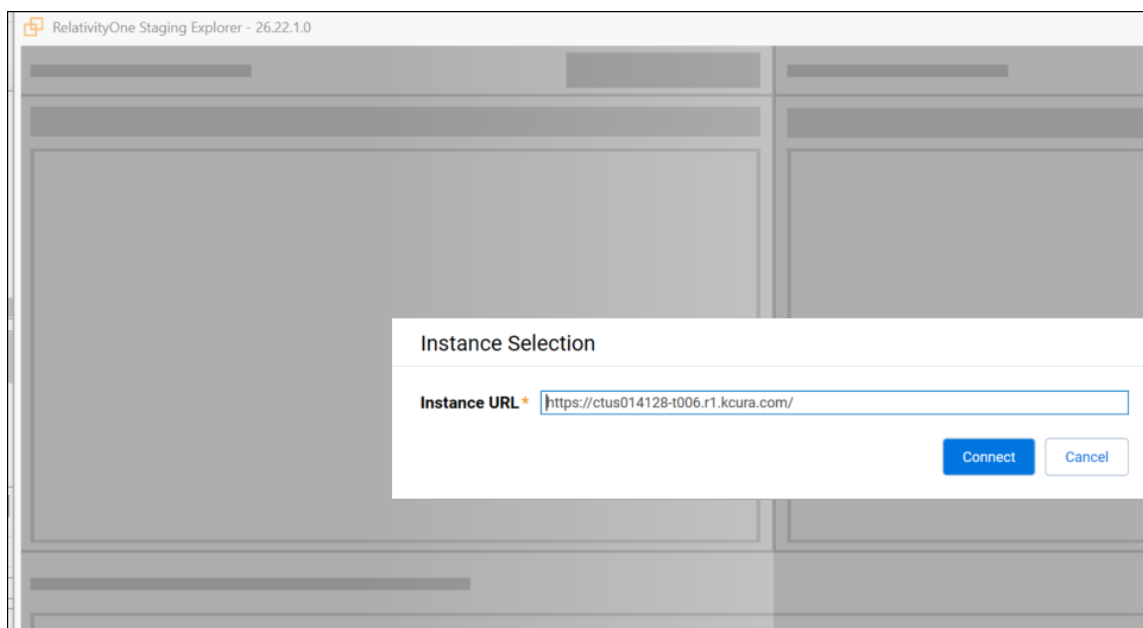
6.5.3 Launching Staging Explorer

To launch Staging Explorer, follow these steps:

Notes:

- You must have the minimum security permissions to launch Staging Explorer. See [Permissions](#) for more details. The Client Domain Admin group does not have Staging Explorer access by default. A System Admin needs to add the correct permissions.
 - Before you begin using Staging Explorer, review [Best practices, limitations, and data transfer performance considerations on page 310](#) for information to keep in mind.
 - See [Uploading files or Downloading files](#) to begin transferring files.
 - Only one Windows user can run an instance of Staging Explorer on a machine at a time.
-

1. Navigate to the installation path and click **RelativityOne Staging Explorer**. If you saved its shortcut to your desktop, then click its icon.
2. Enter the desired **Instance URL** in the Instance Selection dialog box and click **Connect**.

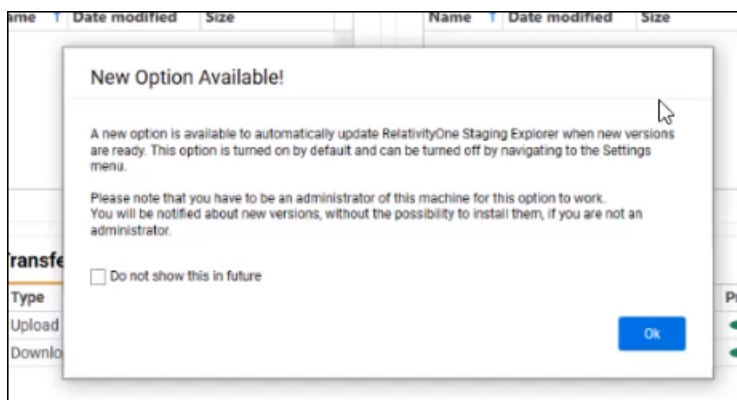


Note: Domain URL is sufficient, for example: <https://kcura.relativity.one> or <https://relativity-uk.relativity.one>.

3. Log in with your RelativityOne credentials.

Note: Users log in with the same provider method as they have with Relativity. The Staging Explorer supports most Relativity authentication providers, such as password, Integrated Authentication, and OpenID Connect, by displaying the Relativity login page within the Staging Explorer as a dialog window. The only provider that doesn't work with the Staging Explorer is SAML, because the Relativity's IdP-initiated SAML doesn't display the Relativity login page directly.




4. If applicable, the New Option Available window displays. Select **Do not show this in the future** if you do not want the window to display the next time Staging Explorer is opened.



5. When you open Staging Explorer, a connection status icon will indicate if you are connected to Relativity and/or the internet.

Notes:

- The system checks for connectivity to the fileshare and will display a message if an error is encountered. Follow the information on the message to correct it. Otherwise, you will not be able to access the fileshare and its contents.
 - If applicable, Staging Explorer will open to the last Staging fileshare you visited.
 - If the fileshare does not exist, the root folder of that fileshare will open.
-

Icon	Status Description
	Connected to the internet and Relativity
	Connected to the internet but not Relativity
	Not connected to the internet or Relativity

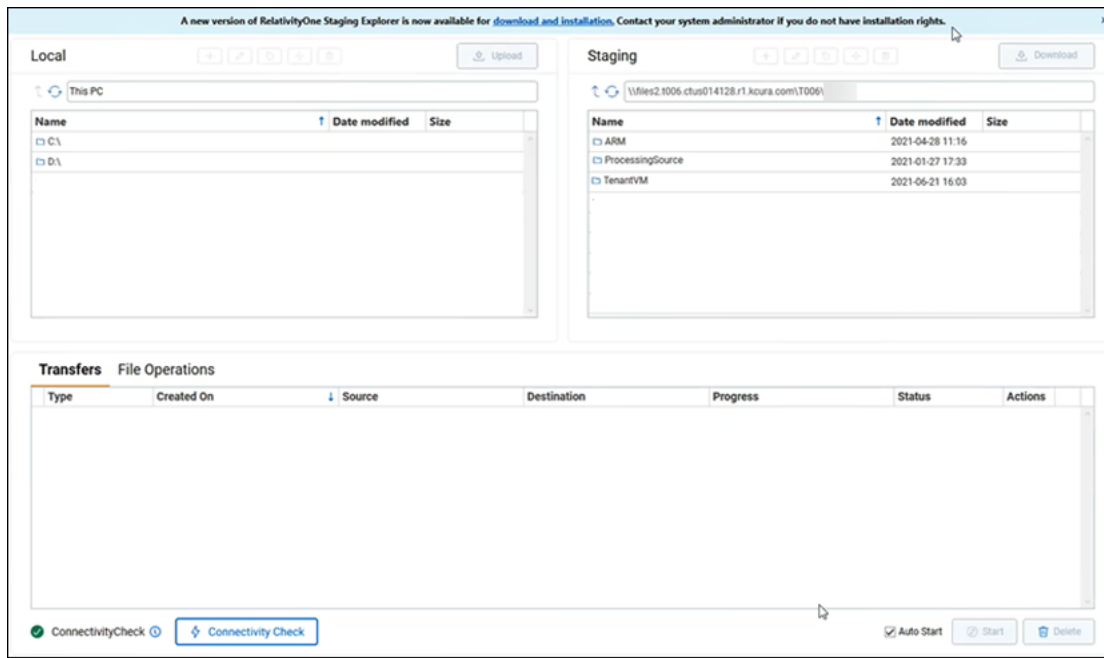
6.5.4 Manually updating Staging Explorer

To manually update Staging Explorer:

Notes:

- You must have the minimum security permissions to update Staging Explorer. See [Permissions](#) for more details.
 - Be sure to use the most recent version of the application to maintain optimal performance and security.
 - If the current version of Staging Explorer you are using is marked critical, it will no longer run and you will be prompted to update to the newest version.
 - If a new version of Staging Explorer is available for download, a blue banner displays at the top of the application. If the version update is critical, a yellow banner displays.
 - If you have [Automatic Update](#) enabled in Settings, the update will be completed automatically.
-

1. Launch **RelativityOne**, and log in with your RelativityOne credentials.



2. If a message displays indicating a new version is available, click the **download and installation** link. The update will be completed automatically.
3. Launch Staging Explorer. See [Launching Staging Explorer on page 314](#) for more details.

6.5.5 Automatically updating Staging Explorer

You can configure the application to automatically apply software updates instead of having to update it manually. This ensures that you are using the most recent version of the application to maintain optimal performance and security.

1. [Launch the Staging Explorer.](#)
2. Click the **Settings** button in the user drop-down menu next to your name. The Settings window displays.

The screenshot shows a 'Settings' window with two main sections. The 'Transfer Settings' section includes: 'Limit Bandwidth' (unchecked), 'Overwrite Files' (checked), 'Transfer Empty Folders' (checked), 'Maximum Active Transfers' (set to 3), 'Maximum Number of Auto Retry' (set to 1), and 'Transfer Email Notification Recipients' (a text input field containing 'mar' and '@relativit...'). The 'Automatic update' section includes 'Enable Automatic Update' (checked). At the bottom right are 'Save' and 'Cancel' buttons.

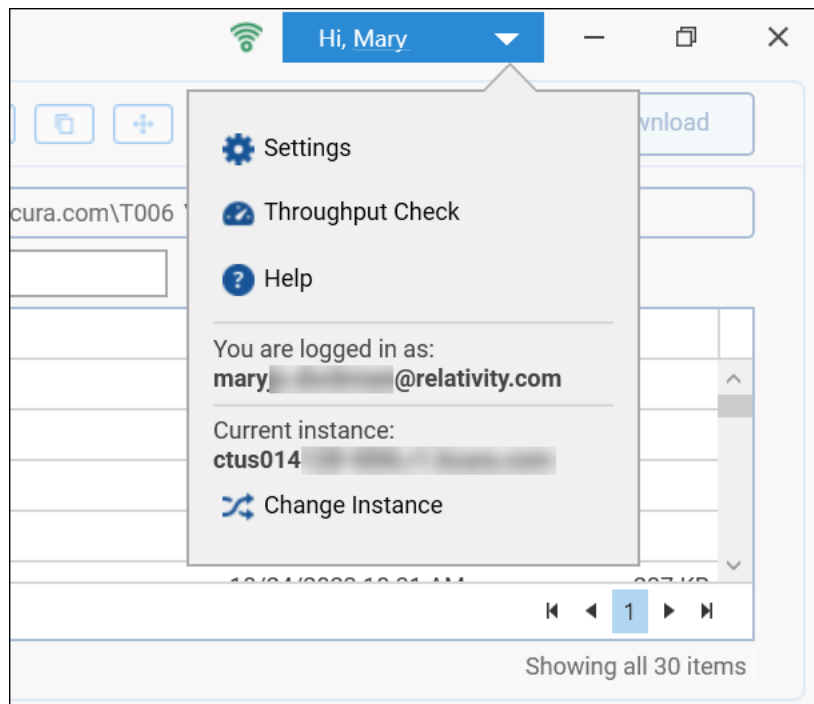
3. Select **Enable Automatic Update** to automatically have Staging Explorer update to the newest version available. If you change your mind and want to do the updates [manually](#), clear the checkbox.
4. Click **Save**.

6.6 Navigation

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

6.6.1 User drop-down menu

When you open Staging Explorer, there is user drop-down menu next to your name.

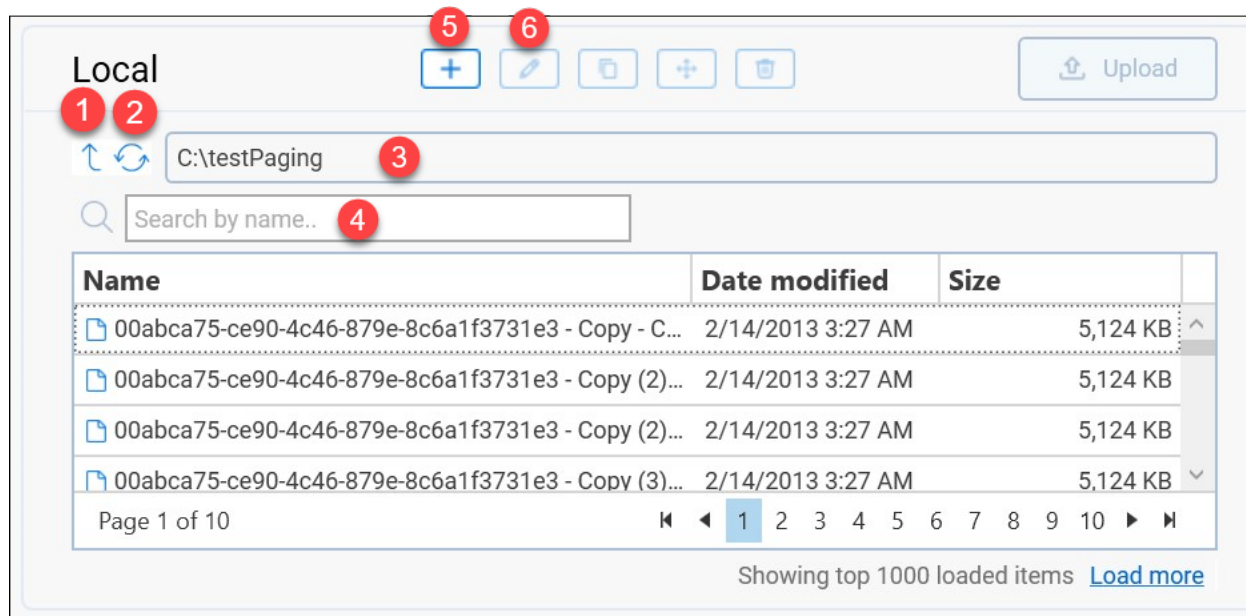


Use the drop-down menu to do the following:

- View the logged in email address.
- View the current Instance's name.
- **Throughput Check**—opens the Throughput Check window.
- **Settings**—opens the Settings window where you can configure the [Transfer Settings](#) and [Automatic update](#) option.
- **Help**—launches the Staging Explorer documentation on the Relativity Documentation website.
- **Change Instance**—opens the Instance Selection dialog box that allows you to enter a new Instance. Changing the Instance will log you out of the current session of the Staging Explorer.

6.6.2 General navigation

Use these options in either the Local or Staging panes:



- 1 - Click the up arrow button to go up a folder level in the drive. Repeat as many times as folder levels available.
- 2 - Click the circling arrows to refresh the list.
- 3 - Paste a UNC path directly into the browser field.
- 4 - Use the Search box to locate a particular item in the list by typing all or part of the name and matching files will display.
- 5 - Click the **New Folder** plus button to create a new folder on the selected drive.
- 6 - Click the **Rename** pencil button to rename a folder on the selected drive.

See also:


[File and folder operations \(copy, move, delete\) on page 329](#)

[Calculating folder size in Local/Staging panes on page 341](#)

6.6.3 Sorting file lists

When opening Staging Explorer, file and directory lists for the Local and Staging panes are displayed. By default, the lists are sorted in ascending order by the Name column. Click on any column header to sort its list in ascending (up arrow) or descending (down arrow).

Name	↑	Date modified	Size
Demert v Hopson Institute		10/31/2023 10:26 AM	
Harrold Intl v Western District Association		12/14/2023 2:42 PM	
Kensington v HWT Enterprises		3/15/2024 10:22 AM	
Review Litigations		9/6/2024 1:43 PM	

Name	Date modified	Size
 Western332.dat	10/4/2018 6:34 AM	1 KB
 Western331.dat	10/4/2018 6:34 AM	1 KB
 Western41.dat	10/4/2018 6:34 AM	1 KB
 Smith v Harrison	12/18/2023 12:03 PM	

6.6.4 Pagination








You can page through a large list of items in a particular folder in the Local or Staging pane. Each page contains 100 items. The system will load up to 10 pages of items (which equates to 1000 items) at a time if available. If there are more items, the **Load more** link displays. By clicking **Load more**, the next 1000 items will load, and so forth, until all pages of items are loaded.

The total page count loaded and current page number you're on displays in the "Page # of #" area.



To advance through the pages, click a particular page number or click the left and right arrows for Next Page, Previous Page, First Page, and Last Page.

Note: Using the Search by name box to locate a filename will automatically begin loading all items that are available in the selected folder.


Staging





Download



\\files.t006.ctus014128.r1.kcura.com\T006 \StructuredData\





Search by name..

Name	Date modified	Size
 file1.dat	7/2/2020 11:49 AM	1 KB
 file10.dat	7/2/2020 11:49 AM	1 KB
 file100.dat	7/2/2020 11:49 AM	1 KB
 file1000.dat	7/2/2020 11:49 AM	1 KB

Page 1 of 10

1 2 3 4 5 6 7 8 9 10

Showing top 1000 loaded items [Load more](#)

6.7 Transfer workflows

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

Refer to the sections below for the various transfer workflows available in Staging Explorer.

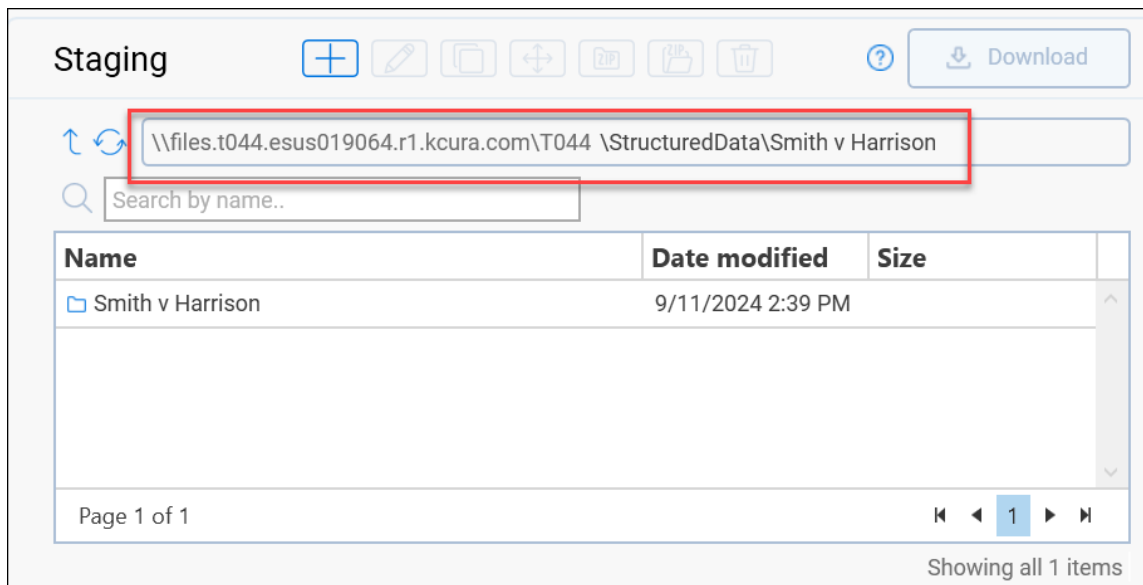
See [Best practices, limitations, and data transfer performance considerations on page 310](#) for additional information to be aware of before transferring files.

Note: The maximum number of active transfers for one instance of the Staging Explorer is three. See [Updating Transfer Settings on page 339](#).

6.7.1 Uploading files

To upload files:

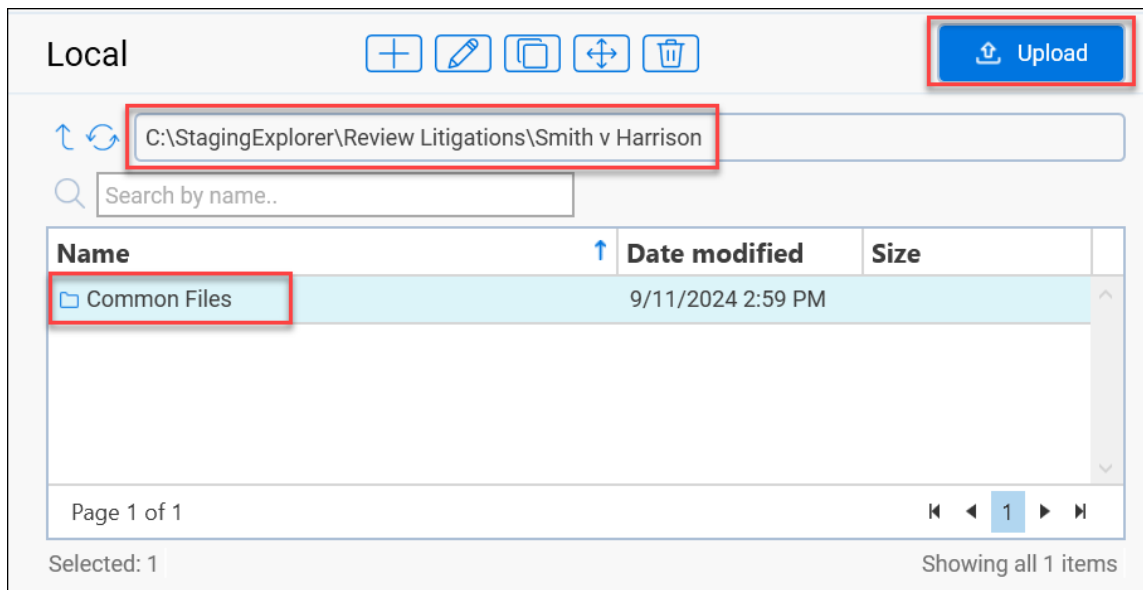
1. [Launch the Staging Explorer](#).
2. In the **Staging** pane, navigate to the location where you want to upload the files from your local drive.




3. In the **Local** pane, navigate to the location on your local drive containing the files for uploading to Staging and click **Upload**. If the **Auto Start** checkbox is selected, the transfer begins immediately. If not, click the **Start** button (see [Starting and canceling a transfer on page 325](#)). If the system detects a potential issue with the transfer job, a warning window displays. Click **Cancel** to cancel the transfer or click **I want to proceed anyway** to continue with the transfer.

Notes:

- You may also hold down **CTRL** to select multiple files or **SHIFT** to select all the files between the first one you selected and the next.
 - The Upload button will be grayed out (inactive) if no items are selected, if the destination folder is a list of fileshares, or if the destination folder is a root of the fileshare.
 - If you plan for this data set to be later processed in Relativity, make sure the dataset folder name is unique. Data sources are not case sensitive. If you have data sources with duplicate names, you may see processing errors. For example, \\[file.share]\\Processing Source[**SOURCE.NAME**] and \\[file.share]\\Processing Source[**Source.Name**] would be considered duplicate names since the system does not differentiate between capital and lower case letters. To make them unique, you could rename the folders [SOURCE.NAME1] and [Source.Name2].
-



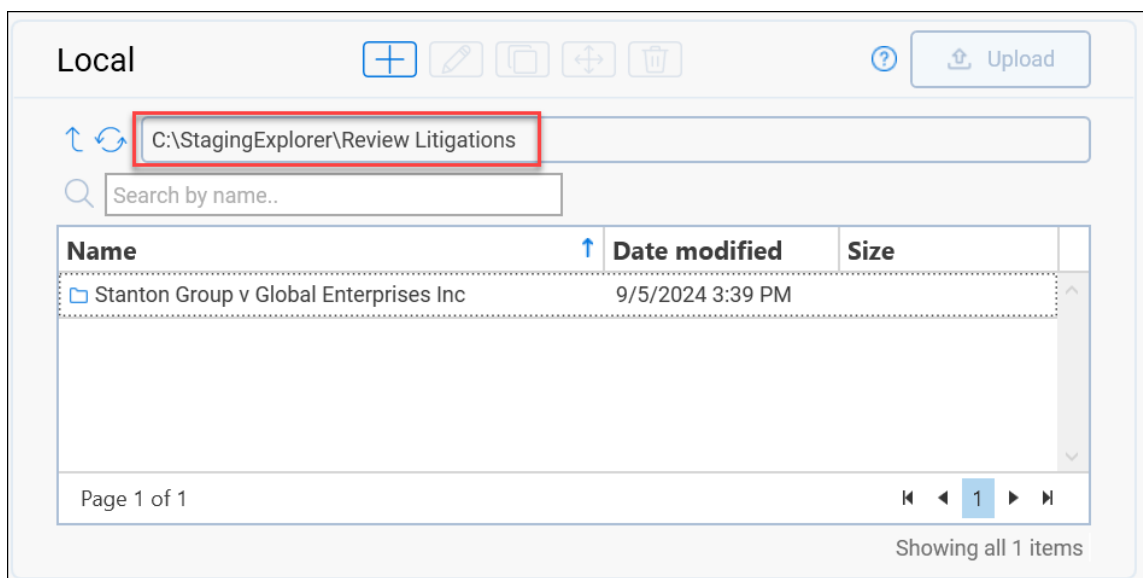
4. From the **Transfers** tab, monitor upload progress via the **Progress** and **Status** columns displayed for the transfer. When the transfer successfully completes, a circled green check mark  displays. You can click the expand plus button to next to a transfer row to view the transfer details. See [Transfer workflows on the previous page](#).

Note: Uploading overwrites existing files only if it already exists in the destination folder and its metadata and contents differ. Otherwise, the file will be skipped.

6.7.2 Downloading files

To download files:

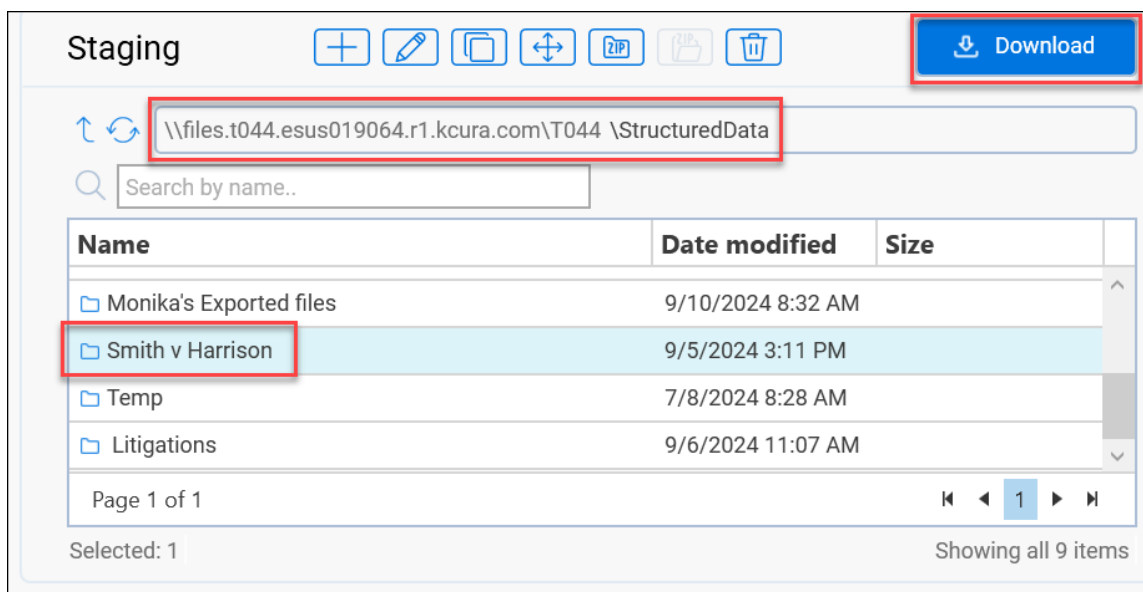
1. [Launch the Staging Explorer](#).
2. In the **Local** pane, navigate to the location into which you want to download the files from Staging.




- Next, in the **Staging** pane, navigate to the location containing the folder or files that you want to download to your local drive and click **Download**. If the **Auto Start** checkbox is selected, the transfer begins immediately. If not, click the **Start** button (see [Starting and canceling a transfer on the next page](#)). If the system detects a potential issue with the transfer job, such as inadequate space on the destination drive or impact on performance, a warning window displays. Click **Cancel** to cancel the transfer or click **I want to proceed anyway** to continue with the transfer.

Notes:

- You may also hold down **CTRL** to select multiple files or **SHIFT** to select all the files between the first one you selected and the next.
- The Download button will be grayed out (inactive) if no items are selected or if the destination folder is a list of local drives.




4. From the **Transfers** tab, monitor upload progress via the **Progress** and **Status** columns displayed for the transfer. When the transfer successfully completes, a circled green check mark  displays. You can click the expand plus button to next to a transfer row to view the transfer details. See [Transfer workflows on page 322](#).

Note: Downloading overwrites existing files only if it already exists in the destination folder and its metadata and contents differ. Otherwise, the file will be skipped.


6.7.3 Starting and canceling a transfer

Note: Staging Explorer does not alter metadata while transferring files. All metadata remains untouched.


You can manually start a canceled/failed transfer or cancel a transfer that is in progress.

- **Manually start a transfer:** To manually start a transfer, highlight the transfer job in the Transfers tab and click the **Start** button or simply click the two-way arrow  icon in the Actions column of the desired job. These options are only available if you do not have the **Auto Start** checkbox selected in the lower left portion of the application.

Note: To start multiple transfers, you may also hold down **CTRL** to select multiple individual transfers or hold **SHIFT** to select all the transfers between the first one you selected and the next before initiating the start action. The next transfer starts automatically when the previous transfer finishes.


- **Automatically start a transfer:** To automatically start a transfer, select the **Auto Start** checkbox in the lower left portion of the application.
- **Cancel a transfer:** To cancel a transfer, click the circle with the line through it  icon in the Actions column of the Transfers tab. The transfer completes the most recent file in progress and stops immediately after that.

6.7.4 Retrying a transfer

The **Retry**  button is enabled if the transfer was stopped (Canceled) or it failed due to an error. When you click this button, the status reverts to "Transferring" once the transfer is starts. Be aware that the transfer will continue from the point it was stopped. Any files that were successfully transferred prior to the cancellation or failure will not be re-transferred, and any incomplete transferred files will be re-transferred in their entirety.

Note: Transfer jobs that completed successfully are not eligible for retry.

6.7.5 Deleting a transfer

Individual transfers with the status New, In Queue, Canceled, Finished, or Failed can be deleted by clicking the Trash  button under the Actions column. To delete multiple transfers, you may also hold down **CTRL** to select multiple individual transfers or hold **SHIFT** to select all the transfers between the first one you selected and the next and click the Trash button.


Note: Once a transfer is deleted, it is removed from both the Transfers tab and the user's machine.

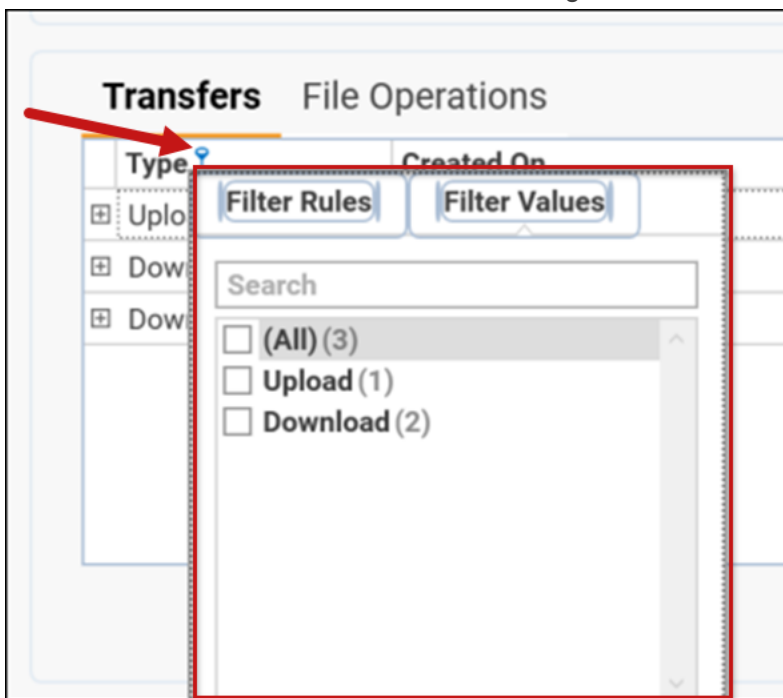
6.7.6 Viewing transfer history

When opening Staging Explorer, all of the transfers you previously ran displays in the Transfers tab.

1. [Launch the Staging Explorer.](#)
2. Click on the **Created On** column header to sort the transfers by the creation time in the ascending or descending order. When a new transfer is created, the transfer is added at the beginning of the Transfers tab list, provided no sorting has been selected.

Type	Created On	
Download	4/14/2021 5:42:32 PM	
Download	4/14/2021 5:41:44 PM	
Upload	4/14/2021 5:41:03 PM	
Upload	4/14/2021 5:40:40 PM	

3. Hover over a column heading to view the **Filter**  icon and click it. You can filter the column by selected **Filter Rules** and **Filter Values**, which will vary depending on the column selected. The sample image displays the filter options for the Type column. To filter on the transfer created date, click the filter icon next to the Created On column heading and use the Filter Values tab to select a date.



4. You can filter the Transfers list by using CTRL+F. Type in filtering criteria in the filter box and press **Enter** to display only matching transfers.

Harris					
Source	Destination	Progress	Status	Actions	
2:59:37 PM \\files.t044.esus019064.r1.kcura.com\T044\StructuredData\Monika's Exported fi...	C:\StagingExplorer\Review Litigations\Smith v Harri...	<div></div>	100% Finished		
2:39:06 PM C:\StagingExplorer\Review Litigations\Smith v Harrison	\\files.t044.esus019064.r1.kcura.com\T044\Structur...	<div></div>	100% Finished		
2:08:08 PM \\files.t044.esus019064.r1.kcura.com\T044\StructuredData\Smith v Harrison	C:\StagingExplorer\Review Litigations	<div></div>	100% Finished		

6.7.7 Viewing and editing transfer details

Refer to the sections below for how to view and edit transfer details.

6.7.7.1 Viewing transfer details

To view details for a transfer, click the expand plus button for the transfer in the Transfers tab. When you extend the details of a transfer, all folders/files that are in scope of that transfer are highlighted in gray in the source directory in the Local or Staging pane depending on the transfer type (upload or download).

Local

C:\StagingExplorer\Review Litigations

Search by name..

Name	Date modified	Size
Smith v Harrison	9/11/2024 2:08 PM	
Stanton Group v Global Enterprises Inc	9/5/2024 3:39 PM	

Page 1 of 1

Showing all 2 items

Staging

\\files.t044.esus019064.r1.kcura.com\T044 \StructuredData\Smith v Harrison

Search by name..

Name	Date modified	Size
Smith v Harrison	9/11/2024 2:39 PM	

Page 1 of 1

Showing all 1 items

Transfers

File Operations

Type	Created On	Source	Destination	Progress	Status	Actions
Upload	9/11/2024 2:39:06 PM	C:\StagingExplorer\Review Li...	\\files.t044.esus019064.r1.k...	<div></div>	100% Finished	

Status: Finished

Remaining Time: 00:00:00

Duration: 00:00:05

Started On: 9/11/2024 2:39:06 PM

Finished On: 9/11/2024 2:39:11 PM

Job ID: 6e096b30-307a-435c-9d4e-0938b3080aba

Settings

Limit Bandwidth: No

Overwrite Files: Yes

Transfer Empty Directories: Yes

Transfer Rate: 0.00 Mbps

Transferred Data: 0 B / 0 B

Transferred Items: 1 / 1

Incl. Empty Directories: 1

Skipped Files: 0

Failed Files: 0

Auto Retry: 0 / 1

Email Recipients:

mary

☒ Auto Start

Start

Delete

The following information is displayed about the transfer:





- **Status**—status of the transfer.
- **Remaining Time**—how long the transfer will take.
- **Duration**—how long the transfer took.
- **Started On**—the date and time the transfer started.
- **Finished On**—the date and time the transfer completed.
- **Job ID**— unique number of a transfer.
- **Settings**—this section displays the options selected on the Transfer Settings page. See [Updating Transfer Settings on page 339](#) for more information.
 - **Limit Bandwidth**—Yes indicates the Limit bandwidth setting is selected in Transfer Settings and No indicates it was not.

- **Overwrite Files**—Yes indicates the Overwrite Files setting is selected in Transfer Settings and files that have the same name in the destination folder will be overwritten. No indicates the setting was not selected and files will not be overwritten.
- **Transfer Empty Directories**—Yes indicates the Transfer Empty Directories setting is selected in Transfer Settings and empty folders will be recreated in the destination folder. No indicates the setting was not selected and empty folders will be ignored.
- **Transferred Data**—the size of the data currently transferred in reference of the total size of the transfer. If the Transferred Data shows more data than requested, for example 6 GB / 4.5 GB, it might mean that some of documents were modified after the transfer was started.
- **Transferred Items**—the number of files currently transferred in reference to the total amount of files and empty directories of the transfer.

Note: The Transferred Data and Transferred Files total values increase while the Calculation phase is in progress.

- **Incl. Empty Directories**—the number of empty directories included in Transferred Items.
- **Skipped files**—the number of skipped files in the transfer.
- **Failed files**—the number of failed files in the transfer.

Notes:

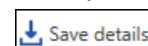
-  icon indicates the transfer Failed with failed path issues.
 -  icon indicates the transfer finished with skipped paths, but no failed paths, in the transfer.
 - For active transfer, if there are any path issues, failed or skipped, the  icon displays. However, if the transfer finishes with failed paths the  icon displays.
 - Click Skipped/Failed details link to download a CSV file to your local drive containing
-
- **Auto Retry**—based on the value set for Maximum Number of Auto Retry in Transfer Settings, this field will display the number of attempts completed out of total number of attempts set. For example, if the maximum number of auto retries is set to 3, then this field will update consecutively, for example 1/3 for one out of three attempts, 2/3 for two out of three attempts, and 3/3 for three out of three attempts. See [Updating Transfer Settings on page 339](#) for more information.
 - **Email Recipients**—by default this field will be populated with the email addresses entered in [Transfer Email Notification Recipients](#) field. If applicable, remove or add email recipients for a particular transfer. This field will only be visible to users who have the **Send Email Notification** permission on. They will only receive an email notification when a transfer finishes or fails.
 - **Error**—text box displays error messages.

The Email Sent checked box will display above the **Email Recipients** field when the email is sent.

nation	Progress	Status	Actions
	100.00 %	Finished	
Email Recipients: <div>seb.cza@relativity.com </div>			
			Email Sent

6.7.8 Saving the path issues report

The path issues report is generated for each transfer that has at least one skipped or failed path. The report



can be saved during and after the transfer completes by clicking on the **Save details** button. The saved file contains information about the phase when the issue occurred (Calculation or Transfer), the error message, and the path that was skipped or failed.

6.8 File and folder operations (copy, move, delete)

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

File operations are available for files and folders in the **Local** and **Staging** panes.

Notes:

- There is no need to log in to Utility Server virtual machine (UVM) to copy, move, or delete files and folders from Staging.
- Due to the inherent distinctions in storage technologies between traditional Windows file shares (such as on your local drive) and cloud-based file shares, there are differences in the behavior of file and folder operations. These differences are noted where applicable in this topic when they occur between Local pane and Staging pane functionality.
- You can only copy and move files and folders between different fileshares that you are permitted to use.

Below are the top-level directories included in the [Staging area](#) within each tenant or client domain storage area:

- **ARM**—a folder for archiving workspaces and for staging restores via the ARM application.
- **ProcessingSource**—a folder for storing files you want to process into your RelativityOne workspace.

- **StructuredData**—a folder for importing and exporting workspace data using Import/Export and Integration Points. Refer to [Import/Export](#) and [Integration Points](#) documentation for more information.

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

- **TenantVM**—a folder to temporarily store Utility Server virtual machine (UVM) workflows. Refer to [Utility Server](#) documentation for more information.

6.8.1 Button legend

The list below identifies the buttons in Staging Explorer.



— Add a new folder to the path location



— Rename the folder



— Copy the selected folders or files



— Move the selected folders or files



— Delete the selected folders or files



— Move up one folder level



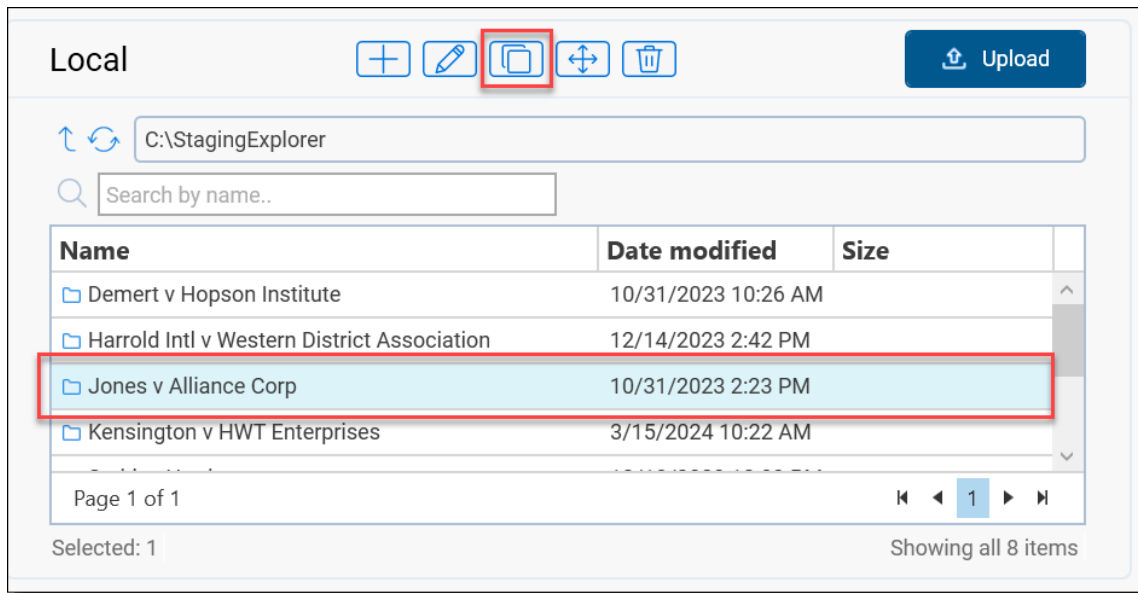
— Refresh list

6.8.2 Copying files and folders

To copy one or more folders or files in Staging Explorer:

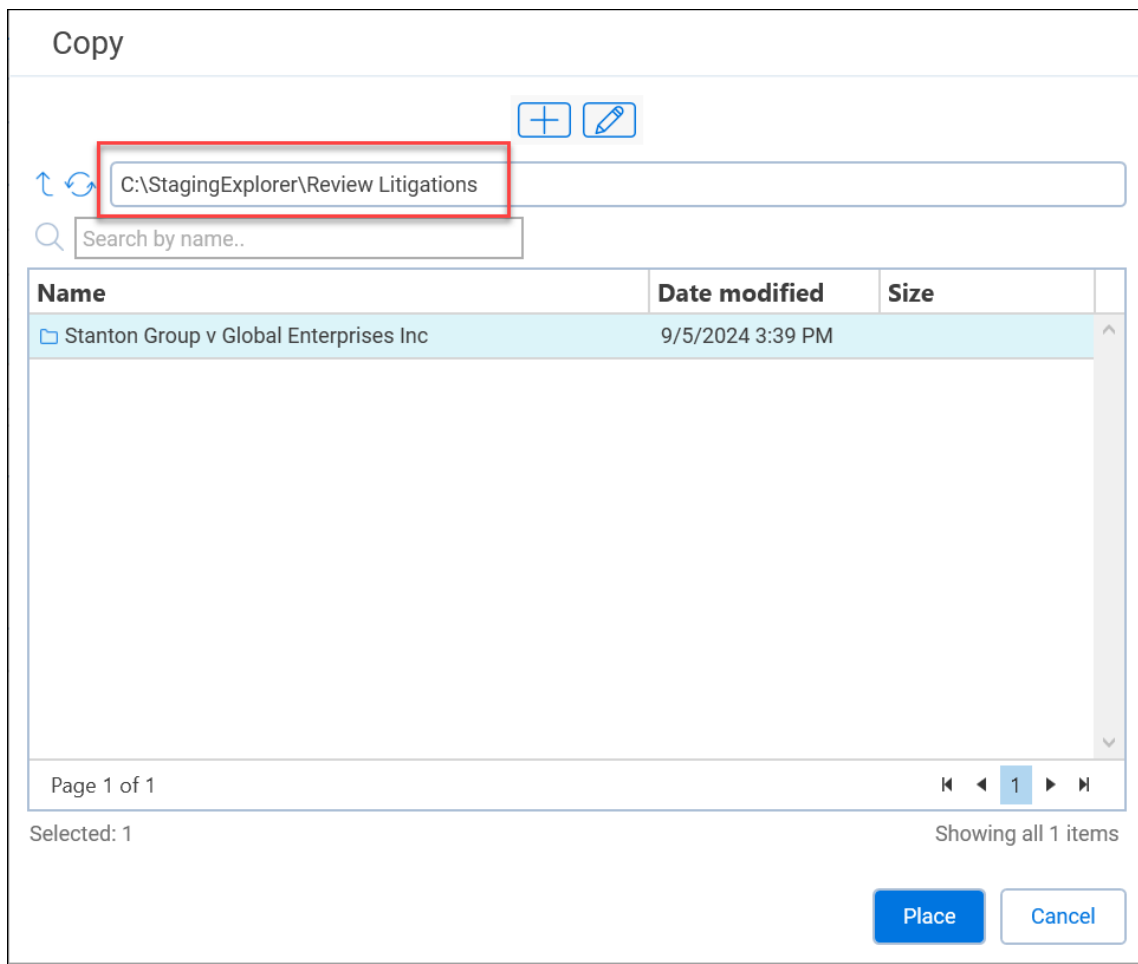
1. Click on a listed folder or file in the **Local** or **Staging** pane to select it and click the **Copy** button. To select multiple individual folders or files, hold down the **CTRL** button on your keyboard as you click each one. To select a group of sequential folders or files, select the first one, then hold down the **SHIFT** button on your keyboard and select the last file in the group.


Note: The Copy operation overwrites existing files and folders on the destination location. If a file or folder that is being copied exists on the destination location, it will be overwritten. This applies to the Local and Staging panes.



2. In the Copy dialog box, open the destination folder to copy the folder or file and click **Place**.

Note: From this dialog, you can also create a new folder by clicking the plus button, as well as rename an existing one by clicking the pencil button.



- Monitor the copy progress via the **Progress** and **Status** columns displayed in the File Operations tab. When the copy process is complete, you can click the expand plus  button to view the copy details.

Transfers

File Operations

Type	Created On	Source	Destination	Progress	Status	Actions
Copy	9/5/2024 3:43:32 PM	C:\StagingExplorer	C:\StagingExplorer\Review Li...	<div><div></div></div> 100%	Finished	<div><div></div><div></div></div>
<div><div><div>Status:Finished</div><div>Duration:00:00:05</div><div>Started On:9/5/2024 3:43:32 PM</div><div>Finished On:9/5/2024 3:43:38 PM</div><div>Job ID:7ed2567c-1143-4d2c-836a-f8422ef11285</div></div><div><div>Copied Data:1 GB / 1 GB</div><div>Copied Files:32 / 32</div><div>Path IssuesFailed: 0</div></div></div>						





- **Status**—status of the copy.
- **Duration**—how long the copy took.
- **Started On**—the date and time the copy started.
- **Finished On**—the date and time the copy completed.

- **Job ID**—unique number of a copy operation.
- **Copied Data**—the size of the data currently copied in reference to the total size of the selected data to be copied. This field only applies to the Local pane.
- **Copied Files**—the number of files currently copied in reference to the total amount of files selected to be copied.

Note: When copying items in the Staging pane, the number of Copied Items only represents the number of items (folders and/or files) selected and not the total number of files in the folders copied. For example, if two folders containing 100 files each and one other separate file were selected and copied, the Copied Items value would be 3/3, meaning three items were copied (2 folders + 1 file). It would not indicate 201 files were copied (100 files + 100 files + 1 file). This is not the case when copying items in the Local pane. In that scenario using our example, the Copied Items value would be 201/201, meaning 200 files (from the two folders) and one other file were copied.

- **Path issues**—the number of skipped and/or failed files with the option to save the details.

Notes:

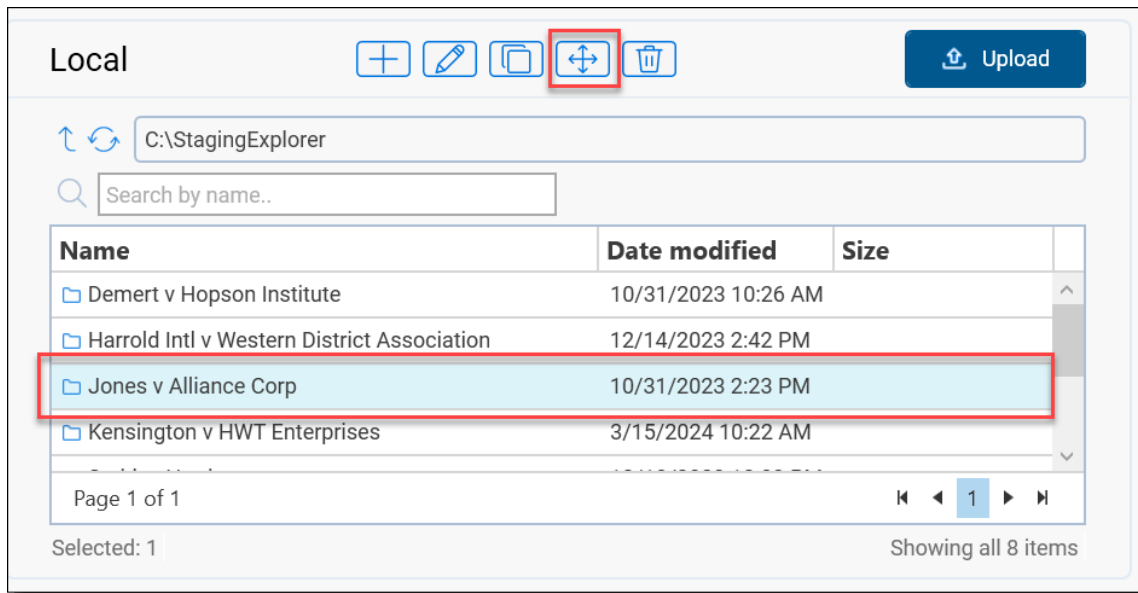
-  icon indicates the operation Failed with failed path issues.
 -  icon indicates the operation finished with skipped paths, but no failed paths.
 - For active operations, if there are any path issues, failed or skipped, the  icon displays. However, if the operation finishes with failed paths, the  icon displays.
-

6.8.3 Moving files and folders

To move one or more folders or files in Staging Explorer:

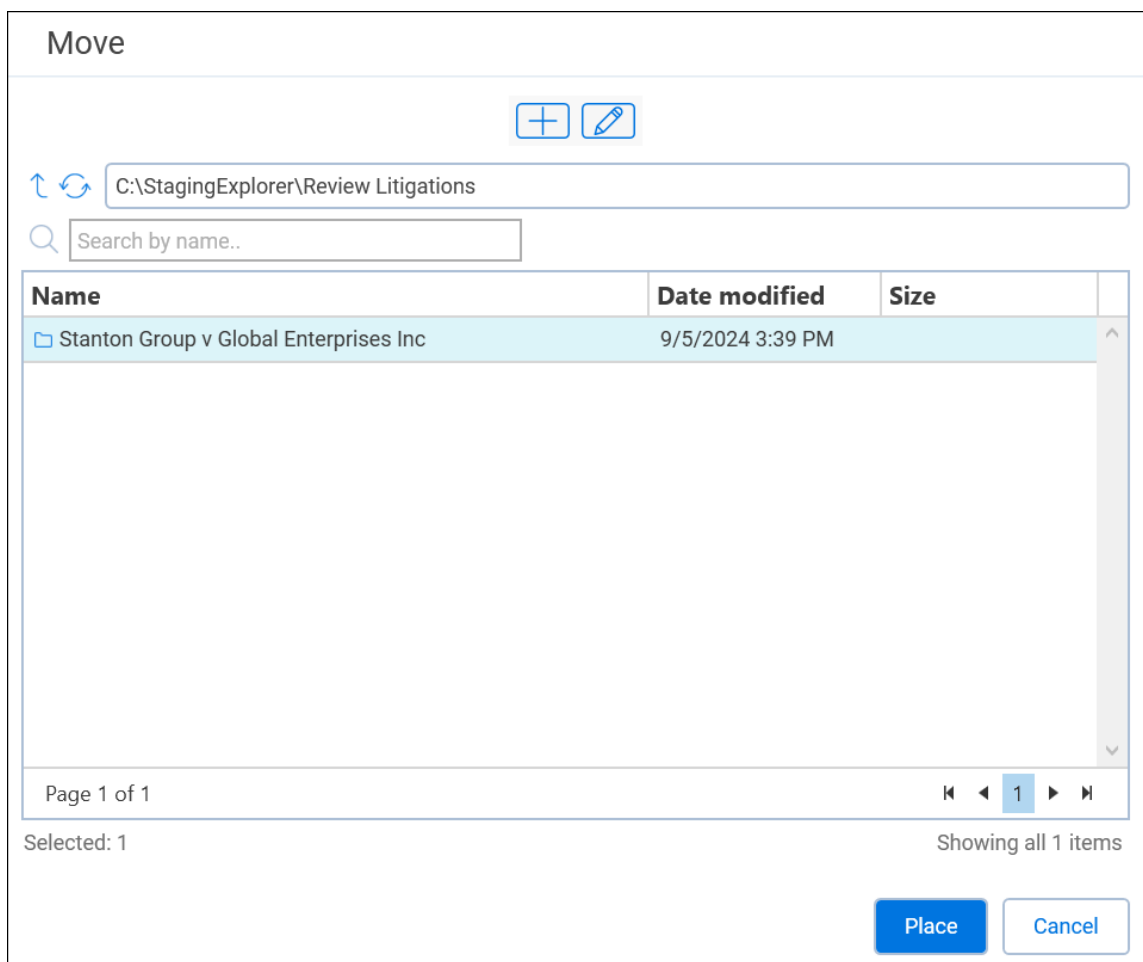
1. Click on a listed folder or file in the **Local** or **Staging** pane to select it and click the **Move** button. To select multiple individual folders or files, hold down the **CTRL** button on your keyboard as you click each one. To select a group of sequential folders or files, select the first one, then hold down the **SHIFT** button on your keyboard and select the last file in the group.


Note: For the Local pane, the Move operation overwrites any existing files and folders on the destination location. However, for the Staging pane, the Move operation will fail and not replace any existing files and folders that already exist on the destination location.



2. On the Move dialog box, open the destination folder to move the folder or file and click **Place**.

Note: From this dialog, you can also create a new folder by clicking the plus button, as well as rename an existing one by clicking the pencil button.



- Monitor the move progress via the **Progress** and **Status** columns displayed in the File Operations tab. When the move process is complete, you can click the expand plus  button to view the move details.

Transfers		File Operations					
Type	Created On	Source	Destination	Progress	Status	Actions	
Move	9/6/2024 1:31:31 PM	C:\StagingExplorer	C:\StagingExplorer\Review Li...	<div><div></div></div> 100%	Finished		
<div> <div>Status: Finished</div> <div>Duration: 00:00:02</div> <div>Started On: 9/6/2024 1:31:31 PM</div> <div>Finished On: 9/6/2024 1:31:33 PM</div> <div>Job ID: 093b7f7e-b8c2-43d9-84be-7e381f1f121a</div> </div> <div> <div>Moved Data: 1 GB / 1 GB</div> <div>Moved Files: 32 / 32</div> <div>Path Issues Failed: 0</div> </div>							





- **Status**—status of the move.
- **Duration**—how long the move took.
- **Started On**—the date and time the move started.
- **Finished On**—the date and time the move completed.
- **Job ID**—unique number of a move operation.

- **Moved Data**—the size of the data moved in reference to the total size of the selected data to move. This field only applies to the Local pane.
- **Moved Items**—the number of items currently moved in reference to the total items selected to be moved.

Note: When moving items in the Staging pane, the number of Moved Items only represents the number of items (folders and/or files) selected and not the total number of files in the folders moved. For example, if two folders containing 100 files each and one other separate file were selected and moved, the Moved Items value would be 3/3, meaning three items were moved (2 folders + 1 file). It would not indicate 201 files were moved (100 files + 100 files + 1 file). This is not the case when moving items in the Local pane. In that scenario using our example, the Moved Items value would be 201/201, meaning 200 files (from the two folders) and one other file were moved.

- **Path issues**—the number of skipped and/or failed files with the option to save the details.

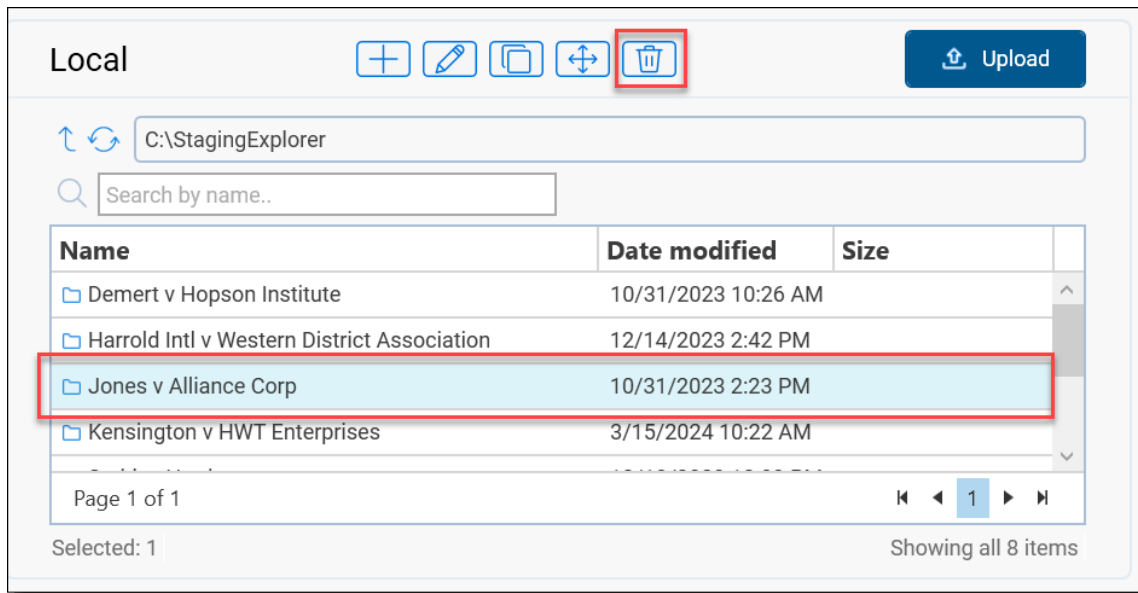
Notes:

-  icon indicates the operation Failed with failed path issues.
 -  icon indicates the operation finished with skipped paths, but no failed paths.
 - For active operations, if there are any path issues, failed or skipped, the  icon displays. However, if the operation finishes with failed paths, the  icon displays.
-


6.8.4 Deleting files and folders

To delete one or more folders or files in Staging Explorer:

1. Click on a listed folder or file in the **Local** or **Staging** pane to select it and click the **Delete** button. To select multiple individual folders or files, hold down the **CTRL** button on your keyboard as you click each one. To select a group of sequential folders or files, select the first one, then hold down the **SHIFT** button on your keyboard and select the last file in the group.



2. Click **Delete** on the delete confirmation dialog.
3. Monitor the deletion progress on the **File Operations** tab via the **Progress** and **Status** columns.

When the deletion process is complete, you can click the expand plus  button to view the delete details.





Transfers		File Operations				
Type	Created On	Source	Destination	Progress	Status	Actions
<div>Delete</div>	9/6/2024 1:48:32 PM	C:\StagingExplorer		<div><div></div></div> 100%	Finished	<div><div></div><div></div></div>
<div><div><div>Status: Finished</div><div>Duration: 00:00:01</div><div>Started On: 9/6/2024 1:48:32 PM</div><div>Finished On: 9/6/2024 1:48:33 PM</div><div>Job ID: 0706174e-1dcd-4c0a-832e-0b882ac48141</div></div><div><div>Deleted Data: 1 GB / 1 GB</div><div>Deleted Files: 32 / 32</div><div>Path Issues Failed: 0</div></div></div>						

- **Status**—status of the delete.
- **Duration**—how long the deletion process took to complete.
- **Started On**—the date and time the deletion process started.
- **Finished On**—the date and time the deletion process completed.
- **Job ID**—unique number of the delete operation.
- **Deleted Data**—the size of the data deleted in reference to the total size of the selected data to delete. This field only applies to the Local pane.
- **Deleted Files**—the number of files or folders deleted in reference to the total number of files or folders selected to delete.

Note: When deleting items in the Staging pane, the number of Deleted Files only represents the number of items (folders and/or files) selected and not the total number of files in the folders deleted. For example, if two folders containing 100 files each and one other separate file were selected and deleted, the Deleted Files value would be 3/3, meaning three items were deleted (2 folders + 1 file). It would not indicate 201 files were deleted (100 files + 100 files + 1 file). This is not the case when deleting items in the Local pane. In that scenario using our example, the Deleted Files value would be 201/201, meaning 200 files (from the two folders) and one other file were deleted.

- **Path issues**—the number of skipped and/or failed files with the option to save the details.

Notes:

-  icon indicates the operation Failed with failed path issues.
 -  icon indicates the operation finished with skipped paths, but no failed paths.
 - For active operations, if there are any path issues, failed or skipped, the  icon displays. However, if the operation finishes with failed paths, the  icon displays.
-

6.9 Requesting a Throughput Check

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

Throughput Check is used to provide reference transfer throughput based on your current connection.

- The Throughput Check runs automatically when users click **Throughput Check** in the user drop-down menu next to your name.
- If applicable, click **Close** to cancel the Throughput Check.
- The Throughput Check performs a sample transfers (upload) of 500 files, each 500kB.
- The Throughput Check test results are shown under Throughput Check summary.
- The green number is your current network's speed available upload to RelativityOne.

Throughput Check

This evaluation of your current network speed is obtained by transferring a data set containing 500 files, each 500kB in size. [Detailed documentation](#) is available.

51 Mbps

Check Again

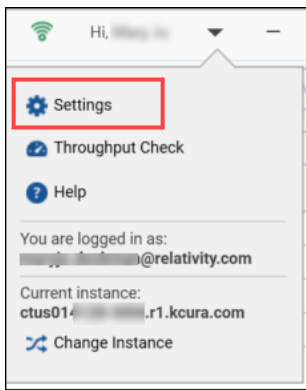
Close

6.10 Updating Transfer Settings

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

Complete the following steps to update various transfer settings and apply automatic updates.

1. [Launch the Staging Explorer](#).
2. Navigate to Settings by clicking the down arrow next to your username, then click **Settings**.



3. On the Settings window, configure the following Transfer Settings fields as needed:

Settings

Transfer Settings

Limit Bandwidth ☐ Better quality of data transmission with lower speed.

Overwrite Files ☒ Overwrite files with the same name that already exist in the destination

Transfer Empty Folders ☒ Recreate empty directories on the destination

Maximum Active Transfers* 3 ▾

Maximum Number of Auto Retry 1 ▾

Transfer Email Notification Recipients

mar @relativit... ✕ +

Automatic update

Enable Automatic Update ☒ New versions of RelativityOne Staging Explorer will have to be installed manually if this option is not enabled.

Save Cancel

- **Limit bandwidth**—select this option if your organization has slow internet speeds and there are issues with job transfer stability. By default, this option is not selected.

Some organizations may have slow internet speeds and experience issues with file transfer stability causing transfers to fail due to connection timeouts. In this situation, it may be necessary to limit bandwidth so that it's shared with Staging Explorer transfers and other business activities to improve the efficiency and stability of file transfers. When Limit bandwidth is enabled, transfers will be slower, but more stable.

- **Overwrite Files**—select this option to overwrite files that have the same name in the destination folder or leave it blank to not overwrite same name folders. This option is selected by default.
- **Transfer Empty Folder**—select this option to recreate corresponding empty folders in the destination folder that may exist in the source folder or leave it blank to ignore empty folders and not copy them to the destination folder. This option is selected by default.
- **Maximum Active Transfers**—select from the drop-down list the number of active transfer jobs permitted to run at the same time. The default value is 1 and maximum value is 3.

- **Maximum Number of Auto Retry**—select from the drop-down list the number of times the system will automatically retry a failed transfer job before it displays a failed error message. The default value is 1 and maximum value is 3.
- **Transfer Email Notification Recipients**—if applicable, enter the default email addresses in the field. Email notifications will only be sent to recipients when a transfer job finishes or fails.

Notes:

- This field will only be visible to users who have the Send Email Notification [permission](#) on.
 - When opening Staging Explorer for the very first time, the user's email address from the current instance will be inserted into the **Transfer Email Notification Recipients** field by default.
-

4. Optionally, select **Enable Automatic Update** to automatically permit Staging Explorer to update to the newest version when it's available.
5. Click **Save**.

6.11 Calculating folder size in Local/Staging panes

Note: As of September 1, 2024, we've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you will **no longer be able to write to or access data outside of the four defined staging area folders**. The four folders that comprise the Staging area are ARM, ProcessingSource, StructuredData, and TenantVM. Folders that were removed include FTA, Temp, Export, and dtSearch, in addition to any other folders that you manually created. Refer to the [Staging Area FAQ](#) in Community for more details.

With the proper permissions, users can calculate the size of folders in the Local and Staging panes.

6.11.1 Permissions

System Administrators or Client Domain Administrators need the minimum Instance-level security permission listed below to be able to calculate the size of a folder in the Local or Staging panes. Users must belong to a group that is added at the instance level to access the tab. For more information on how to set these permissions, see Setting instance permissions. Without this permission, the functionality is disabled. For more information on Staging Reports, see Staging reports.


Note: After granting these permissions to a user(s), close and reopen Staging Explorer for the changes to be implemented.

Admin operations

View Staging Reports

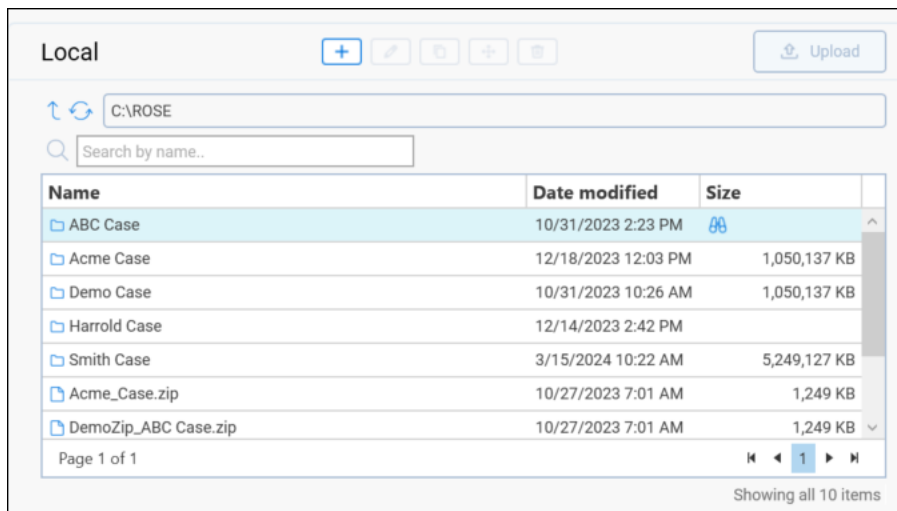
6.11.2 Calculating folder size

To calculate the size of a folder in the **Local** or **Staging** panes, complete the following steps:

1. [Launch the Staging Explorer.](#)
2. Select and open the drive that contains the folders for which you want to calculate size.
3. Hover over the folder you want to calculate and click the **Calculate**  (binoculars) button that displays under the Size column. The **Calculating...** status displays briefly under the Size column during calculation. When finished, the size of the folder displays in that column. Click the binoculars icon again to recalculate the column, if needed. More detailed information about the calculated folder, size, number of folders, and files displays at the bottom of the pane.

Notes:

- You can hold down **CTRL** to select multiple individual folders or **SHIFT** to select all the folders between the first one you selected and the next. With the folders selected, you can click any of their binocular icons to begin the calculation.
 - Calculated data is not persistent. When you change the directory or refresh it, all calculated size data is lost, and you will have to use the Calculate button again to view the data.
 - If the binocular icon has a slash through it and is grayed out, then the calculate size functionality is not available. This occurs when the selected folder is at the root level of the folder structure, as you cannot calculate the size at the root folder level. Simply select a folder at least one level lower to enable the icon and functionality. This can also occur if you do not have the proper permissions listed above to use the Calculate Size functionality.
-



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