

Simple File Upload

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Table of Contents

1 Simple File Upload	3
1.1 Special considerations	3
1.2 Workspace security permissions	3
1.3 Accessing Simple File Upload	4
1.3.1 Uploading new documents	4
1.3.2 Replacing documents	6
1.4 Simple File Upload for processing errors	8
1.4.1 Viewing audits	13

1 Simple File Upload

Simple File Upload, formerly Single File Upload, gives users the ability to add new documents to Relativity without using the Relativity Desktop Client.

1.1 Special considerations

Keep the following considerations in mind:

- When you upload a document using Simple File Upload, Relativity imports the following metadata:
 - ArtifactID
 - Control Number
 - Extracted Text
 - Relativity Folder Name
 - Has Images
 - Has Native
 - Relativity Native Type
 - Supported By Viewer
 - System Created By
 - System Created On
 - System Last Modified By
 - System Last Modified On
 - File Name
 - File Size
- Simple File Upload provides the capacity to upload any document format also supported by the legacy ActiveX viewer.
- You can search extracted text with keyword search or Data Grid. However, if Data Grid is enabled, keyword searching is disabled. For more information, see Relativity Data Grid.

1.2 Workspace security permissions

To configure workspace security permissions for Simple File Upload:

1. Navigate to the **Relativity Utilities** console on the **Workspace Details** tab.
2. Click **Manage Workspace Permissions**.
3. Click **Edit Permissions** for a group on the **Group Management** tab.
4. Grant access to the workspace security permissions listed in the table.

Object Security	Tab Visibility	Other Settings
<ul style="list-style-type: none"> ■ Document - View, Add <ul style="list-style-type: none"> ○ New Document (child) 	<ul style="list-style-type: none"> ■ Documents 	<ul style="list-style-type: none"> ■ Admin Operations: Allow Import

Notes:

- The New Document button will appear in all workspaces. You can only remove the button by removing the Add Document permission from individual users.
- If you are upgrading from Relativity 9.6 or below, the New Document permission is disabled upon upgrade.


1.3 Accessing Simple File Upload

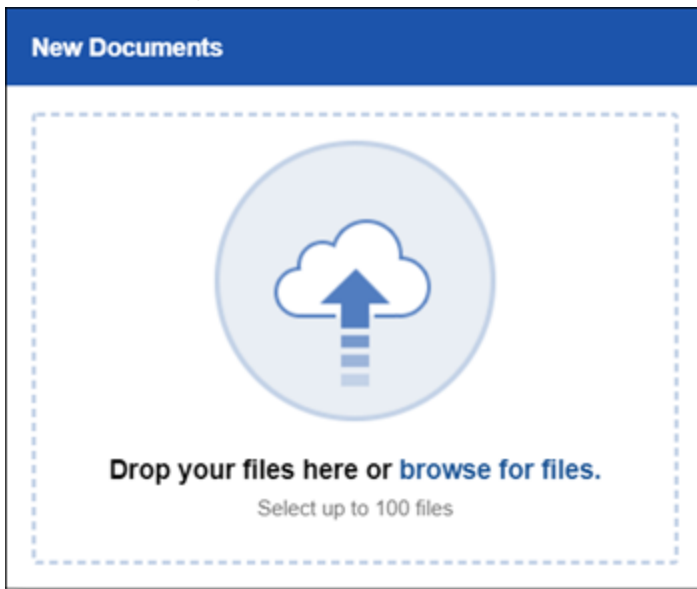
Access Simple File Upload within a workspace in the Documents tab. The application functions on the Folders, Clusters, and Field Tree browsers.

Note: You need to have the Add Document permission to access the New Document button.

1.3.1 Uploading new documents

To upload a new document to a workspace:

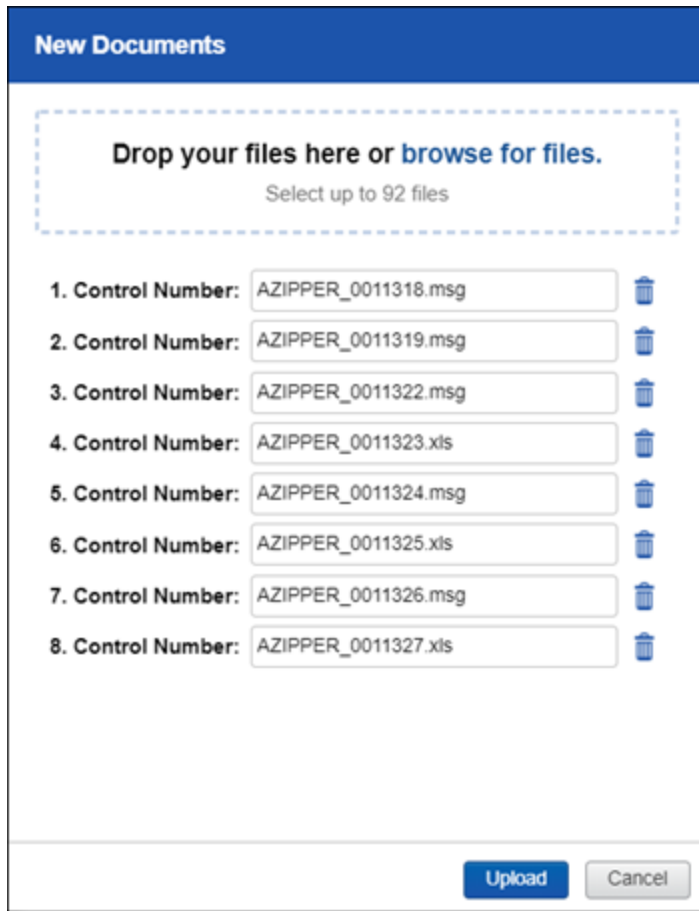
1. Click , which is located to the left of the View bar. The New Documents pop-up window appears.
2. Drag and drop up to 100 files into the New Documents pop-up window or click on the pop-up to select files that you want to upload.



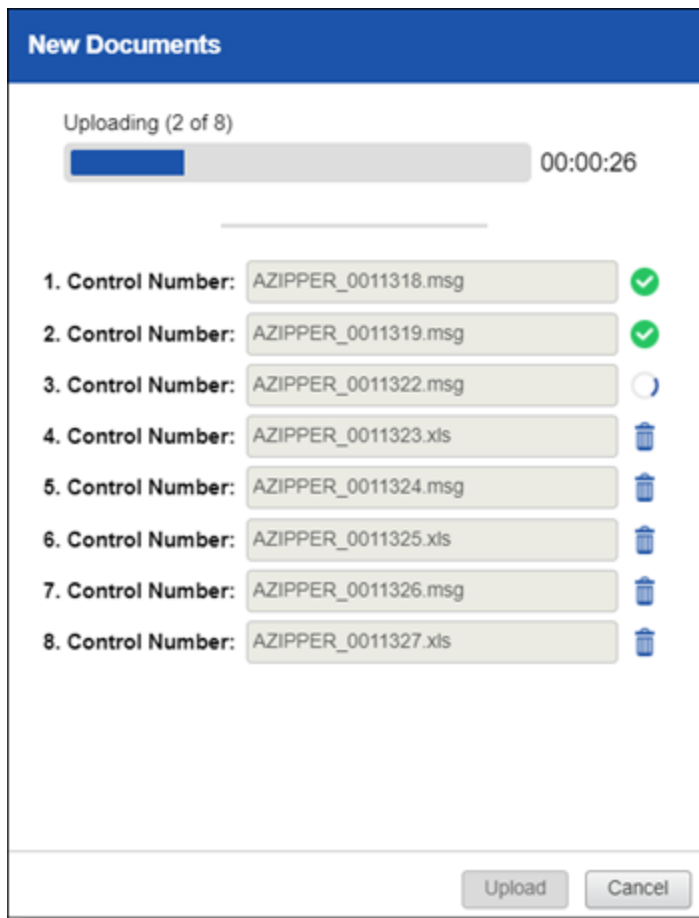
Notes:

- The SFUMaxFilesToUpload instance setting determines the maximum number of documents you can upload using Simple File Upload. Admins can set the maximum number of documents that you can upload at one time up to 100.
 - When the instance setting is set to 100, you can only upload up to 100 files at one time with Simple File Upload. If you select more than 100 files, Relativity will only upload the first 100 files you selected. Any files after the first 100 will not upload. A warning message will display in the pop-up if more than 100 files are selected.
-

The selected files will display in a list. If you choose not to upload one of the selected files, click the delete icon next to the file's name in the pop-up.



3. Click upload. When a document uploads successfully, a green check mark appears next to the file name. A progress bar tracks the progress of all the files selected.



Note: You cannot upload a document that shares a Control Number with a document that already exists in Relativity. If you want to replace a document, use the Replace document native icon in the Core Reviewer Interface. See [Replacing documents below](#).


1.3.2 Replacing documents

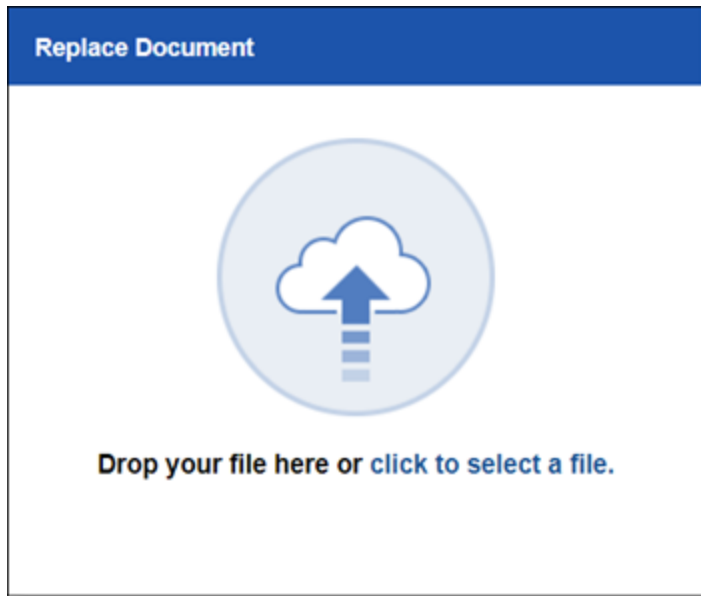
You can replace a natives and images in the viewer of the Core Reviewer Interface by using the **Replace document native** icon.

Note: You need the View Document permission with Replace Document selected to access the Replace document native icon.

To replace a document in the viewer:

1. Open a document.

2. Navigate to the layout and click . The Replace Document pop-up window opens.



3. Drag and drop or select the document that you would like to replace the current document in the viewer with.

On replace, the following meta data is uploaded:

- ArtifactID
- Control Number
- Extracted Text
- Folder Name
- Has Images
- Has Native
- Relativity Native Type
- Supported By Viewer
- System Created By
- System Created On
- System Last Modified By
- System Last Modified On
- FileName
- FileSize
- FileExtension

If you replace a document with a document that shares the same control number, all existing meta data will remain intact, except for the following fields, which Relativity overwrites:

- FileName
- FileSize
- FileExtension
- Extracted text

1.4 Simple File Upload for processing errors

If you have the Simple File Upload application installed on your workspace, you have the option of opening an individual processing error, downloading the errored file, and uploading the repaired file as a replacement after you resolve the error outside of Relativity.

This is available through the Error Actions console, which appears on the Processing Error Layout after you have configured your environment with the assistance of a support representative.

Notes:

- This option is available only for document-level errors that have a status of Ready to Retry.
 - The Error Actions console is hidden from the error layout if the option to **Download and upload files with processing errors** is not checked for the Processing Error object in the workspace security console. In order to access this functionality, every user, including system administrators, must be included in a group where this option has been manually checked after installing or upgrading the Simple File Upload application.
 - The **Download and upload files with processing errors** permission was added in Relativity 9.5.219.30.
-

Workspace Security DevWorkspace

Group Management
Object Security
Tab Visibility
Other Settings

Object Security Level 1 ▾

NAME	NONE	VIEW	EDIT	DELETE	ADD	EDIT SECURITY
<input type="text" value="Search"/>						
Password Entry						
Persistent Highlight Set						
Pivot Profile						
Processing Data Source						
Processing Error <input type="checkbox"/> Download and Upload files with processing errors						
Processing Profile						
Processing Set						
Production						
Production Data Source						
Production Information						
Production Placeholder						
RAR Saved Cat. Results						
RAR Saved Cat. Results Set						
RARComparison						

Save Cancel Close

To upload a Simple file for a processing error, perform the following steps:

1. Navigate to the **Processing | Document Errors** tab, locate the error you'd like to resolve, and click on the name of the error in the **Current Error Message** field to get to the document error layout.

#	File ID	Current Status	Current Category	Current Error Message	Source Location	Custodian	Processing Set	Processing Data Sour...	Number of Retr...	Republish required
1	1	Ready to retry	Password Protected	Error occurred when attempting to open the Word document. The document may be password protected.	W:\files\T046\ProcessingSource\PasswordProtectedFiles\Pre2007BasicPasswordProtectedWordFile - Test12341.doc	Smith, Jane	Processing Set 001	Smith, Jane - 1056878	0	
2	2	Ready to retry	Password Protected	Unable to extract metadata and attachments from this document. The document may be password protected.	W:\files\T046\ProcessingSource\PasswordProtectedFiles\Word Sheet - Test12341.docx	Smith, Jane	Processing Set 001	Smith, Jane - 1056878	0	
3	3	Ready to retry	Password Protected	Unable to extract metadata and attachments from this document. The document may be password protected.	W:\files\T046\ProcessingSource\PasswordProtectedFiles\Presentation - Test12341.pptx	Smith, Jane	Processing Set 001	Smith, Jane - 1056878	0	
4	4	Ready to retry	Password Protected	Error occurred when attempting to open the PDF file. The document may be password protected.	W:\files\T046\ProcessingSource\PasswordProtectedFiles\PDF Sheet - Test12341.pdf	Smith, Jane	Processing Set 001	Smith, Jane - 1056878	0	
5	5	Ready to retry	Password Protected	Unable to extract metadata and attachments from this document. The document may be password protected.	W:\files\T046\ProcessingSource\PasswordProtectedFiles\Excel Sheet - Test12341.xlsx	Smith, Jane	Processing Set 001	Smith, Jane - 1056878	0	

- Click **Download File** on the Error Actions console on the right side of the layout. Note that when you do this, you're downloading the document from the same folder patch displayed in the Document file location field on the document error layout.

Document Error Layout Record 1 of 5

Document Error Details

Processing Data Source: Smith, Jane - 1056878

Processing Set: Processing Set 001

Custodian: Smith, Jane

Source Location: W:\files\T046\ProcessingSource\PasswordProtectedFiles\Pre2007BasicPasswordProtectedWordFile - Test12341.doc

File ID: 1

Current Category: Password Protected

Number of Retries: 1

Current Status: Ready to retry

ERROR ACTIONS

Retry

Ignore

Edit Notes

Download File

Upload Replacement File

- Once the file appears in the lower-right hand corner of your browser window, either open or save it to your local machine.

The screenshot displays the 'Document Error Layout' in Relativity One. At the top, there are navigation tabs for various system functions. The main content area is divided into two sections: 'Document Error Details' and 'Processing Errors'.

Document Error Details:

- Processing Data Source: Smith, Jane - 1056878
- Processing Set: Processing Set 001
- Custodian: Smith, Jane
- Source Location: \\files\T046\ProcessingSource\PasswordProtectedFiles\Pre2007BasicPasswordProtectedWordFile - Test12341.doc
- File ID: 1
- Current Category: Password Protected
- Number of Retries: 1
- Current Status: Ready to retry
- Document: [Empty field]
- Notes: [Empty field]

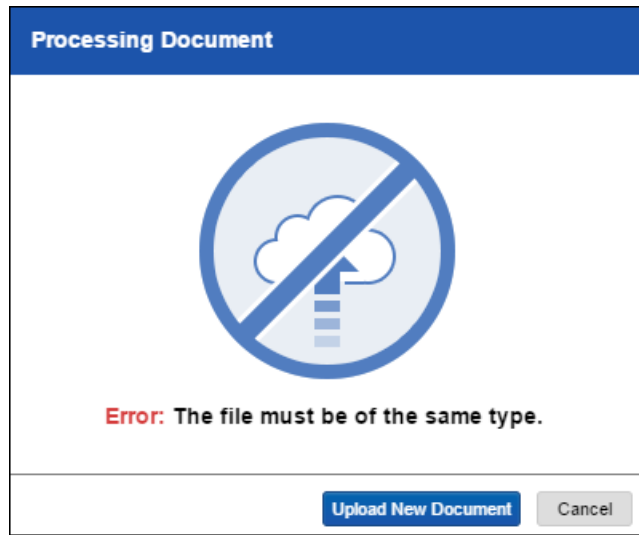
Processing Errors Table:

Message	Identified file type	Processing phase	Error status	Error created on	Notes
<input type="checkbox"/> Edit Error occurred when attempting to open the Word document. The document may be password protected.	Microsoft Word 97 - 2003 Document	Extracting data	Ready to retry	11/28/2018 6:42 PM	
<input type="checkbox"/> Edit Error occurred when attempting to open the Word document. The document may be password protected.	Microsoft Word 97 - 2003 Document	Extracting data	Retried	11/28/2018 6:26 PM	

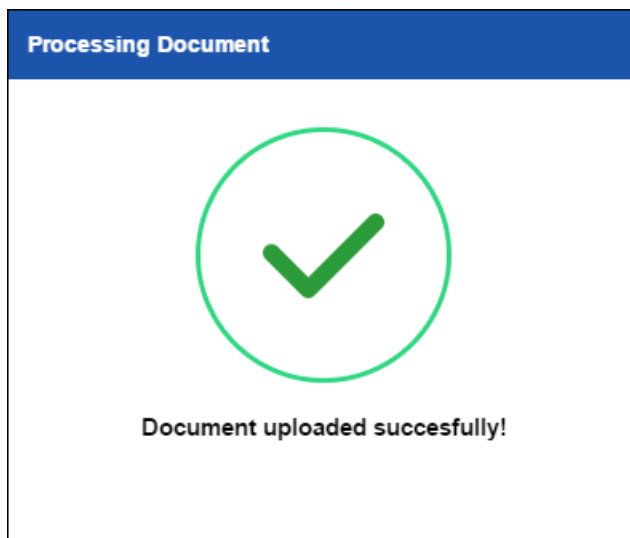
At the bottom of the interface, the status bar shows '1.DOC' with a red arrow pointing to the document icon. To the right of the status bar is a 'Show all' button.

4. Outside of Relativity, address the error to repair the file. For example, if the error was due to password protection because you didn't previously provide that password in the Password Bank, enter it now to decrypt the file and then save the decrypted file to your local machine so that you can upload it here.
5. Once you've repaired the file, return to the document error layout and click **Upload Replacement File** on the Error Actions console.
 - You must upload a file of the same extension as the file you downloaded or you will receive an error. If you receive this error, either click **Upload New Document** to return to your file

explorer or click **Cancel** to return to the document error layout.

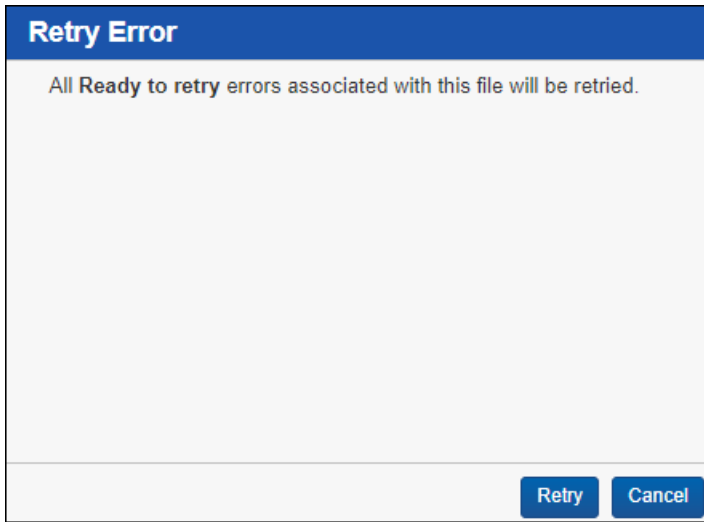


6. Confirm that the upload completed successfully. Note that when you replace a document in this way, the Document file location, File ID, and Name values of the replacement document are identical to those of the file you downloaded.

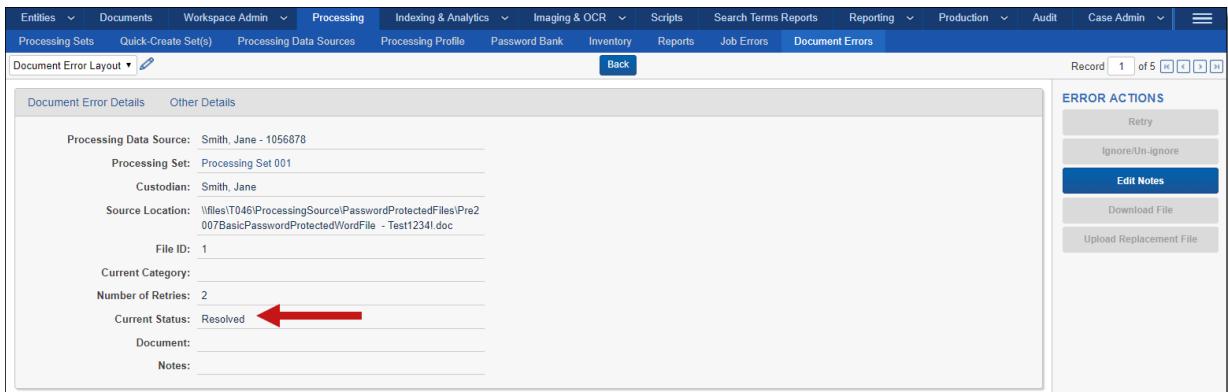


7. Click **Retry** in the Error Actions console.

8. When the Retry Error pop-up opens, click **Retry**.



9. The current status will change to **Resolved**.



For more information, see Processing error workflow.

1.4.1 Viewing audits

When you use Simple File Upload for processing errors, Relativity audits your actions, which you can view via the View Audit button on the processing error layout. When you open the audit view, you can see such actions as **File Download** and **File Upload**, along with the processing error file download and replacement paths, among other details.

Note: Auditing for Simple File Upload for processing errors was added in Relativity 9.5.219.30.

History of ProcessingError: 00000000000000001643		
User Name	Action	Timestamp
Select...	Select...	(All)
Details Filter: (All)		
Admin, Relativity	File Download	6/19/2017 1:41:00 PM CDT
<i>Processing Error File Download Path: \\localhost\files\EDDS1034329\Processing\1051031\INV1034329\SOURCE\0\1950.PDF (8503)</i>		
Admin, Relativity	File Upload	6/14/2017 2:38:09 PM CDT
<i>Processing Error File Replacement Path: \\localhost\files\EDDS1034329\Processing\1051031\INV1034329\SOURCE\0\1950.PDF</i>		
Service Account, Relativity	Create	6/14/2017 11:33:37 AM CDT

Viewing all items in sets of per page

You can also access audit information through the History tab by filtering on the Object Type field for **ProcessingError** and on the Action field for **File Download** and/or **File Upload**.

Action	Object Type	User Name
<input type="button" value="SET"/> <input type="button" value="Cancel"/>	ProcessingError OCRLanguage OCRProfile OCRSet PasswordBank PasswordEntry PersistentHighlightSet PivotProfile ProcessingDataSource ProcessingError ProcessingProfile ProcessingSet Production ProductionDataSource ProductionInformation ProductionPlaceholder RARComparison RARSavedCatResults RARSavedCatResultsSet RelativityApplication RelativityScript	

OR AND
 (Show All)
 Document Query
 Export
 File Download
 File Upload
 Generate Report
 Images - Created
 Images - Created for Production
 Images - Deleted
 Import

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