



Data Transfer Guide

October 7, 2026

For the most recent version of this document, visit our [documentation website](#).

Table of Contents

1 Data transfer	7
1.1 Data transfer considerations	7
1.2 Data transfer network considerations	7
1.3 Data transfer workflows in Relativity aiR	7
1.3.1 Workflow 1: Loading processed and unprocessed data directly into Relativity aiR using Import/Export with Express Transfer (recommended)	8
1.3.2 Workflow 2: Loading processed and unprocessed data directly into Relativity aiR using Import/Export with Express Transfer from the Utility Server	8
1.3.3 Workflow 3: Loading processed data to the staging directory and then into Relativity aiR	8
1.3.4 Workflow 4: Loading unprocessed data to your Relativity aiR staging directory for processing	8
1.3.5 Workflow 5: Migrating case data to the staging directory into Relativity aiR	9
2 Staging Area	9
2.1 Staging Area folders	9
2.2 Billable	10
2.3 Best Practices	10
3 Utility Server (UVM)	10
3.1 Utility Server access	11
3.2 Connecting to your Utility Server	11
3.3 Logging off or disconnecting Utility Server sessions	12
3.4 Data, applications and storage capacity on the Utility Server	13
3.5 GlobalProtect VPN client	13
3.5.1 GlobalProtect VPN requirements	13
3.5.2 Current VPN portal URL	14
3.5.3 Accepting the invitation from Microsoft Entra ID	15
3.5.4 Downloading and installing the GlobalProtect VPN client	15
3.5.5 Logging in using your GlobalProtect VPN client	17
3.5.6 Changing your VPN password	21
3.5.7 Adding an additional VPN region to GlobalProtect	21
4 Import/Export overview	22
4.1 Getting started with Import/Export	23
4.2 Import and export workflows	24
4.3 Import/Export transfer modes	25
4.4 Considerations when to use and not use Express Transfer with Import/Export	25

4.5 Supported file types	26
4.6 Data upload size limitation	26
4.7 Concurrent and consecutive jobs	26
4.8 Import/Export overview	26
4.8.1 Getting started with Import/Export	27
4.8.2 Import and export workflows	28
4.8.3 Import/Export transfer modes	29
4.8.4 Considerations when to use and not use Express Transfer with Import/Export	29
4.8.5 Supported file types	29
4.8.6 Data upload size limitation	30
4.8.7 Concurrent and consecutive jobs	30
4.9 Installing Import/Export	30
4.9.1 Requirements	30
4.9.2 Installing Import/Export	31
4.10 Permissions	31
4.10.1 Workspace-level permissions on Features tab	31
4.10.2 Additional required permissions for document import	34
4.11 Import/Export load file specifications	34
4.11.1 Supported file types	34
4.11.2 Metadata, extracted text, and native files	35
4.11.3 Image and extracted text files	41
4.11.4 Processed data	42
4.11.5 Supported transcript file types	43
4.11.6 Multiple references to the same native file	43
4.11.7 Access DB (MDB) load file specifications	44
4.12 General recommendations for structured data import and export jobs	48
4.12.1 Load file import recommendations	48
4.12.2 Load file export recommendations	49
4.13 Express Transfer overview	49
4.13.1 Prerequisites	50
4.13.2 Considerations when to use and not use Express Transfer with Import/Export	50
4.13.3 Express Transfer overview	50
4.13.4 Installing and updating Express Transfer desktop application	52
4.13.5 Activating and deactivating Express Transfer	65

4.13.6 Express Transfer system tray menu	69
4.13.7 Express Transfer Preferences	70
4.13.8 Express Transfer connectivity check	91
4.13.9 Express Transfer Job tracking and history	94
4.13.10 Express Transfer reporting jobs failed or completed with errors	101
4.14 Importing data using Import/Export	103
4.14.1 Structured data import from Staging	103
4.14.2 Pre-check Load File	105
4.14.3 Importing data using Import/Export	108
4.14.4 Importing a document load file	113
4.14.5 Importing an image load file	127
4.14.6 Importing a production load file	137
4.14.7 Importing an RDO load file	147
4.14.8 Importing an Access DB load file (MDB)	160
4.14.9 Importing transcript MDB data for Processing via Import/Export	171
4.14.10 Importing raw unprocessed data for Processing via Import/Export	178
4.15 Exporting data using Import/Export	188
4.15.1 Exporting data using Import/Export	189
4.15.2 Exporting a folder load file	189
4.15.3 Exporting a production set load file	203
4.15.4 Exporting an RDO load file	214
4.15.5 Exporting a saved search load file	226
4.15.6 Exporting a saved search or a folder with Access DB load file (MDB)	239
4.15.7 Exporting a production set with Access DB load file (MDB)	250
4.16 Import/Export Job tracking and history	260
4.16.1 Reviewing the Import/Export Job page	260
4.16.2 Support for Mass Operations	262
4.17 Import/Export queue	262
5 Integration Points	264
5.1 Integration Points scenarios	264
5.2 Installing Integration Points	265
5.2.1 Installing Integration Points	265
5.3 Integration Points profiles	265
5.3.1 Creating Integration Point profiles	265

5.3.2 Copying Integration Point profiles	269
5.4 Importing data through Integration Points	271
5.4.1 Considerations	271
5.4.2 Creating an import Integration Point	271
5.4.3 Importing a .csv file	272
5.4.4 Importing LDAP	277
5.4.5 Importing a document load file	282
5.4.6 Importing an image load file	288
5.4.7 Importing a production load file	292
5.4.8 Importing from Microsoft Entra ID	296
5.4.9 Manually running the import job	301
5.4.10 Disabling a scheduled Integration Point job	303
5.4.11 Scheduler date format considerations	304
5.4.12 Automatically stopping a scheduled job that repeatedly fails	305
5.5 Exporting data through Integration Points	306
5.5.1 Exporting a folder to load file	306
5.5.2 Exporting a folder and subfolders to a load file	315
5.5.3 Exporting a production to a load file	323
5.5.4 Exporting a saved search to a load file	331
5.5.5 Exporting to a Relativity workspace	339
5.5.6 Running the export job	339
5.5.7 Stopping (disabling) an Integration Point from promoting data	341
5.5.8 Scheduler date format considerations	342
5.5.9 Automatically stopping a scheduled job that repeatedly fails	343
5.6 Transferring (promoting) data between workspaces	344
5.6.1 Considerations	344
5.6.2 Exporting to a Relativity workspace	345
5.6.3 Mapping saved searches	356
5.6.4 Working with transferred documents	356
5.6.5 Calculating integration point job statistics on-demand	357
5.7 Viewing destination workspaces	359
5.8 Monitoring job history and errors	361
5.8.1 Job History	361
5.8.2 Job History Errors	364

5.8.3 Troubleshooting job history errors	366
5.9 Microsoft Entra ID provider	368
5.9.1 Registering an Azure application and credentials	368
5.9.2 Finding Azure credentials	369
5.9.3 Removing application access	370
6 Staging Explorer	370
6.1 Staging Explorer	371
6.2 Permissions	371
6.3 User access permissions to file shares	373
6.3.1 Prerequisites	373
6.3.2 Assigning user group access permissions	373
6.3.3 Former workflow in Relativity aiR for user access to file shares	378
6.3.4 Granting user access to specific file shares	379
6.4 Best practices, limitations, and data transfer performance considerations	384
6.4.1 Best practices	384
6.4.2 Limitations	385
6.4.3 Data transfer performance considerations	385
6.5 Installing, launching, and updating Staging Explorer	386
6.5.1 System requirements	386
6.5.2 Installing Staging Explorer	388
6.5.3 Launching Staging Explorer	389
6.5.4 Manually updating Staging Explorer	391
6.5.5 Automatically updating Staging Explorer	392
6.6 Navigation	393
6.6.1 User drop-down menu	393
6.6.2 General navigation	394
6.6.3 Sorting file lists	395
6.6.4 Pagination	396
6.7 Transfer workflows	396
6.7.1 File and folder naming rules	397
6.7.2 Uploading files	398
6.7.3 Downloading files	399
6.7.4 Starting and canceling a transfer	401
6.7.5 Retrying a transfer	401

6.7.6 Deleting a transfer	401
6.7.7 Viewing transfer history	401
6.7.8 Viewing and editing transfer details	402
6.7.9 Saving the path issues report	404
6.8 File and folder operations (copy, move, delete, zip, unzip)	404
6.8.1 Button legend	405
6.8.2 Copying files and folders	405
6.8.3 Moving files and folders	408
6.8.4 Deleting files and folders	411
6.8.5 Zipping (compressing) and unzipping (extracting) files and folders	412
6.9 Requesting a Throughput Check	417
6.10 Updating Transfer Settings	417
6.11 Calculating folder size in Local/Staging panes	419
6.11.1 Calculating folder size	419

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 Relativity aiR environment, you may need to get your legacy data into Microsoft Azure. If you are a new Relativity aiR customer or considering Relativity aiR, we recommend that you first review Relativity aiR data migration.
- Relativity aiR also offers a variety of tools for managing your data. For more information on the methods in which data can be stored within your Relativity aiR environment, refer to Relativity aiR 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 Relativity aiR network access in the Relativity aiR technical overview.

1.3 Data transfer workflows in Relativity aiR

For Relativity aiR, you have two major options for data transfer:

- **Loading data directly into Relativity aiR 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 Relativity aiR.

- **Transferring data to the designated Relativity aiR staging area**—you can upload files to your Relativity aiR 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 Relativity aiR. The Utility Server is a virtual machine that can be connected to your Relativity aiR instance that contains additional support tools to help you edit and view the data in your designated staging directory before loading it into Relativity aiR. For example, you may want to access your uploaded files to edit in the staging directory before you add them to your Relativity aiR workspaces or save them to a Relativity aiR 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 Relativity aiR 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 Relativity aiR 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 Relativity aiR. For more information, see [Import/Export overview](#) and [Express Transfer overview](#).

1.3.2 Workflow 2: Loading processed and unprocessed data directly into Relativity aiR 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 Relativity aiR 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 Relativity aiR

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 Relativity aiR.

1. Upload local files to your Relativity aiR 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 Relativity aiR 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 Relativity aiR 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 Relativity aiR using the Processing application.

1. Upload local files to the **Processing Source** folder in your Relativity aiR staging directory using the Staging Explorer.
2. Using the Processing application, ingest your raw data directly into your Relativity aiR 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 Relativity aiR

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 Relativity aiR using the ARM application. The ARM application is used to archive and restore Relativity workspaces between Relativity installations and Relativity aiR. 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 Relativity aiR 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 Relativity aiR staging directory in the cloud.
3. Execute an ARM Restore job to restore the ARM archive into your Relativity aiR instance. ARM restore will recognize the ARM archive on the [Utility Server](#) and make it easily available for restoring.

2 Staging Area

For more information on Staging Area folders, refer to the [Staging Area 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 Relativity aiR. This area is separate from where your workspace data and Relativity aiR system data resides. The volume size of the Staging Area is based on your current Relativity aiR subscription. It is used for:

- Preparing client data (upload, manage, organize) prior to importing data into Relativity aiR.
- 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 Relativity aiR,

See Relativity aiR 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 Relativity aiR workspace. There will be a dedicated job folder for each of the jobs. For example, \ProcessingSource\[JobFolderName].
- **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.
- **TenantVM**—a folder to temporarily store Utility Server virtual machine (UVM) workflows. Refer to [Utility Server](#) documentation for more information.

Note: User groups have access to all four Staging Area folders. If you need to restrict a group's access, you can do so by limiting their access at a file share level. For details, see User access permissions to file shares.

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 Relativity aiR 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.

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

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

- Install Staging Explorer (ROSE) to access data in the staging area.
 - For information on ROSE, see the [Staging Explorer](#) topic.
- 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 issues if you do not have one.

- 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 Relativity aiR are not supported.

Note: This functionality is only available through an administrator account, which Relativity issues if you do not have one.

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

3.1 Utility Server access

Note: Relativity limits access to two users concurrently. However, you can request up to 10 concurrent user sessions. Contact [Customer support](#) to request additional user sessions.

By default, Relativity issues Utility Servers 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 [Customer 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	Issued by request	Issued by default
Administrator	X	X	X*
Default Relativity user account			X
Custom users (client-managed)	NA	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. Refer to the article, [Relativity aiR - 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 Customer Support will share these credentials with you.
2. Use the credentials to connect to the [Global Protect VPN](#).

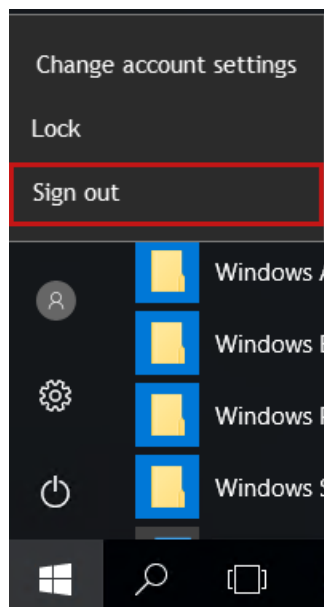
Note: VPN and Utility Server user credentials are unique credentials. Make sure you use the correct credentials to connect to the VPN and Utility Server, respectively. If you cannot establish a connection to the VPN, contact [Customer support](#) for help with troubleshooting.

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 Relativity aiR Utility Server. If you experience issues accessing your Utility Server, contact [Customer support](#).

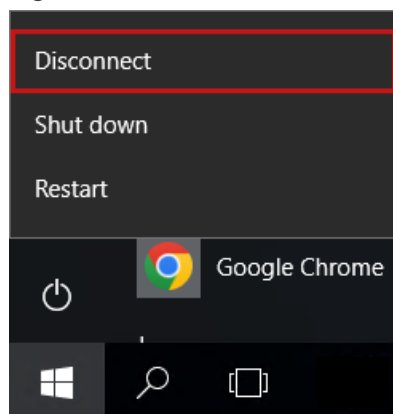
Note: For added security, change your password after you log in. You should change your password a minimum of every 90 days.

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 check 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 keep copies of data on the server in other external locations.
- Utility Servers not used for a period of six months are subject to decommission.
- 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 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

Note: This documentation contains references to third-party software, or technologies. While efforts are made to keep third-party references updated, the images, documentation, or guidance in this topic may not accurately represent the current behavior or user interfaces of the third-party software. For more considerations regarding third-party software, such as copyright and ownership, see [Terms of Use](#).

3.5.1 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 Relativity aiR, 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.

3.5.1.1 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 Relativity aiR.

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 Global Protect VPN or IPsec tunnel connections between GlobalProtect agents and gateways.

See Relativity aiR network access in the Relativity aiR technical overview documentation for complete information on network access requirements.

3.5.2 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 data center IP address ranges for VPN portal URL:

Primary Azure/Entra ID region	Primary IP Range	VPN Portal URL
US-Central (CTUS)	52.189.66.32/27	vpn.ctus.relativity.one
US-East (ESUS)	40.88.50.160/27	vpn.esus.relativity.one
Canada-Central (CACT)	52.228.98.0/27	vpn.cact.relativity.one
UK-South (UKSO)	51.145.60.64/27	vpn.ukso.relativity.one
Asia-East (ESAS)	52.184.89.64/27	vpn.esas.relativity.one
Brazil-South (BRSO)	191.233.244.160/27	vpn.brso.relativity.one
Europe-West (WSEU)	51.105.222.96/27	vpn.wseu.relativity.one
France - Central (FRCT)	20.199.57.128/27	vpn.frct.relativity.one
Germany-West Central (DECT)	51.116.134.160/27	vpn.dect.relativity.one
Switzerland North (CHNO)	51.107.46.128/27	vpn.chno.relativity.one
Australia-East (AUEA)	20.40.190.160/27	vpn.auea.relativity.one
Korea-Central (KRCT)	20.194.51.192/27	vpn.krct.relativity.one
United Arab Emirates (AENO)	20.203.41.32/27	vpn.aeno.relativity.one
India (INCT)	20.204.36.0/27	vpn.inct.relativity.one

Primary Azure/Entra ID region	Primary IP Range	VPN Portal URL
Ireland (NOEU)	20.93.29.128/27	vpn.noeu.relativity.one
South Africa (ZANO)	20.87.64.160/27	vpn.zano.relativity.one
Southeast Asia (SEAS)	52.230.48.0/27	vpn.seas.relativity.one
Japan (JPES)	20.78.107.96/27	vpn.jpes.relativity.one
Legacy Sandboxes	**	vpn.ctusbx.relativity.one

** For Sandboxes, use the FQDN listed in the next table

3.5.3 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 Relativity aiRVPNinvites@microsoft.com.
 - **Subject**—RelativityOneVPN invited you to access applications within their organization.
2. Click on the **Accept Invitation** link in the email.
 - If your organization does not use Active Directory, please continue with the prompts to complete creating the Microsoft account.
 - If your organization has Active Directory, your account will be connected automatically.
3. Your account creation is complete when you log in to Azure/Entra ID Portal.
4. Proceed to [Downloading and installing the GlobalProtect VPN client below](#) to install the GlobalProtect VPN client.

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

3. Enter your own credentials.



Sign in

john.smith@vpn.relative.one

[Can't access your account?](#)

Back

Next



Sign-in options

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



GlobalProtect Portal

[Download Windows 32 bit GlobalProtect agent](#)

[Download Windows 64 bit GlobalProtect agent](#)

[Download Mac 32/64 bit GlobalProtect agent](#)

Windows 32 bit OS needs to download and install Windows 32 bit GlobalProtect agent.

Windows 64 bit OS needs to download and install Windows 64 bit GlobalProtect agent.

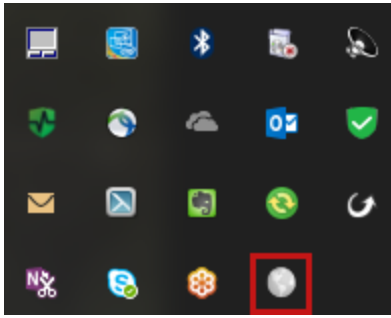
Mac OS needs to download and install Mac 32/64 bit GlobalProtect agent.

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

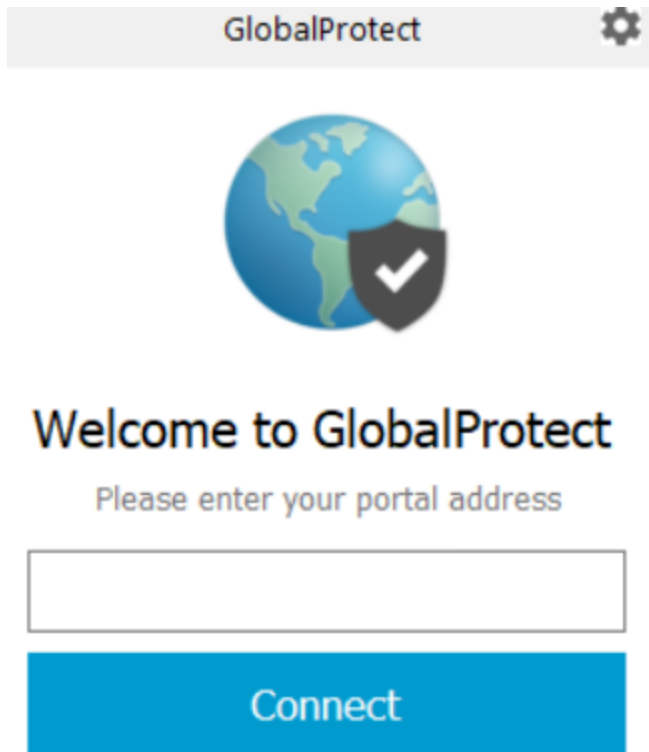
Note: If you are using macOS and are unable to use GlobalProtect after installing, review the General tab in your Security and Privacy settings and ensure that system software from **PanGPS** is not blocked from loading.

3.5.5 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.

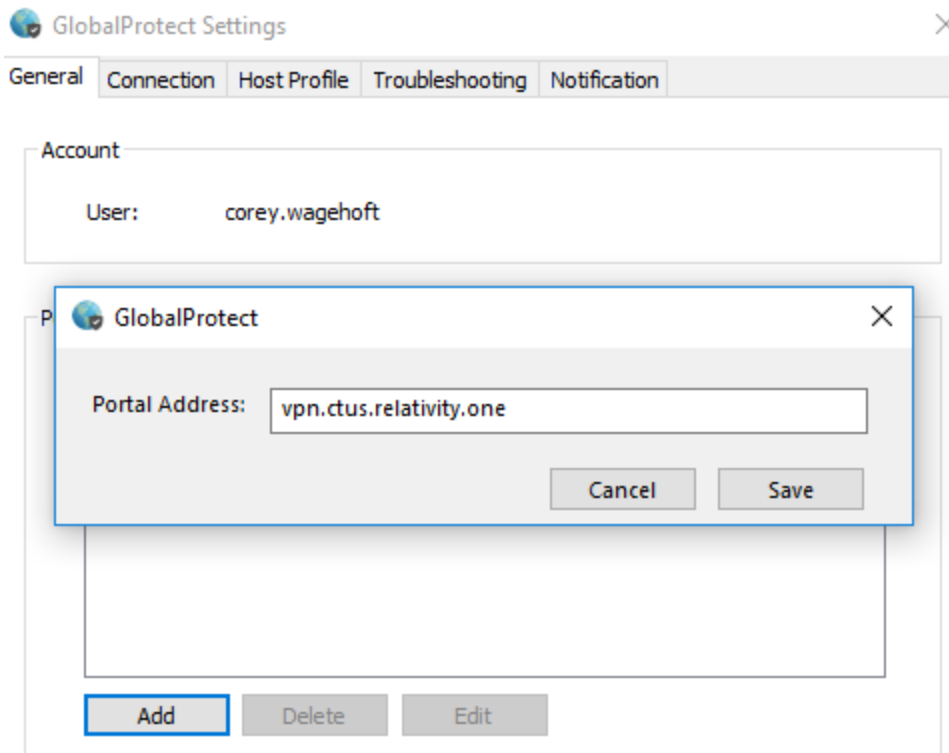


2. Click the **gear icon** in the upper right-hand corner of the toolbar menu, and then select **Settings** to access the Settings dialog window and configure the VPN client.

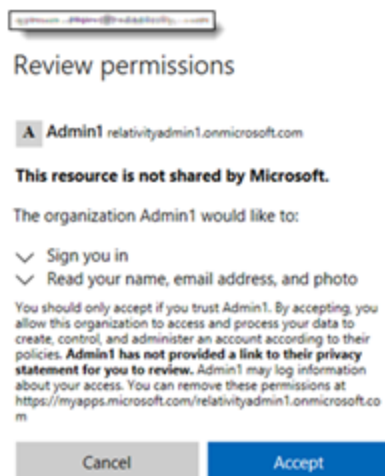


3. Under the General tab, click the **Add** button to add the Relativity aiR **Portal Address**. Ensure you enter the correct portal. This depends on which geographic region your Relativity aiR instance resides in. You should not

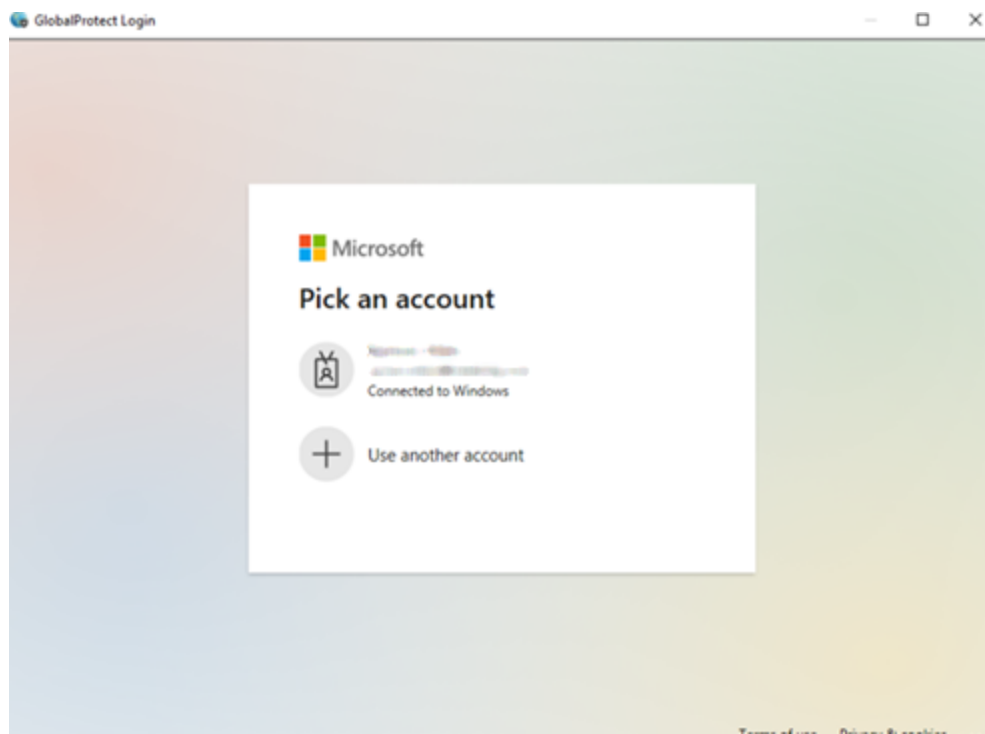
enter the "http://" preceding the portal address.



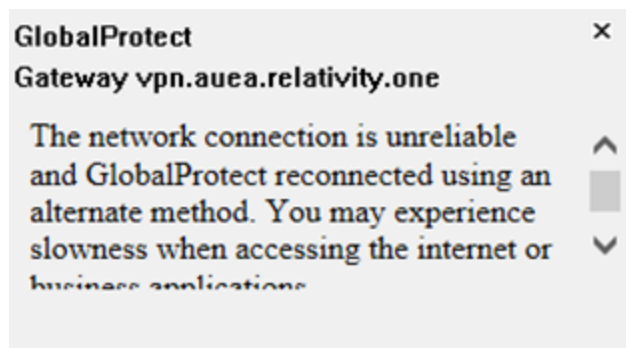
4. Click **Save**.
5. Close the Settings dialog.
6. Click on the GlobalProtect icon in your tray, and then click the blue **Connect** button. A pop-up window for reviewing permissions is displayed.
7. After reviewing the terms, click **Accept**.



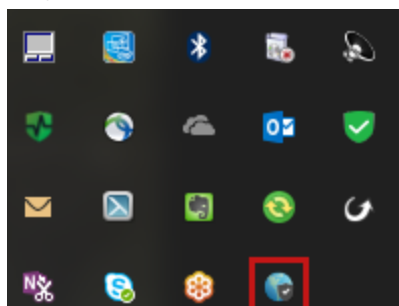
8. A prompt for your VPN user credentials is displayed. Choose the appropriate VPN user credentials to sign in with in the Microsoft *Pick an account* screen. This prompt might appear twice depending on your organization's settings. A window will be displayed momentarily while you are connected to the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

GlobalProtect Settings

×

General

Connection

Host Profile

Troubleshooting

Notification

Account

User:

Portals

Portal	Status
vpn.ctus.relativity.one	Connected

Add

Delete

Edit

3.5.6 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.

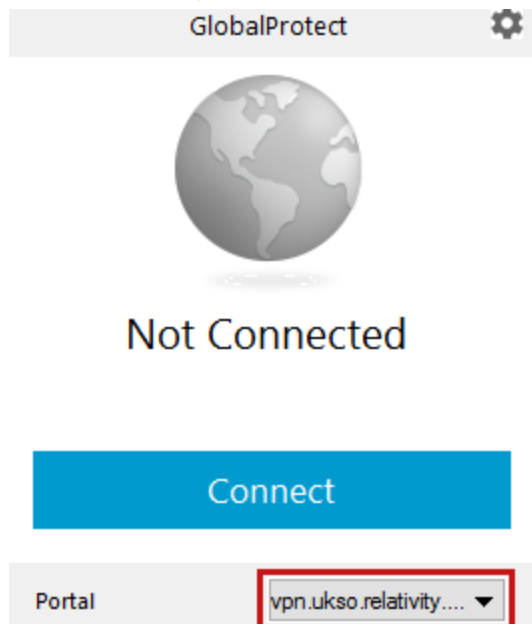
3.5.7 Adding an additional VPN region to GlobalProtect

This guide will show you how to connect to Relativity aiR 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.

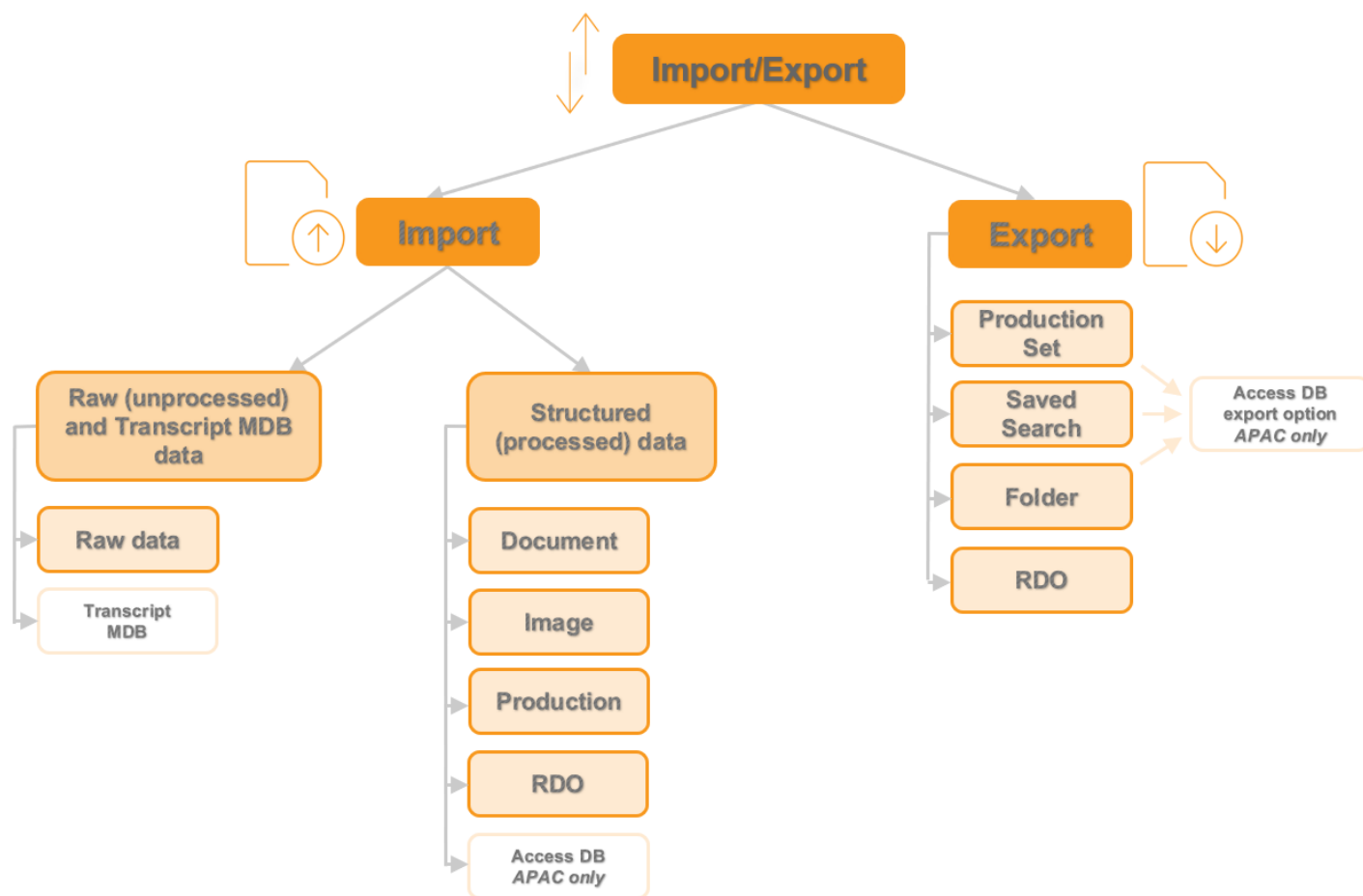
2. Click the **gear icon** in the upper right-hand corner of the toolbar menu, and then select **Settings** to access the Settings dialog window.
3. Under the General tab, click the **Add** button to add the new Relativity aiR portal URL in **Portal Address**.
4. Click **Save**.
5. Close the **Settings** 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 is displayed.
9. Enter your VPN user credentials. A window will be displayed momentarily while you are connected to the VPN for the new URL.

4 Import/Export overview

Import/Export is the recommended method for bringing data into and sending data out of Relativity aiR. With this tool, you can import raw data files, document load files, image load files, production files, RDO files. You can also export folders and subfolders, production sets, saved searches, and RDO files.



Import/Export works with or without Express Transfer, however, activating Express Transfer is recommended. For more information, see [Express Transfer overview on page 50](#) and review the Considerations section when to use and not use Express Transfer.

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.

4.1 Getting started with Import/Export

Complete the following steps before you start working with Import/Export:

1. Contact your IT Department to ensure [TCP port 443](#) is open to transfer data in Relativity aiR 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 help manage structured data loads. Only complete this step if your organization intends to use Express Transfer.

4. Ensure that users have the proper [permissions](#).

Note: Feature Permissions provide an alternative to Relativity's security management by shifting the focus from Object Types and Tab Visibility to feature-based permissions. This method is an alternative option. Any feature-specific permissions information already in this and other topics is still applicable. The Feature Permissions interface enables administrators to manage permissions at the feature level, offering a more intuitive experience. By viewing granular permissions associated with each feature, administrators can ensure comprehensive control, ultimately reducing complexity and minimizing errors. For details see Instance-level permissions and Workspace-level permissions.

After Import/Export is set up, you can:

- [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?

- Submit a ticket to [Customer Support](#) for workflow assistance.
- Visit our [What's New](#) page, [Relativity Documentation](#), or our [Community Site](#).
- Contact [Relativity Customer Support](#).
- Learn more by watching our recorded [Import/Export Foundations: Comprehensive Overview](#) webinar, as well as other Import/Export self-paced webinars on the [Relativity Learning site under Data Ingestion & Management](#).

4.2 Import and export workflows

You can perform the following workflows using Import/Export.

Import workflows:

- Unstructured Data —unprocessed/unstructured files and transcript MDB data that require processing.
 - Raw (Unprocessed) data workflow with Processing
 - Transcript data for Processing
- Structured (Processed) Datastructured 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
 - Access DB load file import (MDB) (for Asia-Pacific region only)

Export workflows:

- Folder export
- Production set export

- Saved Search export
- RDO export
- Saved Search or Folder with Access DB export (MDB) (for Asia-Pacific region only)
- Production set with Access DB export (MDB) (for Asia-Pacific region only)

4.3 Import/Export transfer modes

There are two methods available to transfer data using Import/Export. Refer to the Considerations section 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 Relativity aiR. This mode is the recommended method for data transfer. Express Transfer is a separately installed desktop application that sits outside of the Relativity aiR 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 Relativity aiR 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

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

- data file size is greater than 20 GB, although you can use Express Transfer for any size data transfer.
- processing multiple import jobs. Jobs are queued and executed when the previous job is complete.
- slow or unstable network connection. You can retry the upload with Express Transfer.

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

- your company policy prohibits installing desktop applications.
- your network configuration prevents third-party applications from sending or receiving data, such as proxy settings.
- data file size is less than 20 GB.
- data is in ZIP files.

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

4.5 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. Supported formats: single page TIFF (Group IV) files, single page JPG files, and single and multiple PDF files.
- **Access DB load file import**—.mdb or .accdb. For more information, see [Access DB \(MDB\) load file specifications](#).

Note: In Relativity aiR you can restrict specific 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 Relativity aiR, therefore, skips all file types listed as restricted 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 48](#).

4.6 Data upload size limitation

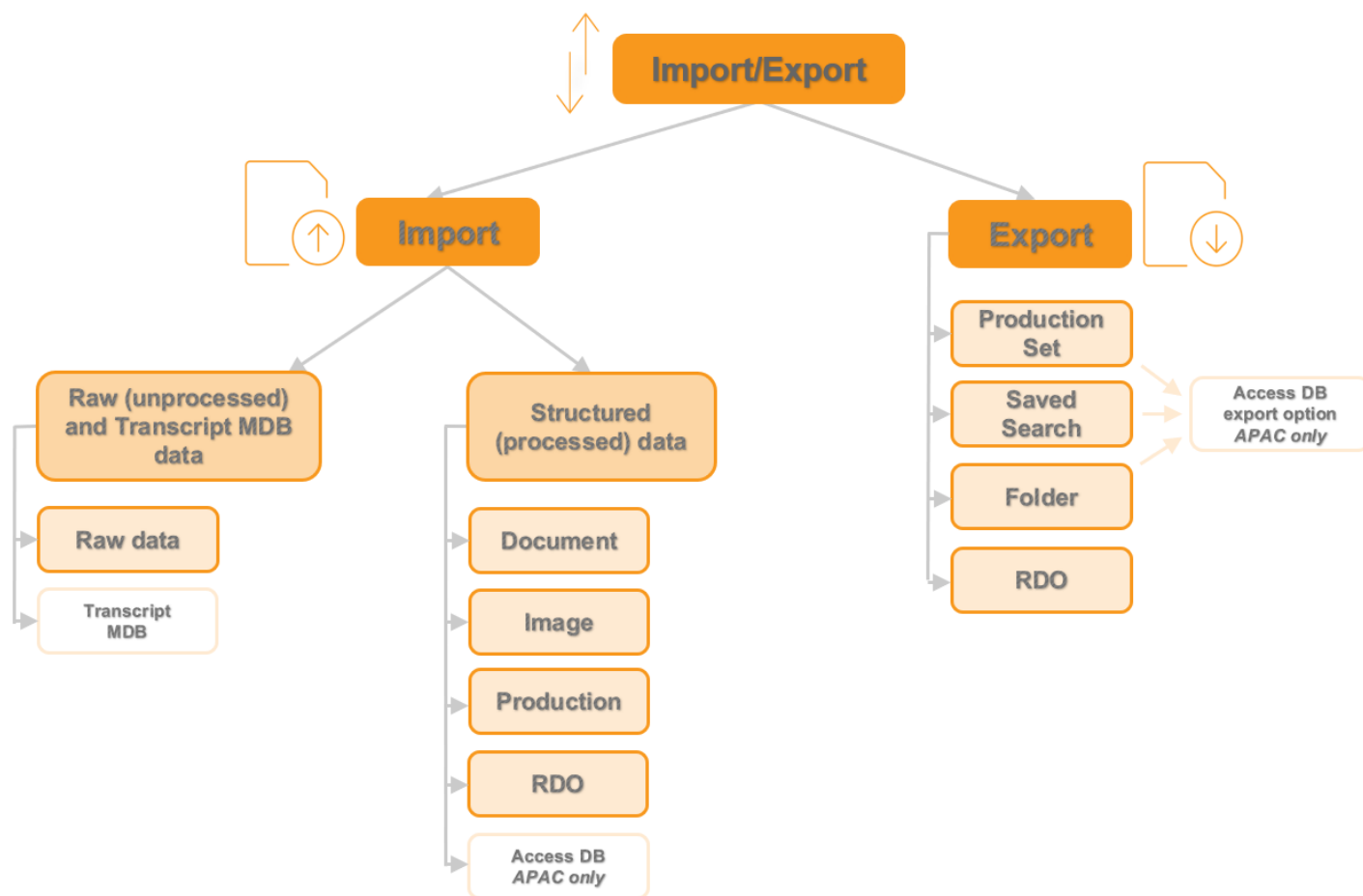
When Express Transfer is activated for use with Import/Export, there is no data upload limit. See Express Transfer overview and Activating Express Transfer for more information. When Express Transfer is not activated for use with Import/Export, the application accepts single .zip or .pst containers or a single structured import data set load file up to 20 GB for a single import.

4.7 Concurrent and consecutive jobs

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

4.8 Import/Export overview

Import/Export is the recommended method for bringing data into and sending data out of Relativity aiR. With this tool, you can import raw data files, document load files, image load files, production files, RDO files. You can also export folders and subfolders, production sets, saved searches, and RDO files.



Import/Export works with or without Express Transfer, however, activating Express Transfer is recommended. For more information, see [Express Transfer overview on page 50](#) and review the Considerations section when to use and not use Express Transfer.

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.

4.8.1 Getting started with Import/Export

Complete the following steps before you start working with Import/Export:

1. Contact your IT Department to ensure [TCP port 443](#) is open to transfer data in Relativity aiR 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 help manage structured data loads. Only complete this step if your organization intends to use Express Transfer.

4. Ensure that users have the proper [permissions](#).

Note: Feature Permissions provide an alternative to Relativity's security management by shifting the focus from Object Types and Tab Visibility to feature-based permissions. This method is an alternative option. Any feature-specific permissions information already in this and other topics is still applicable. The Feature Permissions interface enables administrators to manage permissions at the feature level, offering a more intuitive experience. By viewing granular permissions associated with each feature, administrators can ensure comprehensive control, ultimately reducing complexity and minimizing errors. For details see Instance-level permissions and Workspace-level permissions.

After Import/Export is set up, you can:

- [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?

- Submit a ticket to [Customer Support](#) for workflow assistance.
- Visit our [What's New](#) page, [Relativity Documentation](#), or our [Community Site](#).
- Contact [Relativity Customer Support](#).
- Learn more by watching our recorded [Import/Export Foundations: Comprehensive Overview](#) webinar, as well as other Import/Export self-paced webinars on the [Relativity Learning site under Data Ingestion & Management](#).

4.8.2 Import and export workflows

You can perform the following workflows using Import/Export.

Import workflows:

- Unstructured Data —unprocessed/unstructured files and transcript MDB data that require processing.
 - Raw (Unprocessed) data workflow with Processing
 - Transcript data for Processing
- Structured (Processed) Datastructured 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
 - Access DB load file import (MDB) (for Asia-Pacific region only)

Export workflows:

- Folder export
- Production set export
- Saved Search export

- RDO export
- Saved Search or Folder with Access DB export (MDB) (for Asia-Pacific region only)
- Production set with Access DB export (MDB) (for Asia-Pacific region only)

4.8.3 Import/Export transfer modes

There are two methods available to transfer data using Import/Export. Refer to the Considerations section 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 Relativity aiR. This mode is the recommended method for data transfer. Express Transfer is a separately installed desktop application that sits outside of the Relativity aiR 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 Relativity aiR 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

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

- data file size is greater than 20 GB, although you can use Express Transfer for any size data transfer.
- processing multiple import jobs. Jobs are queued and executed when the previous job is complete.
- slow or unstable network connection. You can retry the upload with Express Transfer.

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

- your company policy prohibits installing desktop applications.
- your network configuration prevents third-party applications from sending or receiving data, such as proxy settings.
- data file size is less than 20 GB.
- data is in ZIP files.

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

4.8.5 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. Supported formats: single page TIFF (Group IV) files, single page JPG files, and single and multiple PDF files.
- **Access DB load file import**—.mdb or .acddb. For more information, see [Access DB \(MDB\) load file specifications](#).

Note: In Relativity aiR you can restrict specific 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 Relativity aiR, therefore, skips all file types listed as restricted 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 48](#).

4.8.6 Data upload size limitation

When Express Transfer is activated for use with Import/Export, there is no data upload limit. See Express Transfer overview and Activating Express Transfer for more information. When Express Transfer is not activated for use with Import/Export, the application accepts single .zip or .pst containers or a single structured import data set load file up to 20 GB for a single import.

4.8.7 Concurrent and consecutive jobs

The concurrent or consecutive nature of a job depends on what stage the job is at, which data transfer mode you are using:—web only or Express Transfer, and what type of job you are 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 is not installed automatically in your workspaces. You must install it manually from the Relativity Application Library in each workspace where you want to use the application.

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 Relativity aiR applications installed in your workspace from the Relativity Application Library:

Note: Import/Export requires the *Relativity.Transfer.Service* to be installed in your Relativity aiR instance. This is a global Relativity aiR 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 in 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, contact your IT Department. Also see 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 Relativity aiR 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 **rightward 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 50](#) and [Activating Express Transfer on page 65](#) for more information.

4.10 Permissions

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

All permissions are set at the workspace level in Workspace security.

4.10.1 Workspace-level permissions on Features tab

Note: This feature supports feature permission actions. Each action grants access to a specific task within the feature. You can grant groups access to individual actions, allowing them to perform only the tasks they need. To grant access to the entire feature, select all of its actions. Manage feature actions on the Features tab in a group's workspace permissions. For instructions, see [Setting workspace permissions](#). For more information about feature permissions, see [Feature permissions](#).

The Features tab is the primary location for managing access to Relativity features. It lists all of the features and their associated permissions. Use the Features tab to set permissions to Import/Export workflows for a group per preset explained in the Admin Guide. The workflows are grouped into the following feature permissions:

- Export Structured Data
- Import Data

To grant permissions to Import/Export workflows for a group:

1. From the Workspace Details tab, click **Manage Workspace Permissions**.
2. On the Features tab, select a group from the drop-down.
3. Select appropriate feature permission for the group: Export Structured Data, Import Data.
4. Click **See details**. A panel opens on the right.
5. Select a preset for the group from the drop-down list: Administrator, Viewer, Importer, or Importer with Staging Access. Each preset includes different actions explained in the Admin Guide.
6. Review actions assigned to the preset. You can select and deselect them, adjusting the preset to your workflow.
7. Click **Review and Save**.
8. Review changes, then click **Save**.

Permissions

>>

Import Data

×

Workspace Security

Groups

Features ^{NEW}

Object Security

Tab Visibility

Other Settings

Preservation/Collection

☐ Collect **User**

2 presets available

Production/Export

☐ Export Structured Data **User**

2 presets available

☐ Production **User**

2 presets available

Ingestion

☒ Import Data **Administrator**

8/8 of actions

☐ Processing

0/7 of actions

Review - Actions

☐ Configure Doc Review

0/2 of actions

☐ Document Actions

0/4 of actions

Preset

Administrator

Description

Full access to all Import Data actions.

Actions

☒ Select all

☒ View Import/Export Jobs

☒ Import Structured Data

☒ Import Unstructured Data

☒ Import From Staging Area

☒ Manage Production Sets

☒ Create Workspace Fields

☒ Delete Import/Export Jobs

☒ Secure Import/Export Jobs

>> [Granular permissions mapping](#)

Review and Save

Revert All

Close

The following granular permissions are designated for all import and export workflows:

Object Security	Tab Visibility	Other Settings
• Document—Add, Edit, View • Folder—Add, Edit • Import/Export Extraction Job—Add, Edit • Import/Export Job—Add, Edit • Relativity Time Zone—View	• Documents • Import/Export Job	

Additional permissions designated for [Raw \(Unprocessed\) Data import](#) and [Transcript MDB Data import](#) workflows only:

Object Security	Tab Visibility	Other Settings
• 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		Admin operations • Allow Import • Allow Staging Import

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

Object Security	Tab Visibility	Other Settings
• Production—View • Relativity Import Data Source—Add, Edit, View • Relativity Import Job—Add, Edit, View		Admin operations • Allow Import • Allow Staging Import

Note: Import/Export now allows importing data directly from the Staging locations, such as StructuredData (load file) and ProcessingSource (raw data). You must have Allow Staging Import permission to activate these import options in the application UI.

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

Object Security	Tab Visibility	Other Settings
• Import/Export Job—Add, Edit • Production—View • Relativity Export Service Job—Add, Edit, View		Admin operations • Allow Export

For more detailed information on what is included in each Import/Export feature permission, see Workspace-level permissions.

4.10.2 Additional required permissions for document import

When performing imports in Relativity, additional permission requirements apply, depending on the workflow and the object type being imported. The following requirements apply to all document import workflows, regardless of the import source or format.

4.10.2.1 Mapped field permissions

When importing data that includes field mappings, you must have appropriate permissions for each field mapped in the import configuration:

- **View** permissions for all mapped fields
- **Edit** permissions for any field into which values are being imported

If you do not have permissions for one or more mapped fields, the import may fail or result in incomplete ingestion of field values.

4.10.2.2 System field permissions for Document object import

In addition to mapped fields, Relativity evaluates several system fields during document ingestion. The user performing the import must have the following system field permissions when importing Document object:

- Supported By Viewer
- Has Natives
- Relativity Native Type

These permissions are required even when the system fields are not explicitly mapped during import. Missing permissions may cause validation errors or prevent the import from completing successfully.

4.11 Import/Export load file specifications

A load file is used to transfer data and its associated metadata into a database. During import, the application reads the load file to determine what metadata should be written into each field and to copy it to the workspace. If your organization uses a processing vendor, you need to upload case data with a load file. You will 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. Supported formats: single page TIFF (Group IV) files, single page JPG files, and single and multiple PDF files.
- **Access DB load file import**—.mdb or .accdb. For more information, see [Access DB \(MDB\) load file specifications](#).

Note: In Relativity aiR you can restrict specific 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 Relativity aiR, therefore, skips all file types listed as restricted file types.

Import/Export [web only](#) accepts the following 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 must be at the folder level

For Load Files and Structured Data Sets

- Load file—keep the Load File in .dat, .opt, or other format, 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.

Note: Import/Export requires consistent line breaks, that is, end-of-line (EOL) characters, throughout the load file. Mixing line endings, such as UNIX (LF), Mac (LF), and Windows (CRLF), can cause errors or unexpected behavior during import. To ensure smooth processing, use only one type of line break in the entire file.

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

Relativity aiR does not 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:

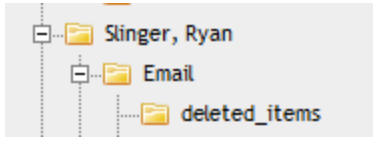
- **Identifier**—the unique identifier of the record.
- **Group Identifier**—the identifier of a document’s family group.
 - The group identifier repeats for all records in the group.
 - Usually, this is the document identifier of the group’s parent document. For example, if an email with the document 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.
- **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.
- **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, you must activate Express Transfer. 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*.
- **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, you must activate Express Transfer. 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 using the **Pre-check Load File** button. This process validates 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 exist 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 may lead to billing consequences.

-
- **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 sub-folder in the browser. For example, if the load file contains the following entry in the folder information field, “Slinger, Ryan\Email\deleted_items”, the software builds the

following folder structure. Each document with the above entry is stored in the “deleted_items” folder.



- **Relativity Native Time Zone Offset**—numeric field in decimal format that applies a time zone offset to date/-time values displayed in the Native Viewer, such as the Sent Date/Time in email headers.
 - If the field value is blank or 0, no offset is applied, and the date/time is displayed in Coordinated Universal Time (UTC).
 - The field accepts whole or fractional numbers, positive or negative, to represent the desired offset from UTC. For example, “-5”, “5.5”, “-6.0”. To display time in India Standard Time (IST), enter “5.5” because IST is UTC+5:30. If you want to display time in Central Time for Chicago, use “-6.0” for standard time or “-5.0” if Daylight Saving Time (CDT) is in effect.
 - The value should account for any Daylight Saving Time (DST) adjustments based on the document’s date and the intended time zone. The Native Viewer does not automatically adjust for DST.
 - This offset only affects how date/time values appear in the Native Viewer. Metadata fields and extracted text are displayed exactly as imported.

4.11.2.4 Accepted date formats

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

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

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

Entry in Load File	Object Type	Definition
Monday January 4 2023	1/4/2318 0:00	
05/28/2023 7:11 AM	05/28/2023 7:11 AM	
5.08:40 PM	6/30/2023 17:08	The current date will be entered if the date is missing. For this example, assume the import was done on 6/30/2023.
17:08:33	6/30/2023 17:08	The current date will be entered if the date is missing. For this example, assume the import was done on 6/30/2023.
17:08	6/30/2023 17:08	The current date will be entered if the date is missing. For this example, assume the import was done on 6/30/2023.
5:08 PM	6/30/2023 17:08	The current date will be entered if the date is missing. For this example, assume the import was done on 6/30/2023.
14-Apr	4/14/2023 0:00	The current year will be entered if the year is missing.

Entry in Load File	Object Type	Definition
9-Apr	4/9/2023 0:00	The current year will be entered if the year is missing.
14-Mar	3/14/2023 0:00	The current year will be entered if the year is missing.
1-Mar	3/1/2023 0:00	The current year will be entered if the year is missing.
22-Feb	2/22/2023 0:00	The current year will be entered if the year is missing.
20230420	4/20/2023 0:00	
20230420 2:22:00 AM	4/20/2023 0:00	
4/9/2023 16:13	4/9/2023 16:13	
4/9/2023 8:49	4/9/2023 8:49	
9-Apr-23	4/9/2023 0:00	
Apr. 9, 23	4/9/2023 0:00	
4.9.2023	4/9/2023 0:00	
4.9.23	4/9/2023 0:00	
4/9/2023	4/9/2023 0:00	
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

4.11.2.5 Delimiters

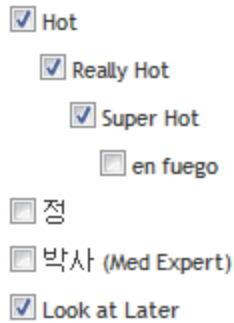
During import, you can choose which delimiters are used in your load file. You can select each delimiter from the ASCII characters, 001 – 255.

The delimiter characters have the following functions:

- **Column**—separates load file columns.
- **Quote**—marks the beginning and end of each load file field. It is also known as a text qualifier.

- **Newline**—marks the end of a line in any extracted or long text field.
- **Multi-value**—separates distinct values in a column. This delimiter is only used when importing into a Relativity aiR multi-choice field.
- **Nested-values**—denotes the hierarchy of a choice. This delimiter is only used when importing into a Relativity aiR multi-choice field.

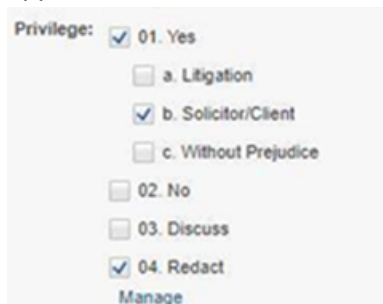
For example, a load file contains the following entry, and is being imported into a multi-choice field: “Hot\Really Hot\Super Hot; Look at Later”, with the multi-value delimiter set as “;” and the nested value delimiter set as “\”, the choices appears in Relativity aiR as:



All checkboxes are automatically selected under each nested value. You must provide the full path to each multi-choice element. 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. The following image shows a sample hierarchical zip file structure and a matching load file.

› MainFolder › SubFolderTextA › SubFolderTextB

Name	Type
 TextFile12345	Text Document

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

^DOCUMENT_

12345^|^MainFolder\SubFolderTextA\SubFolderTextB\TextFile12345.txt^|^MainFolder\SubFolderNatives\NativeFile12345.xls^

4.11.3 Image and extracted text files

For image imports, Import/Export uses Opticon load files that reference the Control ID on a page level. The first page should match up to any data you intend to load. The same process applies when importing page-level extracted text. You should save these .opt files using UTF-8 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.

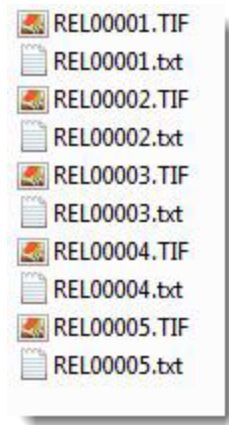
- Field Six (blank)—used to indicate a box; not required and not used in Import/Export.
- Field Seven (3)—used to store page count; not required and not used in Import/Export.

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 a relevant 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. You should deliver the fielded data as delimited files with column or field names located in the first line.

```

pControl Numberp000pAttachmentp000pAttachment Parent IDp000pAuthorp000pCategorizationp000pCategorization F
pAMEYERS_0000001p000pp000pp000pp000pp000pp000pp000pp000pp000pp01C9D027DAA6A2F2823541C44E6FA79C3DD05
pAMEYERS_0000003p000pp000pp000pp000pp000pp000pp000pp000pp000pp01C9D027DAB52FC39F778516475E
pAMEYERS_0000004p000pp000pp000pp000pp000pp000pp000pp000pp000pp01C9D027DACAFA068C750D47CAA51
pAMEYERS_0000005p000pp000pp000pp000pp000pp000pp000pp000pp000ppdeal 539246.1 RELiant HLP dms 7634/7636p000
pAMEYERS_0000006p000pp000pp000pp000pp000pp0.69p000pp000pNon Responsive;p000pp000pInfo on some cuts for 05
pAMEYERS_0000007p000pp000pp000pp000pp000pp0.69p000pp000pNon Responsive;p000pp000pInfo on some cuts for 05
pAMEYERS_0000008p000pp000pp000pp000pp000pp0.64p000pp000pResponsive;p000pp000pTAG #22872p000pp01C9D027B28A4
pAMEYERS_0000009p000pp000pp000pp000pp000pp000pp000pp000pp000ppNEW PAC Numbersp000pp01C9D027B2966CFD0EBEC93
pAMEYERS_0000010p000pp000pp000pp000pp000pp000pp000pp000pp000ppDates to Keep in mindp000pp01C9D027B29647CD3
pAMEYERS_0000011p000pp000pp000pp000pp000pp0.76p000pp000pResponsive;p000pp000pAccomplishments and Goals 20
pAMEYERS_0000012p000pp000pp000pp000pp000pp0.77p000pp000pResponsive;p000pp000pLV Cogen cut for HE 19p000pp0
pAMEYERS_0000013p000pp000pp000pp000pp000pp0.83p000pp000pNon Responsive;p000pp000pCut on TAG 23841p000pp01C
pAMEYERS_0000014p000pp000pp000pp000pp000pp0.89p000pp000pNon Responsive;p000pp000pTAG 25883p000pp01C9D027B2
pAMEYERS_0000015p000pp000pp000pp000pp000pp0.75p000pp000pNon Responsive;p000pp000pTAG 26235p000pp01C9D027B2
pAMEYERS_0000016p000pp000pp000pp000pp000pp000pp000pp000pp000ppFrontier Unit Outage for 07/21/01p000pp01C9F
pAMEYERS_0000017p000pp000pp000pp000pp000pp000pp000pp000pp000ppTag #27652 & 27656p000pp01C9D027B2C0BCE9AED1
pAMEYERS_0000018p000pp000pp000pp000pp000pp000pp000pp000pp000ppLV COGEN for 07/21/01p000pp01C9D027B2C090D68

```

4.11.5 Supported transcript file types

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.

4.11.6 Multiple references to the same native file

Import/Export supports load files that reference the same native, image, or text file across multiple documents. When importing with Express Transfer enabled, the file is uploaded only once and linked to documents based on the load file configuration. Each reference is counted individually for billing purposes.

You can run Pre-check Load File process to identify duplicated references to the same files before starting an import job. This validation helps you review potential data issues early and decide whether to proceed with the import as configured.

During the Pre-check Load File process, the system scans the load file for cases where the same file path is referenced more than once. When duplicated references are detected, Pre-check does not block the import, but it surfaces the findings as warnings displayed in the Warnings tab that appears in the Pre-check results.

[< Back](#)

Pre-check Load File

[Errors](#) **[Warnings](#)** [Choices](#) **1 warning** found in your Load File.

All 3 rows checked.

 File path duplicated (1) **Column:** File_Path File path duplicated. Found 3 times: rel001.mp4[Import](#)[Cancel](#)

This tab provides detailed information to help you understand where and how duplicates occur in your load file, including:

- Name of the load file column that contains the duplicated reference
- Number of occurrences for each duplicated file
- Duplicated file path as specified in the load file

You can use this information to verify whether the duplicated references are expected, for example, for intentional reuse of the same file across multiple documents, or whether the load file should be corrected before running the import.

4.11.7 Access DB (MDB) load file specifications

Note: The import and export workflows with Access DB (MDB) are designed for and are currently available for the Asia-Pacific region. For information on the possibility of enabling this flow in your instance, contact your Account Representative.

In certain markets, you can use Import/Export to transfer structured data defined in Access DB load files. The structure of the Access DB contains the following four tables.

Table name	Table description
Export	Main document information
Parties	People and organization information for each document
Pages	Listing of electronic image filenames for each document
Export_	Additional data fields for each document

Table name	Table description
Extras	

- **Import workflow**—Import/Export supports import from Access DB load file with .mdb or .accdb extension.
- **Export workflow**—Import/Export generates a single Access DB load file with .mdb extension.

4.11.7.1 Export table

This table holds the primary information about a document.

Field	Data type	Explanation—document types, coding method, and possible values	If mandatory
Document_ID	Text, 255	Uniquely identifies the document and is the link to the other four tables.	Yes
Host_Reference	Text, 255	If the document is an Attachment, this field contains the Document ID of its host document.	No, can be left blank
Document_Date	Text, 11	Dates in the format "DD-MMM-YYYY," where: • "DD" equals the day date; • "MMM" equals the month; • "YYYY" equals the year. For example, 26 March 2017 would be represented as "26-Mar-2017".	Yes, if information is available
Estimated	Text, 3	The estimated date for a document. For example: YES, NO, Y, N.	No
Document_Type	Text, 255	Document type. For example: letter, minutes, maintenance reports, etc.	No
Title	Text, 255	Document title	No
level_1	Text, 20	The Party level of the Document ID	Yes
level_2	Text, 20	The Box level of the Document ID	No
level_3	Text, 20	The Folder level of the document ID	No
Description	Long Text	Document description	No

4.11.7.2 Parties table

This table holds the names of people associated with a particular document and their relationship to the document. It may also hold organization information for these people.

There is a one-to-many relationship between the Export table containing the primary document information and the Parties table, because many people could be associated with a single document.

Field	Data type	Explanation	If mandatory
Document_ID	Text, 255	Identifies the document, related to the Export table via the Document_ID field.	Yes
Correspondence_Type	Text, 100	Correspondence Type. For example, <i>To</i> , <i>From</i> , <i>CC</i> ,	Yes

Field	Data type	Explanation	If mandatory
		<i>BCC.</i>	
Persons	Text, 255	Hard copy—information from the face of the document in the format "Last Name, First Name" or "Last Name, Initial". Emails and other electronic files—information should be in the format as extracted from the document metadata.	No
Organisations	Text, 255	The organization information from the face of the document or extracted from the document metadata.	No

Correspondence_Type_Persons_and_Organizations field logic

Notice that values from fields Correspondence_Type, Persons, and Organisations are combined on the Load File Field Mappings dialog into a single Multiple Object field having the following name format: <Correspondence_Type>_Persons_and_Organisations. This way, you can import them into a single workspace field. That also enables you to select them as a single value during export. For reference, see [Load File Field Mappings](#) and the following table.

MDB file			Relativity UI	
Correspondence_Type	Persons	Organisations	Field name	Field value
BCC	John	Relativity	BCC_Persons_and_Organisations	John [Relativity]
CC	Oliver	-	CC_Persons_and_Organisations	Oliver

4.11.7.3 Pages table

There will be an entry in the Pages table for every TIFF page, text, or PDF document that relates to a single document in the Export table.

There is a one-to-many relationship between the Export table and the Pages table. When exchanging Native Electronic Documents only, without any TIFF, text, PDF files or placeholder pages, there will only be one entry in the Pages table corresponding to each Native Electronic Document.

Field	Data type	Explanation	If mandatory
Document_ID	Text, 255	Identifies the document (related to the Export table via the Document_ID field).	Yes
Image_File_Name	Text, 128	Filename, including extension of each indexed document.	Yes
page_label	Text, 32	Label for each document. For example: Native, Text, PDF, or Document ID.	Yes
page_num	Number, Double	An integer indicating the order in which the files related to the Document ID should be sequenced when viewing the full document.	Yes
num_pages	Number, Long Integer	The number of pages in the file. For rendered PDF files, this is the number of pages in the PDF. For native electronic files, including native PDF files, this	No

Field	Data type	Explanation	If mandatory
		field is set to "1".	

4.11.7.4 Export_Extras table

This table holds any additional metadata the parties want to exchange that is not held in the other three tables.

Field	Data type	Explanation	If mandatory
Document_ID	Text, 255	Identifies the document (related to the Export table via the Document_ID field).	Yes
theCategory*	Text, 50	Identifies the data type. Currently supported types are: TEXT, NUMB, BOOL, DATE, PICK, MEMO.	Yes
theLabel	Text, 255	Field name	Yes
theValue	Text, 255	If not MEMO, Custom Field Data	No if MEMO category
memoValue	Long Text or Text fixed-length setup as length > 255	If MEMO, Custom Field Data	No if not MEMO category

* The table below presents how field types are mapped to theCategory values.

Relativity field type	MDB theCategory value
Fixed-Length Text	TEXT
Long Text	MEMO
Date	DATE
Whole Number	NUMB
Decimal	NUMB
Currency	TEXT
Yes/No	BOOL
Single Choice	PICK
Multiple Choice	PICK
User	TEXT
File	TEXT
Single Object	PICK
Multiple Object	PICK

Note: If length of a TEXT value exceeds 255 characters, it is treated as a MEMO value.

Example of values in Export_Extras table

This table presents exemplary values in Export_Extras table.

theLabel	theCategory	theValue or memoValue	Explanation
File Name	TEXT	Monthly Reports.docx	For all electronic files, the original filename including extension.
MD5	TEXT	08a008a01d498c404b0c30852b39d3b8	The MD5 (a message-digest algorithm) hash value of the file.
Sent Date/Time	DATE	26/05/1999 8:33 PM	The date and time the email was sent.

4.11.7.5 Export recommendations and considerations

If you need to export a date with the time zone and have the date formatted "Day name, DD Month YYYY hh:mm:ss TZ," for example, "Thursday, 28 June 2012 6:29:00 PM (UTC+10:00) Canberra, Melbourne, Sydney," include the Time Zone Field in the Export_Extras at the time of export.

If you need to add the num_pages to the Pages table for PDF documents, include the Relativity PDF Page Count field to the Export_Extras during export.

Import/Export automatically splits export output into multiple MDB files when the data approaches the 2 GB per-file limit. When the limit is near, the system closes the current file and continues export in a new one. This ensures no individual MDB file exceeds safe size limit and documents are exported along with all its related data.

4.12 General recommendations for structured data import and export jobs

The following are recommendations for importing and exporting load files.

4.12.1 Load file import recommendations

Use the following recommendations to optimize performance for load file imports:

- Use Pre-check Load File feature to validate load file data before executing the import job. We strongly recommend using this feature to make sure that the import job does not come across metadata errors. If your workflow uses Staging, the Pre-check Load File step will not be available. In such case, validate your load file manually before proceeding.
- Express Transfer is required for imports exceeding 20 GB. We recommend activating Express Transfer for all import jobs, regardless of dataset size. It is designed for better performance, stability, and control over transfer operations.
- When using Import/Export in [web only mode](#), make sure 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. This minimizes the risk of job failure due to SQL exception related issues.
- When importing new choice fields, you may experience unexpected behavior, such as import errors or slow job performance for choice fields. To help prevent these issues, try to limit the number of choice values in a single import job to 100. This is the maximum number of new values across all choice type fields in the record set.
- Extracted text import:
 - There is no limitation or performance impact related to size of extracted text when the import is performed to Data Grid.

- Depending on the job configuration, the extracted text import to Data Grid may be 60-80% faster than similar import to SQL.
- Performance improves when extracted text files use UTF-16 encoding.
- Performance and stability are affected for the extracted text import to SQL. If SQL is the only option, import extracted text separately from other data fields.

4.12.2 Load file export recommendations

Use the following recommendations to optimize performance for load file exports:

- For some combinations of job configuration and data, Windows system on your local machine may not be able to open ZIP archives due to too long file paths. You may receive an error message: “The compressed (zipped) folder is invalid.” In such case, you can do the following:
 - Use Express Transfer to export the dataset to your local disk without creating an archive.
 - Use other tools to extract the archive or move the archive file to a different location on your local machine.
 - Group files by “File Type” and not “Workspace Structure”. This may shorten the folder structure inside the archive file.
- Depending on the exported data structure, a Workspace folder structure can degrade performance significantly, up to 30 times slower in edge cases. We recommend using the File Type folder structure.
- Exporting many fields with complex data structures may affect performance or cause job errors. We recommend exporting only necessary fields.
- Increasing the Max Files to over 10,000 per folder may lead to significant export performance degradation. We recommend using the default setting of the Max Files per folder=2,000.
- The default Max (Volume) Size is set to 6,000 MB. You can adjust this setting to any value that works best for you. Setting it higher than the default value does not impact the export performance.
- Exporting images as PDFs or multi-page TIFFs is slower than exporting them as single-page images.
- Express Transfer is required for exports exceeding 20 GB. We recommend activating Express Transfer for all export jobs, regardless of dataset size. It is designed for better performance, stability, and control over transfer operations. 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 using 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 is designed especially for transferring large structured and unstructured data files greater than 20 GB.

Using Import/Export with Express Transfer active is designed to help reduce transfer time and effort. For additional information on performance considerations when transferring data using desktop applications, see [Data transfer performance considerations on page 68](#).

Express Transfer is a separately [installed](#) desktop application that operates outside of Relativity aiR. You access, start, and process transfer jobs through Import/Export within Relativity aiR. However, it is the activated Express Transfer application that handles the actual data transfer process in the background. It uploads and downloads data to and from Relativity aiR 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.

You can monitor export job transfers [through the Express Transfer application](#) as well as from the [Import/Export Jobs page](#).

To ensure that you always have the most recent version and features of Express Transfer, the default update setting is configured to automatically prompt you when a new version is available. We recommend keeping this setting enabled. See [Installing and updating Express Transfer desktop application on page 52](#) 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 69](#) for details.

4.13.1 Prerequisites

To use Import/Export with Express Transfer, complete the following in this order:

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

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

- data file size is greater than 20 GB, although you can use Express Transfer for any size data transfer.
- processing multiple import jobs. Jobs are queued and executed when the previous job is complete.
- slow or unstable network connection. You can retry the upload with Express Transfer.

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

- your company policy prohibits installing desktop applications.
- your network configuration prevents third-party applications from sending or receiving data, such as proxy settings.
- data file size is less than 20 GB.
- data is in ZIP files.

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

Note: The Staging Explorer transfer currently supports individual file sizes up to 4.75 TB. Files exceeding this limit may fail to process.

4.13.3 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 is designed especially for transferring large structured and unstructured data files greater than 20 GB.

Using Import/Export with Express Transfer active is designed to help reduce transfer time and effort. For additional information on performance considerations when transferring data using desktop applications, see [Data transfer performance considerations on page 68](#).

Express Transfer is a separately [installed](#) desktop application that operates outside of Relativity aiR. You access, start, and process transfer jobs through Import/Export within Relativity aiR. However, it is the activated Express Transfer application that handles the actual data transfer process in the background. It uploads and downloads data to and from Relativity aiR 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.

You can monitor export job transfers [through the Express Transfer application](#) as well as from the [Import/Export Jobs page](#).

To ensure that you always have the most recent version and features of Express Transfer, the default update setting is configured to automatically prompt you when a new version is available. We recommend keeping this setting enabled. See [Installing and updating Express Transfer desktop application on the next page](#) for more information. You can manually check for updates anytime by right-clicking the Express Transfer icon in your system tray. See [Express Transfer system tray menu on page 69](#) for details.

4.13.3.1 Prerequisites

To use Import/Export with Express Transfer, complete the following in this order:

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

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

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

- data file size is greater than 20 GB, although you can use Express Transfer for any size data transfer.
- processing multiple import jobs. Jobs are queued and executed when the previous job is complete.
- slow or unstable network connection. You can retry the upload with Express Transfer.

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

- your company policy prohibits installing desktop applications.
- your network configuration prevents third-party applications from sending or receiving data, such as proxy settings.
- data file size is less than 20 GB.
- data is in ZIP files.

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

Note: The Staging Explorer transfer currently supports individual file sizes up to 4.75 TB. Files exceeding this limit may fail to process.

4.13.4 Installing and updating Express Transfer desktop application

You must install the Express Transfer application on your computer in order to use it with Import/Export workflows. Use the instructions below 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 so the system can automatically check for new software versions and help ensure you are using the latest software features available.

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

4.13.4.1 Requirements

The following sections describe 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 in order for it to operate. For more specific information about port considerations relating to Express Transfer, see [Data Transfer Tools: Required Port Considerations for Relativity aiR \(Import/Export, Express Transfer, ROSE and Migrate\)](#) article in the Relativity Community.

4.13.4.2 Prerequisites

To use Express Transfer, complete the following in this order:

1. Install Import/Export application from the Application Library in the workspace. Refer to Installing Import/Export for more information.
2. Install Express Transfer desktop application on your computer. Refer to Installing Express Transfer for more information.
3. Activate Express Transfer 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 **New Import/Export Job**.

- Depending on the operating system used, click the **Windows** or **MacOS** button to download the installer file.

Import/Export

< Back

Choose Workflow

Import Export

Raw (Unprocessed) Data
I have a ZIP file that contains native files or a PST file for processing.

Structured (Processed) Data
I have a load file for direct import to the workspace.

Express Transfer
✓ Import single data sets **greater than 20 GB** without requiring a ZIP file
✓ Export **unlimited data set sizes** to local disk without staying in the browser

1 Download for **Windows** **MacOS** 2 Install App 3 Click **Activate** to run Express Transfer

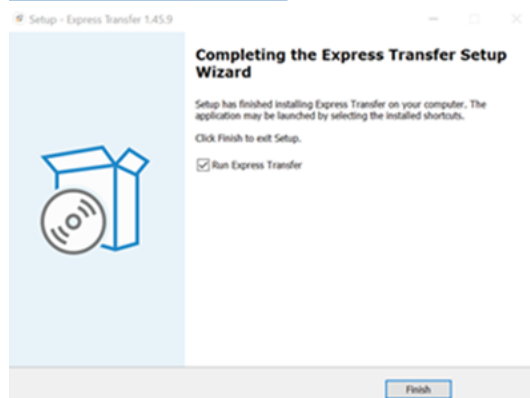
Close

- 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**.

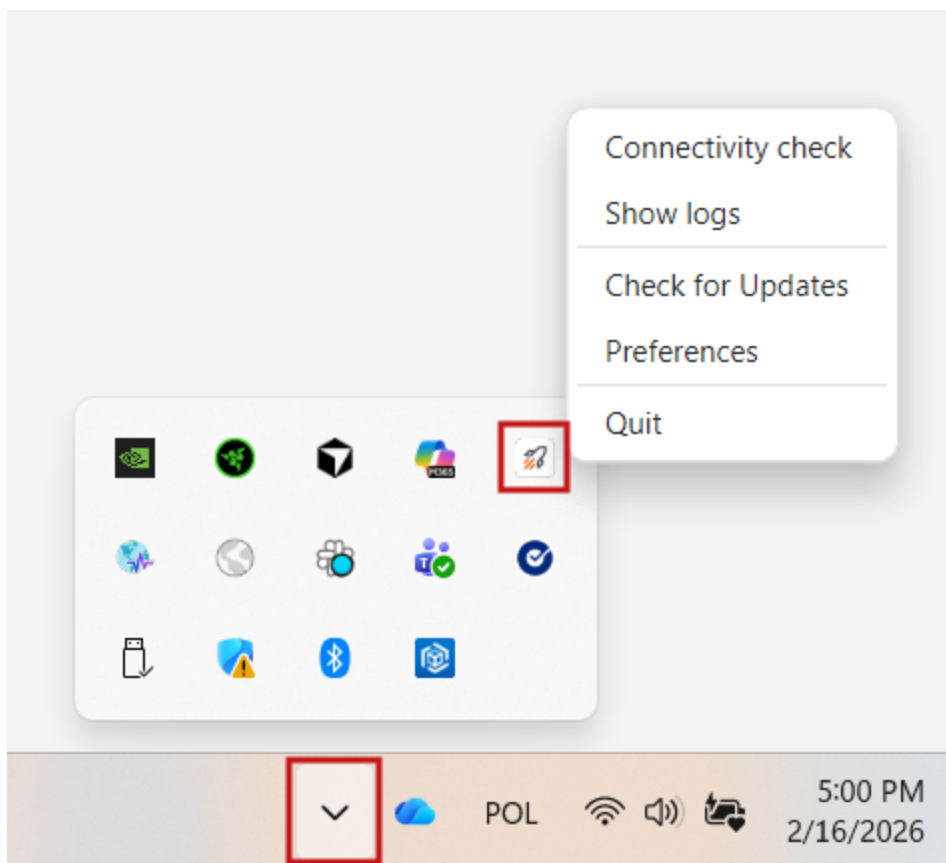


- Navigate to the folder on your computer where the installer file was downloaded. Depending on the operating system, double-click one of the following files to begin the installation process:
 - For Windows OS: **Express Transfer Setup.exe**
 - For macOS: **Express Transfer Setup.pkg**
- Click one of the options on the Select Setup Install Mode dialog:
 - Install for me only (recommended)**—only your account can use Express Transfer.
 - Install for all users**—anyone who logs on to this computer can use Express Transfer. You need Admin credentials to select this option.
- Click **Next**.
- Use the default destination folder already displayed or click **Browse** to select a different location for the Express Transfer application.
- Click **Next**.

10. (Optional) On the Select Additional Tasks dialog, do any of the following:
 - **Autostart Express Transfer on system startup**—select this checkbox 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\<username>\AppData\Local\Express Transfer\logs`. With Express Transfer open, you can also press F8 to display the logs folder.
- **Check for Updates**—choose this option if you want to manually check to see if your version is up-to-date or if a new version of Express Transfer is available. See [Manually checking for software updates on page 63](#) 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 be displayed 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 Installing Express Transfer silently

In some organizations, IT departments or system administrators deploy the Express Transfer desktop application across the network rather than having each user install it individually. Known as a silent or unattended installation, this process runs in the background without any user interaction or awareness. Large enterprise organizations commonly use this approach to standardize software deployment and ensure a consistent installation configuration across all users.

Prerequisites are the following:

- Windows OS installed.
- Administrator rights to run the command prompt.

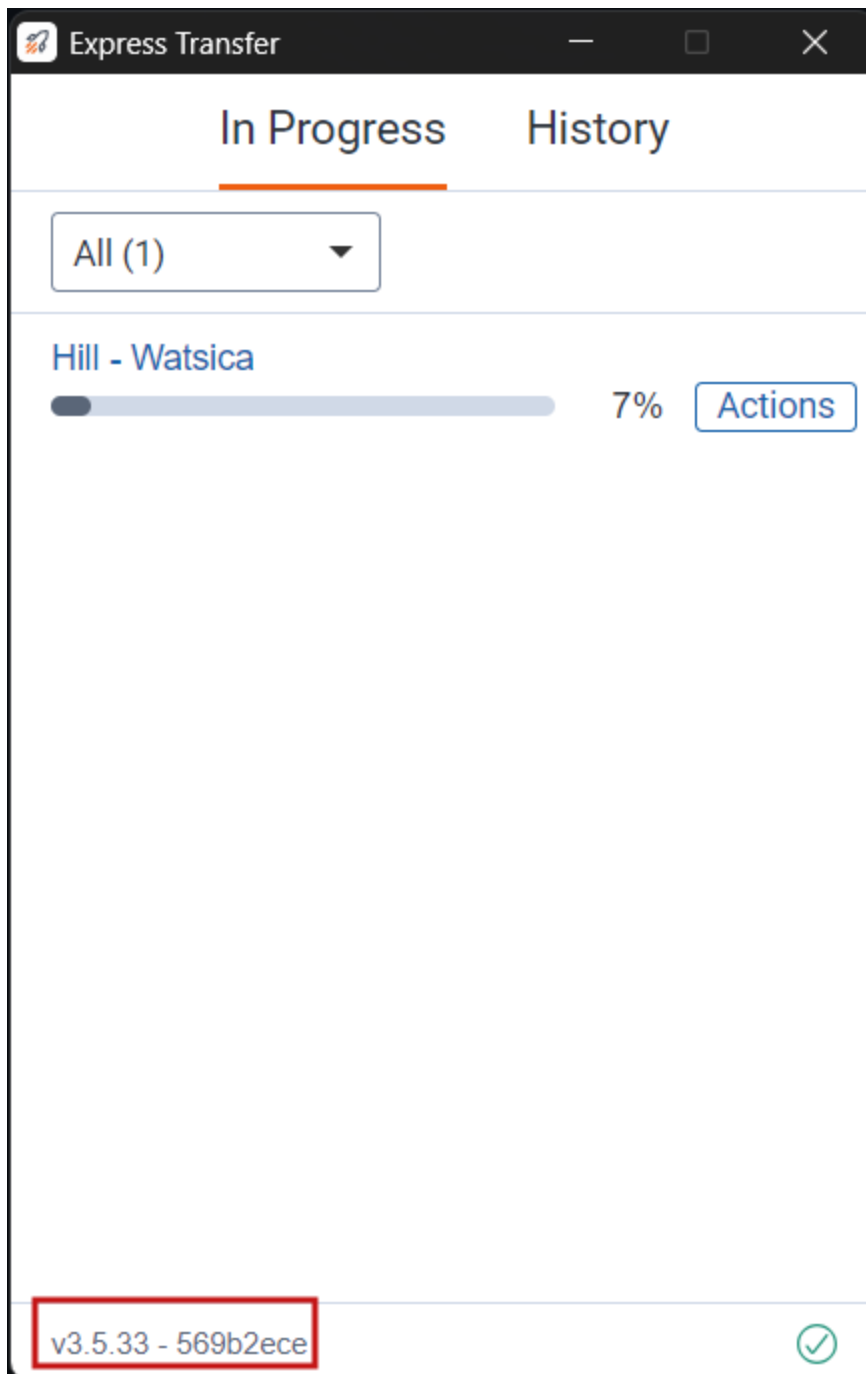
- Knowledge of how to use command line interface (CLI) tools.
- Downloaded Express Transfer installer file for Windows OS, which is **Express Transfer Setup.exe**. See [Installing Express Transfer](#) for more information on how to download the file using the Import/Export application.

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

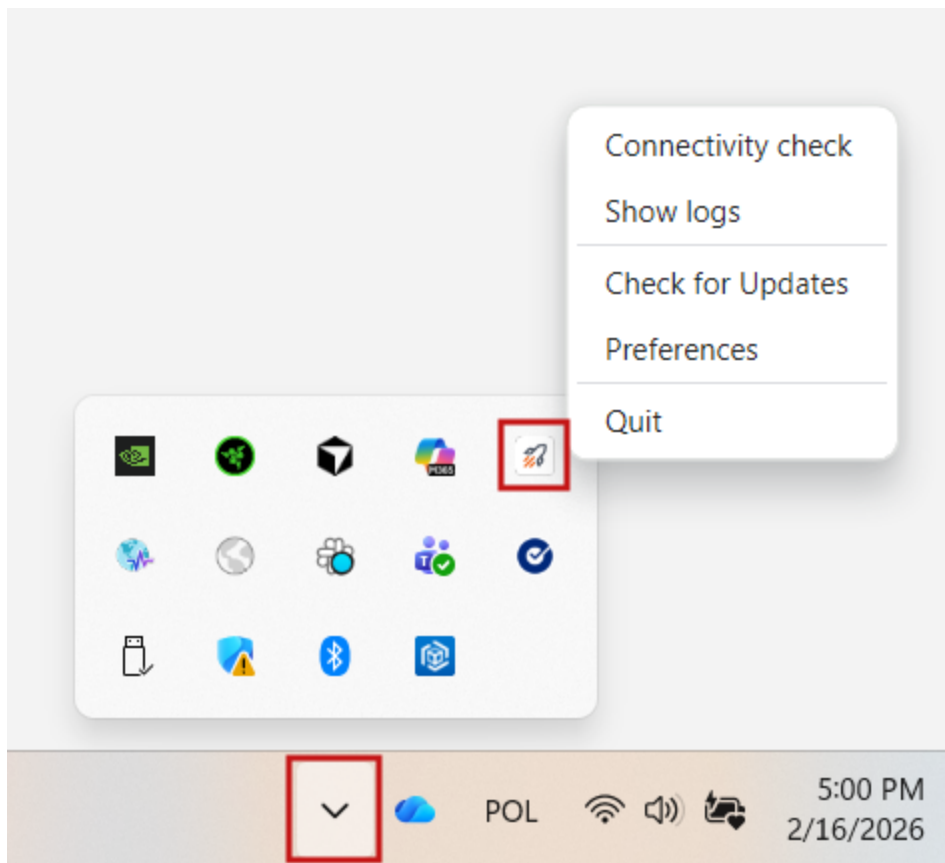
- **/silent**—this option displays the installation wizard as it goes through the installation process. All the default options are automatically selected.
- **/verysilent**—this option does not display the installation wizard as it goes through the installation process. All default options are selected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

4.13.4.5 Locating the Express Transfer version number

You can check the Express Transfer version number 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 clicking **Preferences**.



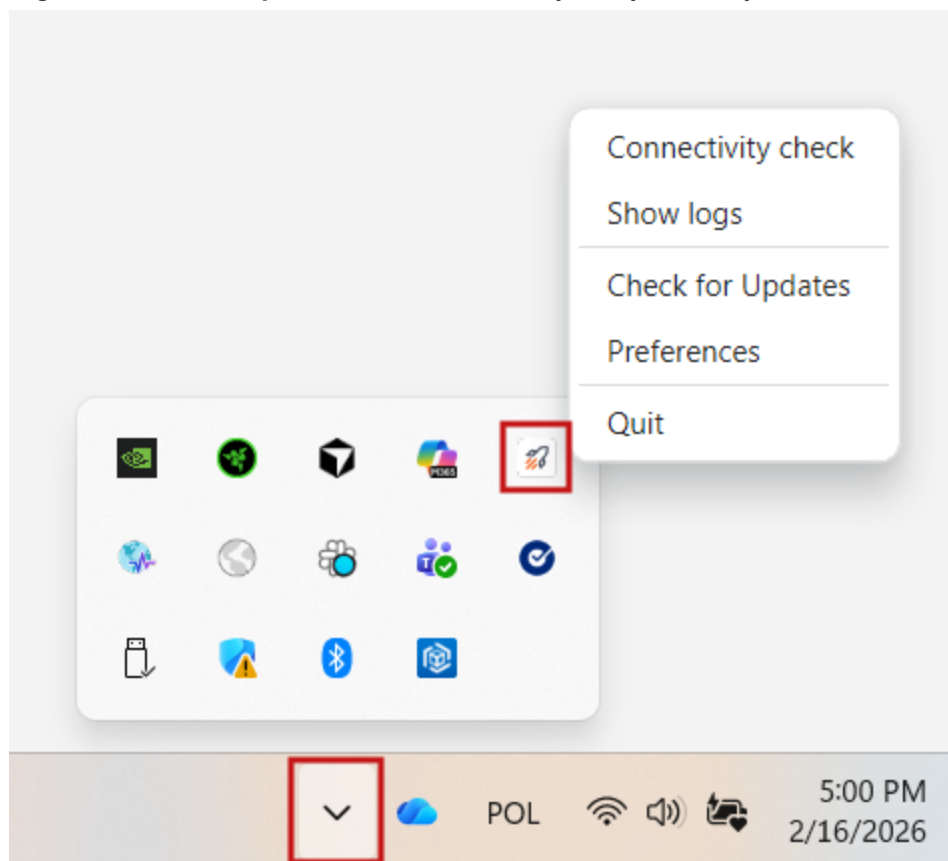
The Express Transfer software version number is contained in the first few numbers after the "v", for example "v2.49.0." The numbers after the hyphen are session identifiers that change each time you launch Express Transfer after quitting the application. These numbers may be used by Customer Support 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 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 keeping the default setting so the system can automatically check for updates and help ensure you are using the latest feature versions. To check for updates manually, use the Check for Updates option in the Express Transfer system tray. See [Manually checking for software updates on page 63](#) for more information.

To automatically check for software updates:

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



2. Click **Preferences**.



Preferences

**Check for updates**

Automatically check when a new version of Express Transfer is available

**Limit bandwidth**

Improve the quality of data transmission while restricting speeds, recommended for weak network connections

**Exclude temporary file(s)**

Exclude [temporary Microsoft Office file\(s\)](#)  from import data

**Proxy settings****Minimize on close**

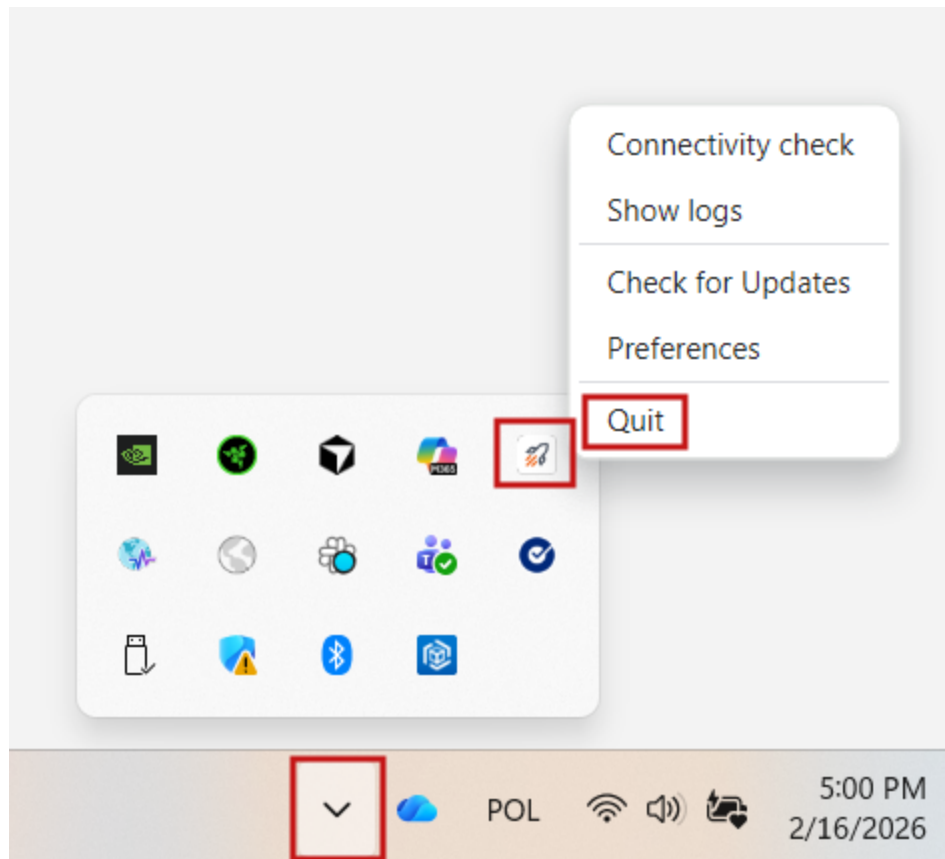
Leave app running in notification area when the window is closed

Save

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.

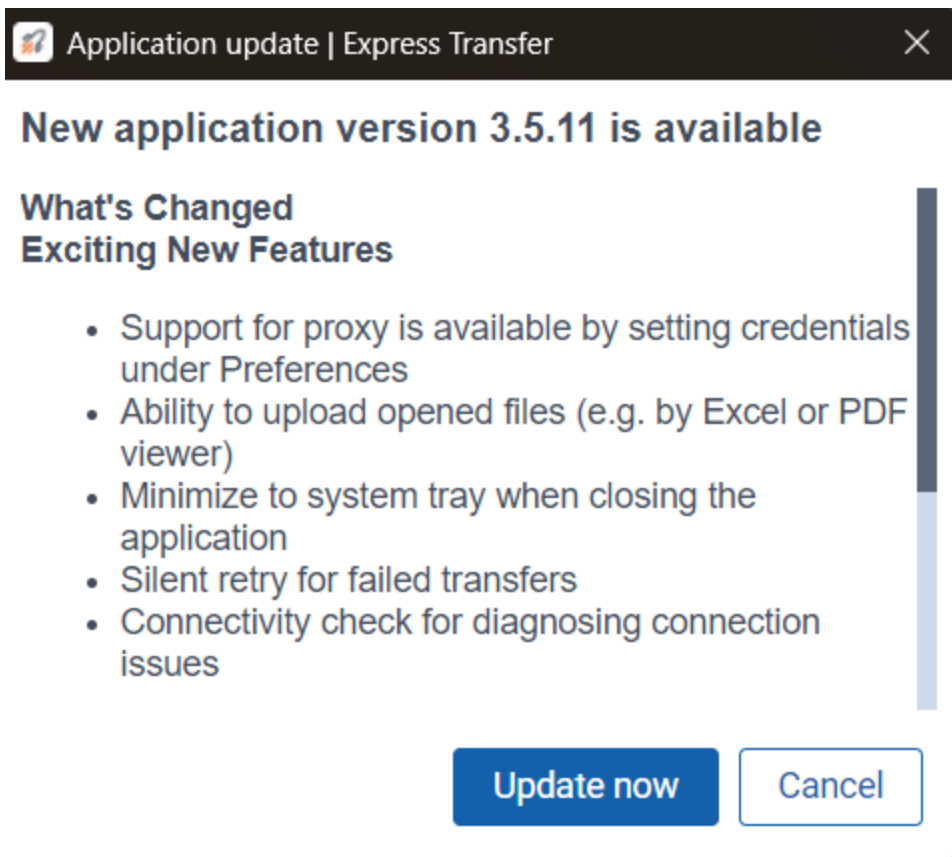
Note: We recommend keeping this option on. If it is off, your Express Transfer version may not contain the latest features. Also, you need to regularly use the Check for Updates option in the Express Transfer system tray to determine if your software version is current. See [Manually checking for software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

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**.



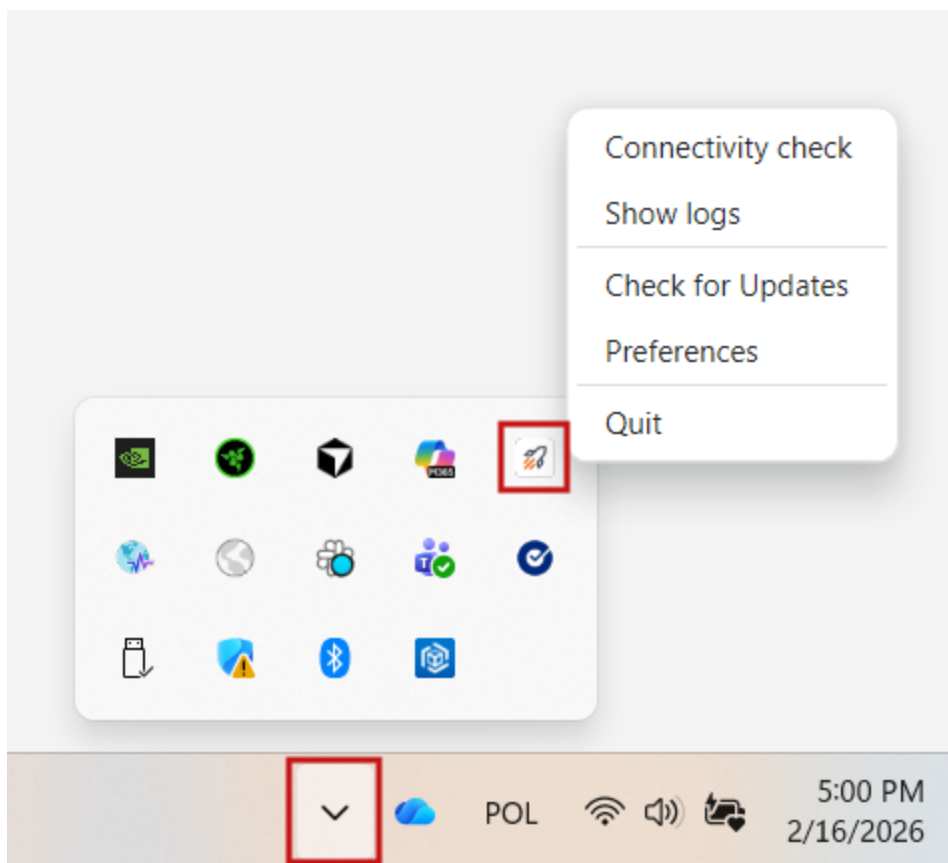
6. Reopen the application by double-clicking on its desktop shortcut, if you saved one for it, or select it from your computer's list of programs.

When a new version is available, an Application update dialog appears with the version number 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 52](#) steps to complete the installation.

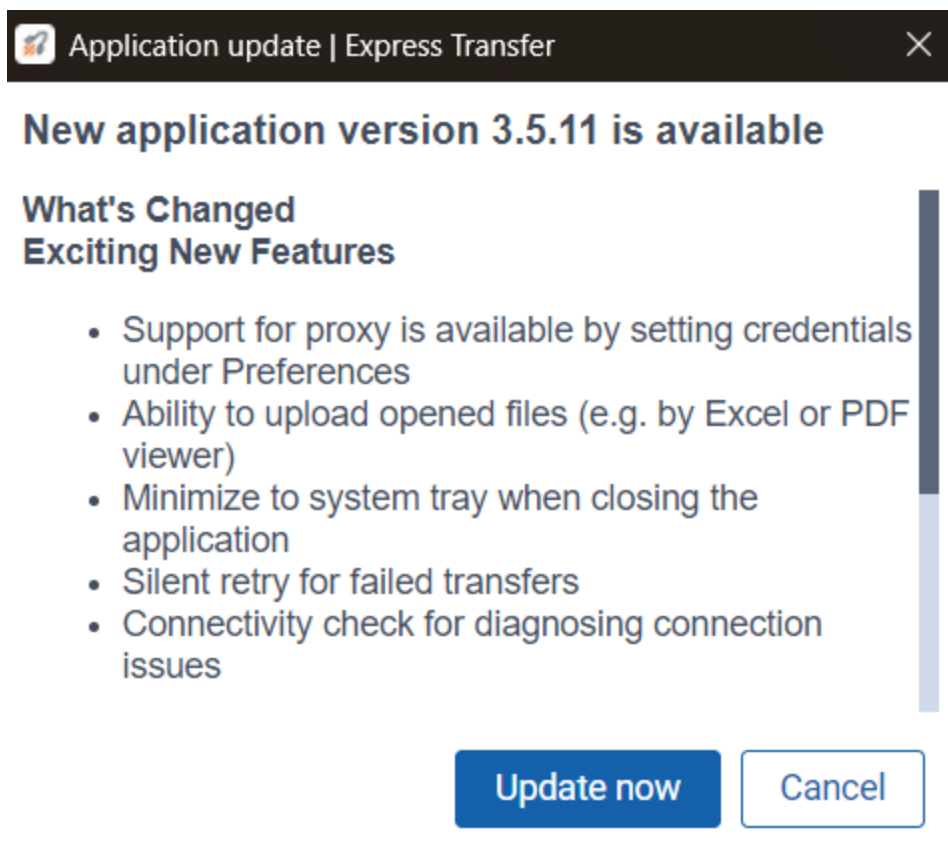


4.13.4.7 Manually checking for software updates

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 appears letting you know it is 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 52](#) steps to finish installing the update.



4.13.5 Activating and deactivating Express Transfer

You can 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, install the following in this order:

1. Install Import/Export application from the Application Library in the workspace. Refer to Installing Import/Export for more information.
2. Install Express Transfer desktop application 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

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

- data file size is greater than 20 GB, although you can use Express Transfer for any size data transfer.
- processing multiple import jobs. Jobs are queued and executed when the previous job is complete.
- slow or unstable network connection. You can retry the upload with Express Transfer.

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

- your company policy prohibits installing desktop applications.
- your network configuration prevents third-party applications from sending or receiving data, such as proxy settings.
- data file size is less than 20 GB.
- data is in ZIP files.

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

- Click **Activate** on the Choose workflow dialog to activate Express Transfer.

Import/Export

< Back

Choose Workflow

Import Export

Raw (Unprocessed) Data
I have a ZIP file that contains native files or a PST file for processing.

Structured (Processed) Data
I have a load file for direct import to the workspace.

Express Transfer
✓ Import single data sets **greater than 20 GB** without requiring a ZIP file
✓ Export **unlimited data set sizes** to local disk without staying in the browser

1 Download for Windows MacOS 2 Install App 3 Click **Activate** to run Express Transfer

Close

- 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, 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 appear anymore.

Allow this site to open the express-transfer link with Express Transfer?

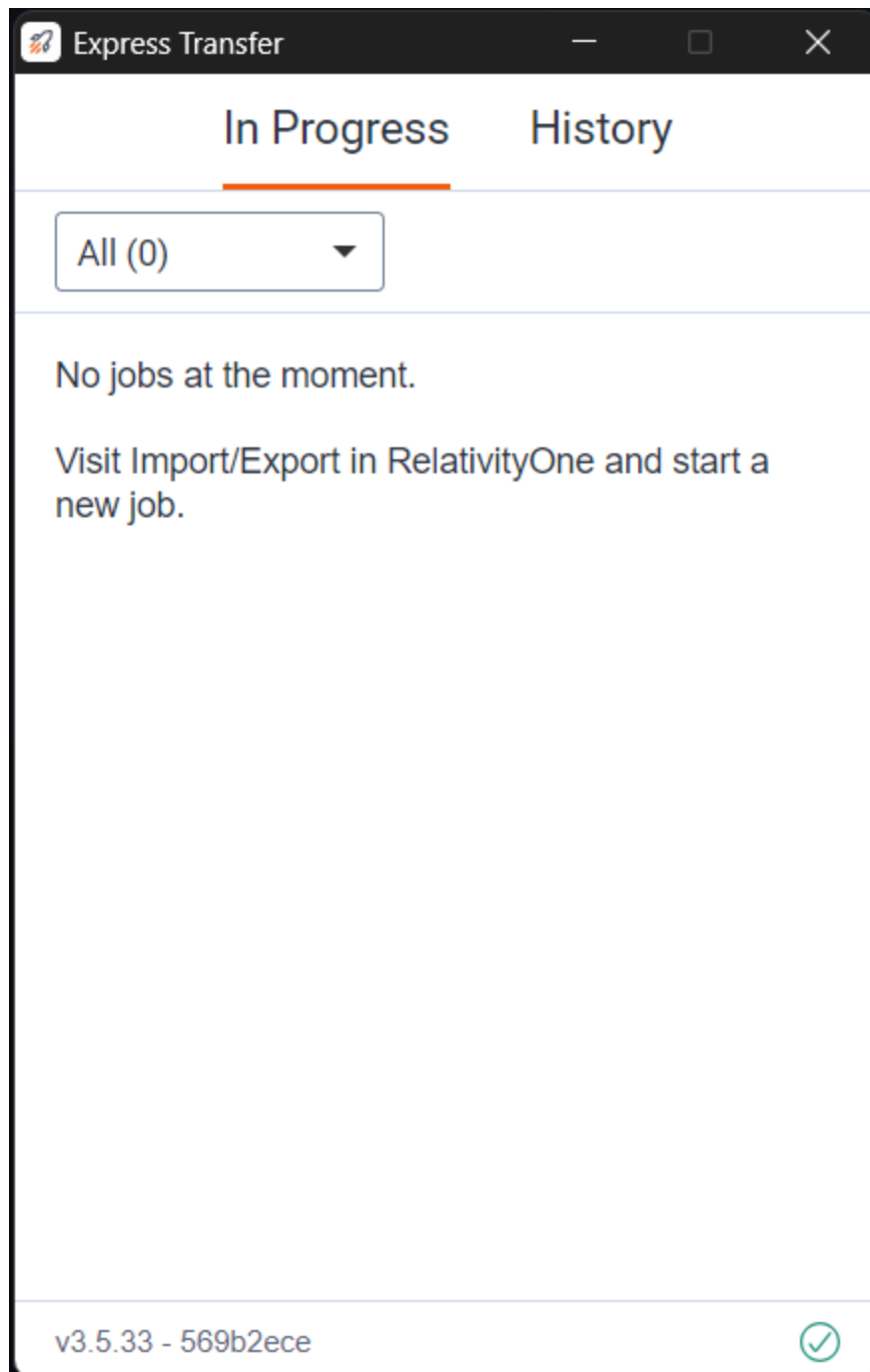
[Choose a different application.](#)

☐ Always allow <https://content-internal.relativity.one> to open express-transfer links

Open Link Cancel

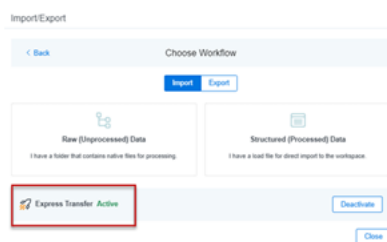
Note: If the activation process fails, click the **Complete activation** button on the message that appears to initiate the activation process. Refer to [Express Transfer connectivity check on page 91](#) for more information on connection status information.

- When the activation process successfully completes, the Express Transfer application opens.



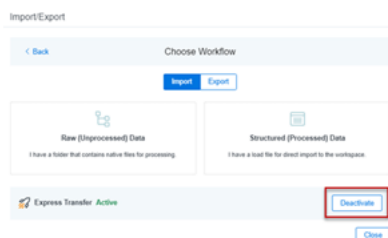
- Return to the Import/Export application. The Express Transfer status changes to **Active** on the Choose Workflow dialog.

Note: Express Transfer stays active until you click **Deactivate** or log out of Relativity aiR. You do not need to keep reactivating it. However, if you [deactivate](#) it or log out of Relativity aiR, you need to reactivate the application 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 **Deactivate** on the Choose Workflow dialog.



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

4.13.5.5 Data transfer performance considerations

Many variables affect data transfer performance for desktop applications like Express Transfer. Factors such as RAM, CPU, local drive specifications, network drive specifications, and available bandwidth at the time of the transfer all affect transfer rates and results.

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

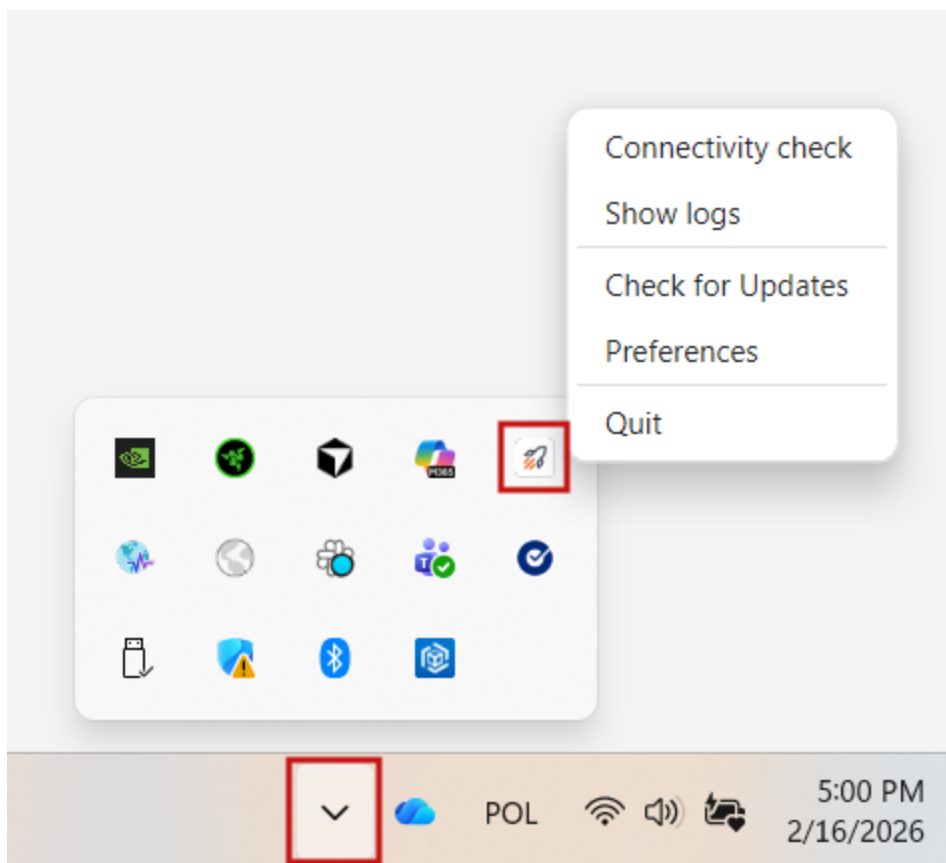
If you experience issues despite following the information below, contact [Support](#) for assistance. See the Community article [Performance considerations for data transfers](#).

- **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 and folders. Remove system / hidden attributes.
- **Port 443:** Ensure that port 443 is open 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. Use a wired connection. Wi-Fi may reduce reliability.
- **Internet speed:** Transfer speeds 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 or 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 software version.
- **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, that is 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, you may consider compressing datasets without decompressing in the destination folder (staging directory) when all the following are true:
 - Dataset consists of fragmented data.
 - Destination folder is a Processing source location.
 - The uploaded dataset 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. Relativity aiR 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 affect 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 is available in the system tray. Right-click on the icon to display the application menu with these options:



- **Connectivity check**—click this option to check if Express Transfer is successfully accessing the Internet and the Import/Export application. See [Express Transfer Connectivity check](#) for more information.
- **Show logs**—click this option if instructed to do so by Relativity Support to investigate or troubleshoot an issue with Express Transfer transaction logs and text files. File Explorer will open the logs folder on your local drive. For example, `C:\Users\<username>\AppData\Local\Express Transfer\logs`. With Express Transfer open, you can also press the F8 key on your keyboard to display the logs folder.
- **Check for Updates**—click this option if you want to manually check whether your version is up-to-date or whether a new version of Express Transfer is available. See [Manually checking for software updates on page 63](#) 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 latest version 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 52](#) 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 appear 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

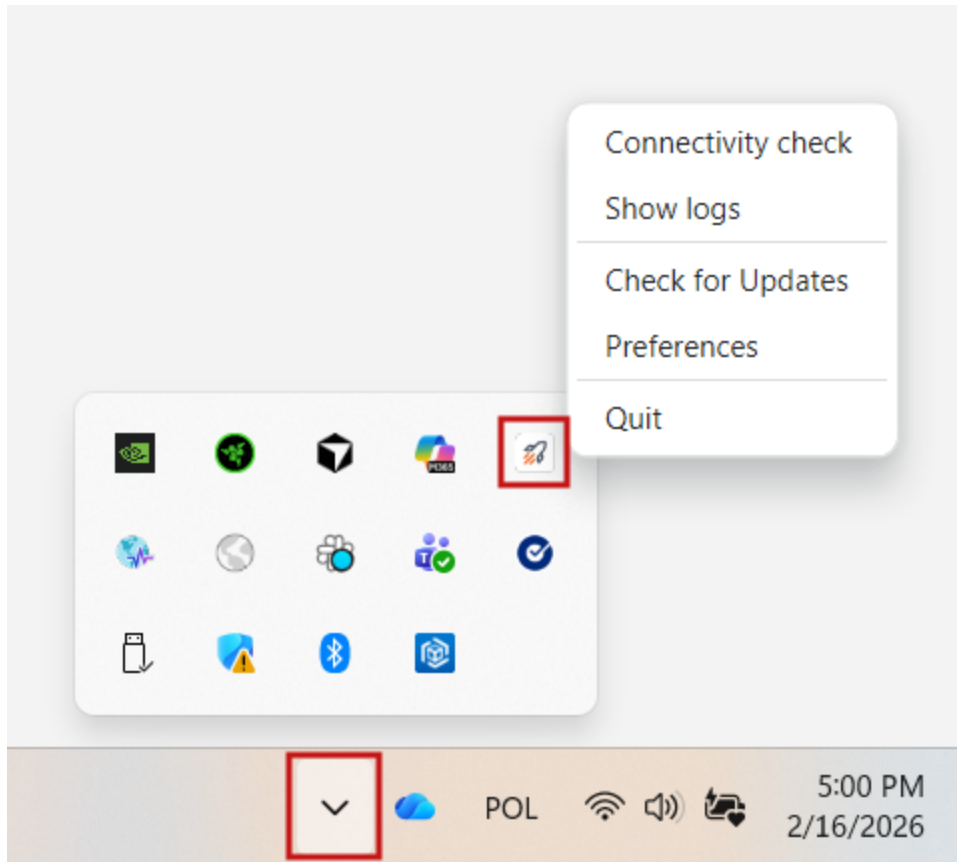
Use Express Transfer Preferences to modify the Check for Updates setting, limit bandwidth, exclude temporary Microsoft Office files from data import, configure proxy settings, and choose the **Close** button behavior.

4.13.7.1 Automatically checking for software updates

You can configure whether 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 keeping the default setting so the system can automatically check for updates and help ensure you are using the latest feature versions. To check for updates manually, use the Check for Updates option in the Express Transfer system tray. See [Manually checking for software updates on page 63](#) for more information.

To automatically check for software updates:

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



2. Click **Preferences**.



Preferences

**Check for updates**

Automatically check when a new version of Express Transfer is available

**Limit bandwidth**

Improve the quality of data transmission while restricting speeds, recommended for weak network connections

**Exclude temporary file(s)**

Exclude [temporary Microsoft Office file\(s\)](#)  from import data

**Proxy settings****Minimize on close**

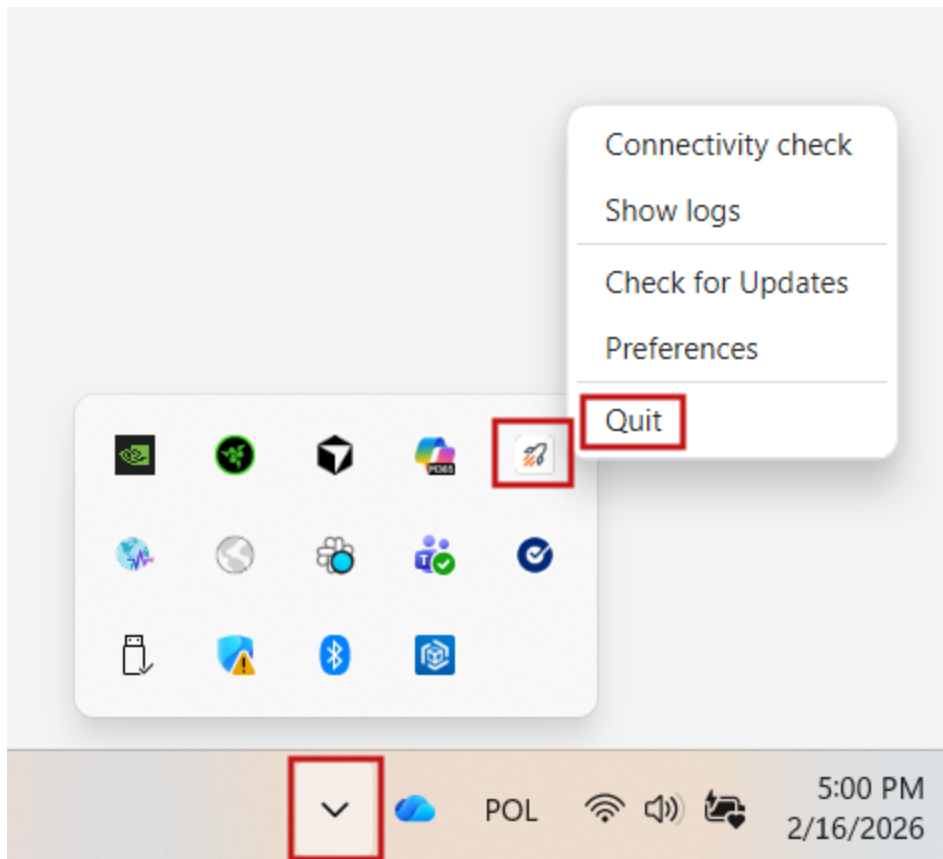
Leave app running in notification area when the window is closed

Save

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.

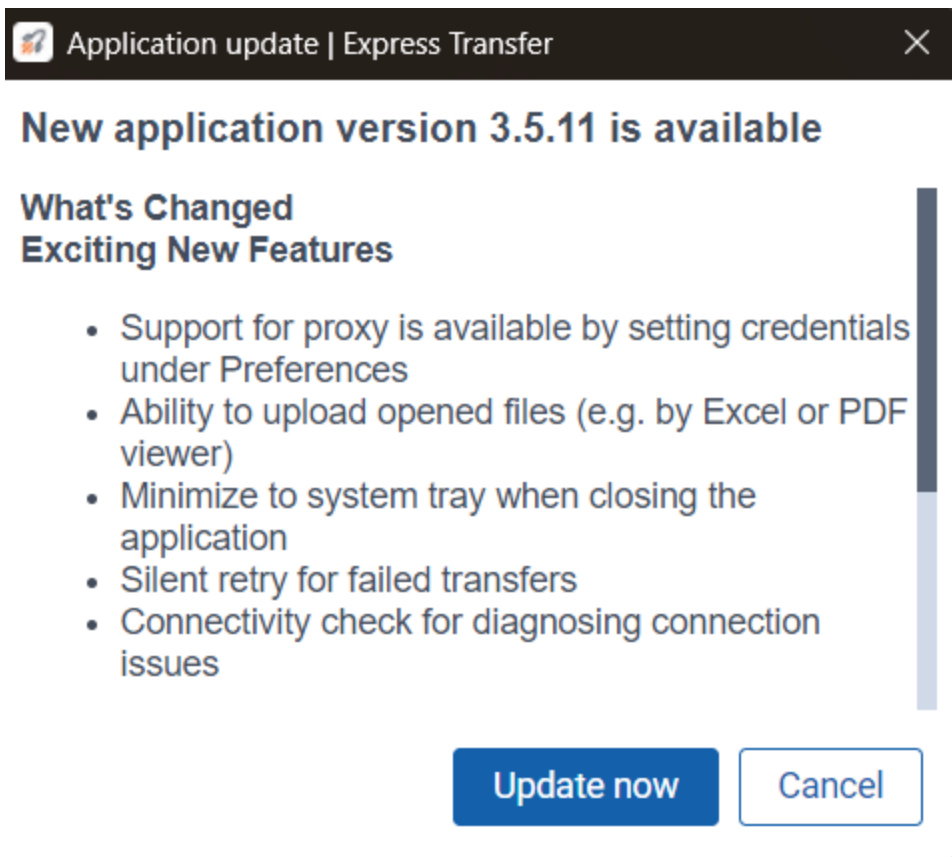
Note: We recommend keeping this option on. If it is off, your Express Transfer version may not contain the latest features. Also, you need to regularly use the Check for Updates option in the Express Transfer system tray to determine if your software version is current. See [Manually checking for software updates on page 63](#) 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.

When a new version is available, an Application update dialog appears with the version number 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 70](#) steps to complete the installation.

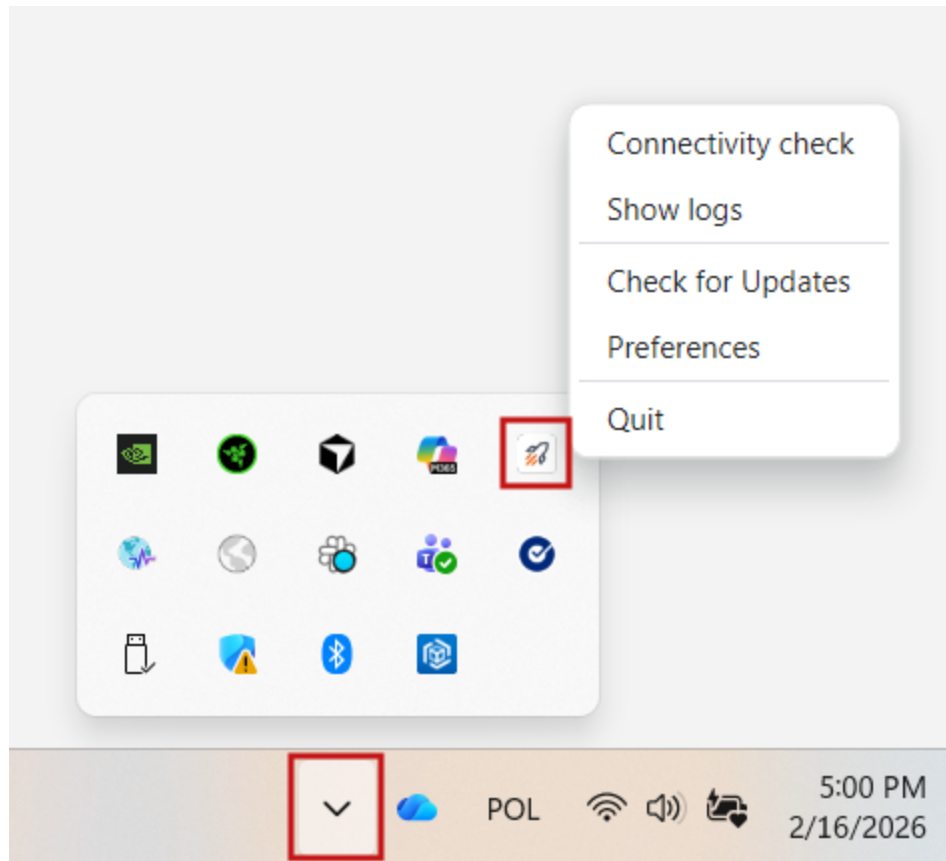


4.13.7.2 Limit bandwidth

Some organizations have slow internet speeds. This can cause transfer jobs to fail due to connection timeouts. In this situation, the organization may want to limit bandwidth so that it is shared with Import/Export transfers and other business activities. This may help improve transfer stability and reduce connection timeouts. You can configure bandwidth limitation in Express Transfer by turning on the **Limit bandwidth** option in Preferences. When this option is on, Express Transfer job transfers are slower, but more stable.

To configure Limit bandwidth:

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



2. Click **Preferences**.



Preferences



Check for updates

Automatically check when a new version of Express Transfer is available



Limit bandwidth

Improve the quality of data transmission while restricting speeds, recommended for weak network connections



Exclude temporary file(s)

Exclude [temporary Microsoft Office file\(s\)](#)  from import data



Proxy settings

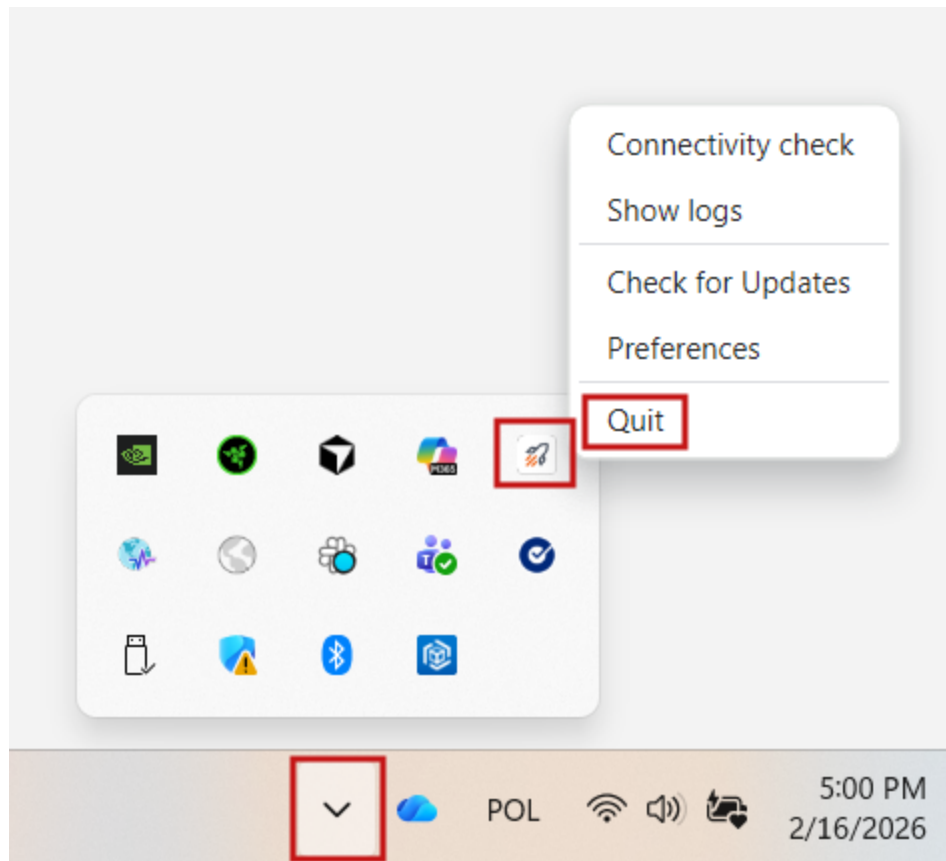


Minimize on close

Leave app running in notification area when the window is closed

Save

3. The **Limit bandwidth** option is toggled off by default. 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 with a ~ (tilde) sign at the beginning of the file name. When you are [importing unprocessed data for Processing](#) and selecting the data source on the [Create Processing Job dialog](#), these temporary files are displayed in the file list and are also included in the data import process.

Import/Export

< Back Create Processing Job

Job Name

Profile

Destination Folder

Notification Addresses

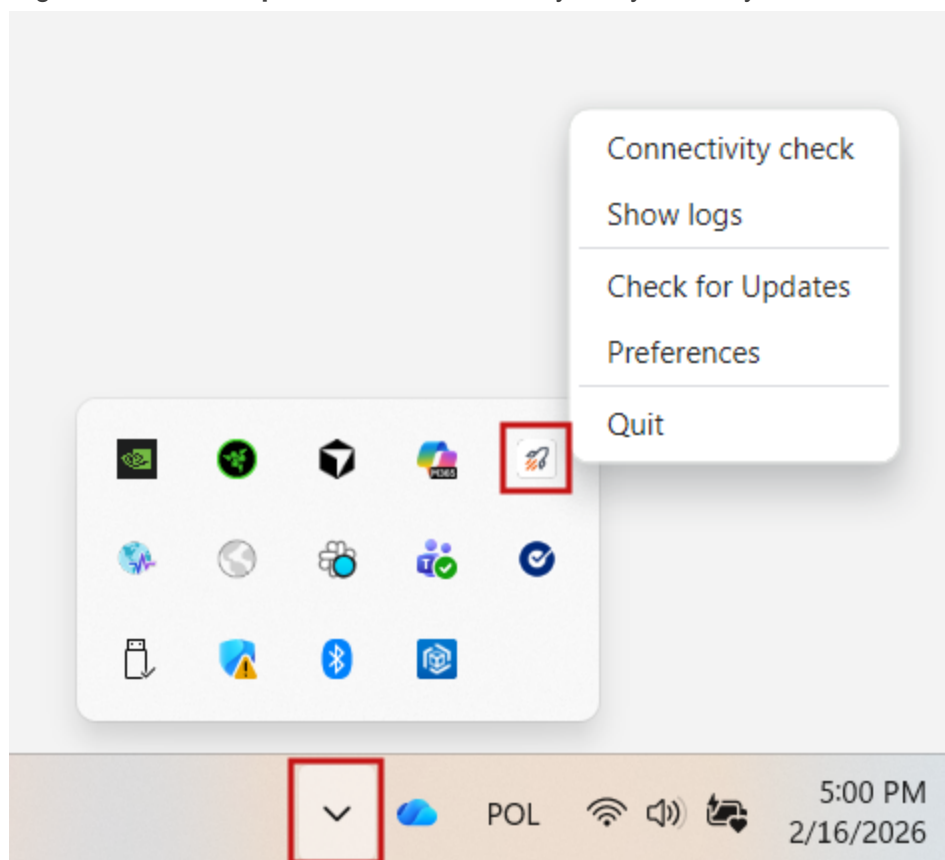
Select Data Sources 1 - 4 of 4 100 per page 1 2 3 4

☐	Name	Custodian
☐	debra_perlingiere	
☐	~\$testpp.pptx	
☐	testpp - Copy.pptx	
☐	testpp.pptx	

To prevent these temporary files from being included in the import process, the **Exclude temporary file(s)** option is toggled on by default in Express Transfer Preferences. 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**.



Preferences



Check for updates

Automatically check when a new version of Express Transfer is available



Limit bandwidth

Improve the quality of data transmission while restricting speeds, recommended for weak network connections



Exclude temporary file(s)

Exclude [temporary Microsoft Office file\(s\)](#)  from import data



Proxy settings

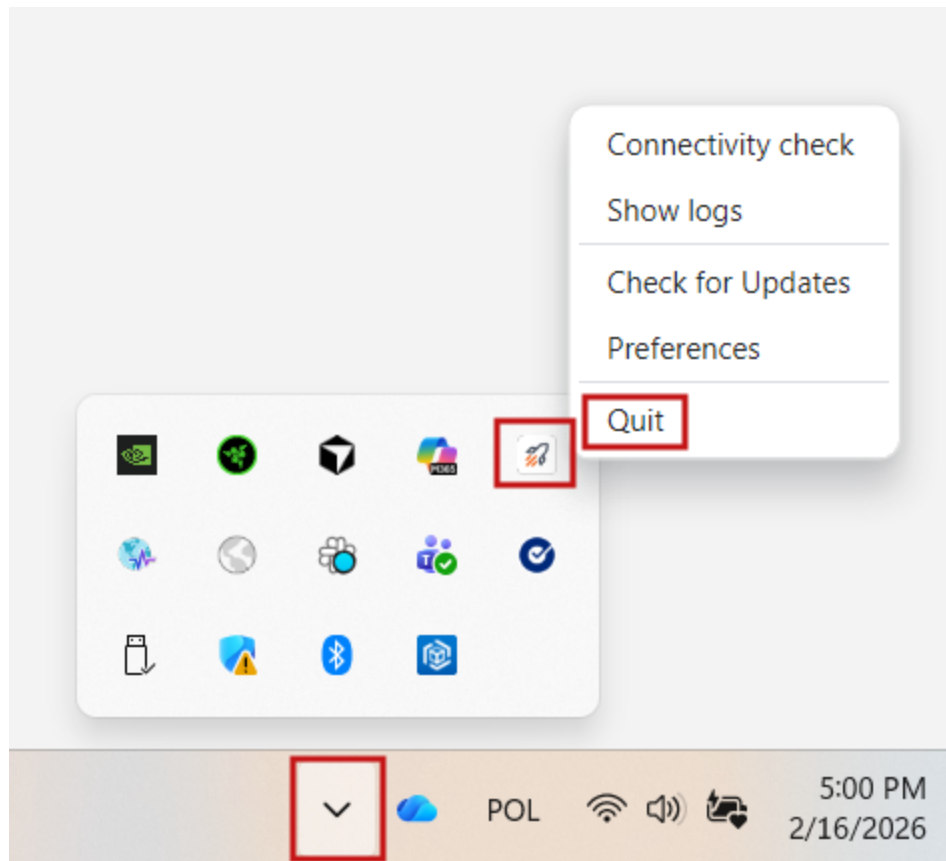


Minimize on close

Leave app running in notification area when the window is closed

Save

3. The **Exclude temporary file(s)** option is toggled on by default. 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.

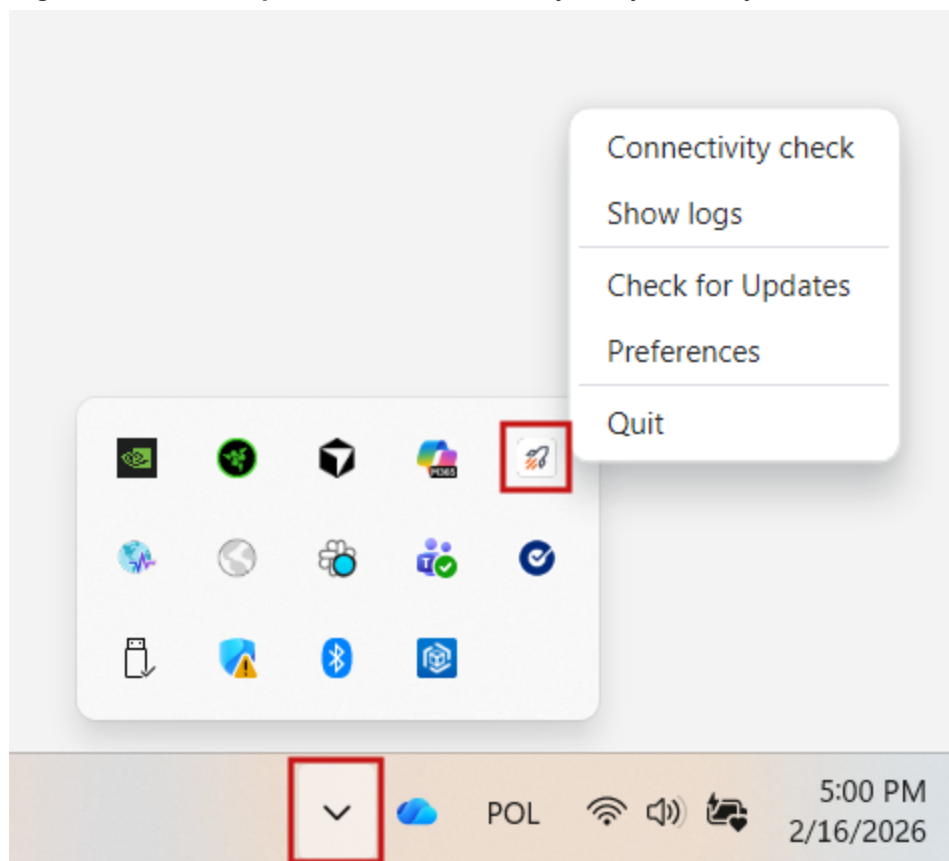
4.13.7.4 Configuring proxy settings

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 is different from Port 443, which is still required to be open regardless of this proxy configuration. See [Port access on page 52](#) for more information.

To configure proxy settings:

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



2. Click **Preferences**.



Preferences



Check for updates

Automatically check when a new version of Express Transfer is available



Limit bandwidth

Improve the quality of data transmission while restricting speeds, recommended for weak network connections



Exclude temporary file(s)

Exclude [temporary Microsoft Office file\(s\)](#)  from import data



Proxy settings

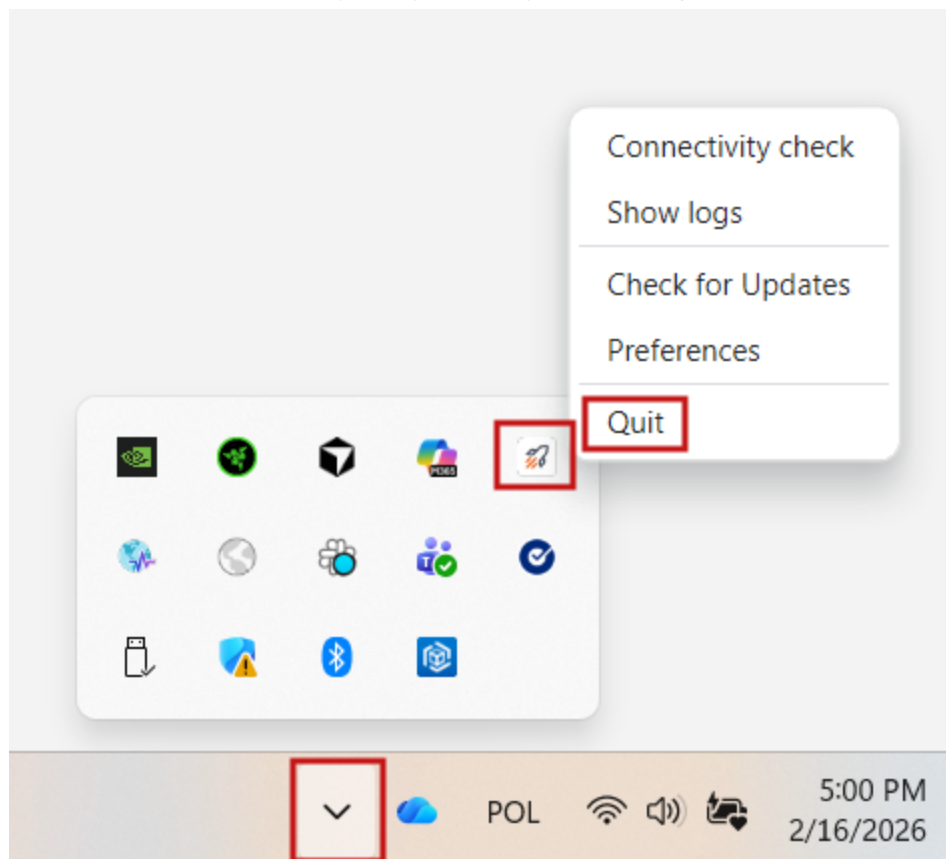


Minimize on close

Leave app running in notification area when the window is closed

Save

3. The **Proxy settings** option is toggled off by default. 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**.

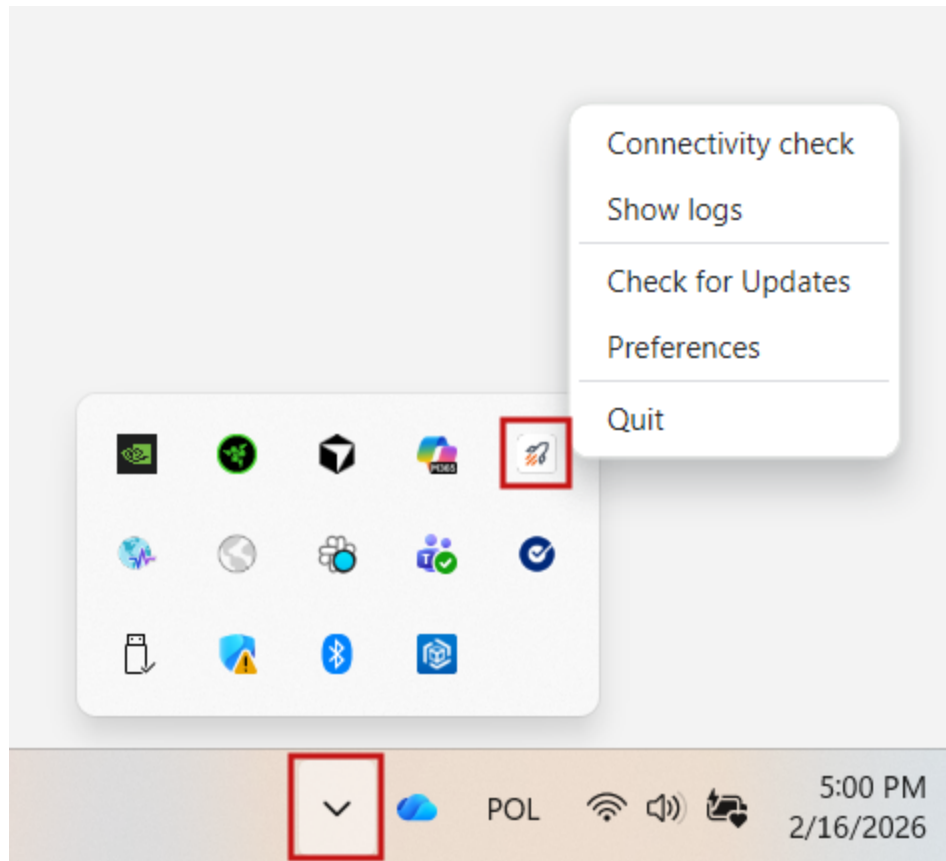


6. Reopen the application by double-clicking on its desktop shortcut, if you saved one for it, or select it from your computer's list of programs.
7. Perform a [Connectivity Check](#) to make sure Express Transfer is connected to the Internet. If it is not, the proxy settings are incorrect and you need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

4.13.7.5 Minimize on close

By setting the Minimize on close option, you choose what happens when you click the application **Close** button.

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



2. Click **Preferences**.



Preferences

**Check for updates**

Automatically check when a new version of Express Transfer is available

**Limit bandwidth**

Improve the quality of data transmission while restricting speeds, recommended for weak network connections

**Exclude temporary file(s)**

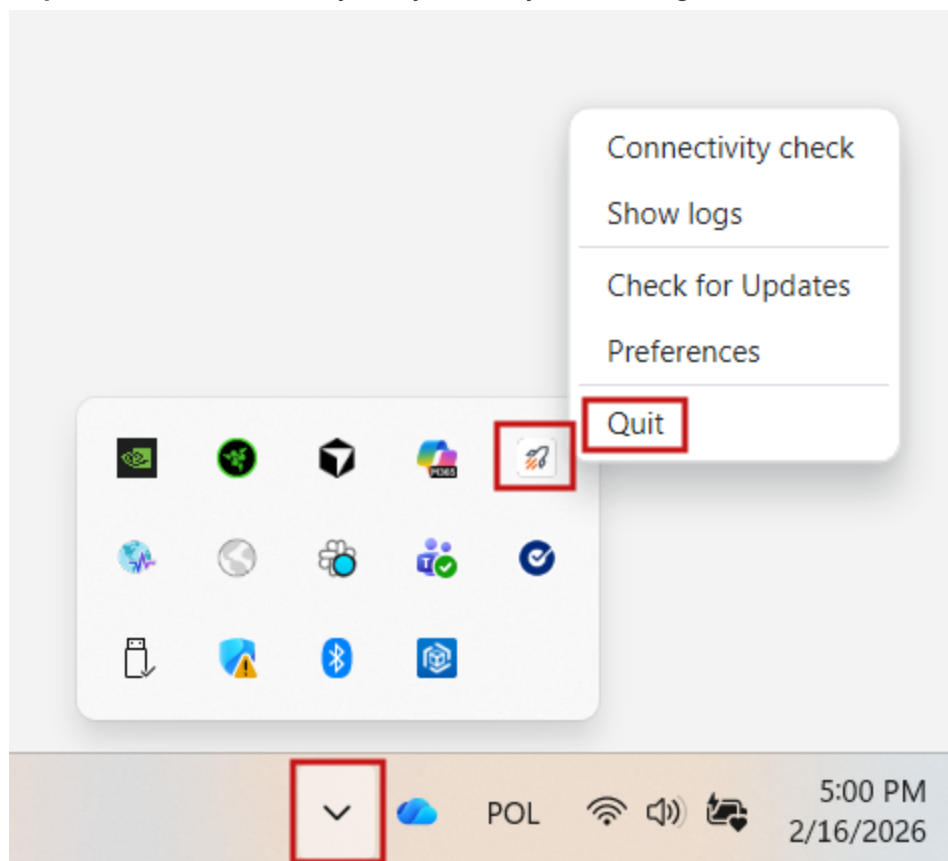
Exclude [temporary Microsoft Office file\(s\)](#)  from import data

**Proxy settings****Minimize on close**

Leave app running in notification area when the window is closed

Save

3. The **Minimize on close** option is toggled on by default. When this option is on, clicking **Close** minimizes the application to the background rather than shutting it down. To close the application fully using the **Close** button, toggle this option off.
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.

4.13.8 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 runs automatically when you activate Express Transfer from the Import/Export application within Relativity aiR. You can also manually perform a connectivity check at any time, even when there are active transfers.

The following checks occur during the connectivity check process:

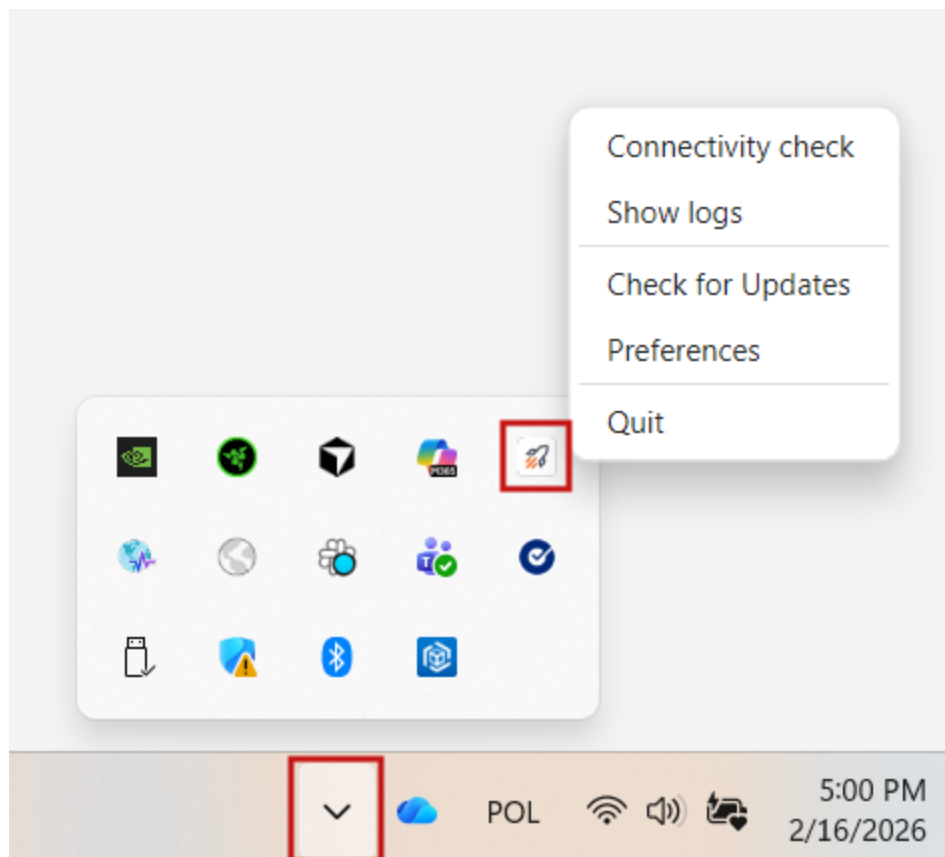
Connectivity check	Description
Internet connection	Confirms your system is connected to the internet. If this step fails, there is either no internet connection available or the proxy or firewall is blocking the connection for Express Transfer. Contact your IT department for help.
Access to Express Trans-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

Connectivity check	Description
fer gateway	
Connection with Express Transfer infrastructure	Confirms Express Transfer successfully connected to the infrastructure specific to your Relativity aiR region. If this step fails, contact your IT department so they can verify the correct port configuration. For more information, see Data Transfer Tools: Required Port Considerations for Relativity aiR (Import/Export, Express Transfer, ROSE and Migrate) article in Community.
Activation status	Confirms Express Transfer is active. If this step fails, see Activating and deactivating Express Transfer for more information on reactivating it.
Connection with Import/Export	Confirms Express Transfer is communicating with Import/Export in Relativity aiR.

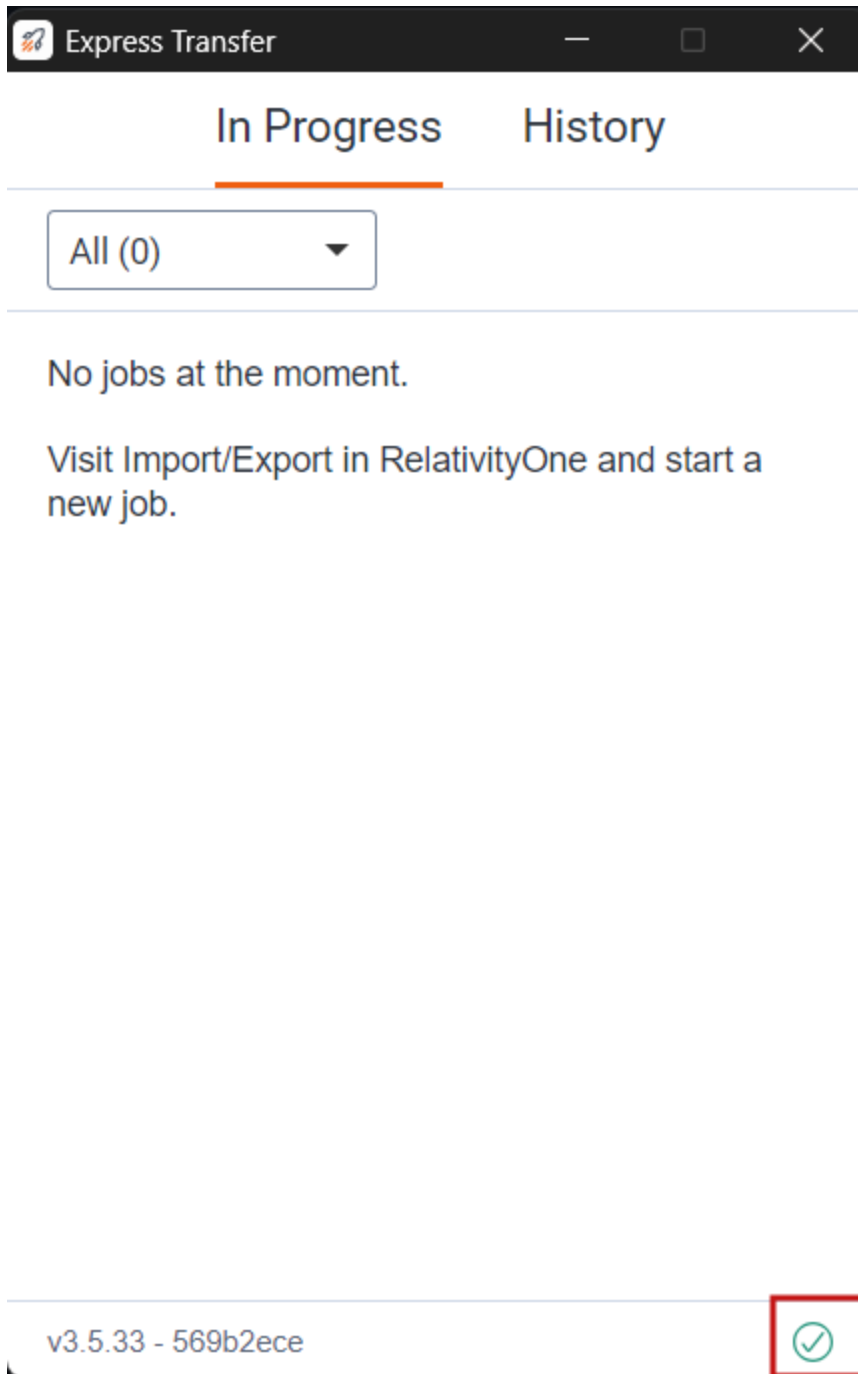
Note: If you perform a connectivity check before activating Express Transfer in Import/Export, only the Internet connection is checked and other system checks display the no connectivity  icon. Express Transfer must be [active](#) to perform the full connectivity check.

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

- **From the System tray:** Right-click on the **Express Transfer icon** and click **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.



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

Click **Check again** to refresh the connection if you lose connectivity.

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

Connectivity check

v3.5.33 - 569b2ece

Check started at: 1/30/2026, 10:10:43 AM

- ✓ Internet connection
- ✓ Access to Express Transfer gateway
- ✓ Connection with Express Transfer infrastructure
- ✓ Activation status
- ✓ Connection with Import/Export
- ⚡ Successful

Check 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 is displayed, verify that 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 is displayed next to the Connectivity check icon. It notifies 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 Relativity aiR. To do so, open Express Transfer by double-clicking the shortcut on your desktop.

When a job is running using Express Transfer, you can close the Import/Export application. The transfer job continues without interruption. You can monitor the job using the following steps. You do not have to be logged into Relativity aiR to view information within the Express Transfer application.

4.13.9.1 Prerequisites

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

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

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 are queued on the client machine.

In Progress

History

All (1) ▼

Hill - Watsica



7%

Actions

v3.5.33 - 569b2ece



- **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 **Actions** 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 is in progress, click **Actions** next to the transfer line and then click **Cancel**.

If no transfers are running, the tab displays a message that there are no jobs at the moment and directs you to Relativity aiR to start a new job.

To check more details about the job, see "Import/Export Job tracking and history".

History tab

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

The screenshot shows the 'Express Transfer' window with the 'History' tab selected. At the top, there are two tabs: 'In Progress' and 'History'. Below the tabs is a dropdown menu showing 'All (8)'. A message states: 'To check the full history visit Import/Export Job Page in RelativityOne.' Below this, there is a list of transfer jobs. Each job entry includes the job name, a progress bar, the completion percentage, and an 'Actions' button. The jobs listed are: 'Kub - Kling' (cancelled), 'Hill - Watsica' (cancelled), 'Cormier LLC' (100%), 'Stehr, Bachtelar and Schroeder' (100%), 'Ortiz, Armstrong and Maggio' (100%), and 'Salt Penner' (100%). At the bottom of the window, the version 'v3.5.33 - 569b2ece' and a green checkmark icon are displayed.

Job Name	Status	Percentage	Actions
Kub - Kling	Cancelled		Actions
Hill - Watsica	Cancelled		Actions
Cormier LLC	Finished	100%	Actions
Stehr, Bachtelar and Schroeder	Finished	100%	Actions
Ortiz, Armstrong and Maggio	Finished	100%	Actions
Salt Penner	Finished	100%	Actions

- **Finished**—a full green bar and 100% indicates that the transfer finished successfully. To view details about the job, click the job name link or click **Actions** 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)**—is displayed 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 **Actions** next to the transfer line and then clicking **Retry failed files**. You can restart only jobs from the last seven days. See [Express Transfer reporting jobs failed or completed with](#)

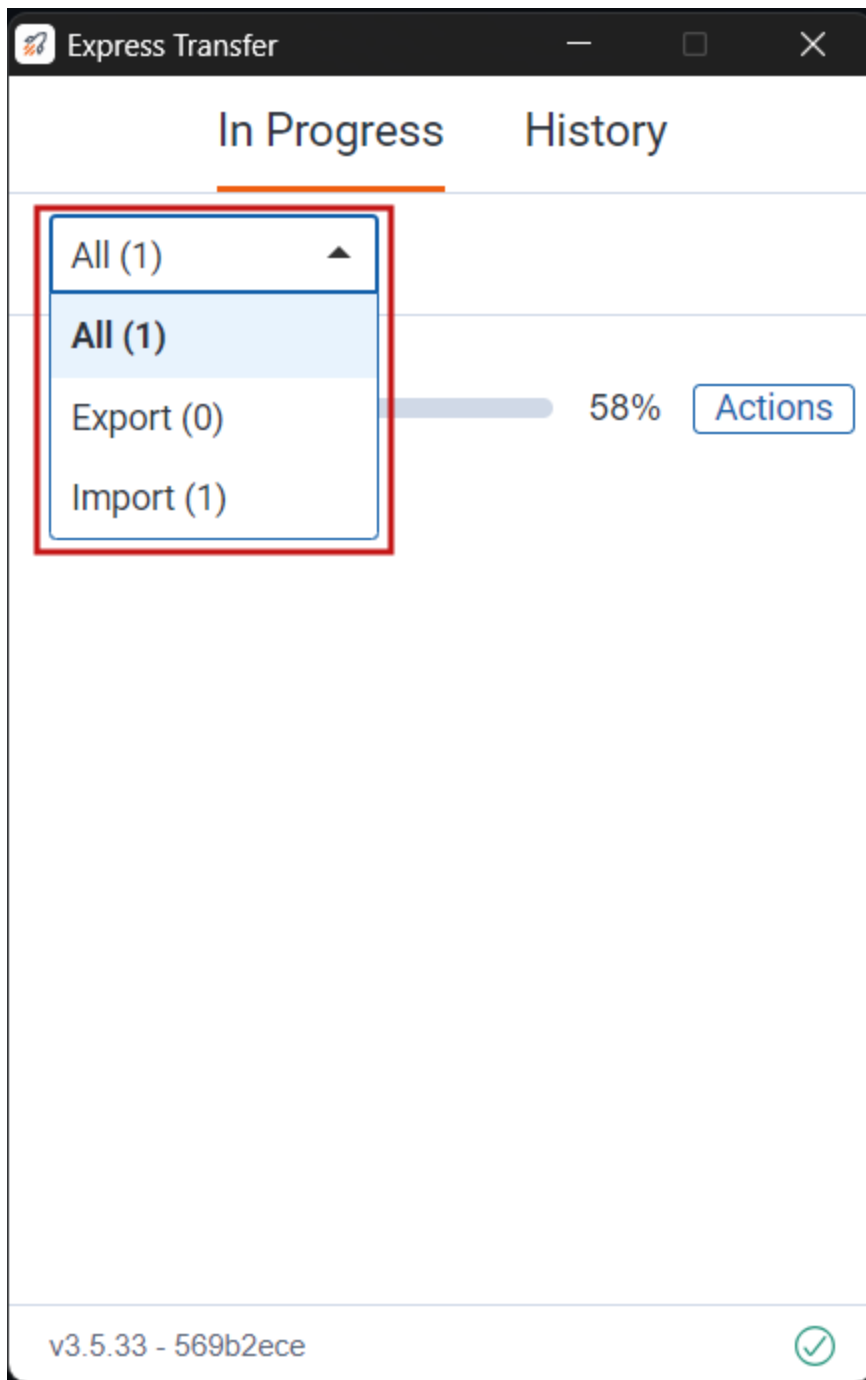
[errors](#) for more information. To view job details, click **Actions** next to the transfer line and then click **View details**.

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

To check the full history, see "Import/Export Job tracking and history".

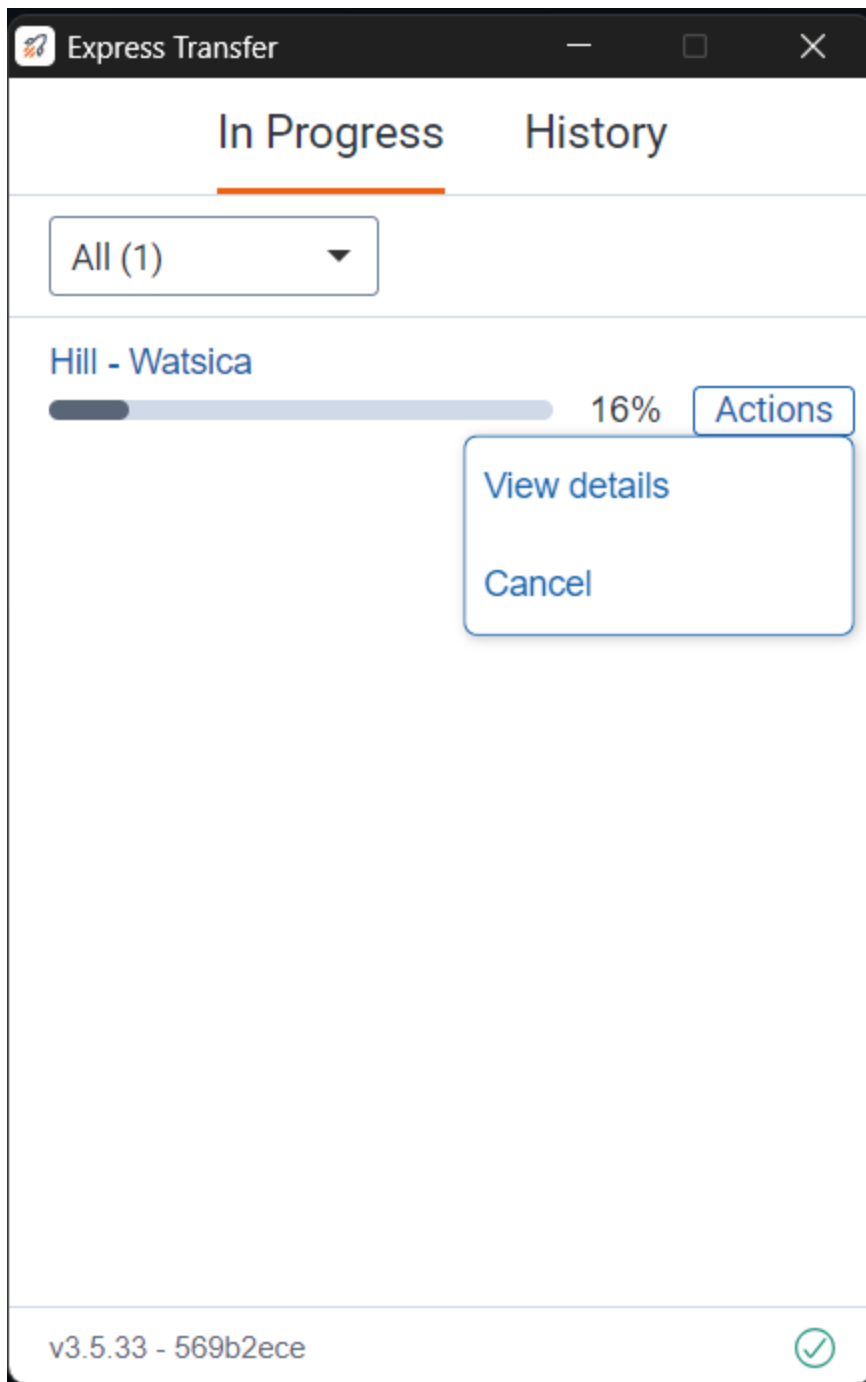
Filtering Express Transfer jobs

To filter 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 get information about a particular Express Transfer job, click **Actions** 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.

emptyCatalogs

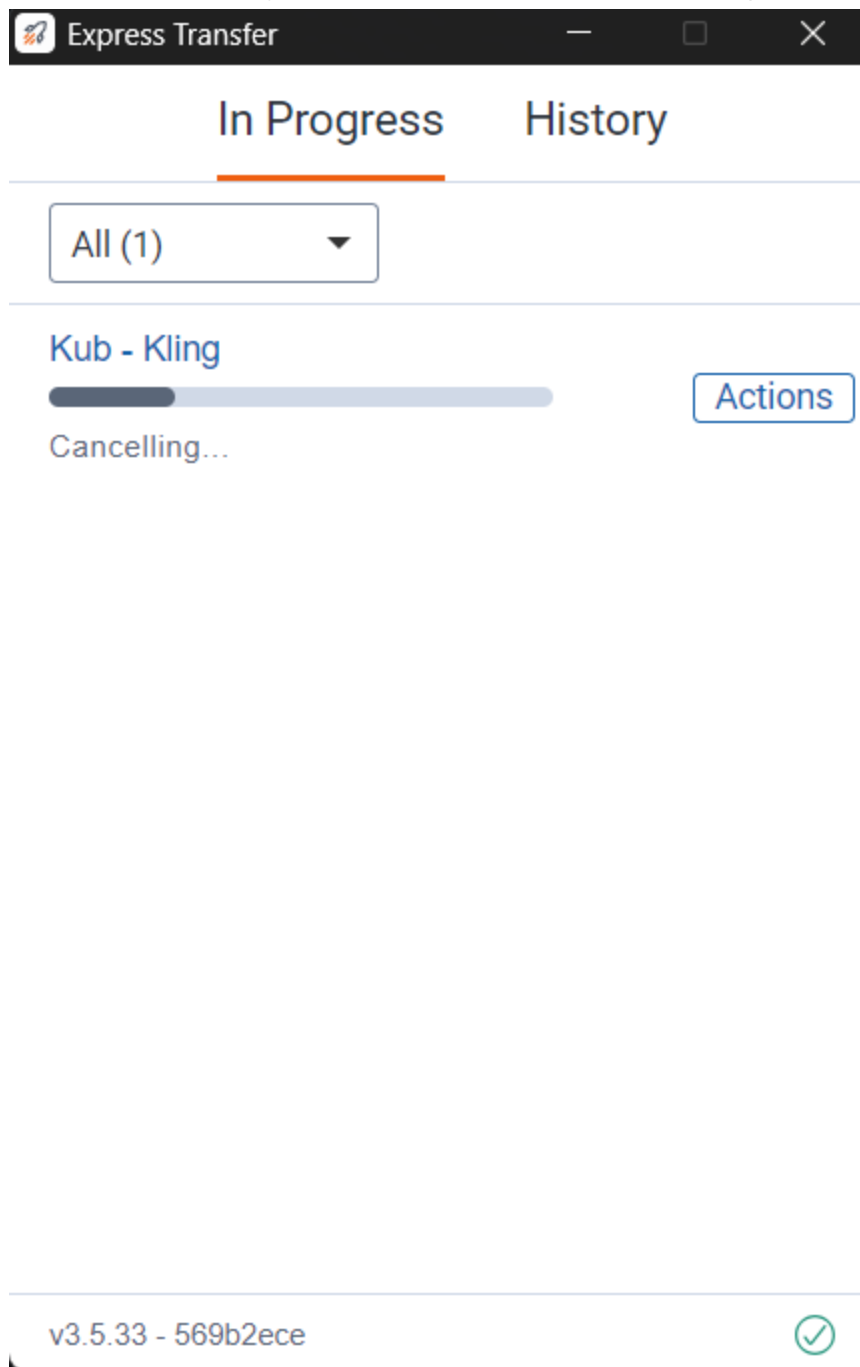
 Completed Upload**Duration:** 00:06:04**Started on:** 11/9/2023 5:26:03 pm**Finished on:** 11/9/2023 5:32:07 pm**Transferred data:** 1.08 GB / 1.08 GB**Transferred files:** 4/4**Transferred empty directories:** 2**Job ID:** fad0e3d6-bd03-4878-bbeb-
0153579b658b**Workspace ID:** 1026384**Catalog path:** C:\emptyCatalogs

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. The report includes information on the time stamp, file status, file name, error message, and file path. You can also handle the failed or errored jobs by retrying or skipping failed files. For more information about job tracking and history, see [Express Transfer Job tracking and history](#).

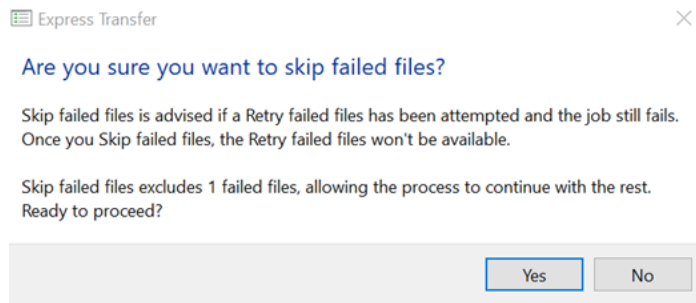
Note: Reports are available for jobs run on Express Transfer version 2.21.1 and later. See [Locating the Express Transfer version number on page 56](#) if needed.

1. Click the **History** tab from the Express Transfer application.
2. Click **Actions** for 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 opens File Explorer on your local drive to the Reports folder, such as *C:\User-s\<username>\AppData\Local\Express Transfer\Reports*.
- **Retry failed files**—click to rerun the failed files. You can rerun only jobs from the last seven days.
- **Skip failed files**—click to continue running the job excluding the failed files. The job status will be “Completed with errors.” Successful documents will be uploaded and available. Click **Show report** to review the failed files and decide how to proceed with them. This option is recommended if you attempted to

retry the failed files and the job still fails. After you run Skip failed files, the Retry failed files option is no longer available.



4.14 Importing data using Import/Export

You can use Import/Export to import unprocessed raw native files, document load files, image load files, production load files, and Relativity Dynamic Objects. See [Import/Export load file specifications](#) and [Data upload size limitation on page 30](#) for details about load files. Also, see [General recommendations for structured data import and export jobs on page 48](#).

Note: After importing documents using Import/Export, you can automate creating a dtSearch index or run a search terms report with those documents using 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.
- [Access DB load file import \(MDB\)](#)—use this workflow to import Access DB load files (MDB) into Relativity.
- [Unstructured data workflow with Processing](#)—use this workflow to import raw (unprocessed) native files that require processing in Relativity.
- [Transcript data import for Processing](#)—use this workflow to import transcript MDB data with the linked audio/video files into Relativity.

4.14.1 Structured data import from Staging

You can import structured data directly from the Staging Area using the Structured (Processed) Data workflow. This option works just like other Structured Import workflows, with the only difference being the source location.

To use this option, you must have Allow Staging Import permission enabled. With this permission:

- When Express Transfer is active, **Staging Load File** button is available on the Select data to Import dialog.

Import/Export

[< Back](#)

Select data to Import

Data Location

Select*

Local Folder

 or

Staging Load File

Continue

Cancel

- When Express Transfer is not active, **Choose From Staging** button is available on the Choose Load File and Location dialog.

Import/Export

< Back

Choose Load File And Location

Job Name*

Destination Folder*

Select

Profile*

☒ None

☐ From Local Disk

Regional Settings (Date And Time)*

English (Australia) | en-AU

25/12/2000 12:00:00 AM

Load File*

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

or **Choose From Staging**

Include Native & Text

☐

How to prepare Native and Text files?

Compress folders with Native and Text files into one .zip file

Notification Addresses

email@domain.com, other@domain.com

Notify me

Continue

Cancel

Note: This feature is only available when appropriate set of permissions is granted. For details, see Workspace-level permissions and the Community article [Changes to Import/Export Choose From Staging Option FAQ](#).

4.14.2 Pre-check Load File

The Pre-check Load File is an optional process when configuring an import job. It ensures consistency of data before the import job starts.

This feature helps to identify data inconsistencies early, enabling you to correct the source load file for a successful import job. That way, you do not need to run the entire import job, including transferring native files and images, to detect potential load file errors. The Pre-check Load File process reduces time required to complete load file imports using Import/Export, particularly for large load files. It also detects duplicated file references that could otherwise lead to unexpected billing consequences.

The Pre-check Load File process validates different data depending on the import workflow.

Note: The Pre-check Load File feature is not available in workflows that utilize Staging. If your import job is configured to use Staging, the Pre-check step is skipped, and validation occurs during the actual import process.

4.14.2.1 Document and RDO load file import

For these workflows, the Pre-check Load File validations are based on the configured Fields Mapping. The load file metadata is compared with the mapped workspace fields. It is also checked if the metadata can be successfully imported to the selected fields.

The Pre-check Load File process validates the following:

- Date/Time format— checks if the metadata mapped to Data/Time fields is within acceptable format, expected by the Relativity field.
- Field type—checks if the metadata type matches the expected type of the selected field, for example, Date/Time, Number, Text, Boolean.
- Field length—checks if the text metadata is not longer than the maximum number of characters defined for the selected Relativity field.
- Number of the load file cells—checks if each row of the load file contains the same number of columns and if it matches the number of the mapped fields.
- Number of folders and choice fields—checks total number of folders and choice fields that will be created during the import job. Large total number may significantly extend the job processing time.
- File paths for native and extracted text files—checks if the file paths lead to actual files to be uploaded during the import job.

The Pre-check Load file process validates all load file rows against the metadata consistency. It also validates random 1,000 rows across the entire load file against the file paths errors. The file paths validation is run when using either Express Transfer or web upload for importing files.

After the validation, the summary dialog displays identified errors, which are divided into error categories. You can click the down arrow next to any error category to view its details.

The summary dialog displays a maximum of 1,000 errors for each error category, so your web browser responsiveness is not affected. For example, if an error category has 2,000 errors, only the first 1,000 are displayed in the drop-down list.

[< Back](#)

Pre-check Load File

Errors

Choices

❗ 4 errors found in your Load File.

All 688 row(s) checked (for file paths 688 random rows are checked)
Only up to first 1000 errors are listed in each category.

❗ Invalid identifier (1)

Error on line: 2 Column: Control Number The value is empty.

❗ Wrong number of columns (1)

Error on line: 3 This line contains 27 columns. Expected number of columns in each row is 28.

❗ Invalid date (2)

Error on line: 4 Column: Date Sent Possible invalid date: 5/21/2001 77:38 PM
Error on line: 5 Column: Date Sent Possible invalid date: 5212001 8:25 PM

Import

Cancel

4.14.2.2 Image and Production load file import

For these workflows, the Pre-check Load File validates if image or PDF file paths lead to actual files which will be uploaded during the import job.

During that process, random 1,000 rows across the entire load file are checked against the file paths errors. The file paths validation is run when using either Express Transfer or web upload mode for importing files.

After the validation, the summary dialog displays identified errors, which are divided into error categories. You can click the down arrow next to any error category to view its details.

[< Back](#)

Pre-check Load File

Errors

❗ **14 errors** found in your Load File.

All 34 row(s) checked (for file paths 34 random rows are checked)
Only up to first 1000 errors are listed in each category.

❗ **File not found in zip (14)**

Error on line: 1 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0002058.tif not found in zip.
 Error on line: 13 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0005740_004.tif not found in zip.
 Error on line: 14 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0005740_005.tif not found in zip.
 Error on line: 15 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0005740_006.tif not found in zip.
 Error on line: 25 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0005837.tif not found in zip.
 Error on line: 26 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0005837_01.tif not found in zip.
 Error on line: 27 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0005837_02.tif not found in zip.
 Error on line: 28 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0005837_03.tif not found in zip.

Import

Cancel

4.14.2.3 Working with Pre-check Load File results

When the Pre-check Load File process is complete, you may choose to correct the errors in the source files and upload the files again. To do so, keep clicking back to the Choose Load File And Location dialog. Then, upload the corrected files and perform the import steps again.

If you do not want to correct the source files, click **Import** and proceed with importing the data.

4.14.3 Importing data using Import/Export

You can use Import/Export to import unprocessed raw native files, document load files, image load files, production load files, and Relativity Dynamic Objects. See [Import/Export load file specifications](#) and [Data upload size limitation on page 30](#) for details about load files. Also, see [General recommendations for structured data import and export jobs on page 48](#).

Note: After importing documents using Import/Export, you can automate creating a dtSearch index or run a search terms report with those documents using 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.
- [Access DB load file import \(MDB\)](#)—use this workflow to import Access DB load files (MDB) into Relativity.

- [Unstructured data workflow with Processing](#)—use this workflow to import raw (unprocessed) native files that require processing in Relativity.
- [Transcript data import for Processing](#)—use this workflow to import transcript MDB data with the linked audio/video files into Relativity.

4.14.3.1 Structured data import from Staging

You can import structured data directly from the Staging Area using the Structured (Processed) Data workflow. This option works just like other Structured Import workflows, with the only difference being the source location.

To use this option, you must have Allow Staging Import permission enabled. With this permission:

- When Express Transfer is active, **Staging Load File** button is available on the Select data to Import dialog.

Import/Export

[< Back](#)

Select data to Import

Data Location

Select*

Local Folder

 or

Staging Load File

Continue

Cancel

- When Express Transfer is not active, **Choose From Staging** button is available on the Choose Load File and Location dialog.

Import/Export

< Back

Choose Load File And Location

Job Name*

Destination Folder*

Select

Profile*

☒ None

☐ From Local Disk

Regional Settings (Date And Time)*

English (Australia) | en-AU

25/12/2000 12:00:00 AM

Load File*



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

or **Choose From Staging**

Include Native & Text

☐

How to prepare Native and Text files?

Compress folders with Native and Text files into one .zip file

Notification Addresses

email@domain.com, other@domain.com

Notify me

Continue

Cancel

Note: This feature is only available when appropriate set of permissions is granted. For details, see Workspace-level permissions and the Community article [Changes to Import/Export Choose From Staging Option FAQ](#).

4.14.3.2 Pre-check Load File

The Pre-check Load File is an optional process when configuring an import job. It ensures consistency of data before the import job starts.

This feature helps to identify data inconsistencies early, enabling you to correct the source load file for a successful import job. That way, you do not need to run the entire import job, including transferring native files and images, to detect potential load file errors. The Pre-check Load File process reduces time required to complete load file imports using Import/Export, particularly for large load files. It also detects duplicated file references that could otherwise lead to unexpected billing consequences.

The Pre-check Load File process validates different data depending on the import workflow.

Note: The Pre-check Load File feature is not available in workflows that utilize Staging. If your import job is configured to use Staging, the Pre-check step is skipped, and validation occurs during the actual import process.

Document and RDO load file import

For these workflows, the Pre-check Load File validations are based on the configured Fields Mapping. The load file metadata is compared with the mapped workspace fields. It is also checked if the metadata can be successfully imported to the selected fields.

The Pre-check Load File process validates the following:

- Date/Time format— checks if the metadata mapped to Data/Time fields is within acceptable format, expected by the Relativity field.
- Field type—checks if the metadata type matches the expected type of the selected field, for example, Date/Time, Number, Text, Boolean.
- Field length—checks if the text metadata is not longer than the maximum number of characters defined for the selected Relativity field.
- Number of the load file cells—checks if each row of the load file contains the same number of columns and if it matches the number of the mapped fields.
- Number of folders and choice fields—checks total number of folders and choice fields that will be created during the import job. Large total number may significantly extend the job processing time.
- File paths for native and extracted text files—checks if the file paths lead to actual files to be uploaded during the import job.

The Pre-check Load file process validates all load file rows against the metadata consistency. It also validates random 1,000 rows across the entire load file against the file paths errors. The file paths validation is run when using either Express Transfer or web upload for importing files.

After the validation, the summary dialog displays identified errors, which are divided into error categories. You can click the down arrow next to any error category to view its details.

The summary dialog displays a maximum of 1,000 errors for each error category, so your web browser responsiveness is not affected. For example, if an error category has 2,000 errors, only the first 1,000 are displayed in the drop-down list.

[< Back](#)

Pre-check Load File

Errors

Choices

❗ 4 errors found in your Load File.

All 688 row(s) checked (for file paths 688 random rows are checked)
Only up to first 1000 errors are listed in each category.

❗ Invalid identifier (1)

Error on line: 2 Column: Control Number The value is empty.

❗ Wrong number of columns (1)

Error on line: 3 This line contains 27 columns. Expected number of columns in each row is 28.

❗ Invalid date (2)

Error on line: 4 Column: Date Sent Possible invalid date: 5/21/2001 77:38 PM
Error on line: 5 Column: Date Sent Possible invalid date: 5212001 8:25 PM

Import

Cancel

Image and Production load file import

For these workflows, the Pre-check Load File validates if image or PDF file paths lead to actual files which will be uploaded during the import job.

During that process, random 1,000 rows across the entire load file are checked against the file paths errors. The file paths validation is run when using either Express Transfer or web upload mode for importing files.

After the validation, the summary dialog displays identified errors, which are divided into error categories. You can click the down arrow next to any error category to view its details.

[< Back](#)

Pre-check Load File

Errors

❗ **14 errors** found in your Load File.

All 34 row(s) checked (for file paths 34 random rows are checked)
Only up to first 1000 errors are listed in each category.

❗ **File not found in zip (14)**

Error on line: 1 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0002058.tif not found in zip.
 Error on line: 13 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0005740_004.tif not found in zip.
 Error on line: 14 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0005740_005.tif not found in zip.
 Error on line: 15 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0005740_006.tif not found in zip.
 Error on line: 25 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0005837.tif not found in zip.
 Error on line: 26 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0005837_01.tif not found in zip.
 Error on line: 27 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0005837_02.tif not found in zip.
 Error on line: 28 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0005837_03.tif not found in zip.

Import

Cancel

Working with Pre-check Load File results

When the Pre-check Load File process is complete, you may choose to correct the errors in the source files and upload the files again. To do so, keep clicking back to the Choose Load File And Location dialog. Then, upload the corrected files and perform the import steps again.

If you do not want to correct the source files, click **Import** and proceed with importing the data.

4.14.4 Importing a document load file

You can use Import/Export to import document load files, .dat, .csv, and .txt, into Relativity aiR that contain document metadata, native files, or extracted text. You can also use saved job profiles, which are intended to reduce configuration time.

4.14.4.1 References

We recommend referring to the following information when importing document load files:

- [Express Transfer overview on page 50](#), if you want to use Import/Export with Express Transfer active, which is the recommended workflow for data transfer.
- [Import/Export load file specifications](#) and [Data upload size limitation on page 30](#) for more information regarding import of load files. Also see [General recommendations for structured data import and export jobs on page 48](#). Also see [Load file import recommendations on page 48](#).

4.14.4.2 Importing document load file workflow

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 **New Import/Export Job** 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.

Import/Export

[< Back](#)

Choose Workflow

Import

Export


Raw (Unprocessed) and Transcript MDB data
I have a ZIP file that contains native files or a PST file for processing.


Structured (Processed) Data
I have a load file for direct import to the workspace.

 **Express Transfer**

- ✓ Import single data sets **greater than 20 GB** without requiring a ZIP file
- ✓ Export **unlimited data set sizes** to local disk without staying in the browser

1 Download for

Windows

MacOS

2 Install App

3 Click

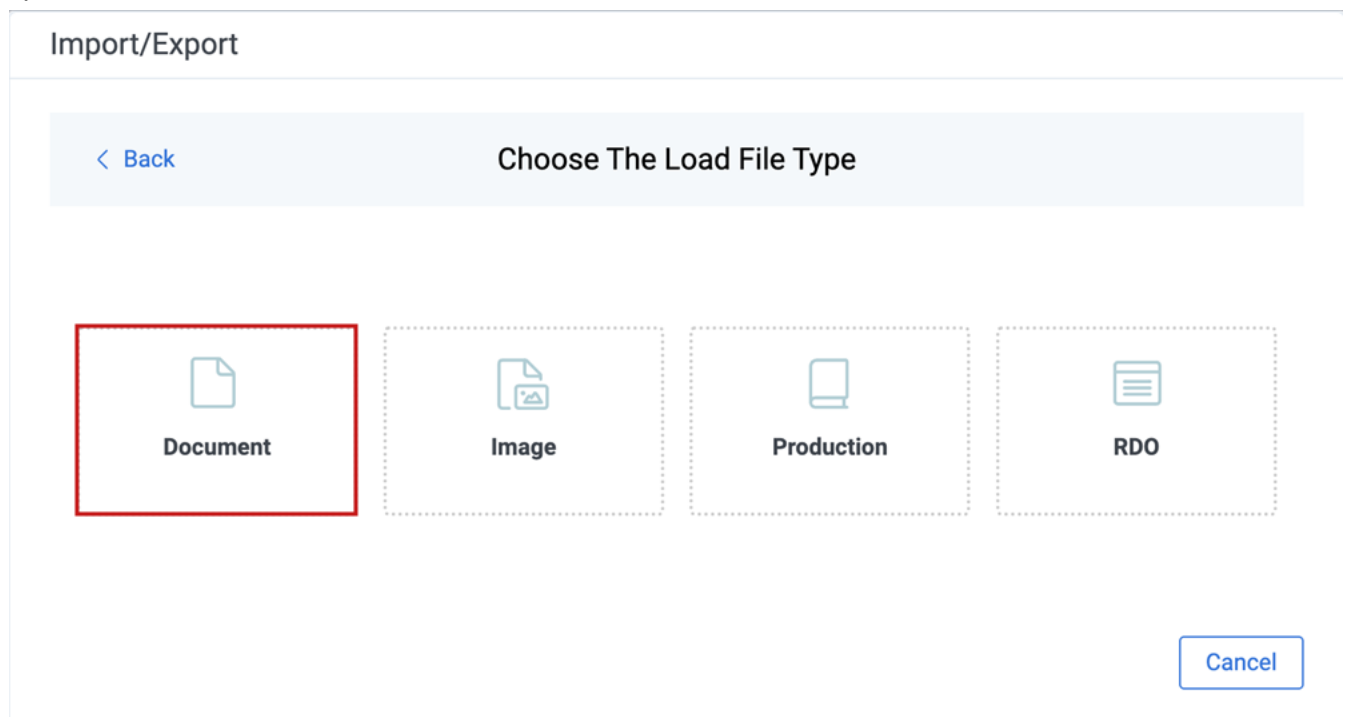
Activate

to run Express Transfer

Close

Note: If you activated Express Transfer, the Express Transfer section displays a status of **Active**. See [Activating and deactivating Express Transfer on page 65](#) 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, go to [Select data to Import fields on page 117](#).
6. Complete fields on the Choose Load File and Location dialog, then click **Continue**. For more information, go to [Choose Load File And Location fields on page 118](#). Also, see [Import/Export load file specifications](#) for details on load files.
7. Select delimiters and encoding on the Load File Settings dialog, then click **Continue**. For more information, go to [Load File Settings fields on page 120](#).
8. On the Load File Field Mappings dialog, select the load file fields to import and map them to the workspace fields, then click **Continue**. For more information, go to [Load File Field Mappings options on page 121](#).
9. Configure your import on the Import Settings dialog. For more information, go to [Import Settings fields on page 123](#).
10. (Optional) Click **Download Profile (.ie)** on the Import Settings dialog to download the job configuration settings entered to an .ie file on your computer. This way they can be reused for other jobs.
11. (Optional) Click **Precheck Load File** on the Import Settings dialog to check for errors before importing the load file. For details, see [Pre-check Load File optional step on page 124](#).
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 are displayed 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 before the Uploading step completes terminates the data transfer (upload) process.

Importing

Overview Job Settings

Uploading
Completed

Extracting
Completed

Importing
Completed

✓

✓

✓

Data import

100%

Processed records: 29 of 29

✓ Records imported successfully: 29

Download Profile (.ie) ^

Close

14. Go to the **Job Settings** tab on the Importing dialog to review the job configuration settings. If desired, select **Download Profile (.ie)** to download the job configuration settings entered to an .ie file on your computer. This way they can be reused for other jobs. You can also select **Download Field Mapping (.csv)** to download the file with field mapping.

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 the load file contains no errors, go to the next step. If errors were found, click the **Errors** tab and follow the instructions in the [Errors tab on the Importing dialog on page 126](#).

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: When a job is running using Express Transfer, you can close the Import/Export application. The transfer job continues without interruption. You can monitor the progress and history of jobs within Express Transfer. For more information, see Express Transfer Job tracking and history. You do not have to be logged in to Relativity aiR to view information within the Express Transfer application.

Select data to Import fields

Complete fields on the Select data to Import dialog

Before importing document load files with Express Transfer activated, consider the following:

- When Express Transfer is active:
 - You should not zip data for importing.
 - It uploads only files linked in the selected load file, regardless of their location.
 - It ignores mismatches in upper and lower case between file paths in the load file and the actual file names.
 - It supports load files with relative paths, absolute paths, and UNC paths. You can mix path types in a single load file.
- You can choose only one folder with a load file to transfer.
- File names must be 200 characters or fewer, 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 68](#).

If you are importing document load files with Express Transfer active, you can do the following in the Select data to Import dialog:

- Click **Local Folder** to browse to your local drive and select the folder with the files that you want to upload. For universal naming convention (UNC) paths, you can copy and paste the path into the Select Folder address bar in the dialog box to access the desired folder. For example, `\\ServerName\SharedResourceName\FilePath`.
- Click **Staging Load File** to select a load file from the StructuredData folder in Staging.

Notes:

- Accessing Staging Load File requires Allow Staging Import permissions. See [Permissions](#) for more information.
 - If you choose to import load file data from Staging, the load file and all linked files are copied to the destination located outside your Staging Area. After the import is completed, you can clean up the source data in Staging.
-

[< Back](#)

Select data to Import

Data Location

Select*

 Local Folder

or

 Staging Load File

Continue

Cancel

Choose Load File And Location fields

Complete fields on the Load File and Location dialog

[< Back](#)

Choose Load File And Location

Job Name*

Destination Folder*

 Workspace[Change](#)

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

☐

How to prepare Native and Text files?

Compress folders with Native and Text files into one .zip file

Notification Addresses

[Notify me](#)[Continue](#)[Cancel](#)

- **Job Name**—provide a descriptive job name so that you can identify and track that job on the Import/Export Job page. The Job name field accepts up to 50 characters.
- **Destination Folder**—by default, Relativity aiR populates the destination with the root workspace folder which is intended to simplify job creation. You can do one of the following:
 - Keep the default destination folder.
 - Choose a different folder by clicking **Change**, followed by **Select**, and then selecting the desired folder from the list.
 - Create a new workspace folder by right-clicking on an existing folder, click **Create**, entering a new folder name, clicking out of the new folder to save it, then clicking **Select**.
- **Profile**—the job configuration settings that you saved to a profile file (.ie or .kw*). You can reuse a profile for future jobs that use the same or similar settings. Reusing a profile is intended to reduce time and data entry errors when mapping fields. You can use .ie profiles only in Import/Export.

- **None**—select this option if you do not want 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 can save the profile settings later to an .ie file using 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 in 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 can 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 appears below the selection. The setting selected remains 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 reverts 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.
- **Choose From Staging**—select a load file from the StructuredData folder in Staging. Your load file data must not be zipped. You can choose only unzipped load file data from Staging.
- **Include Native & Text**—select this option to include native and text 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 41](#).
- (Optional) **Notification Addresses**—enter the email addresses of the people you want to notify after the job completes, fails, or is canceled.

Load File Settings fields

Complete fields on the Load File Settings dialog

On the dialog, select the delimiters and encoding values of the document load file for the import. The File Column Headers Preview pane helps you choose proper settings.

The screenshot shows the 'Load File Settings' dialog box. The 'File Encoding' is set to 'Unicode (UTF-8)'. The 'First Line Contains' checkbox is checked. The 'Columns' list includes '(Default row, other, vertical line or vertical start)'. The 'Quote' is set to '(Default or unquote source)'. The 'Reading Long Text Fields' is set to '(If possible)'. The 'Multi Index' is set to '(Automatic)'. The 'Nested Index' is set to '(Automatic)'. The 'File Column Headers Preview' section shows a list of columns: Date, Country, Name, Gender, Age, Height, Weight, BMI, Blood Pressure, Heart Rate, Cholesterol, Glucose, Hemoglobin, Hematocrit, Hemoglobin A1c, Fasting Insulin, Triglycerides, HDL Cholesterol, LDL Cholesterol, VLDL Cholesterol, Total Cholesterol, and Total Protein.

- **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. Because 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.

Load File Field Mappings options

Map fields on the Load File Fields Mappings dialog
Import/Export

Load File Sample	Load File Fields	Workspace Fields	Additional Field Settings
0100101	Control NR	Control Number [Identifier] Fixed-Lengt...	+ Choose
Here goes the extracted text	Ext Txt	Choose...	+ Choose
02/02/2022	Last_Print_Date	Last Printed Date/Time Date (Date Tim...	+ Choose
32323232323232323	MD5Hash	MD5 Hash Fixed-Length Text (400)	+ Choose
01/01/2011	Modified Date Last	Last Modified Date Long Text	+ Choose
1	PDF Start No	PDF Begin Number Fixed-Length Text (...	+ Choose

You can map fields on the Load File Fields Mappings dialog using:

- **Auto Map Fields** button to automatically map fields.
 - The fields from the load file are mapped to any existing fields of the exact same name in the workspace. Any fields without a match display "Choose..." in the Workspace Fields column. You 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 are displayed 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 are not 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.
- **Map with AI** button to map similarly named fields when field names in the load file do not match precisely field names in the workspace.
 - Consider the following when mapping fields with AI:
 - Your data is not used for training and is not sent outside the Relativity aiR infrastructure.
 - Fields are mapped based on the similarities in the meaning of fields' names.
 - Fields can be mapped automatically when the name meanings are strongly similar.
 - The *Review* label appears for the mappings that may require your attention.
 - Fields remain unmapped if the AI model cannot understand the meaning of the field name, or the name similarities are below the threshold. If you want to map these fields, select a corresponding field from the Workspace Fields list or create a new workspace field.
- **Workspace Fields** column to manually map the load file fields to the existing workspace fields. Use the Filter box to search for field names.

Depending on your workflow, complete the following additional options available on this dialog:

- **Export to CSV** button—click to save the field mapping configuration to a .csv file on your local drive. You can select this option only before you run the job.
- **Create Field** button—click if you want to create a new workspace field. Import/Export currently supports creating the following document object field types. If you need to define advanced field settings, create a field directly from the Fields tab. For more information, go to Fields in the Admin Guide.
 - Currency
 - Date
 - Decimal
 - Fixed-Length Text
 - Long Text
 - Multiple Choice
 - Single Choice
 - User
 - Whole Number
 - Yes/No
- **Sort by** button—click to select your preferred sorting option:
 - **Default (A-Z)**—sorts all rows in alphabetical order, based on the load file field names.
 - **Mapped on top**—brings the mapped fields to the top and sorts them in alphabetical order.
 - **Unmapped on top**—brings the unmapped fields to the top and sorts them in alphabetical order.
 - **Review on top**—brings the mapped fields which require review to the top and sorts them in alphabetical order.
- **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.
- **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. Then, select the File Encoding type for the file. If using absolute or UNC paths, you must activate Express Transfer before starting the import job. This field was renamed from Extracted Text because 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, you must activate Express Transfer before starting the import job.

Import Settings fields

Complete fields on the Import Settings dialog

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

- **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 you select this option, you must include an **Overlay Identifier** in an overlay load. This field acts as a link indicating Relativity aiR where to import the data. A field can be used as an Overlay Identifier only if it meets all of the following requirements:
 - It belongs to the same artifact type as the object being mapped.
 - It is not a base (system) field.
 - Its field type is Fixed-Length Text.
 - Its field category is Generic or Identifier.
 - **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 or .csv, the blank value overlays (removes) any existing value that may reside in the corresponding mapped field.

- **Multi-Select Field Overlay Behavior**—this field appears 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.

Pre-check Load File optional step

You can click **Precheck Load File** option on the Import Settings dialog to run a validation process on the load file to check for errors prior to importing it. For more details, refer to [Pre-check Load File](#).

Note: If the workflow is configured to use Staging, the Pre-check Load File step is unavailable. Ensure your load file is validated manually before proceeding.

All detected errors are displayed in the Pre-check window. Click the down arrow next to any error message to view its details. If you want to correct the errors in the source files and repeat the importing steps, click **Cancel**. Otherwise, go to the next step to import the load file with errors and correct them later. During precheck, Import/Export validates the following:

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

Note: The Pre-check 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 are displayed in the drop-down list.

[< Back](#)

Pre-check Load File

Errors Choices

❗ **4 errors** found in your Load File.

All 688 row(s) checked (for file paths 688 random rows are checked)
Only up to first 1000 errors are listed in each category.

❗ Invalid identifier (1)



Error on line: 2 Column: Control Number The value is empty.

❗ Wrong number of columns (1)



Error on line: 3 This line contains 27 columns. Expected number of columns in each row is 28.

❗ Invalid date (2)



Error on line: 4 Column: Date Sent Possible invalid date: 5/21/2001 77:38 PM
Error on line: 5 Column: Date Sent Possible invalid date: 5212001 8:25 PM

Import

Cancel

[< Back](#)

Pre-check Load File

❗ **5,000 errors** found in your Load File.

Choices: 150, Folders: 101

5,000 row(s) checked. Only up to first 1000 are listed in each category.

Errors Choices

MultipleChoice_4: 50
MultipleChoice_5: 50
MultipleChoice_6: 50

Errors tab on the Importing dialog

If the load file contains errors, click the **Errors** tab on the Importing dialog to view them. Next, do one of the following:

- To proceed without correcting the errors, click **Close**.
- To download the error report as a .csv file, select **Errors & Warnings Report (.csv)**. The report lists all errors and warnings for the import job. You can download in from any tab on the Importing dialog.
- To correct the errors manually:
 1. Select **Download Error Load File**.
 2. Review the errors and correct them as needed.
 3. When you have finished, upload the file with the corrected data by clicking **Select** on the Importing dialog next to New Load File.
 4. Navigate to the load file on your local drive to select it.
 5. Once selected, click **Import** to import the job with corrected data.

Notes:

- You can only correct documents included in the original load file. If you need to add missing documents, create a new import job.
- Only records that imported without errors will appear in the workspace.

Import/Export

Importing

Overview Job Settings **Errors** 

 - This document identifier does not exist in the workspace - no document to overwrite (50) 

Error on line: Row 2, Column 0, Object Identifier AZIPPER_0007291: - This document identifier does not exist in the workspace - no document to overwrite

Error on line: Row 3, Column 0, Object Identifier AZIPPER_0007293: - This document identifier does not exist in the workspace - no document to overwrite

Error on line: Row 4, Column 0, Object Identifier AZIPPER_0007299: - This document identifier does not exist in the workspace - no document to overwrite

Error on line: Row 5, Column 0, Object Identifier AZIPPER_0007300: - This document identifier does not exist in the workspace - no document to overwrite

New Load File

Download Error Load File

Errors & Warnings Report (.csv)

Download Error Load File 

4.14.5 Importing an image load file

You can use Import/Export to import image and PDF load files. The load files must be Opticon-formatted (.opt) page-level files. For more information on Opticon load file, see [Load file format](#).

4.14.5.1 Considerations

Before you begin, consider the following:

- Import/Export adds imported images to the workspace as documents.
- Relativity aiR only accepts the following types of image files:
 - Single page TIFF (Group IV)
 - Single page JPG
 - Single page and multi page PDF. The files must have a .pdf extension. See the 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.
- 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, you must convert them to an image file type, .tiff or .jpg, before you run the import job.
- Import/Export expects all the files in the .opt load files to be of the same type. This means each load file can contain only one file type, either images or PDFs.

4.14.5.2 References

We recommend referring to the following information when importing image load files:

- [Image and extracted text files](#) for more details on importing image files using Import/Export.
- [Express Transfer overview on page 50](#), if you want to use Import/Export with Express Transfer active, which is the recommended workflow for data transfer.
- [Import/Export load file specifications](#) and [Data upload size limitation on page 30](#) for more information regarding import of load files. Also see [Load file import recommendations on page 48](#).

4.14.5.3 Before you begin

Before you begin importing image load files in Import/Export:

- Learn about Opticon load file structure in [Load file format](#).
- Review information in [Image and extracted text files](#).
- Read [Considerations above](#).
- Read [References above](#).

4.14.5.4 Importing image load file workflow

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 **New Import/Export Job** 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.

[< Back](#)

Choose Workflow

Import

Export



Raw (Unprocessed) and Transcript MDB data

I have a ZIP file that contains native files or a PST file for processing.



Structured (Processed) Data

I have a load file for direct import to the workspace.

 **Express Transfer**

✓ Import single data sets **greater than 20 GB** without requiring a ZIP file

✓ Export **unlimited data set sizes** to local disk without staying in the browser

1 Download for

Windows

MacOS

2 Install App

3 Click

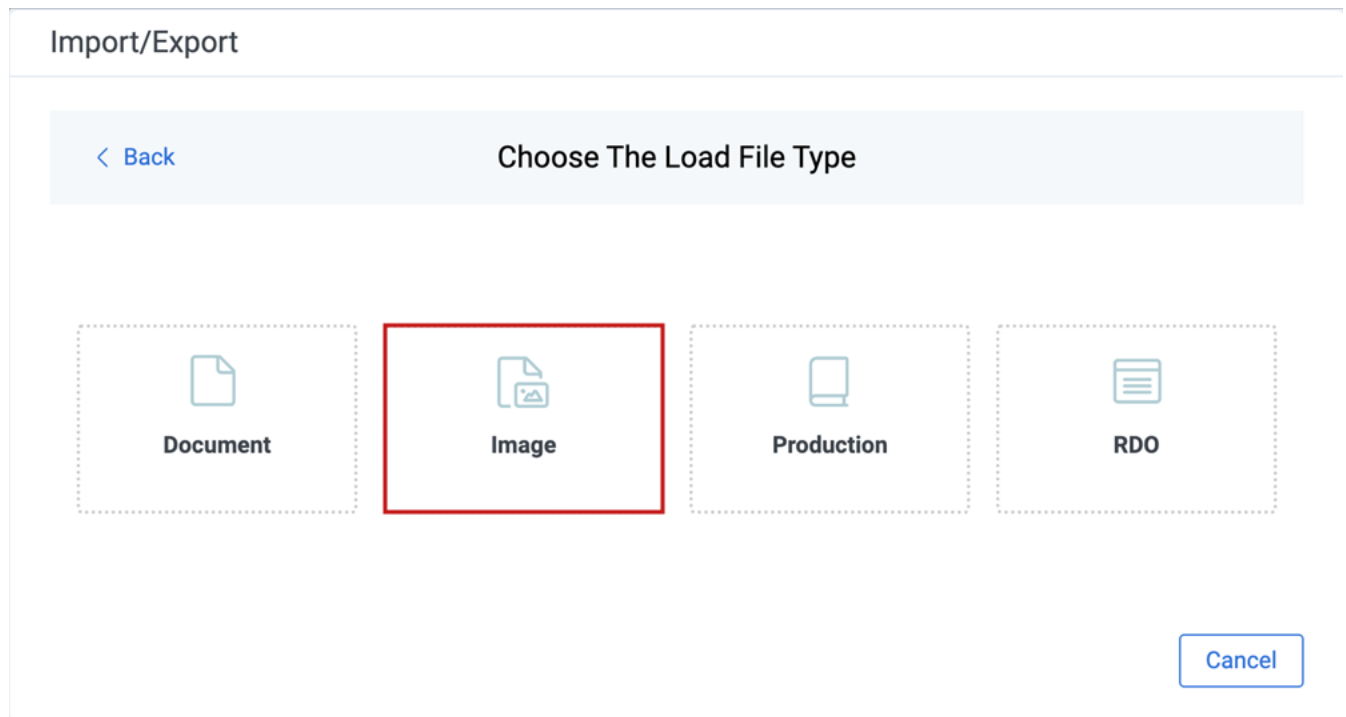
Activate

 to run Express Transfer

Close

Note: If you activated Express Transfer, the Express Transfer section displays a status of **Active**. See [Activating and deactivating Express Transfer on page 65](#) for more information.

4. On the Choose the Load File Type dialog, click the **Image** box.



5. If Express Transfer is not Active, skip this step. If it is Active, go to [Select data to Import fields on page 131](#).
6. Complete fields on the Choose Load File and Location dialog, then click **Continue**. For more information, go to [Choose Load File and Location fields on page 132](#).
7. On the Import Settings dialog, configure your import job by selecting the numbering and choosing the import mode. For more information, go to [Import Settings fields on page 134](#).
8. (Optional) Click **Download Profile (.ie)** on the Import Settings dialog to download the entered job configuration settings to an .ie file on your computer. This way they can be reused for other jobs.
9. (Optional) Click **Precheck Load File** on the Import Settings dialog to check for errors before importing the load file. For details, see [Pre-check Load File optional step on page 135](#).
10. Click **Import** 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 are displayed 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 before the Uploading step completes terminates the data transfer (upload) process.

Importing

Overview
Job Settings

Uploading
Completed

✓

Extracting
Completed

✓

Importing
Completed

✓

Data import

100%

Processed records: 29 of 29

✓ **Records imported successfully:** 29

Download Profile (.ie)
^

Close

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

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

13. If the load file contains no errors, go to the next step. If errors were found, click the **Errors** tab and follow the instructions in the [Errors tab on the Importing dialog on page 136](#).

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: When a job is running using Express Transfer, you can close the Import/Export application. The transfer job continues without interruption. You can monitor the progress and history of jobs within Express Transfer. For more information, see Express Transfer Job tracking and history. You do not have to be logged in to Relativity aiR to view information within the Express Transfer application.

Select data to Import fields

Complete fields on the Select data to Import dialog

Before importing images with Express Transfer activated, consider the following:

- When Express Transfer is active:
 - You should not zip data for importing.
 - It uploads only files linked in the selected load file, regardless of their location.
 - It ignores mismatches in upper and lower case between file paths in the load file and the actual file names.
 - It supports load files with relative paths, absolute paths, and UNC paths. You can mix path types in a single load file.
- You can choose only one folder with a load file to transfer.
- File names must be 200 characters or fewer, 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 68](#).

If you are importing images with Express Transfer active, you can do the following in the Select data to Import dialog:

- Click **Local Folder** to browse to your local drive and select the folder with the files that you want to upload. For universal naming convention (UNC) paths, you can copy and paste the path into the Select Folder address bar in the dialog box to access the desired folder. For example, `\\ServerName\SharedResourceName\FilePath`.
- Click **Staging Load File** to select a load file from the StructuredData folder in Staging.

Notes:

- Accessing Staging Load File requires Allow Staging Import permissions. See [Permissions](#) for more information.
 - If you choose to import load file data from Staging, the load file and all linked files are copied to the destination located outside your Staging Area. After the import is completed, you can clean up the source data in Staging.
-

[< Back](#)

Select data to Import

Data Location

Select*



Local Folder

or



Staging Load File

Continue

Cancel

Choose Load File and Location fields

Complete fields on the Load File and Location dialog

[< Back](#)

Choose Load File And Location

Job Name*

Destination Folder*

 Workspace[Change](#)

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

[Notify me](#)[Continue](#)[Cancel](#)

- **Job name**—provide a descriptive job name so that you can identify and track that job on the Import/Export Job page. The Job name field accepts up to 50 characters.
- **Destination Folder**—by default, Relativity aiR populates the destination with the root workspace folder which is intended to simplify job creation. You can do one of the following:
 - Keep the default destination folder.
 - Choose a different folder by clicking **Change**, followed by **Select**, and then selecting the desired folder from the list.
 - Create a new workspace folder by right-clicking on an existing folder, clicking **Create**, entering a new folder name, clicking out of the new folder to save it, then clicking **Select**.
- **Profile**—the job configuration settings that you saved to a profile file (.ie or .kw*). You can reuse a profile for future jobs that use the same or similar settings. Reusing a profile is intended to reduce time and data entry errors when mapping fields. You can use .ie profiles only in Import/Export.
 - **None**—select this option if you do not want 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 can save the profile settings later to an .ie file using 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 in 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 can 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.
- **Choose From Staging**—select a load file from the StructuredData folder in Staging. Your load file data must not be zipped. You can choose only unzipped load file data from Staging.
- **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 41](#).
- (Optional) **Notification Addresses**—enter the email addresses of the people you want to notify after the job completes, fails, or is canceled.

Import Settings fields

Complete fields on the Import Settings dialog

Import/Export

< Back
Import Settings

Numbering • ☒ Use Load File Page IDs
☐ Auto-Number Pages

Import Mode • ☒ Append Only
☐ Overlay Only
☐ Append/Overlay

Load Extracted Text ☐

- **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 01, 02, and so on to the page-level identifier, creating a unique number per page.
- **Import Mode**—choose how to import the records:
 - **Append Only**—loads only new records.
 - **Overlay Only**—updates existing records only. If you select this option, 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 Relativity aiR 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 appears after you select this toggle. The text files must:
 - have .txt extensions
 - reside in the same directory as image files

- be named in the same way as 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**—uses more than 107,000 characters across 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 ensure that the high bit will always be zero.
 - **Unicode (UTF-8)**—represents all characters in the Unicode character set using 8-bit bytes.

Pre-check Load File optional step

You can click **Precheck Load File** option on the Import Settings dialog to run a validation process on the load file to check for errors before importing it. For more details, refer to [Pre-check Load File](#).

Note: If the workflow is configured to use Staging, the Pre-check Load File step is unavailable. Ensure your load file is validated manually before proceeding.

During precheck, Import/Export validates Image file paths. It checks 1,000 random lines across the whole load file. All detected errors are displayed in the Pre-check window. Click the down arrow next to any error message to view its details. If you want to correct the errors in the source files and repeat the importing steps, click **Cancel**. Otherwise, go to the next step to import the load file with errors and correct them later.

Note: The Pre-check 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 are displayed in the drop-down list.

[< Back](#)

Pre-check Load File

Errors

❗ **14 errors** found in your Load File.

All 34 row(s) checked (for file paths 34 random rows are checked)
Only up to first 1000 errors are listed in each category.

❗ **File not found in zip (14)**

Error on line: 1 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0002058.tif not found in zip.
 Error on line: 13 Column: Column (3) File VOL00001\IMAGES\IMG00001\LKITCHEN_0005740_004.tif not found in zip.
 Error on line: 14 Column: Column (3) File VOL00001\IMAGES\IMG00001\LKITCHEN_0005740_005.tif not found in zip.
 Error on line: 15 Column: Column (3) File VOL00001\IMAGES\IMG00001\LKITCHEN_0005740_006.tif not found in zip.
 Error on line: 25 Column: Column (3) File VOL00001\IMAGES\IMG00001\LKITCHEN_0005837.tif not found in zip.
 Error on line: 26 Column: Column (3) File VOL00001\IMAGES\IMG00001\LKITCHEN_0005837_01.tif not found in zip.
 Error on line: 27 Column: Column (3) File VOL00001\IMAGES\IMG00001\LKITCHEN_0005837_02.tif not found in zip.
 Error on line: 28 Column: Column (3) File VOL00001\IMAGES\IMG00001\LKITCHEN_0005837_03.tif not found in zip.

Import

Cancel

Errors tab on the Importing dialog

If the load file contains errors, click the **Errors** tab on the Importing dialog to view them. Next, do one of the following:

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

Notes:

- You can only correct documents included in the original load file. If you need to add missing documents, create a new import job.
- Only records that imported without errors will appear in the workspace.

Import/Export

Importing

Overview Job Settings Errors ①

① One of the files specified for this document does not exist: {filePath} (1)

Error on line: Row 2, Column 0, Object Identifier AZIPPER_0007291: One of the files specified for this document does not exist: \\files.t015.ctus010192.relativity.one\T015\Files\EDDS5474110\WebImportExport\ImportSource\d6ba9412-24cb-4343-93a4-0901a5a6157e\VOL00001\NATIVES\NATIVE00001\AZIPPER_0007291.htm

New Load File Select
Download Error Load File Close

4.14.6 Importing a production load file

You can use Import/Export to import external productions, including single and multiple PDF files, into Relativity aiR with Import/Export. Import an external production when a case team needs the documents as they appeared in the production, and needs them available for searching.

4.14.6.1 References

We recommend referring to the following information when importing production load files:

- [Express Transfer overview on page 50](#), if you want to use Import/Export with Express Transfer active, which is the recommended workflow for data transfer.
- [Import/Export load file specifications](#) and [Data upload size limitation on page 30](#) for more information regarding import of load files. Also see [General recommendations for structured data import and export jobs on page 48](#). Also see [Load file import recommendations on page 48](#).

4.14.6.2 Importing production load file workflow

Note: You can import data from a production load file only into an existing production set that is in New status and contains no data sets. If no such production set exists in the workspace, you must create one before starting the import job. For more details, refer to the Production documentation. If you want to import a production consisting of produced images, natives, and extracted text, see the Community article [Import Export | Importing a Production with Natives and Extracted Text](#).

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 **New Import/Export Job** 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.

[< Back](#)

Choose Workflow

Import

Export



Raw (Unprocessed) and Transcript MDB data

I have a ZIP file that contains native files or a PST file for processing.



Structured (Processed) Data

I have a load file for direct import to the workspace.

 **Express Transfer**

✓ Import single data sets **greater than 20 GB** without requiring a ZIP file

✓ Export **unlimited data set sizes** to local disk without staying in the browser

1 Download for

Windows

MacOS

2 Install App

3 Click

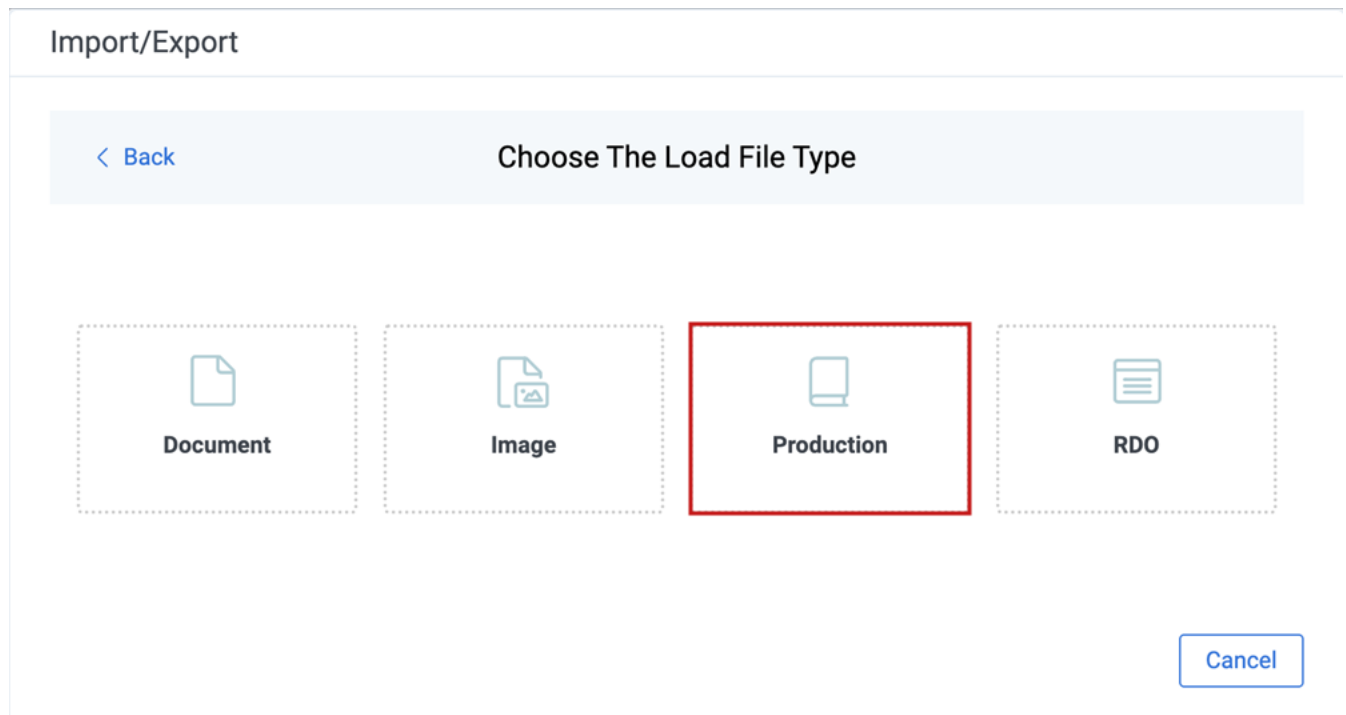
Activate

 to run Express Transfer

Close

Note: If you activated Express Transfer, the Express Transfer section displays a status of **Active**. See [Activating and deactivating Express Transfer on page 65](#) for more information.

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



- If Express Transfer is not Active, skip this step. If it is Active, go to [Select data to Import fields on page 141](#).
- Complete fields on the Choose Load File and Location dialog, then click **Continue**. For more information, go to [Choose Load File and Location fields on page 142](#). Also, refer to [Import/Export load file specifications](#) for details on load files.
- On the Import Settings dialog, select the production to import and choose the numbering and import mode settings. For more information, go to [Import Settings fields on page 144](#).
- (Optional) Click **Download Profile (.ie)** on the Import Settings dialog to download the job configuration settings entered to an .ie file on your computer. This way they can be reused for other jobs.
- (Optional) Click **Precheck Load File** on the Import Settings dialog to check for errors before importing the load file. For details, see [Pre-check Load File optional step on page 145](#).
- Click the **Import** button to start the importing process.
- 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 are displayed 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 before the Uploading step completes terminates the data transfer (upload) process.

Importing

Overview
Job Settings

Uploading
Completed

✓

Extracting
Completed

✓

Importing
Completed

✓

Data import

100%

Processed records: 29 of 29

✓ **Records imported successfully:** 29

Download Profile (.ie)
^

Close

12. 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 to an .ie file on your computer. This way they can be reused for other jobs.

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

13. If the load file contains no errors, go to the next step. If errors were found, click the **Errors** tab and follow the instructions in the [Errors tab on the Importing dialog on page 146](#).

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: When a job is running using Express Transfer, you can close the Import/Export application. The transfer job continues without interruption. You can monitor the progress and history of jobs within Express Transfer. For more information, see Express Transfer Job tracking and history. You do not have to be logged in to Relativity aiR to view information within the Express Transfer application.

Select data to Import fields

Complete fields on the Select data to Import dialog

Before importing production load files with Express Transfer activated, consider the following:

- When Express Transfer is active:
 - You should not zip data for importing.
 - It uploads only files linked in the selected load file, regardless of their location.
 - It ignores mismatches in upper and lower case between file paths in the load file and the actual file names.
 - It supports load files with relative paths, absolute paths, and UNC paths. You can mix path types in a single load file.
- You can choose only one folder with a load file to transfer.
- File names must be 200 characters or fewer, 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 68](#).

If you are importing production load files with Express Transfer active, you can do the following in the Select data to Import dialog:

- Click **Local Folder** to browse to your local drive and select the folder with the files that you want to upload. For universal naming convention (UNC) paths, you can copy and paste the path into the Select Folder address bar in the dialog box to access the desired folder. For example, `\\ServerName\SharedResourceName\FilePath`.
- Click **Staging Load File** to select a load file from the StructuredData folder in Staging.

Notes:

- Accessing Staging Load File requires Allow Staging Import permissions. See [Permissions](#) for more information.
 - If you choose to import load file data from Staging, the load file and all linked files are copied to the destination located outside your Staging Area. After the import is completed, you can clean up the source data in Staging.
-

[< Back](#)

Select data to Import

Data Location

Select*



Local Folder

or



Staging Load File

Continue

Cancel

Choose Load File and Location fields

Complete fields on the Load File and Location dialog

[< Back](#)

Choose Load File And Location

Job Name*

Destination Folder*

 Workspace[Change](#)

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

[Notify me](#)[Continue](#)[Cancel](#)

- **Job name**—provide a descriptive job name so that you can identify and track that job on the Import/Export Job page. The Job name field accepts up to 50 characters.
- **Destination folder**—by default, Relativity aiR populates the destination with the root workspace folder which is intended to simplify job creation. You can do one of the following:
 - Keep the default destination folder.
 - Choose a different folder by clicking **Change**, followed by **Select**, and then selecting the desired folder from the list.
 - Create a new workspace folder by right-clicking on an existing folder, clicking **Create**, entering a new folder name, clicking out of the new folder to save it, then clicking **Select**.
- **Profile**—the job configuration settings that you saved to a profile file (.ie or .kw*). You can reuse a profile for future jobs that use the same or similar settings. Reusing a profile is intended to reduce time and data entry errors when mapping fields. You can use .ie profiles only in Import/Export.
 - **None**—select this option if you do not want 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 can save the profile settings later to an

.ie file using 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 in 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 can 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.
- **Choose From Staging**—select a load file from the StructuredData folder in Staging. Your load file data must not be zipped. You can choose only unzipped load file data from Staging.
- **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 41](#).
- (Optional) **Notification Addresses**—enter the email addresses of the people you want to notify after the job completes, fails, or is canceled.

Import Settings fields

Complete fields on the Import Settings dialog

Import/Export

[< Back](#)

Import Settings

Production *

Select

Create Production Set

Start Line *

0

Numbering *

☒ Use Load File Page IDs

☐ Auto-Number Pages

Import Mode *

☒ Append Only

☐ Overlay Only

☐ Append/Overlay

Download Profile (.ie)

^

Import

Precheck Load File

Cancel

- **Production**—select the Production set to import or click **Create Production Set** to create a new, empty production set. The **Create Production Set** option supports limited configuration. To access advanced Production set settings, use the Production Sets tab described in the Admin Guide.

Note: You can import data from a production load file only into an existing production set that is in New status and contains no data sets. If no such production set exists in the workspace, you must create one before starting the import job. For more details, refer to the Production documentation. If you want to import a production consisting of produced images, natives, and extracted text, see the Community article [Import Export | Importing a Production with Natives and Extracted Text](#).

- **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 to import the records:
 - **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 Relativity aiR 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** field that will be used to overlay data in the workspace. This field acts as a link indicating to Relativity aiR where to import the data.

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.
- **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.

Pre-check Load File optional step

You can click **Precheck Load File** option on the Import Settings dialog to run a validation process on the load file to check for errors before importing it. For more details, refer to [Pre-check Load File](#).

Note: If the workflow is configured to use Staging, the Pre-check Load File step is unavailable. Ensure your load file is validated manually before proceeding.

During precheck, Import/Export validates Image file paths. It checks 1,000 random lines across the whole load file. All detected errors are displayed in the Pre-check window. Click the down arrow next to any error message to view its details. If you want to correct the errors in the source files and repeat the importing steps, click **Cancel**. Otherwise, go to the next step to import the load file with errors and correct them later.

Note: The Pre-check 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 are displayed in the drop-down list.

[< Back](#)

Pre-check Load File

Errors

❗ **14 errors** found in your Load File.

All 34 row(s) checked (for file paths 34 random rows are checked)
Only up to first 1000 errors are listed in each category.

❗ File not found in zip (14)

Error on line: 1 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0002058.tif not found in zip.
 Error on line: 13 Column: Column (3) File VOL00001\IMAGES\IMG00001\LKITCHEN_0005740_004.tif not found in zip.
 Error on line: 14 Column: Column (3) File VOL00001\IMAGES\IMG00001\LKITCHEN_0005740_005.tif not found in zip.
 Error on line: 15 Column: Column (3) File VOL00001\IMAGES\IMG00001\LKITCHEN_0005740_006.tif not found in zip.
 Error on line: 25 Column: Column (3) File VOL00001\IMAGES\IMG00001\LKITCHEN_0005837.tif not found in zip.
 Error on line: 26 Column: Column (3) File VOL00001\IMAGES\IMG00001\LKITCHEN_0005837_01.tif not found in zip.
 Error on line: 27 Column: Column (3) File VOL00001\IMAGES\IMG00001\LKITCHEN_0005837_02.tif not found in zip.
 Error on line: 28 Column: Column (3) File VOL00001\IMAGES\IMG00001\LKITCHEN_0005837_03.tif not found in zip.
 Error on line: 29 Column: Column (3) File VOL00001\IMAGES\IMG00001\LKITCHEN_0005837_04.tif not found in zip.

Import

Cancel

Errors tab on the Importing dialog

If the load file contains errors, click the **Errors** tab on the Importing dialog to view them. Next, do one of the following:

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

Notes:

- You can only correct documents included in the original load file. If you need to add missing documents, create a new import job.
- Only records that imported without errors will appear in the workspace.

Import/Export

Importing

OverviewJob SettingsErrors ⓘ

ⓘ One of the files specified for this document does not exist: {filePath} (1) ^

Error on line: Row 2, Column 0, Object Identifier AZIPPER_0007291: One of the files specified for this document does not exist: \\files.t015.ctus010192.relativity.one\T015\Files\EDDS5474110\WebImportExport\ImportSource\d6ba9412-24cb-4343-93a4-0901a5a6157e\VOL00001\NATIVES\NATIVE00001\AZIPPER_0007291.htm

New Load FileSelectDownload Error Load FileClose

4.14.7 Importing an RDO load file

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.

4.14.7.1 References

We recommend referring to the following information when importing RDO load files:

- [Express Transfer overview on page 50](#), if you want to use Import/Export with Express Transfer active, which is the recommended workflow for data transfer.
- [Import/Export load file specifications](#) and [Data upload size limitation on page 30](#) for more information regarding import of load files. Also see [General recommendations for structured data import and export jobs on page 48](#). Also see [Load file import recommendations on page 48](#).

4.14.7.2 Importing RDO load file workflow

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 **New Import/Export Job** 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.

[< Back](#)

Choose Workflow

Import

Export



Raw (Unprocessed) and Transcript MDB data

I have a ZIP file that contains native files or a PST file for processing.



Structured (Processed) Data

I have a load file for direct import to the workspace.

 **Express Transfer**

- ✓ Import single data sets **greater than 20 GB** without requiring a ZIP file
- ✓ Export **unlimited data set sizes** to local disk without staying in the browser

1 Download for

Windows

MacOS

2 Install App

3 Click

Activate

 to run Express Transfer

Close

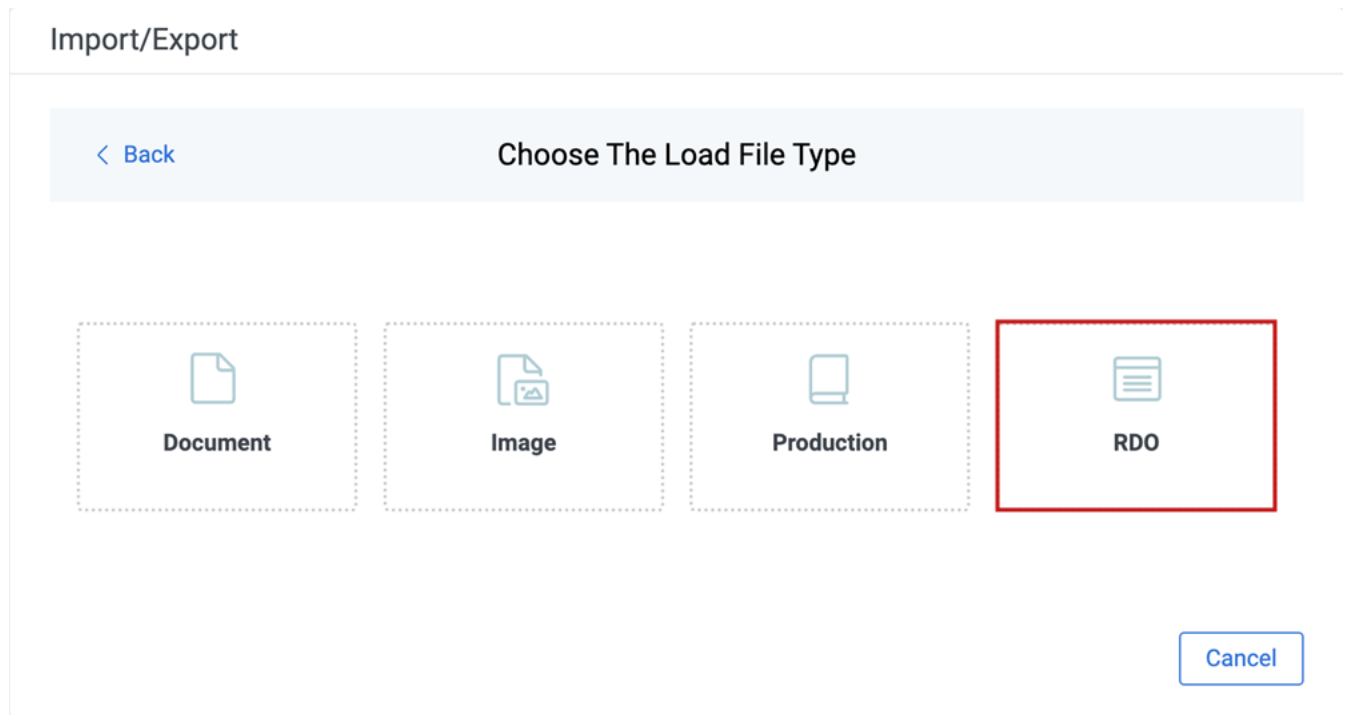
Note: If you activated Express Transfer, the Express Transfer section displays a status of **Active**. See [Activating and deactivating Express Transfer on page 65](#) for more information.

Relativity aiR

Data Transfer Guide

148

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



- If Express Transfer is not Active, skip this step. If it is Active, go to [Select data to Import fields on page 151](#).
- Complete fields on the Choose Load File and Location dialog, then click **Continue**. For more information, go to [Choose Load File and Location fields on page 152](#). Also, see [Import/Export load file specifications](#) for details on load files.
- Select delimiters and encoding values of the load file for the import on the Load File Settings dialog, then click **Continue**. For more information, go to [Load File Settings fields on page 154](#).
- On the Load File Field Mappings dialog, select the load file fields to import and map them to the workspace fields, then click **Continue**. For more information, go to [Load File Field Mappings options on page 155](#).
- Configure your import on the Import Settings dialog. For more information, go to [Import Settings fields on page 157](#).
- (Optional) Click **Download Profile (.ie)** on the Import Settings dialog to download the job configuration settings entered to an .ie file on your computer. This way they can be reused for other jobs.
- (Optional) Click **Precheck Load File** on the Import Settings dialog to check for errors before importing the load file. For details, see [Pre-check Load File optional step on page 157](#).
- Click the **Import** button to start the importing process.
- 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 are displayed 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 before the Uploading step completes terminates the data transfer (upload) process.

Importing

Overview

Job Settings

Uploading
Completed

Extracting
Completed

Importing
Completed

✓

✓

✓

Data import

100%

Processed records: 29 of 29

✓ Records imported successfully: 29

Download Profile (.ie)

Close

14. Go to the **Job Settings** tab on the Importing dialog to review the job configuration settings. If desired, select **Download Profile (.ie)** to download the job configuration settings entered to an .ie file on your computer. This way they can be reused for other jobs. You can also select **Download Field Mapping (.csv)** to download the file with field mapping.

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, go to [Errors tab on the Importing dialog on page 159](#).

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: When a job is running using Express Transfer, you can close the Import/Export application. The transfer job continues without interruption. You can monitor the progress and history of jobs within Express Transfer. For more information, see Express Transfer Job tracking and history. You do not have to be logged in to Relativity aiR to view information within the Express Transfer application.

Select data to Import fields

Complete fields on the Select data to Import dialog

Before importing RDO load files with Express Transfer activated, consider the following:

- When Express Transfer is active:
 - You should not zip data for importing.
 - It uploads only files linked in the selected load file, regardless of their location.
 - It ignores mismatches in upper and lower case between file paths in the load file and the actual file names.
 - It supports load files with relative paths, absolute paths, and UNC paths. You can mix path types in a single load file.
- You can choose only one folder with a load file to transfer.
- File names must be 200 characters or fewer, 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 68](#).

If you are importing RDO load files with Express Transfer active, you can do the following in the Select data to Import dialog:

- Click **Local Folder** to browse to your local drive and select the folder with the files that you want to upload. For universal naming convention (UNC) paths, you can copy and paste the path into the Select Folder address bar in the dialog box to access the desired folder. For example, `\\ServerName\SharedResourceName\FilePath`.
- Click **Staging Load File** to select a load file from the StructuredData folder in Staging.

Notes:

- Accessing Staging Load File requires Allow Staging Import permissions. See [Permissions](#) for more information.
 - If you choose to import load file data from Staging, the load file and all linked files are copied to the destination located outside your Staging Area. After the import is completed, you can clean up the source data in Staging.
-

[< Back](#)

Select data to Import

Data Location

Select*

 Local Folder

or

 Staging Load File

Continue

Cancel

Choose Load File and Location fields

Complete fields on the Load File and Location dialog

[< Back](#)

Choose Load File And Location

Job Name*

Relativity Object Type ?*

Profile*



None



From Local Disk

Regional Settings (Date And Time)*

12/25/2000 12:00:00 AM

Load File*

Drop your .dat, .csv or .txt file here or [browse for a file](#).or [Choose From Staging](#)

Include Native & Text



How to prepare Native and Text files?

Compress folders with Native and Text files into one .zip file

Notification Addresses

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

- **Job Name**—provide a descriptive job name so that you can 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 into.
- **Profile**—the job configuration settings that you saved to a profile file (.ie or .kw*). You can reuse a profile for future jobs that use the same or similar settings. Reusing a profile is intended to reduce time and data entry errors when mapping fields. You can use .ie profiles only in Import/Export.
 - **None**—select this option if you do not want 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 can save the profile settings later to an .ie file using the **Download Profile (.ie)** button.

- **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.

Load File Field Mappings options

Map fields on the Load File Fields Mappings dialog

Import/Export

< Back
Load File Field Mappings

Auto Map Fields
Map with AI
Export to CSV
Create Field

Mapped Fields: 6/7
Sort By: Default (A-Z) ▼

Load File Sample	Load File Fields	>>	Workspace Fields	+	Additional Field Settings
0100101	Control NR	>>	Control Number [Identifier] Fixed-Lengt...	+	Choose ▼
Here goes the extracted text	Ext Txt	>>	Choose...	+	Choose ▼
02/02/2022	Last_Print_Date	>>	Last Printed Date/Time Date (Date Tim...	+	Choose ▼
32323232323232323	MD5Hash	>>	MD5 Hash Fixed-Length Text (400)	+	Choose ▼
01/01/2011	Modified Date Last	>>	Last Modified Date Long Text	+	Choose ▼
1	PDF Start No	>>	PDF Begin Number Fixed-Length Text (...)	+	Choose ▼

Continue
Cancel

You can map fields on the Load File Fields Mappings dialog using:

- **Auto Map Fields** button to automatically map fields.
 - The fields from the load file are mapped to any existing fields of the exact same name in the workspace. Any fields without a match display "Choose..." in the Workspace Fields column. You 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 are displayed 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 are not 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.

- **Map with AI** button to map similarly named fields when field names in the load file do not match precisely field names in the workspace.
 - Consider the following when mapping fields with AI:
 - Your data is not used for training and is not sent outside the Relativity aiR infrastructure.
 - Fields are mapped based on the similarities in the meaning of fields' names.
 - Fields can be mapped automatically when the name meanings are strongly similar.
 - The *Review* label appears for the mappings that may require your attention.
 - Fields remain unmapped if the AI model cannot understand the meaning of the field name, or the name similarities are below the threshold. If you want to map these fields, select a corresponding field from the Workspace Fields list or create a new workspace field.
- **Workspace Fields** column to manually map the load file fields to the existing workspace fields. Use the Filter box to search for field names.

Depending on your workflow, complete the following additional options available on this dialog:

- **Export to CSV** button—click to save the field mapping configuration to a .csv file on your local drive. You can select this option only before you run the job.
- **Create Field** button—click if you want to create a new workspace field. Import/Export currently supports creating the following document object field types. If you need to define advanced field settings, create a field directly from the Fields tab. For more information, go to Fields in the Admin Guide.
 - Currency
 - Date
 - Decimal
 - Fixed-Length Text
 - Long Text
 - Multiple Choice
 - Single Choice
 - User
 - Whole Number
 - Yes/No
- **Sort by** button—click to select your preferred sorting option:
 - **Default (A-Z)**—sorts all rows in alphabetical order, based on the load file field names.
 - **Mapped on top**—brings the mapped fields to the top and sorts them in alphabetical order.
 - **Unmapped on top**—brings the unmapped fields to the top and sorts them in alphabetical order.
 - **Review on top**—brings the mapped fields which require review to the top and sorts them in alphabetical order.
- **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.

- **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. Then, select the File Encoding type for the file. If using absolute or UNC paths, you must activate Express Transfer before starting the import job. This field was renamed from Extracted Text because 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, you must activate Express Transfer before starting the import job.

Import Settings fields

Complete fields on the Import Settings dialog

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

- **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 Relativity aiR where to import the data. For Append/Overlay and Overlay Only, if a blank metadata field exists in the load file, .dat or .csv, the blank value overlays (removes) 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, assign the unique identifier that is used to overlay data in the workspace. This field acts as a link indicating to Relativity aiR where to import the data.

Pre-check Load File optional step

You can click **Precheck Load File** option on the Import Settings dialog to run a validation process on the load file to check for errors before importing it. For more details, refer to [Pre-check Load File](#).

Note: If the workflow is configured to use Staging, the Pre-check Load File step is unavailable. Ensure your load file is validated manually before proceeding.

All detected errors are displayed in the Pre-check window. Click the down arrow next to any error message to view its details. If you want to correct the errors in the source files and repeat the importing steps, click **Cancel** . Otherwise, go

to the next step to import the load file with errors and correct them later. During precheck, Import/Export validates the following:

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

Note: The Pre-check 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 are displayed in the drop-down list.

Import/Export

< Back

Pre-check Load File

Errors

Choices

1 errors found in your Load File.

All 22 row(s) checked (for file paths 22 random rows are checked)
Only up to first 1000 errors are listed in each category.

! Duplicate identifier (1)

▼

Import

Cancel

Import/Export

< Back

Pre-check Load File

Errors

Choices

2 choices and 0 folders will be created by importing records into the workspace (if they don't already exist).

All 22 row(s) checked.

Choice fields in the load file

Classification: 1

Type: 1

Import

Cancel

Errors tab on the Importing dialog

If the load file contains errors, click the **Errors** tab on the Importing dialog to view them. Next, do one of the following:

- To proceed without correcting the errors, click **Close**.
- To download the error report as a .csv file, select **Errors & Warnings Report (.csv)**. The report lists all errors and warnings for the import job. You can download in from any tab on the Importing dialog.
- To correct the errors manually:
 1. Select **Download Error Load File**.
 2. Review the errors and correct them as needed.
 3. When you have finished, upload the file with the corrected data by clicking **Select** on the Importing dialog next to New Load File.
 4. Navigate to the load file on your local drive to select it.
 5. Once selected, click **Import** to import the job with corrected data.

Notes:

- You can only correct documents included in the original load file. If you need to add missing documents, create a new import job.
- Only records that imported without errors will appear in the workspace.

Import/Export

Importing

Overview Job Settings **Errors** 

 - This document identifier does not exist in the workspace - no document to overwrite (50) 

Error on line: Row 2, Column 0, Object Identifier AZIPPER_0007291: - This document identifier does not exist in the workspace - no document to overwrite

Error on line: Row 3, Column 0, Object Identifier AZIPPER_0007293: - This document identifier does not exist in the workspace - no document to overwrite

Error on line: Row 4, Column 0, Object Identifier AZIPPER_0007299: - This document identifier does not exist in the workspace - no document to overwrite

Error on line: Row 5, Column 0, Object Identifier AZIPPER_0007300: - This document identifier does not exist in the workspace - no document to overwrite

New Load File Select

Download Error Load File

Errors & Warnings Report (.csv)

Download Error Load File 

Close

4.14.8 Importing an Access DB load file (MDB)

Note: The import and export workflows with Access DB (MDB) are designed for and are currently available for the Asia-Pacific region. For information on the possibility of enabling this flow in your instance, contact your Account Representative.

You can use Import/Export to import document load files, .mdb and .mdbacc, into Relativity aiR that contain document metadata, native files, or extracted text. You can also use saved job profiles, which are intended to reduce configuration time.

4.14.8.1 References

We recommend referring to the following information when importing Access DB load files:

- [Express Transfer overview on page 50](#), if you want to use Import/Export with Express Transfer active, which is the recommended workflow for data transfer.
- [Import/Export load file specifications](#) and [Data upload size limitation on page 30](#) for more information regarding import of load files. Also see [General recommendations for structured data import and export jobs on page 48](#). Also see [Load file import recommendations on page 48](#).

4.14.8.2 Importing Access DB load file workflow

To import an Access DB 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 **New Import/Export Job** 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.

[< Back](#)

Choose Workflow

Import

Export



Raw (Unprocessed) and Transcript MDB data

I have a ZIP file that contains native files or a PST file for processing.



Structured (Processed) Data

I have a load file for direct import to the workspace.

 **Express Transfer**

✓ Import single data sets **greater than 20 GB** without requiring a ZIP file

✓ Export **unlimited data set sizes** to local disk without staying in the browser

1 Download for

Windows

MacOS

2 Install App

3 Click

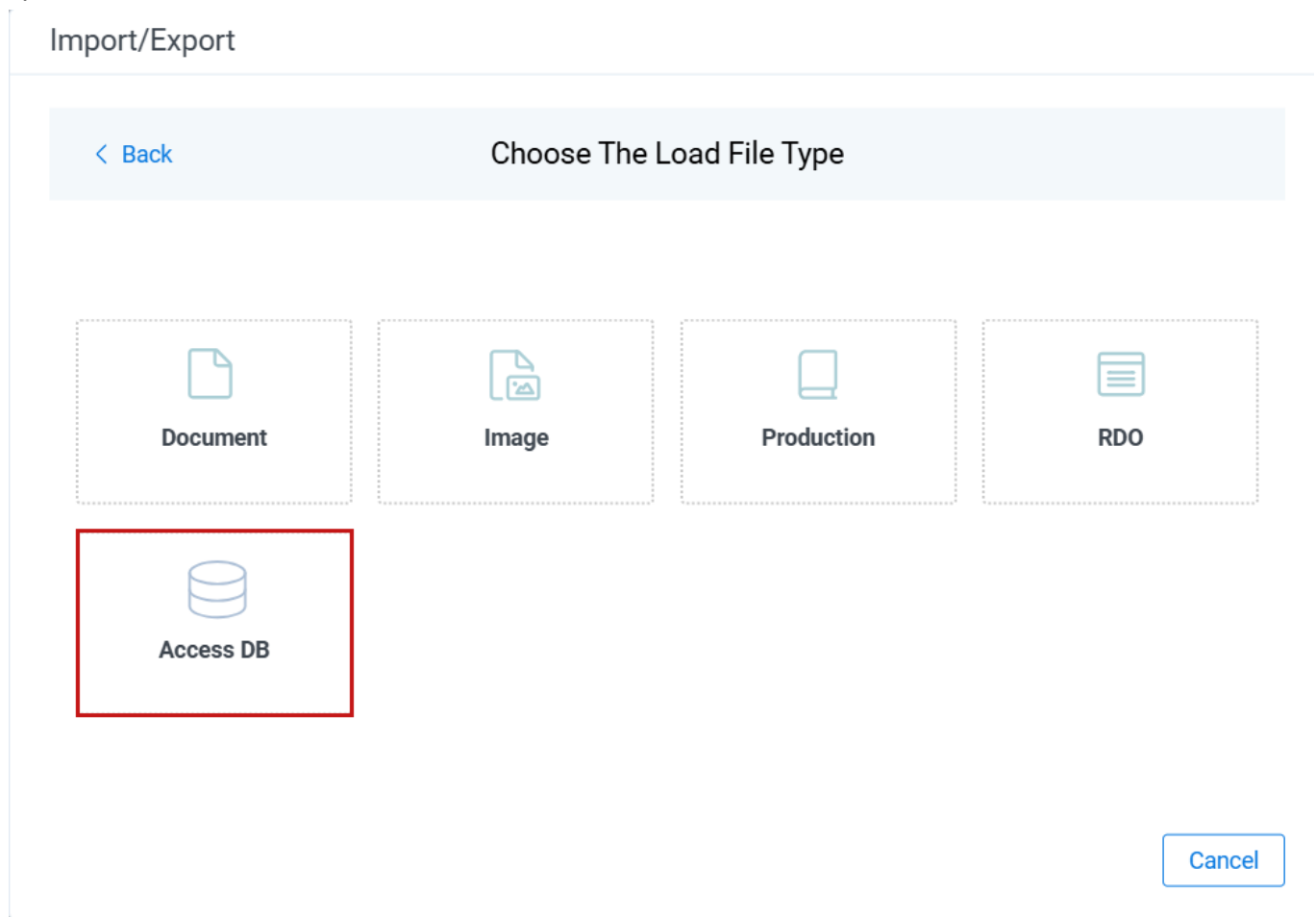
Activate

 to run Express Transfer

Close

Note: If you activated Express Transfer, the Express Transfer section displays a status of **Active**. See [Activating and deactivating Express Transfer on page 65](#) for more information.

- On the Choose the Load File Type dialog, click the **Access DB** box to import an MDB load file to your workspace.



- If Express Transfer is not Active, skip this step. If it is Active, go to [Select data to Import fields on page 164](#).
- Complete fields on the Choose Load File and Location dialog, then click **Continue**. For more information, go to [Choose Load File And Location fields on page 165](#). Also, see [Access DB \(MDB\) load file specifications](#) for details on load files.
- On the Import Data Settings dialog, select options referring to file types you want to import. For more information, go to [Import Data Settings fields on page 167](#).
- On the Load File Field Mappings dialog, select the load file fields to import and map them to the workspace fields, then click **Continue**. For more information, see [Load File Field Mappings options on page 168](#).
- Configure your import on the Import Settings dialog. For more information, go to [Import Settings fields on page 169](#).
- (Optional) Click **Download Profile (.ie)** on the Import Settings dialog to download the job configuration settings entered to an .ie file on your computer. That way they can be reused for other jobs.
- Click the **Import** button to start the importing process.
- 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 are displayed 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 before the Uploading step completes terminates the data transfer (upload) process.

Import/Export

Importing

Overview

Job Settings

Uploading
Completed

Extracting
Completed

Importing
Completed

✓

✓

✓

Data import

100%

Processed records: 29 of 29

✓ Records imported successfully: 29

Download Profile (.ie)

^

Close

- 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 to an .ie file on your computer. That

way they can be reused for other jobs.

Import/Export

The screenshot shows the 'Importing' dialog box with the 'Job Settings' tab selected. The dialog has two main sections: 'Load File and Location' and 'Delimiters and Encoding'. The 'Load File and Location' section contains a table with the following data:

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

The 'Delimiters and Encoding' section contains a table with the following data:

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)

At the bottom of the dialog, there are three buttons: 'Download Profile (.ie)' with a dropdown arrow, 'Cancel', and 'Close'.

14. If no errors were found in the .mdb file, click **Close**. If errors were found, go to [Errors tab on the Importing dialog on page 170](#).

15. Click **Close** 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: When a job is running using Express Transfer, you can close the Import/Export application. The transfer job continues without interruption. You can monitor the progress and history of jobs within Express Transfer. For more information, see Express Transfer Job tracking and history. You do not have to be logged in to Relativity aiR to view information within the Express Transfer application.

Select data to Import fields

Complete fields on the Select data to Import dialog

Before importing MDB load files with Express Transfer activated, consider the following:

- When Express Transfer is active:
 - You should not zip data for importing.
 - It uploads only files linked in the selected load file, regardless of their location.
 - It ignores mismatches in upper and lower case between file paths in the load file and the actual file names.
 - It supports load files with relative paths, absolute paths, and UNC paths. You can mix path types in a single load file.
- You can choose only one folder with a load file to transfer.
- File names must be 200 characters or fewer, 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 68](#).

If you are importing Access DB load files with Express Transfer active, click **Select folder** 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. For universal naming convention (UNC) paths, you can copy and paste the path into the Select Folder address bar in the dialog box to access the desired folder. For example, `\\ServerName\SharedResourceName\FilePath`.

Import/Export

[< Back](#) Select data to Import

Folder Location

Select folder* [Select](#)

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

Choose Load File And Location fields

Complete fields on the Load File and Location dialog

[< Back](#)

Choose Load File And Location

Job Name*

Destination Folder*

 Workspace[Change](#)

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

☐

How to prepare Native and Text files?

Compress folders with Native and Text files into one .zip file

Notification Addresses

[Notify me](#)[Continue](#)[Cancel](#)

- **Job Name**—provide a descriptive job name so that you can identify and track that job on the Import/Export Job page. The Job Name field accepts up to 50 characters.
- **Destination Folder**—by default, Relativity aiR populates the destination with the root workspace folder which is intended to simplify job creation. You can do one of the following:
 - Keep the default destination folder.
 - Choose a different folder by clicking **Change**, followed by **Select**, and then selecting the desired folder from the list.
 - Create a new workspace folder by right-clicking on an existing folder, clicking **Create**, entering a new folder name, clicking out of the new folder to save it, then clicking **Select**.
- **Profile**—the job configuration settings that you saved to a profile file (.ie or .kw*). You can reuse a profile for future jobs that use the same or similar settings. Reusing a profile is intended to reduce time and data entry

errors when mapping fields. You can use .ie profiles only in Import/Export.

- **None**—select this option if you do not want 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 can save the profile settings later to an .ie file using 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 in 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 can 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 appears below the selection. The setting selected remains 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 reverts 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 .mdb or .accdb 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 Opticon-formatted (.opt) files.

- (Optional) **Notification Addresses**—enter the email addresses of the people you want to notify after the job completes, fails, or is canceled.

Import Data Settings fields

Complete fields on the Import Data Settings dialog

Import/Export

[< Back](#)

Import Data Settings

Import PDF Files

☐

Import Native Files

☐

Import Text Files

☐

Continue

Cancel

- **Import PDF Files** toggle—select this option to import PDF files.
- **Import Native Files** toggle—select this option to import Native files.
- **Import Text Files** toggle—select this option to import Text files.
 - **Workspace Long Text Field**—select a field from your Relativity workspace that you want to import to.
 - **Text File Encoding**—select an encoding format for Text files.

Load File Field Mappings options

Map fields on the Load File Fields Mappings dialog

Import/Export

[< Back](#)

Load File Field Mappings

[Auto Map Fields](#) [Map with AI](#) [Export to CSV](#) [Create Field](#) Mapped Fields: 17/22 Sort By [Mapped on top](#)

Load File Sample	Load File Fields		Workspace Fields	
	Filter		Filter	
Sample\sample data\20220309 Email Samples2.pst\Inbox_Samples For Rel ...	All Paths/Locations	>>	All Paths/Locations Long Text	+
No	AO - Privileged	>>	Privilege Description Long Text	+
Relativity Fest London	Author_Persons_and_Organi	>>	Author Fixed-Length Text (255) (Overla...	+
'{F284291}.UK04@EUWCSE.aoglobal.com' [F284291].UK04@EUWCSE.aoglobal.com]	BCC_Persons_and_Organisa	>>	Entity BCC Multiple Object	+
Liu, Daniel:LT (SY) [Daniel.Liu@AllenOvery.com]	CC_Persons_and_Organisati	>>	Entity CC Multiple Object	+
7/03/2022 9:19 PM	Date Email Sent	>>	Email Sent Date Long Text	+
7/03/2022 9:19 PM	Date File Created	>>	Created Date/Time Date (Date Time)	+

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

You can map fields on the Load File Fields Mappings dialog using:

- **Auto Map Fields** button to automatically map fields.
 - The fields from the load file are mapped to any existing fields of the exact same name in the workspace. Any fields without a match display "Choose..." in the Workspace Fields column. You 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 are displayed 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 are not 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.
- **Map with AI** button to map similarly named fields when field names in the load file do not match precisely field names in the workspace.

- Consider the following when mapping fields with AI:
 - Your data is not used for training and is not sent outside the Relativity aiR infrastructure.
 - Fields are mapped based on the similarities in the meaning of fields' names.
 - Fields can be mapped automatically when the name meanings are strongly similar.
 - The *Review* label appears for the mappings that may require your attention.
 - Fields remain unmapped if the AI model cannot understand the meaning of the field name, or the name similarities are below the threshold. If you want to map these fields, select a corresponding field from the Workspace Fields list or create a new workspace field.
- **Workspace Fields** column to manually map the load file fields to the existing workspace fields. Use the Filter box to search for field names.

Depending on your workflow, complete the following additional options available on this dialog:

- **Export to CSV** button—click to save the field mapping configuration to a .csv file on your local drive. You can select this option only before you run the job.
- **Create Field** button—click if you want to create a new workspace field. Import/Export currently supports creating document object field types listed below. If you need to define advanced field settings, create a field directly from the Fields tab. For more information, go to Fields in the Admin Guide.
 - Currency
 - Date
 - Decimal
 - Fixed-Length Text
 - Long Text
 - Multiple Choice
 - Single Choice
 - User
 - Whole Number
 - Yes/No
- **Sort by** button—click to select your preferred sorting option:
 - **Default (A-Z)**—sorts all rows in alphabetical order, based on the load file field names.
 - **Mapped on top**—brings the mapped fields to the top and sorts them in alphabetical order.
 - **Unmapped on top**—brings the unmapped fields to the top and sorts them in alphabetical order.
 - **Review on top**—brings the mapped fields which require review to the top and sorts them in alphabetical order.
- **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.

Import Settings fields

Complete fields on the Import Settings dialog

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 to import the records.

Import/Export

[< Back](#)

Import Settings

Production

Select

Start Line*

0

Workspace Folder Structure*

☒ MDB Folder Structure (Levels Data)
☐ Flat Structure

Import Mode*

☒ Append Only
☐ Overlay Only
☐ Append/Overlay

Download Profile (.ie)

^

Import

Cancel

- **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.
- **Workspace Folder Structure**—choose the workspace structure:
 - **MDB Folder Structure**—uses the information from the levels data from the Export table.
 - **Flat Structure**—includes all documents in a single folder without the folder structure.
- **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 Relativity aiR 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, the blank value overlays (removes) any existing value that may reside in the corresponding mapped field.

Errors tab on the Importing dialog

If the .mdb file contains errors, click the **Errors** tab on the Importing dialog to view them. Next, do one of the following:

- To proceed without correcting the errors, click **Close**.
- To download the error report as a .csv file, select **Errors & Warnings Report (.csv)**. The report lists all errors and warnings for the import job. You can download in from any tab on the Importing dialog.

- To correct the errors manually, select:
 - **Download Document Error Load File (.dat)**—for errors related to documents and native files import.
 - **Download Image/PDF Error Load File (.opt)**—for errors related to images/PDFs import.

Note: If you want to correct the documents or add missing documents, create a new import job.

Import/Export

Importing

Overview
Job Settings
Errors

>
Duplicated record with a type PDF in pages table spotted for Document_ID VOL-0000048. File with Image_File_Name : VOL-0000048_2.tif was not imported, because this document already has PDF file. Please note that document can have only one PDF. (129)

>
An item with identifier {Identifier} already exists in the workspace (40)

>
Item error occurred. Image location cannot be empty (40)

Download Document Error Load File (.dat)
Download Image/PDF Error Load File (.opt)
Errors & Warnings Report (.csv)
Download Document Error Load File (.dat)

Close

4.14.9 Importing transcript MDB data for Processing via Import/Export

Note: 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 when it is no longer needed.

You can use Import/Export to import transcript MDB data with the linked audio/video files into Relativity aiR. This automatically triggers a Processing job to extract metadata from the selected transcript MDB file, create documents, and link them with audio/video content included in the dataset, in one operation. Once the transcript data is successfully imported into your workspace, you can use the Relativity Transcript application to review the content.

4.14.9.1 Considerations

Consider the following before importing the transcript MDB data for Processing:

- Import/Export uses the Processing application to capture transcript metadata from the MDB file, create a transcript document, link the attached audio/video files, and publish this transcript family to the workspace.
- 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 Relativity aiR, and then run Processing directly.
- The Relativity Native Viewer uses the processing Family Group field, formerly known as "Group Identifier", to properly display the transcript along with synced audio/video content. Ensure the Family Group field is mapped to your workspace before Publish commences. See Mapping Processing Fields in the Processing Guide for more information.
- See Processing in Relativity documentation for more information about using the Processing application to ingest raw data directly into your workspace.

4.14.9.2 Before you begin

Before you import the transcript MDB data, complete the following:

- Install the following applications in your workspace before using Relativity Transcripts:
 - Import/Export
 - Processing
 - Transcripts
- To import transcript MDB data with linked audio/video files for Processing:
 - Prepare the transcript dataset for import with Import/Export by creating a single ZIP file that contains the transcript MDB file and all linked audio and video files. No ZIP size limits apply.
 - Locate all files, including the MDB file, on the top level of the ZIP file structure. The audio and video files cannot be included in a nested container.

Name	Date	Type	Size	Length
145603_ts.mdb	30.08.2024 06:27	Microsoft Access ...	194 KB	
20231115_Chairman Lucas Delivers his Remarks for the Markup of H.R. 6213 and H.R. 6131.mp4	30.08.2024 06:27	MP4 File	15 502 KB	00:06:00
20231130_Rep. Obernolte Delivers Remarks at Missing the Target-- CEQs Meritless Selection of SBTI.mp4	30.08.2024 06:27	MP4 File	13 134 KB	00:05:31
20240312_Subcommittee Chair Brandon Williams Delivers his Remarks on ARPA-E.mp4	30.08.2024 06:27	MP4 File	15 689 KB	00:06:11
20240613_Chairman Lucas Delivers his Opening Statement at the June Markup.mp4	30.08.2024 06:27	MP4 File	14 431 KB	00:06:01
20240613_Chairman Obernolte Delivers his Opening Statement at Environmentalism Off the Rails.mp4	30.08.2024 06:27	MP4 File	14 237 KB	00:06:01
20240626_Chairman Frank Lucas Delivers Remarks at Overview of the Budget Proposal for DOE for FY 2025.mp4	30.08.2024 06:27	MP4 File	11 679 KB	00:04:45
20240626_Rep Weber Questions Deputy Secretary Turk at Budget Hearing.mp4	30.08.2024 06:27	MP4 File	7 672 KB	00:02:47
20240710_Chairman Lucas Delivers his Remarks at the NASA Reauthorization Markup.mp4	30.08.2024 06:27	MP4 File	12 800 KB	00:05:09

- Do not edit the MDB file, and do not change the video file names. Changing the file names may cause errors.

Index	MediaGroup	ID	FullPath	Duration	Offset
1	145603, Sample Files (Vol. 01) - 08/29/2024	20231115_Chairman Lucas Delivers his Remarks for the Markup of H.R. 6213 and H.R. 6131	S:\082624A\Media\20231115_Chairman L	360.679992676	0.000000000
2	145603, Sample Files (Vol. 01) - 08/29/2024	20231130_Rep. Obernolte Delivers Remarks at Missing the Target-- CEQs Meritless Selection of SBTI		331.629992676	360.679992676
3	145603, Sample Files (Vol. 01) - 08/29/2024	20240312_Subcommittee Chair Brandon Williams Delivers his Remarks on ARPA-E	S:\082624A\Media\20240312_Subcommitt	371.359995352	692.609985352
4	145603, Sample Files (Vol. 01) - 08/29/2024	20240613_Chairman Lucas Delivers his Opening Statement at the June Markup	S:\082624A\Media\20240613_Chairman L	361.260000766	1.063.969970703
5	145603, Sample Files (Vol. 01) - 08/29/2024	20240613_Chairman Obernolte Delivers his Opening Statement at Environmentalism Off the Rails		361.329996572	1.425.229980469
6	145603, Sample Files (Vol. 01) - 08/29/2024	20240626_Chairman Frank Lucas Delivers Remarks at Overview of the Budget Proposal for DOE for FY 2025		285.799996914	1.786.590058594
7	145603, Sample Files (Vol. 01) - 08/29/2024	20240626_Rep Weber Questions Deputy Secretary Turk at Budget Hearing	S:\082624A\Media\20240626_Rep Weber	167.720001221	2.072.330078125
8	145603, Sample Files (Vol. 01) - 08/29/2024	20240710_Chairman Lucas Delivers his Remarks at the NASA Reauthorization Markup	S:\082624A\Media\20240710_Chairman L	309.380004883	2.240.050048828

- Do not add any other container or loose files to the ZIP file. Otherwise, the import job may fail.
- If you need to process additional data, do it in a separate set.
- 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 50](#) for more information.

4.14.9.3 Importing transcript MDB data workflow

To import transcript MDB 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 **New Import/Export Job** to start a new job.
3. On the Choose Workflow dialog, the **Import** button is selected by default. Next, click the **Raw (Unprocessed) and Transcript MDB data** workflow box.

Import/Export

[< Back](#)

Choose Workflow

Import

Export


Raw (Unprocessed) and Transcript MDB data
I have a ZIP file that contains native files or a PST file for processing.


Structured (Processed) Data
I have a load file for direct import to the workspace.

 **Express Transfer**
✓ Import single data sets **greater than 20 GB** without requiring a ZIP file
✓ Export **unlimited data set sizes** to local disk without staying in the browser
1 Download for

Windows

MacOS

 2 Install App 3 Click

Activate

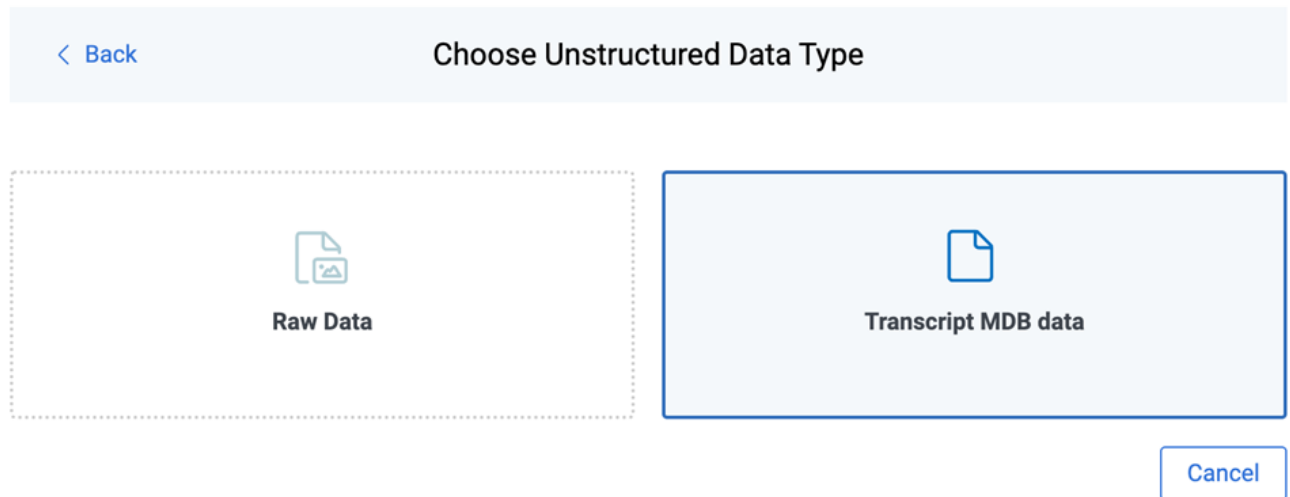
 to run Express Transfer

Close

Note: If you activated Express Transfer, the Express Transfer section displays a status of **Active**. See [Activating and deactivating Express Transfer on page 65](#) for more information.

4. On the Choose Unstructured Data Type dialog, click the **Transcript MDB data** workflow box.

Import/Export



5. Select the transcript data files to import depending on the Express Transfer activation status. For more information, go to [Selecting transcript data files below](#).
6. Complete fields on the Transcript Import and Processing dialog. For more information, go to [Transcript Import and Processing fields on page 176](#).
7. Click **Run Job** to start importing data.

Note: Import/Export uploads all the zipped transcript data to the staging area and creates a new Processing job based on the provided job configuration. The Processing application extracts the uploaded zip file and processes the attached MDB file with the audio/video files.

8. Review the importing progress on the Importing & Processing dialog. For more information, go to [Import & Processing options on page 177](#).

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: When a job is running using Express Transfer, you can close the Import/Export application. The transfer job continues without interruption. You can monitor the progress and history of jobs within Express Transfer. For more information, see Express Transfer Job tracking and history. You do not have to be logged in to Relativity aiR to view information within the Express Transfer application.

Selecting transcript data files

Select the transcript 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 that includes only the zipped transcript data you want to upload. In the case of universal naming convention (UNC) paths, you can copy and paste the path into the Select Folder address bar in the dialog box to access the desired folder. For example, `\\ServerName\SharedResourceName\FilePath`.

- Or select transcript data from a file share:
 1. Click **Choose from File Share**.
 2. Select the import source folder that includes only the zipped transcript data.
 3. Click **Select Folder**.
 4. Once you select the folder, click **Continue**.

Note: When you select a folder to upload, ensure that it contains **only the zipped transcript data**. Express Transfer transfers all the data from the selected folder, including sub-folders, to the staging area, regardless of the specific job configuration. If the selected folder contains any other files than the zipped transcript data, the import job may fail.

Import/Export

[< Back](#)
Select data to Import

Folder Location

Select folder*

Select

or

Choose From File Share

Continue

Cancel

- **With Express Transfer not active:** On the Select File dialog, do one of the following to upload a file. You must zip the transcript MDB file along with the linked audio/video files when using the first two options.

Import/Export

[< Back](#)
Select File



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

or [Choose From Staging](#)

Cancel

- Drag and drop the zipped transcript data file into the upload area.
- Click **browse for a file** to select a zipped transcript data from your local drive.

- Click **Choose From Staging** to upload files directly from the Staging Area, select the folder that contains the zipped transcript file, and click **Select**.

Transcript Import and Processing fields

Complete fields on the Transcript Import and Processing dialog

Import/Export

< Back

Transcript Import and Processing

Job Name*

Processing Profile* Select ▼

Destination Folder* Select

Deponent* Deponent ▼ Add Deponent

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

Run Job
Cancel

- **Job name**—provide a descriptive job name so that you can identify and track that job on the Import/Export Job page. The Job name field accepts up to 50 characters.
- **Processing Profile**—select the desired Processing profile. The Processing profile must already exist in Relativity aiR.

Note: Select the Processing profile with the Auto-Publish setting enabled to automatically publish the discovered documents.

- **Destination folder**—by default, Relativity aiR populates the destination with the root workspace folder to simplify job creation. You can do one of the following:
 - Keep the default destination folder.
 - Choose a different folder by clicking **Clear**, followed by **Select**, and then selecting the desired folder from the list.
 - Create a new workspace folder by right-clicking on an existing folder, clicking **Create**, entering a new folder name, clicking out of the new folder to save it, then clicking **Select**.
- **Deponent**—assign the deponent by selecting it from the list or by adding a new deponent with the **Add Deponent** button.

Note: The Deponent drop-down list shows custodians available in the workspace. When you create a new deponent with the **Add Deponent** button, it is stored in the Entity Object as a custodian.

- **(Optional) Notification Addresses**—enable email notifications by providing the email addresses of those who should get notified once the job completed, failed, or canceled.

Import & Processing options

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

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

Import/Export

Importing & Processing

Overview Job Settings

Uploading
Completed



Extracting
Completed



Discovery
Completed



Publish
Skipped



Raw data processing



100%

Go to Processing

Close

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

Note: 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 is closed *after* the Uploading step completes. Closing the dialog earlier terminates 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.

4.14.10 Importing raw unprocessed data for Processing via Import/Export

Note: 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 Relativity aiR 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 Relativity aiR 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 50](#) 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 **New Import/Export Job** to start a new job.
3. On the Choose Workflow dialog, the **Import** button is selected by default. Next, click the **Raw (Unprocessed) and Transcript MDB data** workflow box to import native (raw) files into your workspace.

[< Back](#)

Choose Workflow

Import

Export



Raw (Unprocessed) and Transcript MDB data

I have a ZIP file that contains native files or a PST file for processing.



Structured (Processed) Data

I have a load file for direct import to the workspace.



Express Transfer

- ✓ Import single data sets **greater than 20 GB** without requiring a ZIP file
- ✓ Export **unlimited data set sizes** to local disk without staying in the browser

1 Download for

Windows

MacOS

 2 Install App
 3 Click

Activate

 to run Express Transfer

Close

Note: If you activated Express Transfer, the Express Transfer section displays a status of **Active**. See [Activating and deactivating Express Transfer on page 65](#) for more information.

- On the Choose Unstructured Data Type, click the **Raw Data** workflow box.

[< Back](#)

Choose Unstructured Data Type



Raw Data



Transcript MDB data

Cancel

5. 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, 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. For example, `\\Server-Name\SharedResourceName\FilePath`.

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 you select the folder, 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.

Import/Export

[< Back](#) **Select data to Import**

Folder Location

Select folder* or

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

Import/Export

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

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

[or Choose From Staging](#)

- 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.

Note: Effective July 5, 2025, accessing Choose from Staging requires Allow Staging Import permissions. Refer to the Community article [Changes to Import/Export Choose From Staging Option FAQ](#) and the [Permissions on page 31](#) page for more information.

6. On the Create Processing Job dialog, complete fields, select data sources and assign custodians. For details, see [Create Processing Job on page 183](#).
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: 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 are displayed during the Uploading and Extracting steps. Do any of the following:

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

Importing & Processing

Overview Job Settings



Go to Processing

Close

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

Note: 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 is closed *after* the Uploading step completes. Closing the dialog earlier terminates 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 uses 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 autopublish 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 Relativity aiR, and then run Processing directly.

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: When a job is running using Express Transfer, you can close the Import/Export application. The transfer job continues without interruption. You can monitor the progress and history of jobs within Express Transfer. For more information, see Express Transfer Job tracking and history. You do not have to be logged in to Relativity aiR to view information within the Express Transfer application.

4.14.10.1 Create Processing Job

On the Create Processing Job dialog:

- Complete the following fields:

Import/Export

< Back Create Processing Job

Job Name*

Profile*

Destination Folder*

Notification Addresses

Select Data Sources* - 3 of 3 per page

Limit of selected data sources: 0/70 ⓘ

☐	Name	Custodian
☐	Atkins, Roman	
☐	McDonald, Roland	
☐	Zipper, Adam	

All 3

- **Job name**—provide a descriptive job name so that you can 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, refer to [Importing Slack short message data for Processing through Import/Export on page 188](#) below.

- **Destination folder**—by default, Relativity populates the destination with the root workspace folder to simplify job creation. You can do one of the following:
 - Keep the default destination folder.
 - Choose a different folder by clicking **Clear**, followed by **Select**, and then selecting the desired folder from the list.
 - Create a new workspace folder by right-clicking on an existing folder, clicking **Create**, entering a new folder name, clicking out of the new folder to save it, then clicking **Select**.

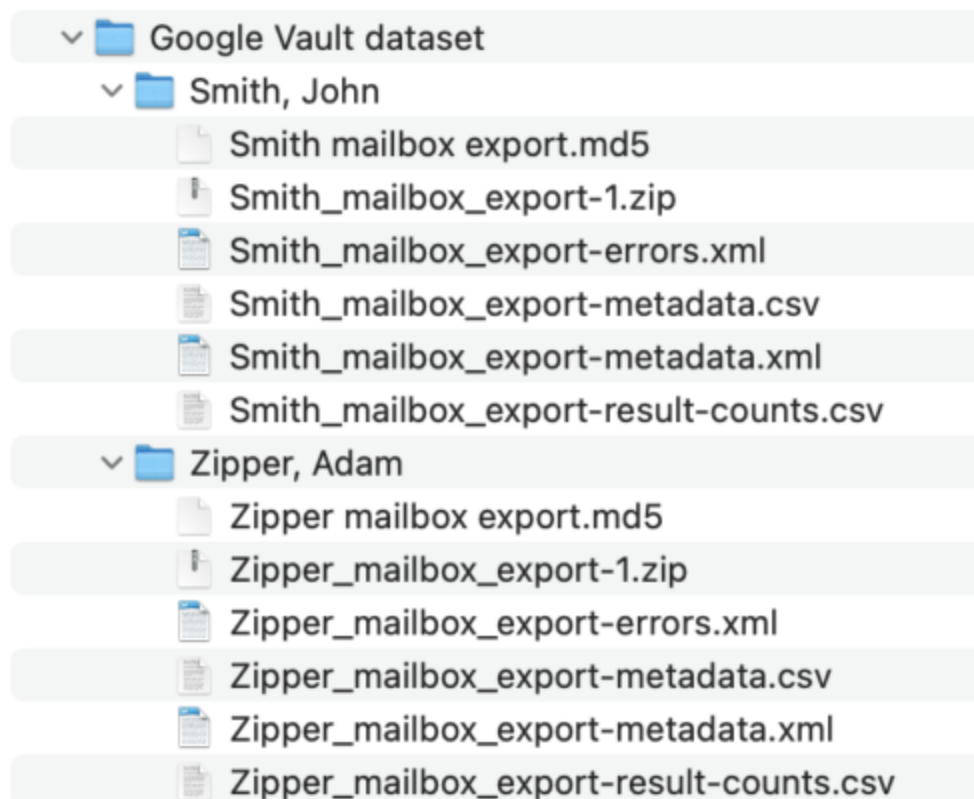
- **(Optional) Notification Addresses**—enable email notifications by providing the email addresses of those who should get notified once the job completed, failed, or canceled.

- 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 79](#) 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]`.
- To import multi-part containers, place all parts inside a sub-folder within a top-level folder.
 - If you use Express Transfer, select the top-level folder as the data source.
 - If you prefer the web mode, compress the sub-folder and choose the zip file as the data source. Following these steps ensures all parts are treated as a single data source, allowing the multi-part container to process correctly.
- To import Google Vault data, place each custodian's files in a separate sub-directory. For example, for two custodians, create two sub-directories:



- If using the web mode, compress the custodian-level sub-directory and upload the zip file. Multiple custodian sub-directories may be included in that zip file, but make sure that they exist at the root of the zip. That way you can assign custodians to the sub-directories in the next step of

the Import workflow.

- If using Express Transfer, select the root folder as a data location. For example, *Google Vault dataset*, as in the screenshot above. That way you can assign custodians to the sub-directories in the next step of the Import workflow.
- Avoid assigning loose files to custodians when importing Google Vault data.
- For a Vault export that includes data from multiple Google accounts, it may be impractical to parse into separate custodian sub-directories. In this case, we recommend exporting from Vault a single Custodian at a time. These individual exports should be put into folders separately, as in the screenshot above.
- For Google Gemini exports from Vault, Relativity requires the data to be converted to RSMF before submitting for import and processing.

-
- Use the Select Data Sources section to choose **Data Sources** by selecting the checkbox next to the folder name. A maximum of 70 data sources, for example folders with data or loose files, can be selected and assigned to custodians.
 - 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:

Add Custodian

Type * ☒ Person ☐ Other

First Name *

Last Name *

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.

4.14.10.2 Importing Slack short message data for Processing through Import/Export

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

To import Slack short messages for Processing through 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 65](#) 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. 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

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.
- [Exporting a saved search or a folder with Access DB load file \(MDB\)](#)—use this workflow to export a saved search or a folder with Access DB load file (MDB).
- [Exporting a production set with Access DB load file \(MDB\)](#)—use this workflow to export a production set with Access DB load file (MDB).

Also, see [General recommendations for structured data import and export jobs on page 48](#).

4.15.1 Exporting data using Import/Export

You can use Import/Export to export the following:

- Exporting a folder—use this workflow to export a folder.
- Exporting a production set—use this workflow to export a production set.
- Exporting a saved search—use this workflow to export a saved search load file.
- Exporting RDO data—use this workflow to export Relativity's dynamic objects (RDO) load file.
- [Exporting a saved search or a folder with Access DB load file \(MDB\)](#)—use this workflow to export a saved search or a folder with Access DB load file (MDB).
- [Exporting a production set with Access DB load file \(MDB\)](#)—use this workflow to export a production set with Access DB load file (MDB).

Also, see [General recommendations for structured data import and export jobs on page 48](#).

4.15.2 Exporting a folder load file

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

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 50](#) 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 30](#).

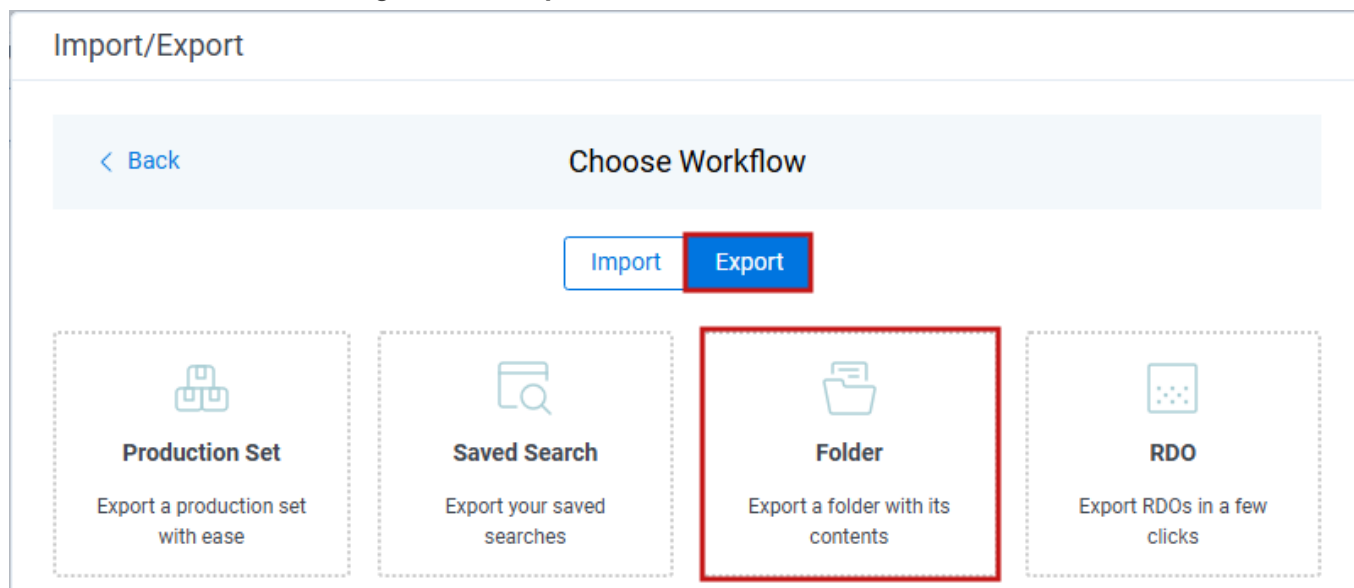
Refer to [Import/Export load file specifications](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 48](#).

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 65](#) 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*

Select

Export Sub-Folders

☐

Views*

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.
 - **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**—the job configuration settings that were previously saved to a profile file (.ie or .kw*). They can be reused when creating future jobs with the same or similar settings in Relativity aiR. This 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 data from your workspace and download it to your local disk.
 - If you activated Express Transfer, click **Local Folder** and select the destination folder on your disk. Once the export completes, Express Transfer automatically downloads the exported data to that folder. Exporting with Express Transfer activated is recommended for all export volumes.
 - If you export data without Express Transfer, the system exports and compresses it into a single zip file. Once the export completes, you can download the zip file directly to your local disk by clicking the **Download** button.

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.

Notes:

- 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.
 - For some combinations of job configuration and data, Windows system on your local machine may not be able to open ZIP archives due to too long file paths. You may receive an error message: “The compressed (zipped) folder is invalid.” For details, go to [General recommendations for structured data import and export jobs](#).
-

- 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 is displayed 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 *

: (Semicolon)

Nested Value *

\ (Backslash)

- **Start Line**—select a line (record number) that identifies the initial document for export. The application begins by exporting the document with this number and continues by exporting documents with subsequent record numbers.
- **Data File Encoding**—select the encoding type for the document-level load file from the drop-down.
- **Regional Settings (Date and Time)**—select the desired format for the exported date and time data. A preview of the chosen format will appear below the next field. Your selection for this field will remain for future export jobs until you change it or clear the browser cache. Clearing the browser cache will default the format to "English (United States)."

- **Long Time (with seconds)**—by default, this option is toggled off. Toggle it on if you want to include seconds with the exported date and time information. For example, the time will export as 12:10 AM (HH:MM AM/PM) when the toggle is off. 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 Relativity aiR 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**. Optionally, you can enter field name aliases to replace the original workspace field names in the exported load file. The Workspace Fields box displays all available fields, but only the fields in the Selected Fields box will be exported.

Note: All fields from the chosen View are automatically added 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.

Note: Field aliases should not include delimiters that define the load file structure. The job will not start if a field alias includes such delimiter.

7. On the Image Source dialog, select what images you want to export.

Import/Export

< Back Image Source

Image Source

Production Images Type* ☐ Original Images ☒ Produced Images

Select Productions

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

Available Productions Selected Productions

Filter Filter

Continue Cancel

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

[< 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
☐ Convert to PDF

PDFs

Export PDFs ☒

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

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, that is Opticon, IPRO, or IPRO (FullText), and the **File Type** for export images, that is 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, that is 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**.

< 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 appear:
 - **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.

Note: Rename settings do not apply to images or PDFs. Only native and text files can be renamed.

- **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.

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.

Relativity aiR

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 first field in the list for text. If the field is null, it checks the next field in order of precedence for text, and so on. When Relativity finds a field that contains text, it adds the contents of that field to the Text Fields Precedence column in the document load file. 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.

[< Back](#)

Advanced Settings

Volume And Subdirectory Information

Set Custom Information ☒

Volume Information

Prefix* VOL

Start* 1

of digits* 5

Max Size (MB)* 6000

Subdirectory Information

Image Prefix* IMG

Native Prefix* NATIVE

Text Prefix* TEXT

PDF Prefix* PDF

Start* 1

of digits* 3

Max Files* 2000

Continue

Cancel

For more information, see [Load file export recommendations](#).

- **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 dialog, 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

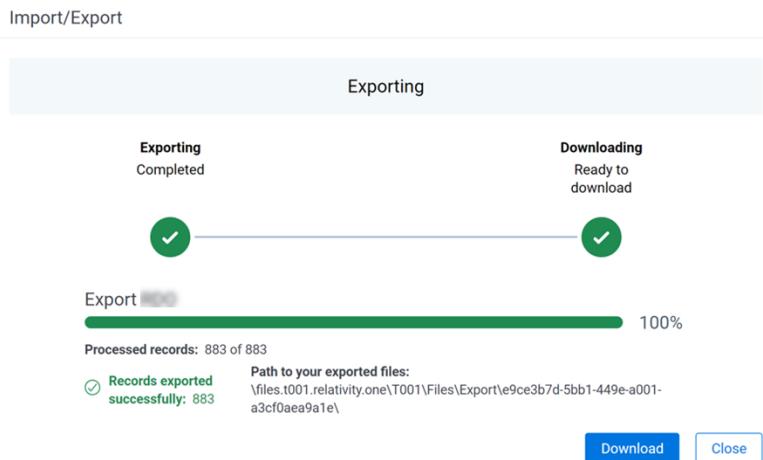
16. (Optional) Click **Save Settings** on the Export Job Configuration Summary dialog to export the job configuration settings entered thus far to its own profile file (.ie file extension) and save it on your computer. This way you can reuse these settings when creating a new export job with Import/Export.

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 Relativity aiR 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. For more information, 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. 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 Relativity aiR 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 Relativity aiR 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.

4.15.3 Exporting a production set load file

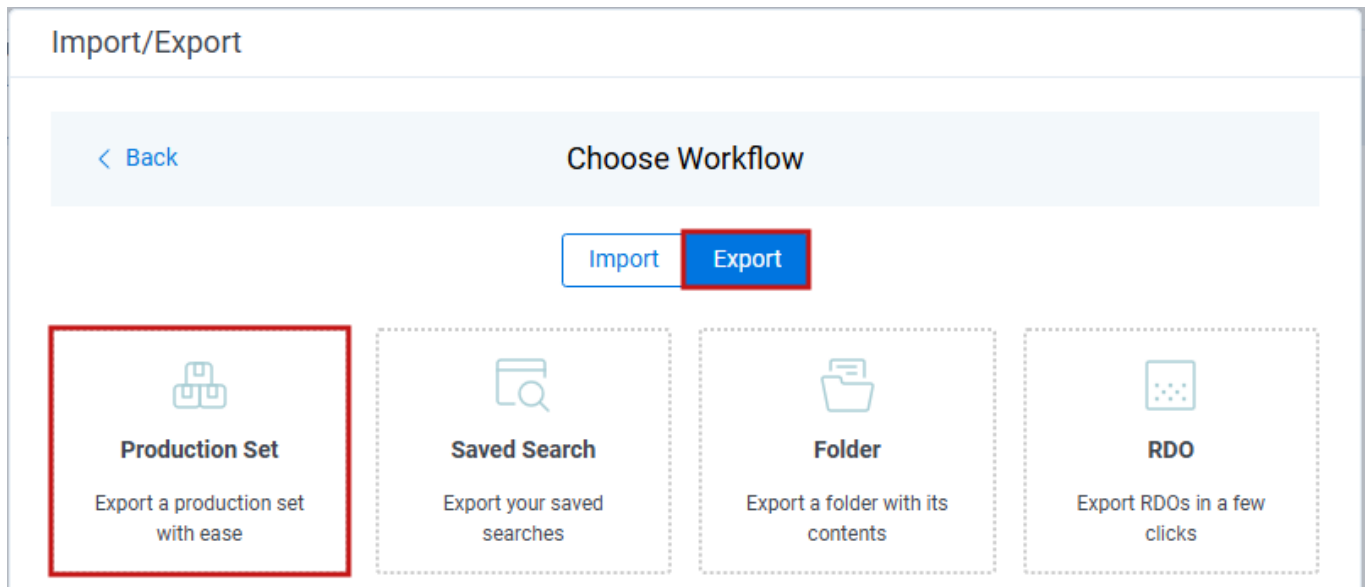
You can use Import/Export to export a production set load file out of Relativity aiR.

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 50](#) 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 30](#).

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 48](#).

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 65](#) for more information.

4. Complete fields on the Export Settings dialog, then click **Continue**. For details, see [Export Settings on page 212](#).

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 is displayed.

Load File Characters

Column *

DC4 (Device control 4)

Quote *

" (Latin Small Letter Thorn)

Newline (Long Text Fields) *

@ (Registered sign)

Multi-Value *

: (Semicolon)

Nested Value *

\ (Backslash)

- **Start Line**—select a line (record number) that identifies the initial document for export. The application begins by exporting the document with this number and continues by exporting documents with subsequent record numbers.
- **Data File Encoding**—select the encoding type for the document-level load file from the drop-down.
- **Regional Settings (Date and Time)**—select the desired format for the exported date and time data. A preview of the chosen format will appear below the next field. Your selection for this field will remain for future export jobs until you change it or clear the browser cache. Clearing the browser cache will default the format to "English (United States)."

- **Long Time (with seconds)**—by default, this option is toggled off. Toggle it on if you want to include seconds with the exported date and time information. For example, the time will export as 12:10 AM (HH:MM AM/PM) when the toggle is off. 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 Relativity aiR 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**. Optionally, you can enter field name aliases to replace the original workspace field names in the exported load file. 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

Workspace Fields

Filter

All Paths/Locations

Artifact ID

Attachment Document IDs

Attachment List

Selected Fields

Export Name

Filter

Production::Begin Bates

Production::End Bates

Production End_Bates

Continue

Cancel

Note: Field aliases should not include delimiters that define the load file structure. The job will not start if a field alias includes such delimiter.

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**.

[< Back](#)

File Settings

Natives

Export Native Files

☒

Production

Export Images

☒

Data File Format*

☒ Opticon
 ☐ IPRO
 ☐ IPRO (FullText)

File Type*

☒ Single-page TIFF/JPG
 ☐ Multi-page TIFF/JPG
 ☐ Convert to PDF

Continue

Cancel

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

Note: The **Convert to PDF** option is only available for production sets that contain exclusively images or a combination of images and native files. Production sets that include only native files or mixed content, such as PDFs combined with images, are not supported for PDF conversion.

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

[< Back](#)
Files And Folders

Text and Native File Names

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

Append original filename
☐

Folder Structure

Group files by
☒ File Type
 ☐ Workspace Structure

Continue
Cancel

- Text and Native File Names:
 - Named after**—select one of the following naming conventions for exported files:
 - Control Number**—select this option to name the files after the control number.
 - Production Begin Bates**—select this option to name the files after the production number.
 - Custom name**—select this option to customize native and text file names. If this option is selected, enter data in the following fields that are displayed:
 - 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.

Note: Rename settings do not apply to images or PDFs. Only native and text files can be renamed.

- 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.

Import/Export

[< Back](#)
Text File Settings

Basic Settings

Export Text Field as Files
☒

Text File Encoding *

Unicode (UTF-8) ▼

Text Fields Precedence

Add Fields *

Choose... ▼

Add

Continue

Cancel

- **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 first field in the list for text. If the field is null, it checks the next field in order of precedence for text, and so on. When Relativity finds a field that contains text, it adds the contents of that field to the Text Fields Precedence column in the document load file. 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.

Note: If you have workflows that rely on clearing a text field for multiple production versions, you will need to ensure that you clear this field using either Mass Replace or a load file that sets the values to NULL. Operations such as Mass Edit will clear the field but set it to blank instead of null. This may result in exporting blank text files.

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.

[< Back](#)

Advanced Settings

Volume And Subdirectory Information

Set Custom Information ☒

Volume Information

Prefix* VOL

Start* 1

of digits* 5

Max Size (MB)* 6000

Subdirectory Information

Image Prefix* IMG

Native Prefix* NATIVE

Text Prefix* TEXT

PDF Prefix* PDF

Start* 1

of digits* 3

Max Files* 2000

Continue

Cancel

For more information, see [Load file export recommendations](#).

- **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.

12. Click **Continue**.

13. On the Export Job Configuration Summary dialog, 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

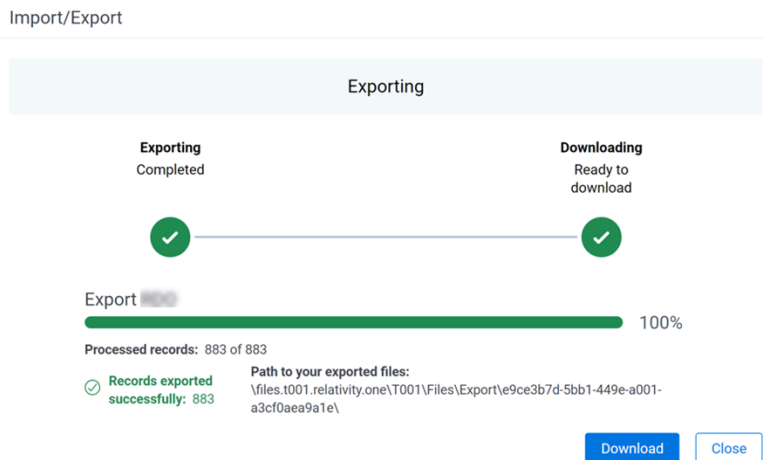
14. (Optional) Click **Save Settings** on the Export Job Configuration Summary dialog to export the job configuration settings entered thus far to its own profile file, .ie file extension. Save it on your computer so you can reuse these settings when creating a new export job with Import/Export.

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 Relativity aiR 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. For more information, 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. 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 Relativity aiR 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 Relativity aiR file share and skips the downloading process. Go the path listed on the dialog to access the exported data files.

4.15.3.1 Export Settings

Complete the following fields on the Export Settings dialog

[< Back](#)

Export Settings

Data Source

Job Name*

Profile*

☒ None☐ From Local Disk

Production*

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**—the job configuration settings that were previously saved to a profile file (.ie or .kw*). They can be reused when creating future jobs with the same or similar settings in Relativity aiR. This 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 data from your workspace and download it to your local disk.
 - If you activated Express Transfer, click **Local Folder** and select the destination folder on your disk. Once the export completes, Express Transfer automatically downloads the exported data to that folder. Exporting with Express Transfer activated is recommended for all export volumes.
 - If you export data without Express Transfer, the system exports and compresses it into a single zip file. Once the export completes, you can download the zip file directly to your local disk by clicking the **Download** button.

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.

Notes:

- 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.
 - For some combinations of job configuration and data, Windows system on your local machine may not be able to open ZIP archives due to too long file paths. You may receive an error message: "The compressed (zipped) folder is invalid." For details, go to [General recommendations for structured data import and export jobs](#).
-

- 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.

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

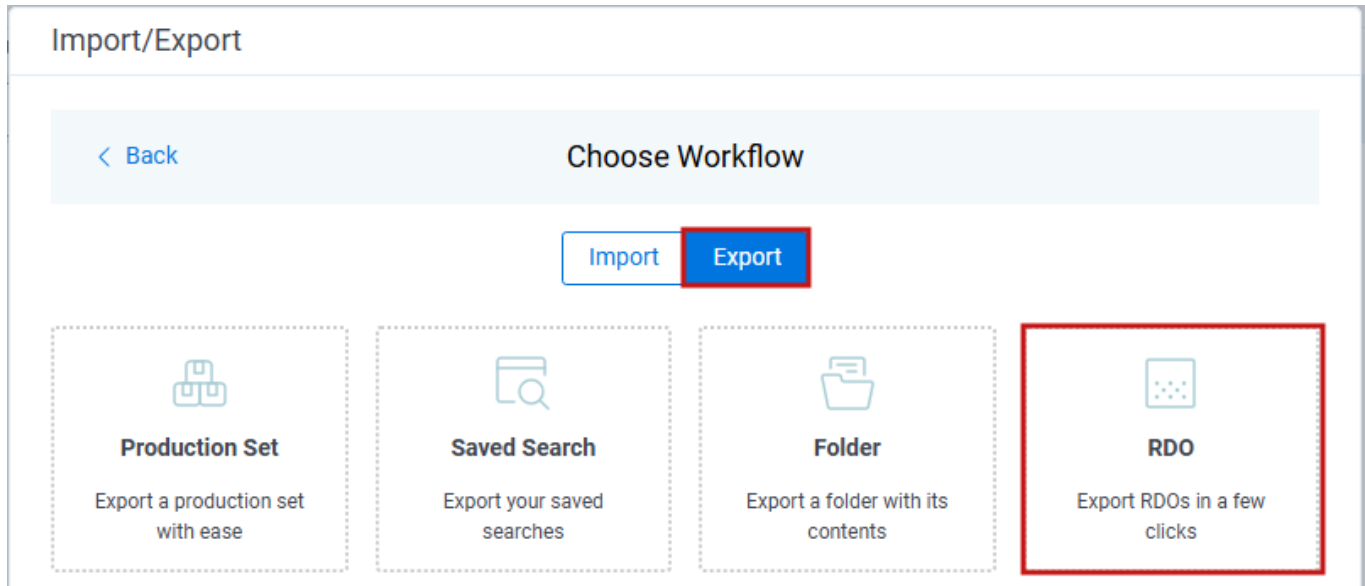
You can use Import/Export to export Relativity's dynamic objects (RDO) load file out of Relativity aiR.

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 50](#) 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 30](#).

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 48](#).

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 65](#) for more information.

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

Import/Export

[< Back](#) **Export Settings**

Data Source

Job Name*

Profile* ☒ None
☐ From Local Disk

Relativity Object Type*

View*

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.
- **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**—the job configuration settings that were previously saved to a profile file (.ie or .kw*). They can be reused when creating future jobs with the same or similar settings in Relativity aiR. This 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 data from your workspace and download it to your local disk.
 - If you activated Express Transfer, click **Local Folder** and select the destination folder on your disk. Once the export completes, Express Transfer automatically downloads the exported data to that folder. Exporting with Express Transfer activated is recommended for all export volumes.
 - If you export data without Express Transfer, the system exports and compresses it into a single zip file. Once the export completes, you can download the zip file directly to your local disk by clicking the **Download** button.

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.

Notes:

- 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.
 - For some combinations of job configuration and data, Windows system on your local machine may not be able to open ZIP archives due to too long file paths. You may receive an error message: “The compressed (zipped) folder is invalid.” For details, go to [General recommendations for structured data import and export jobs](#).
-

- Notifications:

- **(Optional) Notification Addresses**—enable email notifications by providing the email addresses of those who should get notified once the job completed, failed, or canceled.

5. On the Load File Settings dialog, select the data file format and data file encoding, then click **Continue**.

Import/Export

[< Back](#)

Load File Settings

Data File Settings

Data File Format*

☒ .dat (Concordance)

☐ .csv (Comma separated)

☐ .html (HTML)

☐ .txt (Custom)

Start Line*

Data File Encoding*

Unicode (UTF-8)

Regional Settings (Date And Time)*

English (United States) | en-US

Long time (with seconds)

☒

12/25/2000 12:00:00 AM

Export Multiple Choice Fields as Nested

☐

Continue

Cancel

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

- **.txt (Custom)**—load file exports with the custom delimiters that you select in the **Load File Characters** section that is displayed 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. 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 Relativity aiR 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**. Optionally, you can enter field name aliases to replace the original workspace field names in the exported load file. 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.

Import/Export

< Back
Select Fields

Workspace Fields

Filter

Artifact ID

Company Name

Domain

Email Address

Selected Fields

Selected Fields
Export Name

Filter

Full Name

Document numbering prefix

Notes

⋮

Classification

Entity_classification

Continue
Cancel

Note: Field aliases should not include delimiters that define the load file structure. The job will not start if a field alias includes such delimiter.

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

Import/Export

< Back
File Settings

Natives

Export Native Files

Continue
Cancel

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

The screenshot shows the 'Import/Export' dialog with the 'Files And Folders' tab selected. Under the 'Text and Native File Names' section, the 'Named after' radio buttons have 'Identifier' selected. The 'Append original filename' toggle is currently turned off. 'Continue' and 'Cancel' buttons are at the bottom right.

- 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 are displayed:
 - **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.

Note: Rename settings do not apply to images or PDFs. Only native and text files can be renamed.

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.

The screenshot shows the 'Import/Export' dialog with the 'Text File Settings' tab selected. In the 'Basic Settings' section, 'Export Text Field as Files' is toggled on, and 'Text File Encoding' is set to 'Unicode (UTF-8)'. In the 'Text Fields Precedence' section, there is an 'Add Fields' button and a 'Choose...' dropdown menu. Below this, it says 'No fields selected for Text Fields Precedence.' 'Export' and 'Close' buttons are at the bottom right.

- **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 first field in the list for text. If the field is null, it checks the next field in order of precedence for text, and so on. When Relativity finds a field that contains text, it adds the contents of that field to the Text Fields Precedence column in the document load file. 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.

[< Back](#)

Advanced Settings

Volume And Subdirectory Information

Set Custom Information ☒

Volume Information

Prefix* VOL

Start* 1

of digits* 5

Max Size (MB)* 6000

Subdirectory Information

Image Prefix* IMG

Native Prefix* NATIVE

Text Prefix* TEXT

PDF Prefix* PDF

Start* 1

of digits* 3

Max Files* 2000

Continue

Cancel

For more information, see [Load file export recommendations](#).

- **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.

12. Click **Continue**.

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

Import/Export

[< Back](#)
Export Job Configuration Summary

Data Source

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

Location And Files

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

Data File Settings

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

Export
Save Settings
Cancel

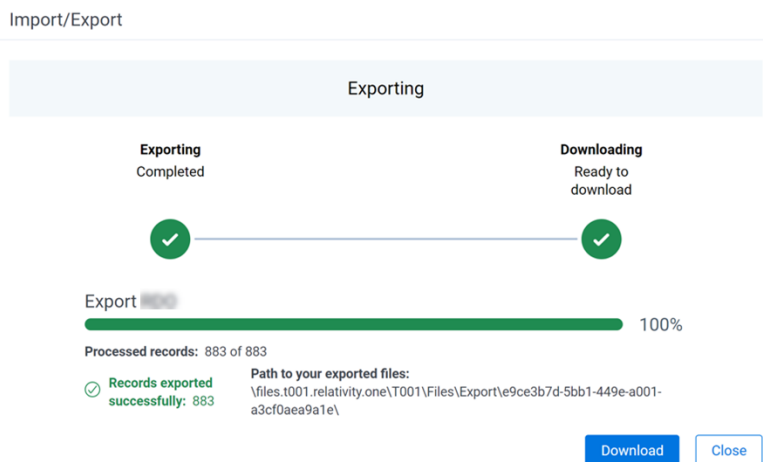
14. (Optional) Click **Save Settings** on the Export Job Configuration Summary dialog to export the job configuration settings entered thus far to its own profile file, .ie file extension. Save it on your computer so you can reuse these settings when creating a new export job with Import/Export.

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. For more information, 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 Relativity aiR 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 Relativity aiR 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

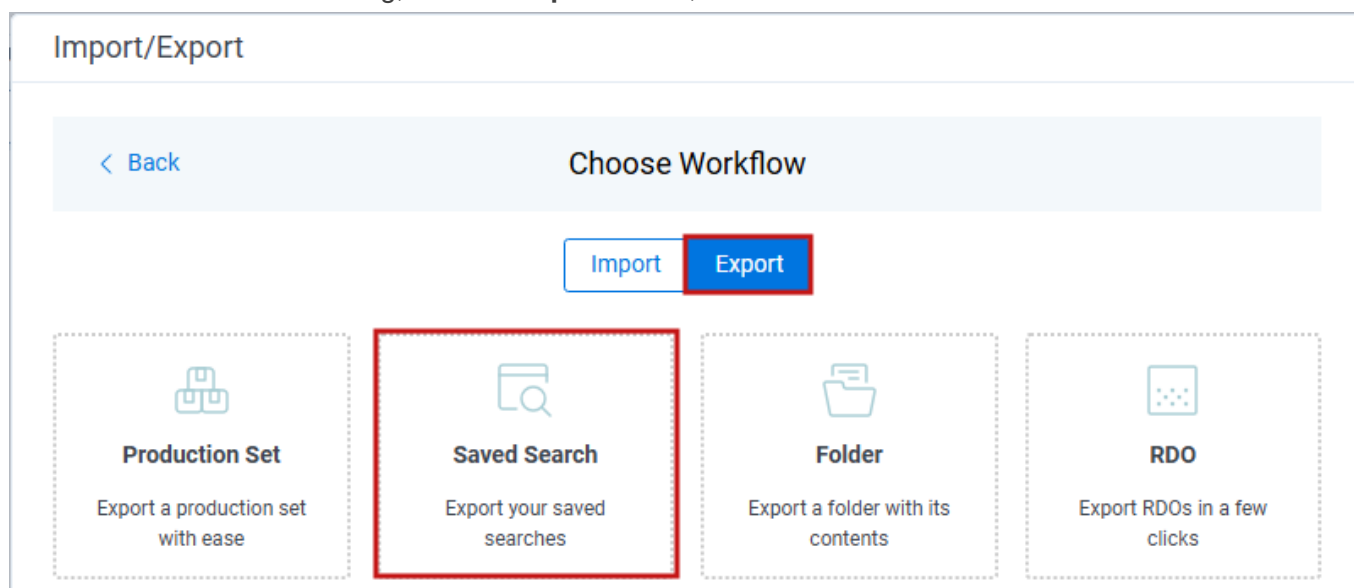
You can use Import/Export to export a saved search load file out of Relativity aiR.

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 50](#) 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 30](#).

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 48](#).

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 65](#) 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**—the job configuration settings that were previously saved to a profile file (.ie or .kw*). They can be reused when creating future jobs with the same or similar settings in Relativity aiR. This 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 data from your workspace and download it to your local disk.
 - If you activated Express Transfer, click **Local Folder** and select the destination folder on your disk. Once the export completes, Express Transfer automatically downloads the exported data to that folder. Exporting with Express Transfer activated is recommended for all export volumes.
 - If you export data without Express Transfer, the system exports and compresses it into a single zip file. Once the export completes, you can download the zip file directly to your local disk by clicking the **Download** button.

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.

Notes:

- 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.
 - For some combinations of job configuration and data, Windows system on your local machine may not be able to open ZIP archives due to too long file paths. You may receive an error message: “The compressed (zipped) folder is invalid.” For details, go to [General recommendations for structured data import and export jobs](#).
-

- Notifications:
 - **(Optional) Notification Addresses**—enable email notifications by providing the email addresses of those who should get notified once the job completed, failed, or canceled.

5. On the Load File Settings dialog, select the data file format and data file encoding, then click **Continue**.

Import/Export

[< Back](#)

Load File Settings

Data File Settings

Data File Format *

☒ .dat (Concordance)

☐ .csv (Comma separated)

☐ .html (HTML)

☐ .txt (Custom)

Start Line *

Data File Encoding *

Unicode (UTF-8)

Regional Settings (Date And Time) *

English (United States) | en-US

Long time (with seconds)

☒

12/25/2000 12:00:00 AM

Export Multiple Choice Fields as Nested

☐

Continue

Cancel

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

: (Semicolon)

Nested Value *

\ (Backslash)

- **Start Line**—select a line (record number) that identifies the initial document for export. The application begins by exporting the document with this number and continues by exporting documents with subsequent record numbers.
- **Data File Encoding**—select the encoding type for the document-level load file from the drop-down.
- **Regional Settings (Date and Time)**—select the desired format for the exported date and time data. A preview of the chosen format will appear below the next field. Your selection for this field will remain for future export jobs until you change it or clear the browser cache. Clearing the browser cache will default the format to "English (United States)."

- **Long Time (with seconds)**—by default, this option is toggled off. Toggle it on if you want to include seconds with the exported date and time information. For example, the time will export as 12:10 AM (HH:MM AM/PM) when the toggle is off. 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 Relativity aiR 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**. Optionally, you can enter field name aliases to replace the original workspace field names in the exported load file. 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

Workspace Fields

Filter

CC (SMTP Address)

Child MD5 Hash Values

Child SHA1 Hash Values

Child SHA256 Hash Values

Selected Fields

Export Name

Filter

Control Number

Group Identifier

MD5 Hash

MD5

Continue

Cancel

Note: Field aliases should not include delimiters that define the load file structure. The job will not start if a field alias includes such delimiter.

7. On the Image Source dialog, select what images you want to export.

Import/Export

< Back Image Source

Image Source

Production Images Type* ☐ Original Images ☒ Produced Images

Select Productions

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

Available Productions Selected Productions

Filter Filter

Continue Cancel

- Production Images 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.
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 image is exported.

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

[< 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
☐ Convert to PDF

PDFs

Export PDFs ☒

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

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, that is Opticon, IPRO, or IPRO (FullText), and the **File Type** for export images, that is 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, that is 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**.

[< 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 are displayed:
 - 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.

Note: Rename settings do not apply to images or PDFs. Only native and text files can be renamed.

- 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.

Import/Export

< Back
Text File Settings

Basic Settings

Export Text Field as Files ☒

Text File Encoding Unicode (UTF-8) ▾

Text Fields Precedence

Add Fields Choose... ▾ Add

No fields selected for Text Fields Precedence.

Export Close

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

Import/Export

< Back
Text File Settings

Basic Settings

Export Text Field as Files ☒

Text File Encoding Unicode (UTF-8) ▾

Text Fields Precedence

Add Fields Production OCR ▾ Add

Extracted Text

Production OCR

Continue Cancel

To order the precedence of the fields, click the six-dot handle next to the field name and drag it to the proper ordering position.

During an export, the system checks the first field in the list for text. If the field is null, it checks the next field in order of precedence for text, and so on. When Relativity finds a field that contains text, it adds the contents of that field to the Text Fields Precedence column in the document load file. 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.

[< Back](#)

Advanced Settings

Volume And Subdirectory Information

Set Custom Information ☒

Volume Information

Prefix* VOL

Start* 1

of digits* 5

Max Size (MB)* 6000

Subdirectory Information

Image Prefix* IMG

Native Prefix* NATIVE

Text Prefix* TEXT

PDF Prefix* PDF

Start* 1

of digits* 3

Max Files* 2000

Continue

Cancel

For more information, see [Load file export recommendations](#).

- **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 dialog, review the export job settings and go back to make any corrections as needed.

Import/Export

[< Back](#)
Export Job Configuration Summary

Data Source

Job Name	SavedSearchExport_001
Saved Search	Case-00294
Profile	No

Location And Files

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

Data File Settings

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

Export
Save Settings
Cancel

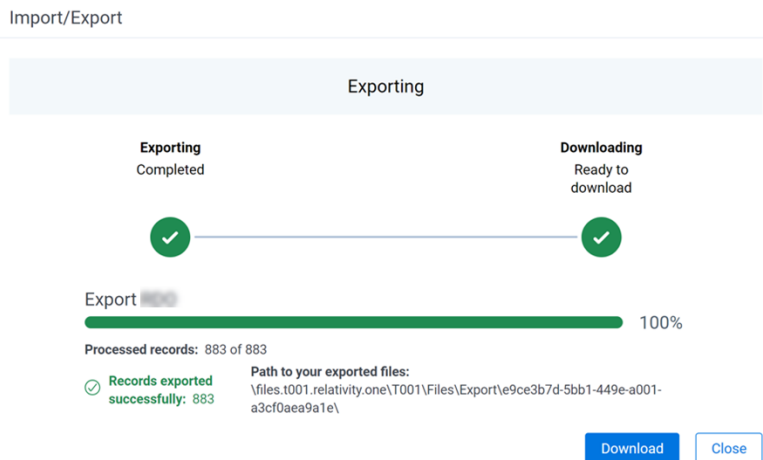
16. (Optional) Click **Save Settings** on the Export Job Configuration Summary dialog to export the job configuration settings entered thus far to its own profile file (.ie file extension) and save it on your computer. This way you can reuse these settings when creating a new export job with Import/Export.

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 Relativity aiR 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. For more information, 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. 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 Relativity aiR 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 Relativity aiR 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.

4.15.6 Exporting a saved search or a folder with Access DB load file (MDB)

Note: The import and export workflows with Access DB (MDB) are designed for and are currently available for the Asia-Pacific region. For information on the possibility of enabling this flow in your instance, contact your Account Representative.

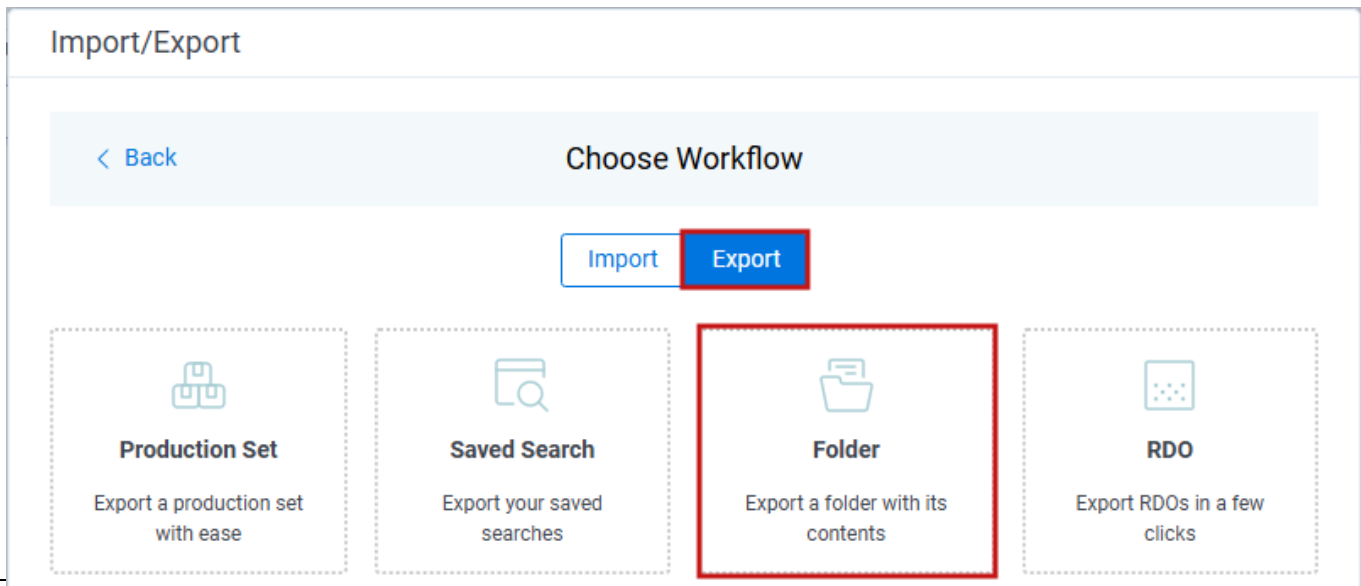
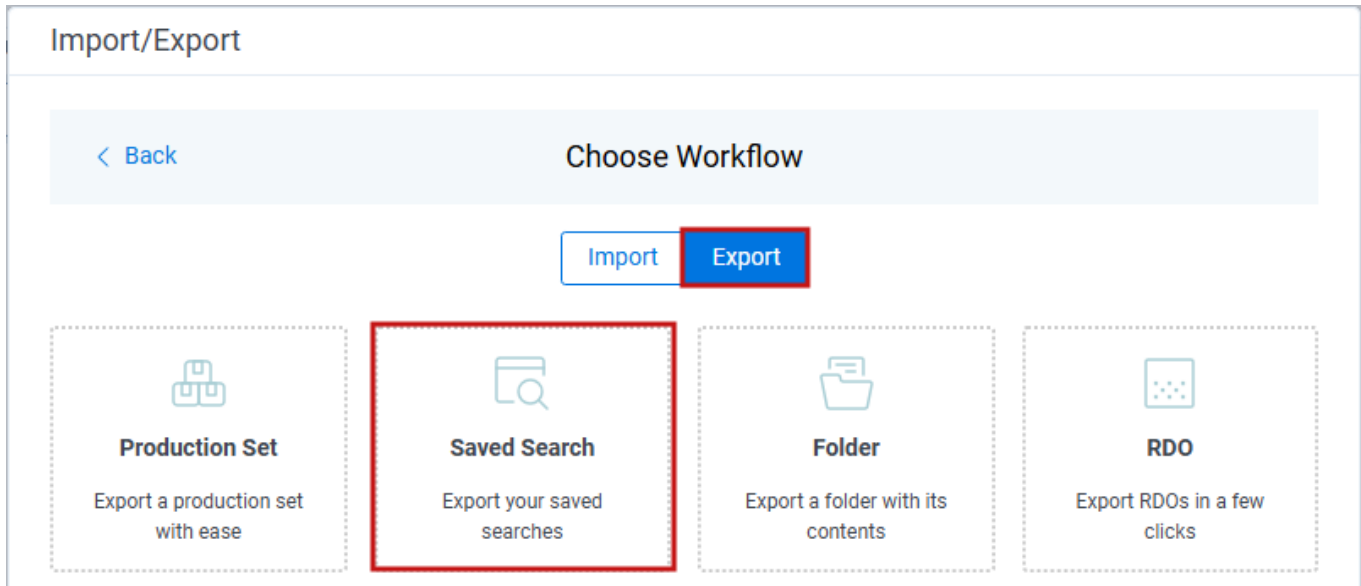
You can use Import/Export to export a saved search or a folder with MDB load file out of Relativity aiR.

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 50](#) 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 30](#).

Refer to [Access DB \(MDB\) load file specifications](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 48](#).

To export a saved search or a folder 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** or **Folder**.



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 65](#) for more information.

4. On the Export Settings dialog, 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

Import/Export

[< Back](#)

Export Settings

Data Source

Job Name*

Profile*

☒ None

☐ From Local Disk

Folders*

Select

Export Sub-Folders

☐

Views*

Choose...

- **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**—the job configuration settings that were previously saved to a profile file (.ie or .kw*). They can be reused when creating future jobs with the same or similar settings in Relativity aiR. This 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. This option is available for a saved search export.
 - **Folders**—choose which workspace folder to export. This option is available for a folder export.
 - **Export Sub-folders** toggle—select this option to export sub-folders of the previously selected folder. This option is available for a folder export.
 - **Views**—select the workspace view that you would like to use to export metadata. This option is available for a folder export.
- **Location and Files:**
 - **Export Location Type**—select one or both of these options:
 - **Local Disk**—select this option to export the selected data from your workspace and download it to your local disk.
 - If you activated Express Transfer, click **Local Folder** and select the destination folder on your disk. Once the export completes, Express Transfer automatically downloads the exported data to that folder. Exporting with Express Transfer activated is recommended for all export volumes.
 - If you export data without Express Transfer, the system exports and compresses it into a single zip file. Once the export completes, you can download the zip file directly to your local disk by clicking the **Download** button.

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.

Notes:

- 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.
- For some combinations of job configuration and data, Windows system on your local machine may not be able to open ZIP archives due to too long file paths. You may receive an error message: “The compressed (zipped) folder is invalid.” For details, go to [General recommendations for structured data import and export jobs](#).

- 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 *

Generate MDB File

☒

Data File Encoding *

Regional Settings (Date And Time) *

Long time (with seconds)

☐
12/25/2000 12:00 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 is displayed 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.
 - **Generate MDB File**—toggle on if you want to generate Access DB load file (MDB). This option is toggled off by default.
 - **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 export full-name date format with the exported date and time information. For example, when using Regional Setting set to "English (Australia) | en-AU", the date and time will export as 08/04/2025, 9:01 AM (DD/MM/YYYY HH:MM AM/PM) when the toggle is off. It will export as Tuesday, 8 April 2025 09:01:00 AM (Day name, DD Month YYYY hh:mm:ss AM/PM) when the toggle is on.
 - **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of Relativity aiR multiple-choice lists, when applicable. The Nested Value delimiter, a backslash, separates child choices.
6. On the Select Fields dialog, configure how to populate individual columns and tables in the exported MDB file. Select options in the three tabs:
- **Export**—on this tab, map the Relativity workspace fields to the corresponding columns in the Export table.

Import/Export

[< Back](#)
Select Fields

We pre-selected some fields for export for your convenience, please check all tables' settings.

Export (5)
Export Extras (0)
Parties (0)

Workspace Fields		Export Table Columns
Control Number	>>	Document_ID
Clear...	>>	Host_Reference
Control Number	>>	Document_Date
PDF Begin Number	>>	Document_Type
Production::Begin Bates	>>	
Record Type	>>	Title
Unified Title	>>	Estimated
Choose...	>>	Description
Choose...	>>	

Continue
Cancel

- **Export Extras**—on this tab, select which Relativity workspace fields to export into the Export_extras table. There is also an option to rename a workspace field to a custom name. Label value in MDB file.

Import/Export

[< Back](#)
Select Fields

We pre-selected some fields for export for your convenience, please check all tables' settings.

Export (5)
Export Extras (3)
Parties (0)

Workspace Fields

Workspace Fields

Date

Received Date

Received Date/Time

Sent Date/Time

Sort Date/Time

Selected Fields

Selected Fields

Export Name

Filter

Unified Title

Last Accessed Date

Sent Date

Title

Continue
Cancel

- **Parties**—on this tab, select which Relativity workspace fields to export into the Parties table. There is also an option to rename a workspace field to a custom name. Correspondence_Type value in MDB file.

Import/Export

[< Back](#)

Select Fields

We pre-selected some fields for export for your convenience, please check all tables' settings.

×

Export (1) Export Extras (0) Parties (2)

Workspace Fields

Workspace Fields

Filter

Alert

Artifact ID

Attachment Name

Attorney Review Comments

»

»

»

»

Selected Fields

Selected Fields

Export Name

Filter

Email To

To

Email From

From

Continue

Cancel

Note: For multichoice fields or multiple values separated with a semicolon within a text field, there will be separate row entries created for each such value in the generated record in the Parties table.

7. On the Image Source dialog, select what images you want to export.

Import/Export

< Back

Image Source

Image Source

Production Images Type* ☐ Original Images ☒ Produced Images

Select Productions

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

Available Productions

Selected Productions

Continue Cancel

- Production Images 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.
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 image is exported.

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

[< 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
☐ Convert to PDF

PDFs

Export PDFs ☒

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

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, that is Opticon, IPRO, or IPRO (FullText), and the **File Type** for export images, that is 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, that is Opticon, IPRO, or IPRO (FullText).

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.

Import/Export

< Back
Text File Settings

Basic Settings

Export Text Field as Files ☒

Text File Encoding Unicode (UTF-8) ▾

Text Fields Precedence

Add Fields Choose... ▾ Add

No fields selected for Text Fields Precedence.

Export Close

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

Import/Export

< Back
Text File Settings

Basic Settings

Export Text Field as Files ☒

Text File Encoding Unicode (UTF-8) ▾

Text Fields Precedence

Add Fields Production OCR ▾ Add

⋮	Extracted Text	🗑
⋮	Production OCR	🗑

Continue Cancel

To order the precedence of the fields, click the six-dot handle next to the field name and drag it to the proper ordering position.

During an export, the system checks the first field in the list for text. If the field is null, it checks the next field in order of precedence for text, and so on. When Relativity finds a field that contains text, it adds the contents of that field to the Text Fields Precedence column in the document load file. 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. On the Export Job Configuration Summary dialog, review the export job settings and go back to make any corrections as needed.

Import/Export

[< Back](#) **Export Job Configuration Summary**

Data Source

Job Name	SavedSearchExport_001
Saved Search	Case-00294
Profile	No

Location And Files

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

Data File Settings

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

Export **Save Settings** **Cancel**

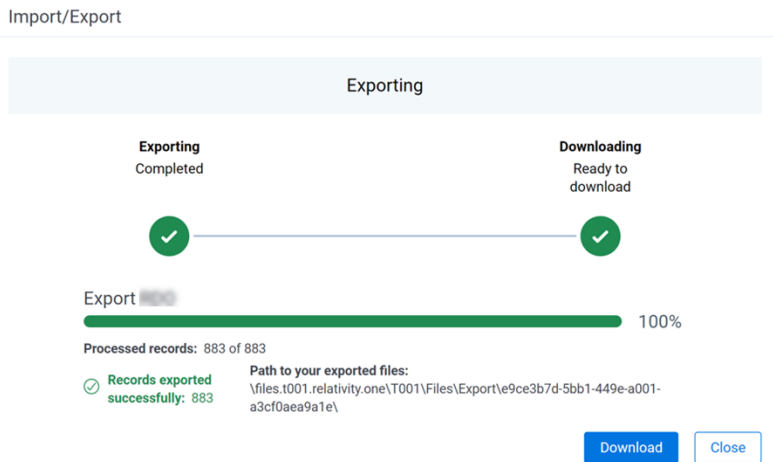
13. (Optional) Click **Save Settings** on the Export Job Configuration Summary dialog to export the job configuration settings entered thus far to its own profile file (.ie file extension). Save it on your computer so you can reuse these settings when creating a new export job with Import/Export.

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 Relativity aiR data transfer tools.

14. Click the **Export** button to start the exporting process.
15. When it's complete, the job summary lists the records exported successfully, including Load files containing .mdb, .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. For more information, 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. 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 Relativity aiR 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 Relativity aiR 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.

4.15.7 Exporting a production set with Access DB load file (MDB)

Note: The import and export workflows with Access DB (MDB) are designed for and are currently available for the Asia-Pacific region. For information on the possibility of enabling this flow in your instance, contact your Account Representative.

You can use Import/Export to export a production set with MDB load file out of Relativity aiR.

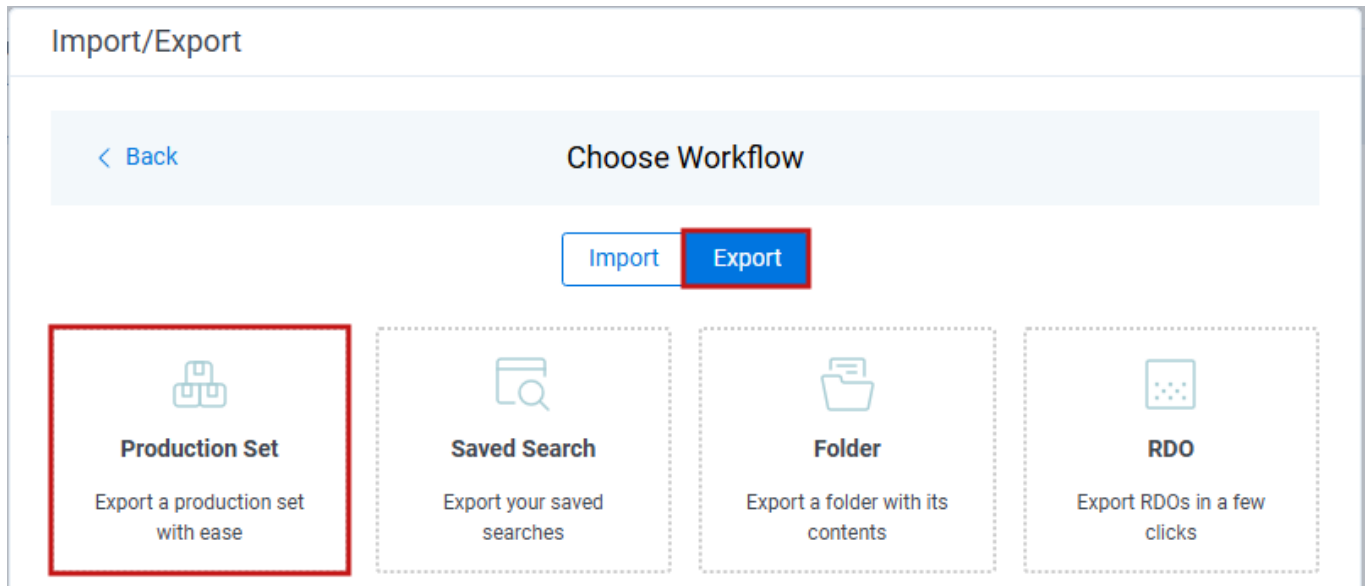
If you want to use Import/Export with Express Transfer, which is the recommended method for data transfer, refer to [Express Transfer overview on page 50](#) for more information. With Express Transfer activated, you can run up to five concurrent export jobs on a single client machine. For more information, see [Concurrent and consecutive jobs on page 30](#).

Refer to [Access DB \(MDB\) load file specifications](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 48](#).

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 65](#) 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

Folders*

Select

Export Sub-Folders

☐

Views*

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.
 - **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**—the job configuration settings that were previously saved to a profile file (.ie or .kw*). They can be reused when creating future jobs with the same or similar settings in Relativity aiR. This 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 data from your workspace and download it to your local disk.
 - If you activated Express Transfer, click **Local Folder** and select the destination folder on your disk. Once the export completes, Express Transfer automatically downloads the exported data to that folder. Exporting with Express Transfer activated is recommended for all export volumes.
 - If you export data without Express Transfer, the system exports and compresses it into a single zip file. Once the export completes, you can download the zip file directly to your local disk by clicking the **Download** button.

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.

Notes:

- 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.
 - For some combinations of job configuration and data, Windows system on your local machine may not be able to open ZIP archives due to too long file paths. You may receive an error message: “The compressed (zipped) folder is invalid.” For details, go to [General recommendations for structured data import and export jobs](#).
-

- 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 *

Generate MDB File

☒

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 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 is displayed.

Load File Characters

Column *

DCA (Device control 4)

▼

Quote *

" (Latin Small Letter Thorn)

▼

Newline (Long Text Fields) *

@ (Registered sign)

▼

Multi-Value *

~ (Semicolon)

▼

Nested Value *

1 (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.
- **Generate MDB File**—toggle on if you want to generate Access DB load file (MDB). This option is toggled off by default.
- **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 export full-name date format with the exported date and time information. For example, when using Regional Setting set to "English (Australia) | en-AU", the date and time will export as 08/04/2025, 9:01 AM (DD/MM/YYYY HH:MM AM/PM) when the toggle is off. It will export as Tuesday, 8 April 2025 09:01:00 AM (Day name, DD Month YYYY hh:mm:ss AM/PM) when the toggle is on.
- **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of Relativity aiR multiple-choice lists, when applicable. The Nested Value delimiter, a backslash, separates child choices.

6. On the Select Fields dialog, configure how to populate individual columns and tables in the exported MDB file. Select options in the three tabs:

- **Export**—on this tab, map Relativity workspace fields to columns in the Export table. You can map the Document ID field to values beyond the default Control Number, including PDF Begin Number and Production: Begin Bates.

Import/Export

Back

Select Fields

We pre-selected some fields for export for your convenience, please check all tables' settings.

Export (5)
Export Extras (0)
Parties (0)

Workspace Fields	Export Table Columns
Control Number	Document_ID
Clear...	
Control Number	Host_Reference
PDF Begin Number	Document_Date
Production: Begin Bates	
Record Type	Document_Type
Unified Title	Title
Choose...	Estimated
Choose...	Description

Continue
Cancel

- **Export Extras**—on this tab, select which Relativity workspace fields to export into the Export_extras table. There is also an option to rename a workspace field to a custom name. Label value in MDB file.

Import/Export

< Back Select Fields

ⓘ We pre-selected some fields for export for your convenience, please check all tables' settings. ✕

Export (5) Export Extras (3) Parties (0)

Workspace Fields

Workspace Fields

Date

Received Date

Received Date/Time

Sent Date/Time

Sort Date/Time

>>

>

<

<<

Selected Fields

Selected Fields	Export Name
Filter	
Unified Title	Title
Last Accessed Date	
Sent Date	

Continue Cancel

- **Parties**—on this tab, select which Relativity workspace fields to export into the Parties table. There is also an option to rename a workspace field to a custom name. Correspondence_Type value in MDB file.

Import/Export

< Back Select Fields

ⓘ We pre-selected some fields for export for your convenience, please check all tables' settings. ✕

Export (5) Export Extras (0) Parties (0)

Workspace Fields

Workspace Fields

Filter

All Paths/Locations

Artifact ID

Attachment Document IDs

Attachment List

>>

>

<

<<

Selected Fields

Selected Fields	Export Name
Filter	
No data.	

Continue Cancel

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

[< Back](#)

File Settings

Natives

Export Native Files
☒

Production

Export Images
☒

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

File Type*
☒ Single-page TIFF/JPG
☐ Multi-page TIFF/JPG
☐ Convert to PDF

Continue

Cancel

- Natives:
 - **Export Native Files** toggle—select this option to export native files. Native files will be exported if they exist in the production set.
 - Production:
 - **Export Images / Export PDFs /Export Images and PDFs** toggle—select this option to include additional files in the export. If this option is toggled on, you must set the following options:
 - **Data File Format**—select one of the formats for image/PDF-level load file: Opticon, IPRO, or IPRO (FullText).
 - **File Type**—select one of the file types for images: Single-page TIFF/JPG, Multi-page TIFF/JPG, or Rendered PDF.
8. On the Text File Settings dialog, you can select to export text field as files and then choose the text file encoding as follows.

Import/Export

[< Back](#)
Text File Settings

Basic Settings

Export Text Field as Files ☒

Text File Encoding Unicode (UTF-8)

Text Fields Precedence

Add Fields Choose... Add

No fields selected for Text Fields Precedence.

Export Close

- **Export Text Field as Files** toggle—determines the export method of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Deselect it to include text as part of 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 first field in the list for text. If the field is null, it checks the next field in order of precedence for text, and so on. When Relativity finds a field that contains text, it adds the contents of that field to the Text Fields Precedence column in the document load file. 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.

Note: If you have workflows that rely on clearing a text field for multiple production versions, you will need to ensure that you clear this field using either Mass Replace or a load file that sets the values to NULL. Operations such as Mass Edit will clear the field but set it to blank instead of null. This may result in exporting blank text files.

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

9. Click **Continue**.
10. On the Export Job Configuration Summary dialog, 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

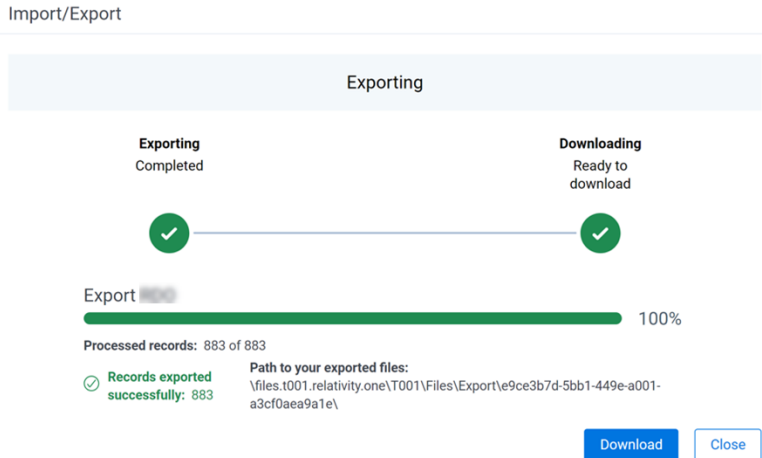
11. (Optional) Click **Save Settings** on the Export Job Configuration Summary dialog to export the job configuration settings entered thus far to its own profile file (.ie file extension). Save it on your computer so you can reuse these settings when creating a new export job with Import/Export.

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 Relativity aiR data transfer tools.

12. Click the **Export** button to start the exporting process.
13. When it's complete, the job summary lists the records exported successfully, including Load files containing .mdb, .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. For more information, 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. 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 Relativity aiR 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 Relativity aiR 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.

4.16 Import/Export Job tracking and history

On the Import/Export Job page, you can 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 262](#).

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**.

#	Name	Job Workflow	Job Status	System Created By	Date Started Local	Date End Local	Identifier
1	LF-004-N	Document Import	Import Job Comple...	Na	7/10/2023, 10:02 AM	7/10/2023, 10:06 AM	7a1ec271-a279-45ee-a709-ac...
2	LF-003-N	Document Import	Import Job Comple...	Na	7/10/2023, 10:02 AM	7/10/2023, 10:06 AM	e5316156-36ae-475c-86d4-c...
3	LF-002-N	Document Import	Import Job Comple...	Na	7/10/2023, 10:01 AM	7/10/2023, 10:05 AM	e7d65027-4770-49d8-a91e-5f...
4	LF-001-N	Document Import	Import Job Comple...	Na	7/10/2023, 10:00 AM	7/10/2023, 10:05 AM	76498dce-ef64-41ed-8d8c-7a...
5	LF-005-N	Document Import	Import Job Inserting	Na	7/10/2023, 10:03 AM		c8017525-a0b8-4578-a25b-b2...

The Import/Export Job page displays the following columns:

- **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 latest job progress.

- **Job Workflow**
 - **Unprocessed**—for imports of raw native files that require file processing.
 - **MsAccess Import**—for imports of load file data in MS Access (.mdb) format.
 - **Transcript Import**—for imports of transcript data in MS Access (.mdb) format.
 - **Document Import**—for imports of document load files.
 - **Image Import**—for imports of image load files.
 - **RDO Import**—for imports of Relativity Dynamic Object (RDO) data.
 - **Production Import**—for imports of production load files.
 - **Saved Search Export**—for exports of saved search results.
 - **Folder Export**—for exports of folder contents.
 - **Production Export**—for exports of production load files.
 - **RDO Export**—for exports of Relativity Dynamic Object (RDO) data.
- **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 Relativity aiR. 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**—Transfer Requested, Transfer Request Failed, Transferring, Transfer Failed, and Transfer Canceled.
 - **Processing phase (only for unprocessed data import)**—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**— the job ID.

You can extend the Import/Export Job view by creating your own view. To create a custom view, see [Creating a view](#).

4.16.2 Support for Mass Operations

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

- **Delete**—select the checkbox next to the 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. It does not remove the job data that was already uploaded to or exported from your system. You need to manually delete those files from your system.
- **Export to a file**—select the checkbox next to the Import/Export jobs on the Job 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. Then, the data currently displayed in rows and columns of the Job list for the selected jobs is exported. As you change the columns displayed, so does the data that is exported. If no individual records are selected, Relativity exports all records in the current view. This applies regardless of how many records appear per page.

4.17 Import/Export queue

Import/Export Queue lists current Import/Export jobs and their statuses across the Relativity aiR 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 260](#).

Production Queue	OCR Queue	PDF Queue	DtSearch Queue Admin	Import/Export Queue	Mass Operation Jobs
1 - 5 of 5 10 per page					
Job Name	Job status	Workspace	Workflow Type	Start Date	Created By
Filter	Filter	Filter	Filter	Filter	Filter
Ik2	DiscoveryCompleted	Web Import Export - Aero CD	Unprocessed	9/5/2023, 1:29:20 PM	K
Ik3	DiscoveryCompleted	Web Import Export - Aero CD	Unprocessed	9/5/2023, 4:35:20 PM	K
Ik4	DiscoveryCompleted	Web Import Export - Aero CD	Unprocessed	9/5/2023, 4:36:40 PM	K
Ik-azcopy1	DiscoveryCompleted WithErrors	Web Import Export - Aero CD	Unprocessed	9/22/2023, 12:07:18 PM	K
Ik-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: We've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you can no longer write to or access data outside of the four defined staging area folders. The four defined staging area folders: *ARM*, *ProcessingSource*, *StructuredData*, and *TenantVM*. Folders removed in the update include *FTA*, *Temp*, *Export*, and *dtSearch*. In addition to any other folders 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 [Transferring \(promoting\) data between workspaces on page 344](#).

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.

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 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 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: We've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you can no longer write to or access data outside of the four defined staging area folders. The four defined staging area folders: *ARM*, *ProcessingSource*, *StructuredData*, and *TenantVM*. Folders removed in the update include *FTA*, *Temp*, *Export*, and *dtSearch*. In addition to any other folders 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

Integration Points uses the ADS framework. You can install it from the Application Library to the current workspace or to multiple workspaces at once.

Once you install Integration Points, the necessary agents deploy automatically.

5.2.1.1 RIP AAD Provider

The AAD Provider application is also available in the Application Library and does not require a separate download or manual installation.

- If you plan to import data from Microsoft Entra ID, install the RIP AAD Provider application to your workspace from the Application Library.
- For more information, see [Microsoft Entra ID provider on page 368](#).

For more information, see Relativity applications.

5.3 Integration Points profiles

Note: We've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you can no longer write to or access data outside of the four defined staging area folders. The four defined staging area folders: *ARM*, *ProcessingSource*, *StructuredData*, and *TenantVM*. Folders removed in the update include *FTA*, *Temp*, *Export*, and *dtSearch*. In addition to any other folders 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.

The screenshot shows the 'Integration Point Details' console. The 'General' tab is selected. The console displays various settings for an integration point, including Name, Overwrite, Export Type, Source Details, Source Workspace, Source Relativity Instance, Transferred Object, Destination Workspace, Destination Folder, Multi Select Overlay, Use Folder Path Info, and Move Existing Docs. On the right side, the 'Transfer Options' console is visible, containing buttons for 'Run', 'Retry Errors', 'Calculate statistics', and 'Save as Profile'. A red arrow points to the 'Save as Profile' button.

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

The screenshot shows the 'Integration Point Profile Name' field with the text 'Documentation export'. Below the field are 'Ok' and 'Cancel' buttons.

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 Integ-](#)

Integration Points

Job History

Job History Errors

Destination Workspaces

Integration Point Profile

Create Integration Point Profile

Cancel

Setup

Complete the Setup

1

2

← Back

Next →

General

Name:

Type:

Import

Export

Source:

Relativity

Destination:

Relativity

Transferred Object:

Document

Profile:

Select...

Advanced

Email Notification Recipients:

Separate by semi-colon

Log Errors:

Yes

No

Scheduling

Enable Scheduler:

Yes

No

- 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

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": 0, "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>		

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

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 below](#).

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.

Create Integration Point

Setup

Complete the Setup

1

2

General

Name:

New export

Type:

Import

Export

Source:

Relativity

Destination:

Relativity

Transferred Object:

Document

Profile:

Select...

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

5.3.2 Copying Integration Point profiles

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

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

5.3.2.1 Configuring an Integration Point Profile for copying

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

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

5.3.2.2 For Setup

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

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 two sections of a configuration form. The top section, titled 'Source', contains two dropdown menus: 'Source' (set to 'Saved Search') and 'Saved Search' (set to 'Select...'). To the right of the 'Saved Search' dropdown is a blue button with three dots. The bottom section, titled 'Destination' with a help icon, contains three fields: 'Destination Workspace' (set to 'Copy Profiles'), 'Location' (with radio buttons for 'Folder' and 'Production Set', both followed by 'Select...' dropdowns), and 'Create Saved Search' (with radio buttons for 'Yes' and 'No', where 'No' is selected). A plus icon is next to the 'Production Set' dropdown.

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: We've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you can no longer write to or access data outside of the four defined staging area folders. The four defined staging area folders: *ARM*, *ProcessingSource*, *StructuredData*, and *TenantVM*. Folders removed in the update include *FTA*, *Temp*, *Export*, and *dtSearch*. In addition to any other folders 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: This documentation contains references to third-party software, or technologies. While efforts are made to keep third-party references updated, the images, documentation, or guidance in this topic may not accurately represent the current behavior or user interfaces of the third-party software. For more considerations regarding third-party software, such as copyright and ownership, see [Terms of Use](#).

5.4.1 Considerations

Consider the following before importing data through Integration Points:

- Although importing and exporting a load file is still possible in Integration Points, this functionality will be deprecated in the near future. For continued stability and efficiency, Import/Export is the recommended application for load file imports and exports going forward.
- All integration points jobs are fully editable after run.
- Changing root folder permissions during import is not a supported workflow.

5.4.2 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 301](#).

5.4.2.1 Import sources

With Integration Points, you can import data from the following sources:

- [FTP, .csv file](#)
- [LDAP](#)
- [Document load file](#)
- [Image load file](#)

- [Production load file](#)
- [Microsoft Entra ID](#)

5.4.3 Importing a .csv file

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

5.4.3.1 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 i

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.

5.4.3.2 Connect to source

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

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

The screenshot shows the 'Create Integration Point' wizard with three steps: Setup, Connect to Source (current), and Map Fields. The 'Connect to Source' step is highlighted with a blue circle containing the number 2. Below the progress bar, there are two sections: 'Connection Information' and 'File Information'. The 'Connection Information' section includes fields for Host, Protocol (set to FTP), Port (set to 21), Username, and Password. The 'File Information' section includes a CSV Filepath field with the example 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 Relativity aiR and FTP server for outgoing connections from Relativity aiR's Web and Agent servers and for listening (FTP server). Some firewall solutions may impact the connectivity between Relativity aiR 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 Relativity aiR instance requires a Security assessment. To successfully import an FTP (CSV file), the standard network ports should be open on both Relativity aiR and FTP server for outgoing connections from Relativity aiR's Web and Agent servers and for listening (FTP server). Note that the firewall solutions may impact the connectivity between Relativity aiR 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.

5.4.3.3 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 and 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.

- We recommend setting the Unique Identifier field to UniqueID.

The screenshot displays the 'Map Fields' step of a data import process. At the top, a progress bar shows three steps: 'Setup' (completed), 'Connect to Source' (completed), and 'Map Fields' (current step, indicated by a blue circle with the number 3). Navigation buttons for 'Back' and 'Save' are in the top right.

The main area is titled 'Field Mappings' and contains four panels:

- Source Fields (12):** A list of fields from the source system, including Business Title, Escalation Email, Location, Manager ID, Primary Work Phone, Status, Termination Date, Work City, Work Country, Work State/Province, Worker Sub Type, and Worker Type.
- Selected Source Fields (5):** A list of fields chosen for mapping: Email, First Name, Last Name, Manager, and Employee ID.
- Selected Destination Fields (5):** A list of fields in the destination system to which source fields are mapped: Email (Fixed-Length Text), First Name (Fixed-Length Text), Last Name (Fixed-Length Text), Manager (Single Object), and UniqueID (Object Identifier).
- Destination Fields (36):** A comprehensive list of all available fields in the destination system, such as Address 1, Address 2, BCC People, CC Recipients, City, Company, Country, Current Title, Custodian Interaction, Custodians, Department, Document numbering prefix, Domain, Employee Number, Employee Status, Employment End Date, Employment Start Date, Location, Middle Name, Notes, Past Department, Past Manager, Past Title, and Phone Number.

Below the field mapping panels is a 'Settings' section with three dropdown menus:

- Overwrite:** Set to 'Append/Overlay'.
- Multi-Select Field Overlay Behavior:** Set to 'Use Field Settings'.
- Unique Identifier:** Set to 'UniqueID'.

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.

Note: We recommend setting the Unique Identifier field to UniqueID. Using a name field can cause an error because there is the possibility of having two custodians with the same name.

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 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 Relativity aiR and the LDAP Server for outgoing connections from Relativity aiR'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 Relativity aiR and the LDAP Server for outgoing connections from Relativity aiR'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 Relativity aiR and LDAP server.

5.4.4.1 Setup

To create an integration point for importing LDAP:

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

General:

- **Name**—the name of your integration for reference purposes.
- **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
- **Source**—select **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.

5.4.4.2 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:

Source Connection

Connection Path:

Object Filter String:

Authentication:

Username:

Password:

Import Nested Items: ☐ Yes ☒ No

- **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-U=Employees,OU=Accounts,OU=Relativity,DC=Relativity,DC=corp`

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

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

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

5.4.4.3 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 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.

5.4.5 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.

5.4.5.1 Setup

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

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

General:

- **Name**—the name of your integration for reference purposes
- **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
- **Source**—select **Load File** here, since you want to import a load file into a workspace. On the Connect to Source layout, you'll have the option of specifying whether 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 265](#).

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.

5.4.5.2 Connect to source

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

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

Create Integration Point Cancel ?

Setup Connect to Source Map Fields

1 2 3

Load File Settings

Import Type:

Workspace Destination Folder:

Import Source:

Start Line:

File Encoding

File Encoding:

Column:

Quote:

File Column Headers:

Relativity

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.

5.4.5.3 Map fields

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

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

When mapping fields, here are some issues to note:

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

The screenshot displays the 'Map Fields' wizard, which is the third step in a three-step process (Setup, Connect to Source, Map Fields). The 'Map Fields' step is highlighted with a blue circle containing the number 3. Below the progress bar, a warning message states: 'Please make sure not to overlay the document images with the 'Links Only' option when transferring from the Review workspace back to the Repository workspace. Doing so may cause the original images to be replaced with their links, which were previously sent to the Review workspace, leading to the deletion of the native file and subsequent data loss. For more details please refer to the [Public Documentation](#)'.

The main interface is titled 'Field Mappings' and includes two buttons: 'Map All Fields' and 'Map Saved Search'. It is divided into four columns:

- Source Fields (264):** A list of fields with a search bar and a scrollable list. Fields include 'Alert [Long Text]', 'Alias BCC [Multiple Object]', 'Alias CC [Multiple Object]', 'Alias Email Bcc Domain [Multiple Object]', 'Alias Email Cc Domain [Multiple Object]', 'Alias Email From Domain [Multiple Object]', 'Alias Email Recipients Domain [Multiple Object]', 'Alias Email To Domain [Multiple Object]', 'Alias From [Multiple Object]', 'Alias Participant [Multiple Object]', 'Alias Recipient [Multiple Object]', 'Alias To [Multiple Object]', 'All Custodians [Multiple Object]', 'All Custodians (Script) [Long Text]', 'All Paths/Locations [Long Text]', 'All Source Locations (Script) [Long Text]', 'Attachment Document IDs [Long Text]', 'Attachment List [Long Text]', 'Attorney Review Comments [Long Text]', 'Author [Fixed-Length Text(255)]', 'Bates Beg [Fixed-Length Text(50)]', 'Bates Beg Attach [Fixed-Length Text(50)]', 'Bates End [Fixed-Length Text(50)]', 'Bates End Attach [Fixed-Length Text(50)]', and 'CC (SMTP Address) [Long Text]'.
- Selected Source Fields (1):** A list containing 'Control Number [Object Identifier]'.
- Selected Destination Fields (1):** A list containing 'Control Number [Object Identifier]'.
- Destination Fields (244):** A list of fields with a search bar and a scrollable list. Fields include 'Per Source Locations (Script) [Long Text]', 'Attachment Document IDs [Long Text]', 'Attachment List [Long Text]', 'Attorney Review Comments [Long Text]', 'Author [Fixed-Length Text(255)]', 'Bates Beg [Fixed-Length Text(50)]', 'Bates Beg Attach [Fixed-Length Text(50)]', 'Bates End [Fixed-Length Text(50)]', 'Bates End Attach [Fixed-Length Text(50)]', 'CC (SMTP Address) [Long Text]', 'Child MD5 Hash Values [Long Text]', 'Child SHA1 Hash Values [Long Text]', 'Child SHA256 Hash Values [Long Text]', 'Classification Index [Multiple Choice]', 'Comments [Long Text]', 'Company [Fixed-Length Text(255)]', 'Conceptual Index [Multiple Choice]', 'Confidential [Single Choice]', 'Container extension [Fixed-Length Text(16)]', 'Container ID [Fixed-Length Text(255)]', 'Container name [Fixed-Length Text(255)]', 'Contains Embedded Files [Yes/No]', 'Control Number Beg Attach [Fixed-Length Text(50)]', 'Control Number End Attach [Fixed-Length Text(50)]', and 'Conversation [Long Text]'.

Navigation arrows are present between the columns to move fields. Below the field lists is a 'Settings' section with the following options:

- Overwrite:** Append/Overlay
- Multi-Select Field Overlay Behavior:** Use Field Settings
- Copy Images:** Yes (selected)
- Image Precedence:** Original Images
- Copy Files to Repository:** No (selected)

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

- **Overwrite**—determines how the system overwrites records once you promote data to the review workspace. This field provides the following choices:
 - **Append Only**—promote only new records into the review workspace.
 - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. This field acts as a link indicating to Relativity where to import the data. When you select this or Append/Overlay, you must complete the Multi-Select Field Overlay Behavior field described below.
 - **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this or Overlay Only, you must complete the Multi-Select Field Overlay Behavior field described below. You are able to create folders or re-folder documents when you select Append/Overlay.
- **Multi-Select Field Overlay Behavior**—determines how the system will overlay records when you push documents to the review workspace. This field is only available if you'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 301](#).

5.4.6 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.

5.4.6.1 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:

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 265](#).

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.

5.4.6.2 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.

Create Integration Point

Cancel ⓘ

Setup Source Information

1 2

← Back Save Preview Options ▾

Load File Settings

Import Type: Image Load File ▾

Workspace Destination Folder: ClarityTest ▾

Import Source: DataTransfer\Import\ClarityTest\2017-03-17_16-35-14UTC\Error_Files\Do ▾

Start Line: 0

Import Settings

Numbering: ☒ Use load file page IDs ☐ Auto-number pages

Import Mode: Append Only ▾

Copy Files to Document Repository: ☒ Yes ☐ No

File Repository: \\files\T001\Files\ Default

Load Extracted Text: ☐ Yes ☒ No

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 Relativity copies files from the location in the image load file field to the workspace's default document repository.
 - **Yes**—copies files to the workspace's default document repository automatically.
 - **No**—select this if the native files already reside in a location that Relativity can access.
- **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 301](#).

5.4.7 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.

5.4.7.1 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 with the 'Setup' tab selected. The dialog has a title bar with 'Create Integration Point', 'Cancel', and an information icon. Below the title bar is a progress bar with two steps: 'Setup' (step 1, highlighted with a blue circle) and 'Complete the Setup' (step 2, in a grey circle). Navigation buttons 'Back' and 'Next' are on the right. The 'General' section contains fields for Name, Type (Import selected), Source (Load File), Destination (Relativity), Transferred Object (Document), and Profile (Select...). The 'Advanced' section has a text area for Email Notification Recipients and a Log Errors checkbox (Yes selected). The 'Scheduling' section has an Enable Scheduler checkbox (No selected).

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 **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 265](#).

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.

5.4.7.2 Source information

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

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

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

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

Below the 'Load File Settings' section is the 'Import Settings' section, which contains the following fields:

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

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**—copies files to the workspace's default document repository automatically.
 - **No**—select this if the native files already reside in their final location, which is accessible by Relativity.
- **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 301](#).

5.4.8 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 can be downloaded from the Relativity Community. 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.

5.4.8.1 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**, formerly known as Azure AD.
- **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.

5.4.8.2 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**—Optional. Limits the users or groups imported from Microsoft Entra ID.
 - Enter only the filter condition using Microsoft Graph query syntax.
 - Do not include the *\$filter* query parameter. Including *\$filter=* in the field may cause errors.
 - Relativity automatically applies *\$filter* when submitting the request to Microsoft Entra ID.
 - Examples:
 - department eq 'Engineering'
 - userType eq 'Member'
 - For more information on using Graph query syntax, see Microsoft's Graph REST API documentation.
 - The Microsoft Entra ID provider supports both standard and advanced Microsoft Graph filters. For more information on filter syntax, supported operators, and query requirements, see Microsoft's Use the \$filter query parameter.
- **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.

Microsoft Graph advanced filters

The Microsoft Entra ID provider supports Microsoft Graph advanced filters. You can use advanced filters to further refine the users or groups returned from Microsoft Entra ID during an import. Filter syntax, supported operators, and query requirements vary by object type and property. For more information, see [Microsoft Graph filter query parameter documentation](#).

5.4.8.3 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. Pre-

viously 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. These merge 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. These merge 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.

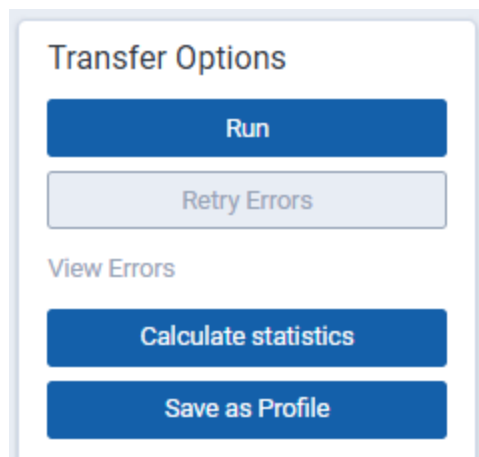
Once all of the settings have been entered the Integration Points job will run according to the schedule that was set. If you would like to run the job ahead of that time. For more information, see the Integration Points guide.

5.4.8.4 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.

5.4.9 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.

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 on the Integration Points details page for the integration point job.

The screenshot shows the 'Integration Points' details page for a specific job. The 'General' tab is selected, displaying various configuration fields. On the right side, there is a 'Transfer Options' panel with buttons for 'Run', 'Retry Errors', 'Calculate statistics', and 'Save as Profile'. The 'Total of Documents' field displays the message 'Press \'Calculate statistics\' button'.

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

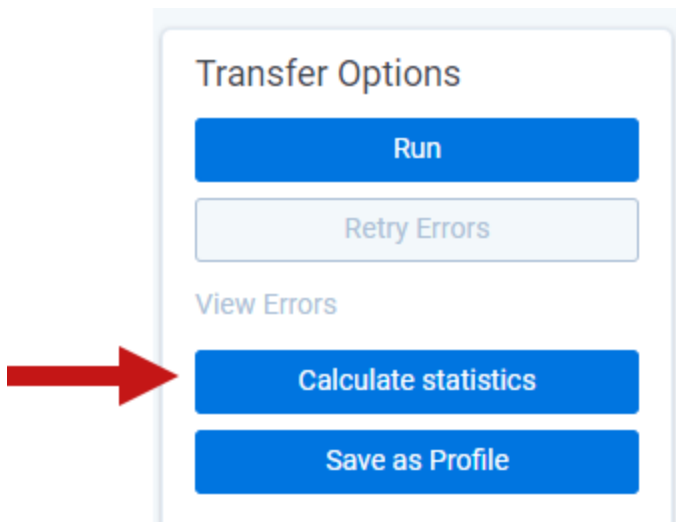
Email Notification Recipients

Total of Documents Press 'Calculate statistics' button

Create Saved Search No

Tag Documents Yes (Source and Destination Workspaces)

2. Click the **Calculate statistics** button under Transfer Options in the right-hand panel.



- A message appears confirming that this action launches the calculation of the Saved Search or Production content, depending on the integration point selected.
- The calculation runs in the background. You can continue using other Transfer Options or leave the page and return for results later.
- If your job includes more than 500,000 documents, a warning banner appears after the calculation runs.
- The same warning appears if your job includes more than 25 GB of extracted text across mapped fields. Split the job into smaller batches before running to reduce job time.
- Calculation results appear on the details page and depend on Integration Point content.
- The total number of documents with a date and time mark of the last calculation will display.
- Depending on the transferred content, the total number and size of images or natives may also display.

Total of Documents 25

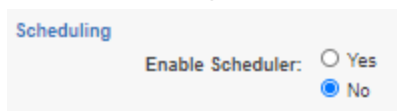
Calculated on: 12/19/2022 16:18 UTC

Total of Natives 25 (2.56 MB)

5.4.10 Disabling a scheduled Integration Point job

To disable a scheduled integration point , simply turn off the scheduler.

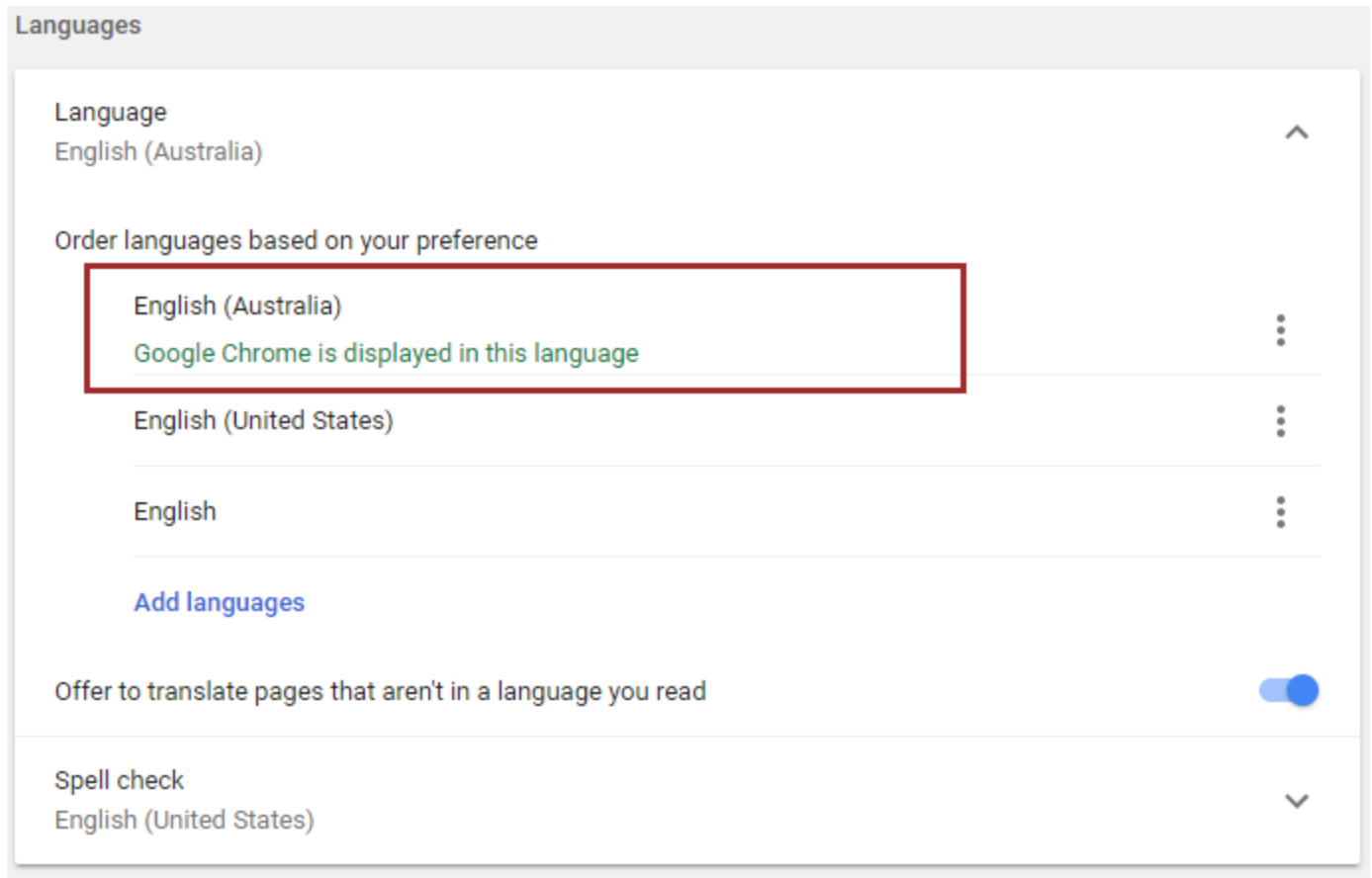
1. From the Integration Points landing page, click the **Integration Point Name** that you wish to disable.
2. Click **Edit**.
3. In the Scheduling section, select **No** for Enable Scheduler. The integration point is no longer scheduled to run.



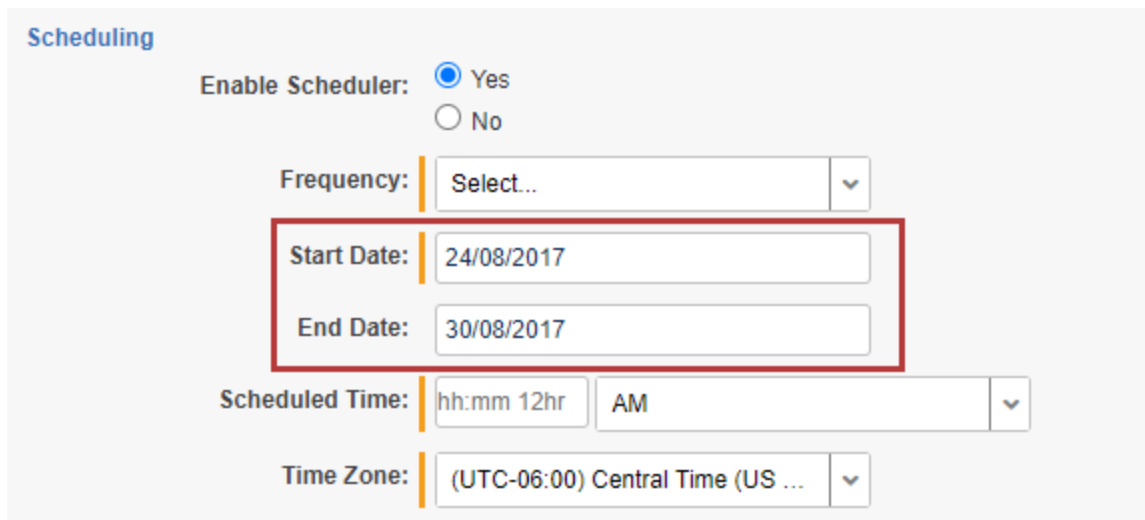
5.4.11 Scheduler date format considerations

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.



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.

		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.

Status										
Job ID	Start Time (UTC)	Artifact ID	Name	Job Type	Job Status	Destination Worksp...	Items Transferred	Total Items	Items with Errors	System Created By
Filter	(All)	Filter	Filter	(All)	(All)	Filter	Filter	Filter	Filter	Filter
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 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.

Job History Error						
Name	Source Unique ID	Job History	Error	Error Status	Error Type	System Created On
Filter	Filter	Filter	Filter	(All) ▾	(All) ▾	(All)
90710540-d664-4e8d-		Automated Stop for...	Scheduled Job reached maximum number of consecutive fails and therefore was stopped by the system. The schedule won't be restored until Integration Point update.	New	Job	



5.5 Exporting data through Integration Points

Note: We've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you can no longer write to or access data outside of the four defined staging area folders. The four defined staging area folders: *ARM*, *ProcessingSource*, *StructuredData*, and *TenantVM*. Folders removed in the update include *FTA*, *Temp*, *Export*, and *dtSearch*. In addition to any other folders 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:

- Import/Export is the recommended application for load file imports and exports.
- 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:

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 265](#).
- **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:

Create Integration Point Cancel i

Setup Source Information Destination Information

← Back Next →

Source Detail

Source: Folder

Folder: SempergerCara

Views: Documents

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
- Control Number Beg Attach
- Control Number End
- Control Number End Attach
- Conversation Family
- Conversation Index
- Data Load Date
- Data Load Volume
- Date Created
- Date Last Printed
- Date Received
- Date Sent
- Delivery Receipt

Selected Fields:

- Confidential Designation
- Control Number
- Custodian - Single Choice
- Date Last Modified
- Document Extension
- Email CC
- Email From
- Email Subject
- Email To
- Group Identifier
- Issue Designation
- Privilege Designation
- Responsive Designation
- Sort Date
- Title

Renamed Fields:

Rename

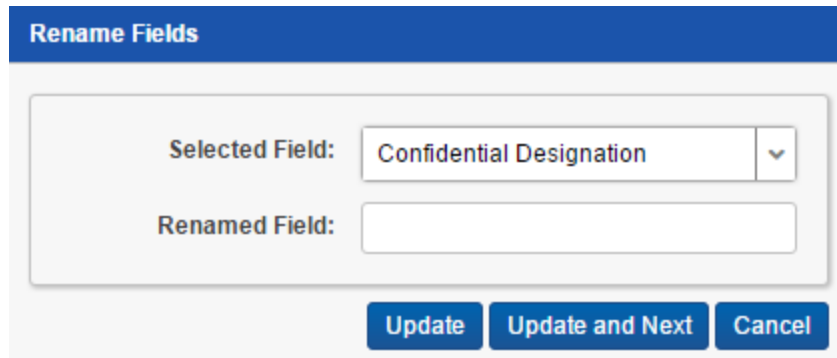
- **Source**—select **Folder** from the drop-down list. Specify that you want to select a folder, from which you want export the data in your load file. You will select this folder below from the folder structure in the Folder field. You will also need to select a View from the Views field.
- **Folder**—click 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 creating the integration point, these fields are updated to reflect the newly selected source.

- **Views**—click on the down arrow and select a view for the data that you want to export. This is only available if you selected Folder or Folder + Subfolders as the source above.
- **Start Export at Record**—select a record number that identifies the initial document for export. Integration Points exports the document with this record number and continues exporting documents with subsequent record numbers.
- **Source Fields | Selected Fields| Renamed Fields**—choose the fields that you want to export by moving them to the Selected Fields box. The box on the left displays all available source fields. The fields listed in the Selected Fields column are determined by what you select for the Source field above, as well

by the folder, production set, or saved search that you select. Only the fields in the Selected Fields box on the right will be exported when you run the integration point. If you wish to rename the fields in your load file before exporting them, you can do so through the Rename option described below. The fields whose names you change are displayed in the Renamed Fields column.

- **Rename**—gives you the option of renaming the fields in your load file before exporting them. When you click this button, you are presented with the following settings and buttons in the Rename Fields window:



- **Selected Field**—displays the current name of the field that you selected from the Source Fields column. To change its name, use the Renamed Field below.
- **Renamed Field**—enter the new name for the Selected Field. This name will appear in the Renamed Fields column of the layout once you click the Update or Update and Next button below. If you do not change the original name of the selected field, then the Renamed Fields column contains an empty row for that field.
- **Update** button—click this button to update the selected field to the name you entered in the Renamed Field setting. When you do this, the renamed field appears in the Renamed Field column.
- **Update and Next** button—click this button to update the selected field to the name you entered in the Renamed Field setting and then move to the next field in the Selected Field column. When you do this, the renamed field appears in the Renamed Field column and the next field appears in the Selected Field setting.
- **Cancel** button—click this to exit the Rename Fields window without applying any changes to current field names.

6. Click **Next** to advance to the Destination Information layout.

7. Complete the following fields on the **Destination Information** layout:

Create Integration Point [Cancel] ⓘ

Setup Source Information **Destination Information** 3 [Back] [Save]

Export Detail ⓘ

Export Type: ☐ Load File ☒ Images ☒ Natives ☒ Text Fields As Files Overwrite Files: ☒

Destination Folder: .StructuredData\export_(TimeStamp) [v]

☒ Create Export Folder

Output Settings

LOAD FILE OPTIONS

Image File Format: [Select...] [v]

Data File Format: [Relativity (.dat)] [v]

Data File Encoding: [Unicode] [v]

File Path: ☒ Relative ☐ Absolute ☐ User Prefix: []

Include Native Files Path: ☒

Export Multiple Choice Fields As Nested: ☐

FILE NAMING OPTIONS

Name Output Files After: [Identifier] [v]

Append Original File Name: ☐

IMAGE

File Type: [Single page TIFF/JPEG] [v]

Image Precedence: [Original Images] [v]

Subdirectory Prefix: [IMG] 001

NATIVE

Subdirectory Prefix: [NATIVE] 001

TEXT

Text File Encoding: [Unicode] [v]

Text Precedence: [Select...] [v]

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 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.

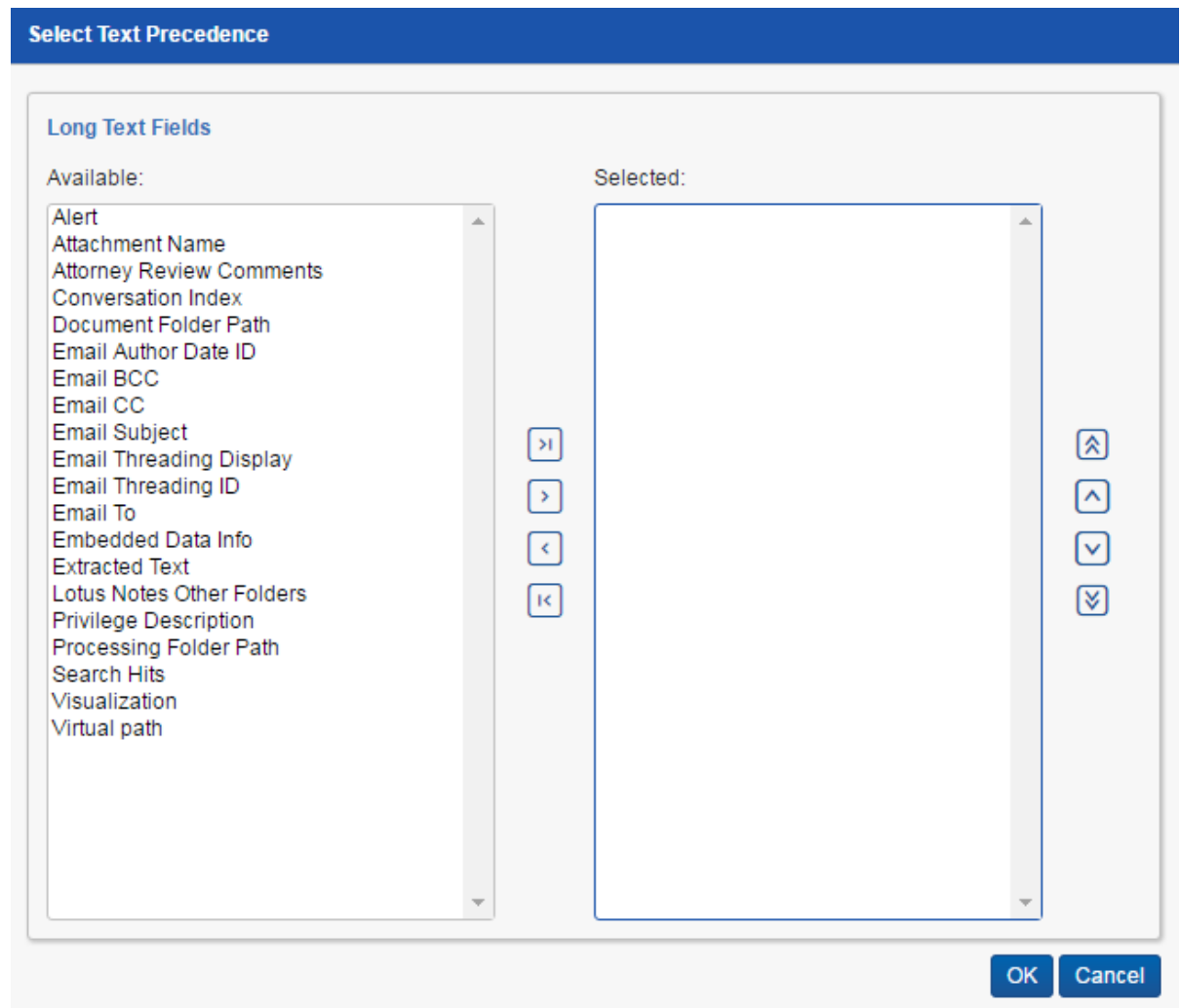
- **Create Export Folder**—check this box to create an export folder named after the existing Relativity Integration Point job and the timestamp in your export folder. This will prevent the overwriting of any previous Relativity Integration Point exports to your export folder. When you check this box, the value displayed in the Destination Folder field is updated to reflect the [JobName]_[Run-TimeStampUTC] information.
- **Image File Format**—select one of these formats for image-level load file:
 - Opticon
 - IPRO
 - IPRO (Full Text)
- **Data File Format**—select the format for the document-level load file you are exporting:
 - **Relativity (.dat)**—load file exports with the standard Concordance delimiters.
 - **HTML (.html)**—load file is in HTML and contains hyperlinks to launch any exported files.
 - **Comma-separated (.csv)**—load file exports as delimited text file that uses a comma to separate values.
 - **promote data**—load file exports with the custom delimiters that you select.
- **Data File Encoding**—select an encoding for the document-level load file from the drop-down box.
- **File Path**—controls how the export path for the files is referenced. Select one of the following options:
 - **Use absolute paths**—paths to exported files are represented as absolute paths. For example, C:\ Desktop\VOL001\NATIVE001\AS000001.msg
 - **Use relative paths**—paths to exported files are represented as relative paths. For example, .\VOL001\NATIVE001\AS000001.msg
 - **Use prefix**—a prefix is added to the relative path, such as a CD drive letter. For example, D:\VOL001\NATIVE001\AS000001.msg
- **Include Native Files Path**—check this box if you want to include the native file path in your data once you export it. Note that in the load file, for example a Relativity.dat file, there will be file path information added for every record you are exporting.
- **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.
- **Name Output Files After**—select one of the following naming convention for exported files:
 - **Identifier**—select this option to name the files after the identifier for your workspace.
 - **Begin production number**—select this option to name the files after the production number. (This number may be the Bates number for a production.) Relativity names files after the production number only if you select Produced Images as the Production Precedence below.
- **Append Original File Name**—select this option to append the original name of the file to the end of the exported file name.

- **Image**—the following fields are only available if you selected Images for the Export Type field above.
 - **File Type**—select one of these file types:
 - Single-page TIF/JPG
 - Multi-page TIF
 - PDF
 - **Production Precedence**—select one of the following groups of produced documents for export instead of the original images:
 - **Original Images**—exports only the original, non-produced images.
 - **Produced Images**—exports a produced version of the images. When you select this, the following fields become available:

The screenshot shows a configuration panel titled 'IMAGE'. It contains several fields: 'File Type' is set to 'Single page TIFF/JPEG'; 'Production Precedence' is set to 'Produced Images'; 'Image Productions' is set to 'November Production' with a blue ellipsis button; 'Include Original Images If Not Produced' is an unchecked checkbox; and 'Subdirectory Prefix' is set to '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.



The dialog box is titled "Select Text Precedence" in a blue header bar. Below the header, there is a section titled "Long Text Fields". This section contains two list boxes: "Available:" on the left and "Selected:" on the right. The "Available:" list box contains the following items: Alert, Attachment Name, Attorney Review Comments, Conversation Index, Document Folder Path, Email Author Date ID, Email BCC, Email CC, Email Subject, Email Threading Display, Email Threading ID, Email To, Embedded Data Info, Extracted Text, Lotus Notes Other Folders, Privilege Description, Processing Folder Path, Search Hits, Visualization, and Virtual path. Between the two list boxes are four buttons: ">|", ">", "<", and "<|". To the right of the "Selected:" list box are four buttons: "⬆", "⬆", "⬇", and "⬇". At the bottom right of the dialog box are two buttons: "OK" and "Cancel".

- **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 339](#) for details.

5.5.2 Exporting a folder and subfolders to a load file

To create an integration point specifically for exporting a folder and subfolders, perform the following steps:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.
3. Complete the following fields in the **Setup** category of the Create Integration Point layout:

Create Integration Point

Cancel

Setup

Complete the Setup

1

2

← Back

Next →

General

Name:

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 an existing profile, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 265](#).
- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semicolons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors. Regardless of your selection, job-level errors are always recorded in Relativity.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity does not log these item level errors.
- **Enable Scheduler**—gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
 - **Frequency**—the interval at which Relativity promotes data using this integration point.
 - **Daily**—select this option to promote data once every day.
 - **Weekly**—select this option to promote data on a weekly basis. You can specify how often in the **Reoccur** field, in which you will provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the data promotion will take place by checking any of the days of the week listed.
 - **Monthly**—select the day of the month that you want this integration point to promote data once every month.
 - **Reoccur**—enter the number of month(s) in which this integration point recurrently promote data.
 - **Send On**
 - **Day __ the month**—select the day of the month that you want this integration point to promote data.
 - **The __ of the Month**—select this option for this integration point to promote data on the chosen day of every month. For example, "The **Second Friday** of the month."
 - **Start Date**—the date that you want Integration Points to start promoting the data.
 - **End Date**—(Optional) the date that you want Integration Points to stop promoting the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
 - **Scheduled Time**—the time at which this integration point promotes data. This time is local to your PC, not to the server.

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

5. Complete the following fields on the **Source Information** layout:

Create Integration Point Cancel ?

Setup Source Information Destination Information

1 **2** 3 ← Back Next →

Source Detail

Source: Folder + Subfolders ▼

Folder + Subfolders Select... ▼

Views: Select... ▼

Start Export at Record: 1

Columns To Export

Source Fields:

- Alert
- Analytics Index
- Artifact ID
- Attachment Name
- Attorney Review Comments
- Batch
- Batch::Assigned To
- Batch::Batch Set
- Batch::Status
- Bates Beg
- Bates Beg Attach
- Bates End
- Bates End Attach
- Case Admin - Production Volume
- Case Admin Saved Searches
- Confidential Designation
- Control Number
- Control Number Beg Attach
- Control Number End
- Control Number End Attach
- Conversation Family
- Conversation Index
- Custodian - Single Choice
- Data Load Date
- Data Load Volume
- Date Created
- Date Last Modified

Selected Fields:

Rename

Renamed Fields:

- **Source**—select **Folder + Subfolders** from the drop-down list and specify that you want to select a folder and subfolders from which you want export the data in your load file. You will select this folder below from the folder structure in the Folder + Subfolders field. You will also need to select a View from the Views field.
- **Folder + Subfolders**—click on the down arrow and expand the folder structure, locate the folder and subfolders from which you want to export the data, and select it. This field is only available if you selected Folder + Subfolders as the source above.

Note: When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to creating the integration point, these fields are updated to reflect the newly selected source.

- **Views**—click on the down arrow and select a view for the data that you want to export. This is only available if you selected Folder or Folder + Subfolders as the source above.

- **Start Export at Record**—select a record number that identifies the initial document for export. Integration Points exports the document with this record number and continues exporting documents with subsequent record numbers.
- **Source Fields | Selected Fields | Renamed Fields**—choose the fields that you want to export by moving them to the Selected Fields box. The box on the left displays all available source fields. The fields listed in the Selected Fields column are determined by what you select for the Source field above, as well by the folder, production set, or saved search that you select. Only the fields in the Selected Fields box on the right will be exported when you run the integration point. If you wish to rename the fields in your load file before exporting them, you can do so through the Rename option described below. The fields whose names you change are displayed in the Renamed Fields column.
- **Rename**—gives you the option of renaming the fields in your load file before exporting them. When you click this button, you are presented with the following settings in the Rename Fields window:

- **Selected Field**—displays the field that you have selected from the Source Fields column, the name of which you can change in the Renamed Field below.
- **Renamed Field**—enter the desired new name for the field. This name will appear in the Renamed Fields column of the layout once you click the Update or Update and Next button below. If you do not change the original name of the selected field, then the Renamed Fields column contains an empty row for that field.
- **Update** button—click this button to update the selected field to the name you entered in the Renamed Field setting. When you do this, the renamed field appears in the Renamed Field column.
- **Update and Next** button—click this button to update the selected field to the name you entered in the Renamed Field setting and then move to the next field in the Selected Field column. When you do this, the renamed field appears in the Renamed Field column and the next field appears in the Selected Field setting.
- **Cancel** button—click this button to exit the Rename Fields window without applying any changes to current field names.

6. Click **Next** to advance to the Destination Information layout.

7. Complete the following fields on the **Destination Information** layout:

Create Integration Point [Cancel]

Setup Source Information **Destination Information** 3 [Back] [Save]

Export Detail

Export Type: ☐ Load File ☒ Images ☒ Natives ☒ Text Fields As Files

Overwrite Files: ☒

Destination Folder: .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]_[Run-TimeStampUTC] 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:

IMAGE

File Type: Single page TIFF/JPEG

Production Precedence: Produced Images

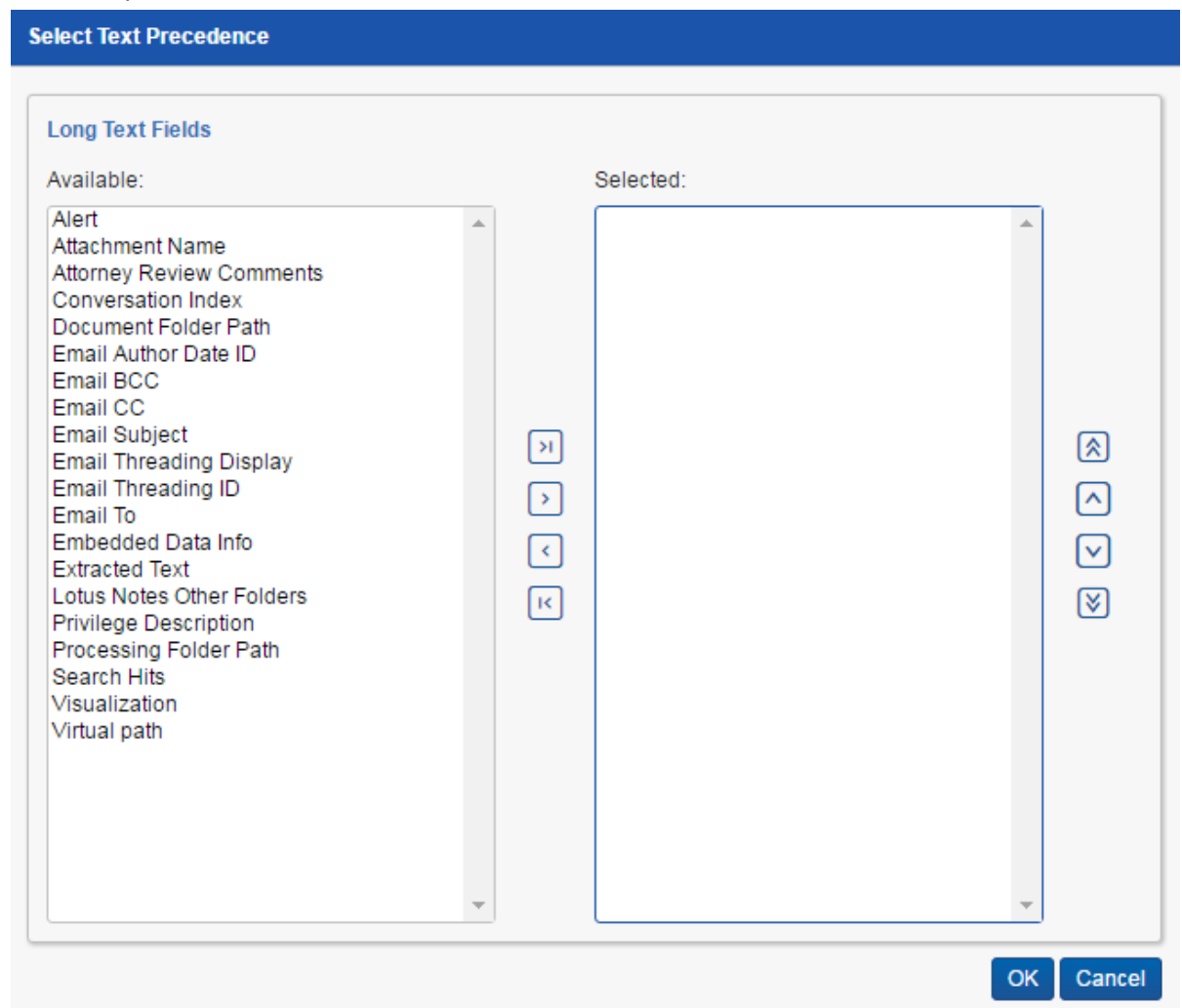
Image Productions: November Production ...

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.



The dialog box is titled "Select Text Precedence" in a blue header bar. Below the header, there is a section titled "Long Text Fields". This section contains two list boxes: "Available:" on the left and "Selected:" on the right. The "Available:" list box contains the following items: Alert, Attachment Name, Attorney Review Comments, Conversation Index, Document Folder Path, Email Author Date ID, Email BCC, Email CC, Email Subject, Email Threading Display, Email Threading ID, Email To, Embedded Data Info, Extracted Text, Lotus Notes Other Folders, Privilege Description, Processing Folder Path, Search Hits, Visualization, and Virtual path. Between the two list boxes are four buttons: ">|", ">", "<", and "<|". To the right of the "Selected:" list box are four buttons: "⬆", "⬆", "⬇", and "⬇". At the bottom right of the dialog box are "OK" and "Cancel" buttons.

- **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](#) 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:

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 an existing profile, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 265](#).
- **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:

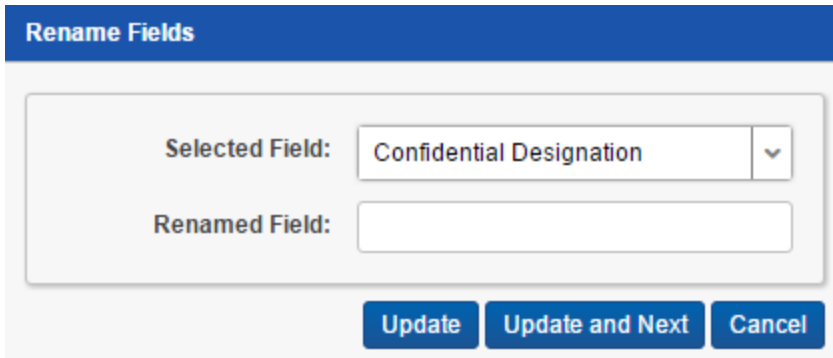
The screenshot shows the 'Create Integration Point' wizard at the 'Source Information' step. The 'Source Detail' section has 'Source' set to 'Production' and 'Production Set' set to 'Select...'. The 'Columns To Export' section shows a list of 'Source Fields' on the left and an empty 'Selected Fields' list on the right. A 'Rename' button is located between the two lists. The 'Renamed Fields' list is also empty.

- **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 creating 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 [Cancel] ⓘ

Setup Source Information **Destination Information** 3 [Back] [Save]

Export Detail ⓘ

Export Type: ☐ Load File ☒ Images ☒ Natives ☒ Text Fields As Files Overwrite Files: ☒

Destination Folder: .StructuredData\export_(TimeStamp) [v]

☒ Create Export Folder

Output Settings

LOAD FILE OPTIONS

Image File Format: [Select...] [v]
 Data File Format: [Relativity (.dat)] [v]
 Data File Encoding: [Unicode] [v]
 File Path: ☒ Relative ☐ Absolute ☐ User Prefix: []
 Include Native Files Path: ☒
 Export Multiple Choice Fields As Nested: ☐

FILE NAMING OPTIONS

Name Output Files After: [Identifier] [v]
 Append Original File Name: ☐

IMAGE

File Type: [Single page TIFF/JPEG] [v]
 Image Precedence: [Original Images] [v]
 Subdirectory Prefix: [IMG] [001]

NATIVE

Subdirectory Prefix: [NATIVE] [001]

TEXT

Text File Encoding: [Unicode] [v]
 Text Precedence: [Select...] [v]
 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]_[Run-TimeStampUTC] 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:

IMAGE

File Type: Single page TIFF/JPEG

Production Precedence: Produced Images

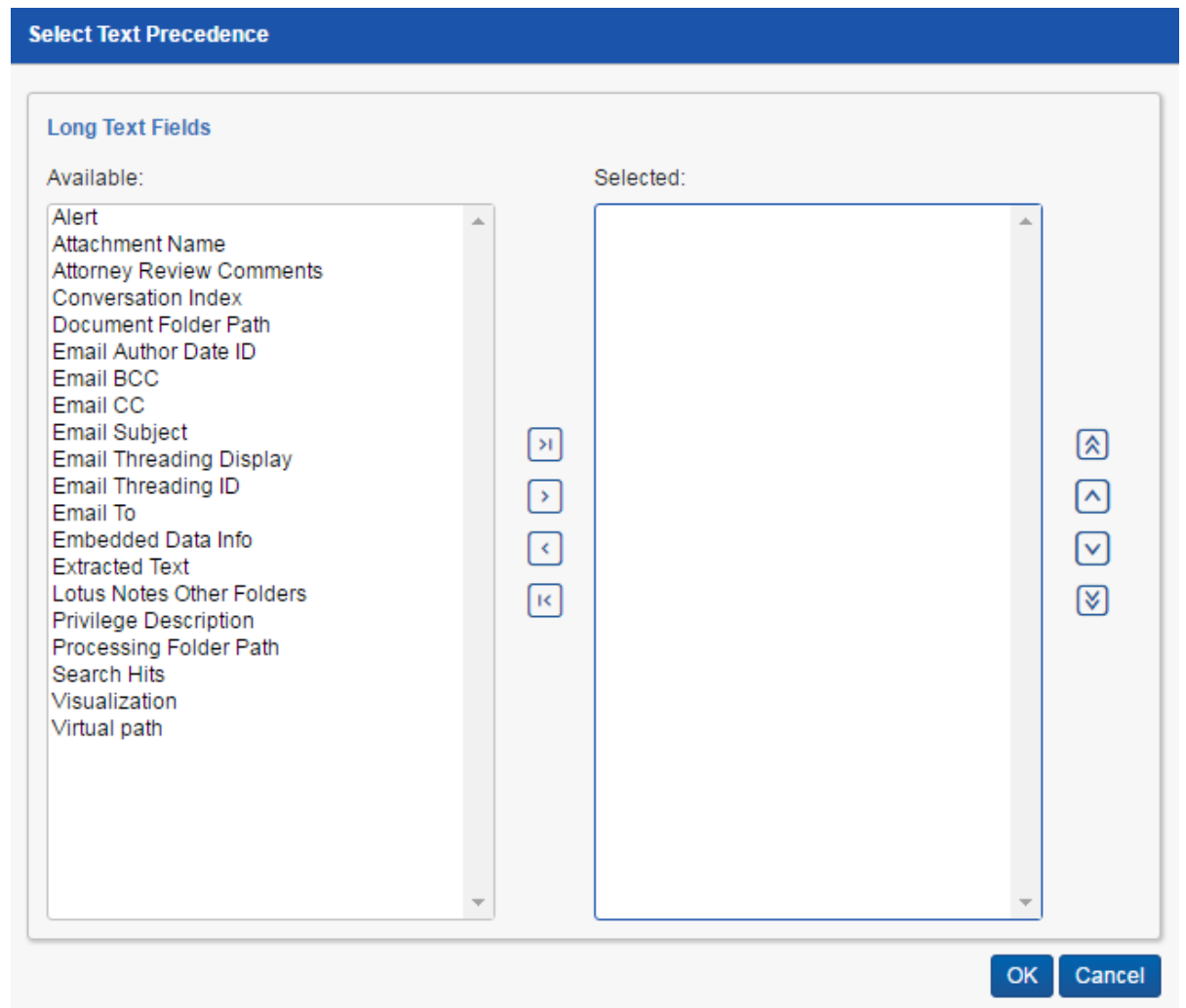
Image Productions: November Production ...

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.



The dialog box is titled "Select Text Precedence" in a blue header bar. Below the header, there is a section titled "Long Text Fields". This section contains two list boxes: "Available:" on the left and "Selected:" on the right. The "Available:" list box contains the following items: Alert, Attachment Name, Attorney Review Comments, Conversation Index, Document Folder Path, Email Author Date ID, Email BCC, Email CC, Email Subject, Email Threading Display, Email Threading ID, Email To, Embedded Data Info, Extracted Text, Lotus Notes Other Folders, Privilege Description, Processing Folder Path, Search Hits, Visualization, and Virtual path. Between the two list boxes are four buttons: ">|", ">", "<", and "<|". To the right of the "Selected:" list box are four buttons: "⬆", "⬆", "⬇", and "⬇". At the bottom right of the dialog box are two buttons: "OK" and "Cancel".

- **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 339](#) 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

12

← BackNext →

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. [Integration Points profiles on page 265](#).
- **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:

- **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 creating 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.

6. Click **Next** to advance to the Destination Information layout.

7. Complete the following fields on the **Destination Information** layout:

Create Integration Point [Cancel] ⓘ

Setup Source Information **Destination Information** 3 [Back] [Save]

Export Detail ⓘ

Export Type: ☐ Load File ☒ Images ☒ Natives ☒ Text Fields As Files Overwrite Files: ☒

Destination Folder: .StructuredData\export_(TimeStamp) [v]

☒ Create Export Folder

Output Settings

LOAD FILE OPTIONS

Image File Format: [Select...] [v]

Data File Format: [Relativity (.dat)] [v]

Data File Encoding: [Unicode] [v]

File Path: ☒ Relative ☐ Absolute ☐ User Prefix: []

Include Native Files Path: ☒

Export Multiple Choice Fields As Nested: ☐

FILE NAMING OPTIONS

Name Output Files After: [Identifier] [v]

Append Original File Name: ☐

IMAGE

File Type: [Single page TIFF/JPEG] [v]

Image Precedence: [Original Images] [v]

Subdirectory Prefix: [IMG] [001]

NATIVE

Subdirectory Prefix: [NATIVE] [001]

TEXT

Text File Encoding: [Unicode] [v]

Text Precedence: [Select...] [v]

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]_[Run-TimeStampUTC] 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:

IMAGE

File Type: Single page TIFF/JPEG

Production Precedence: Produced Images

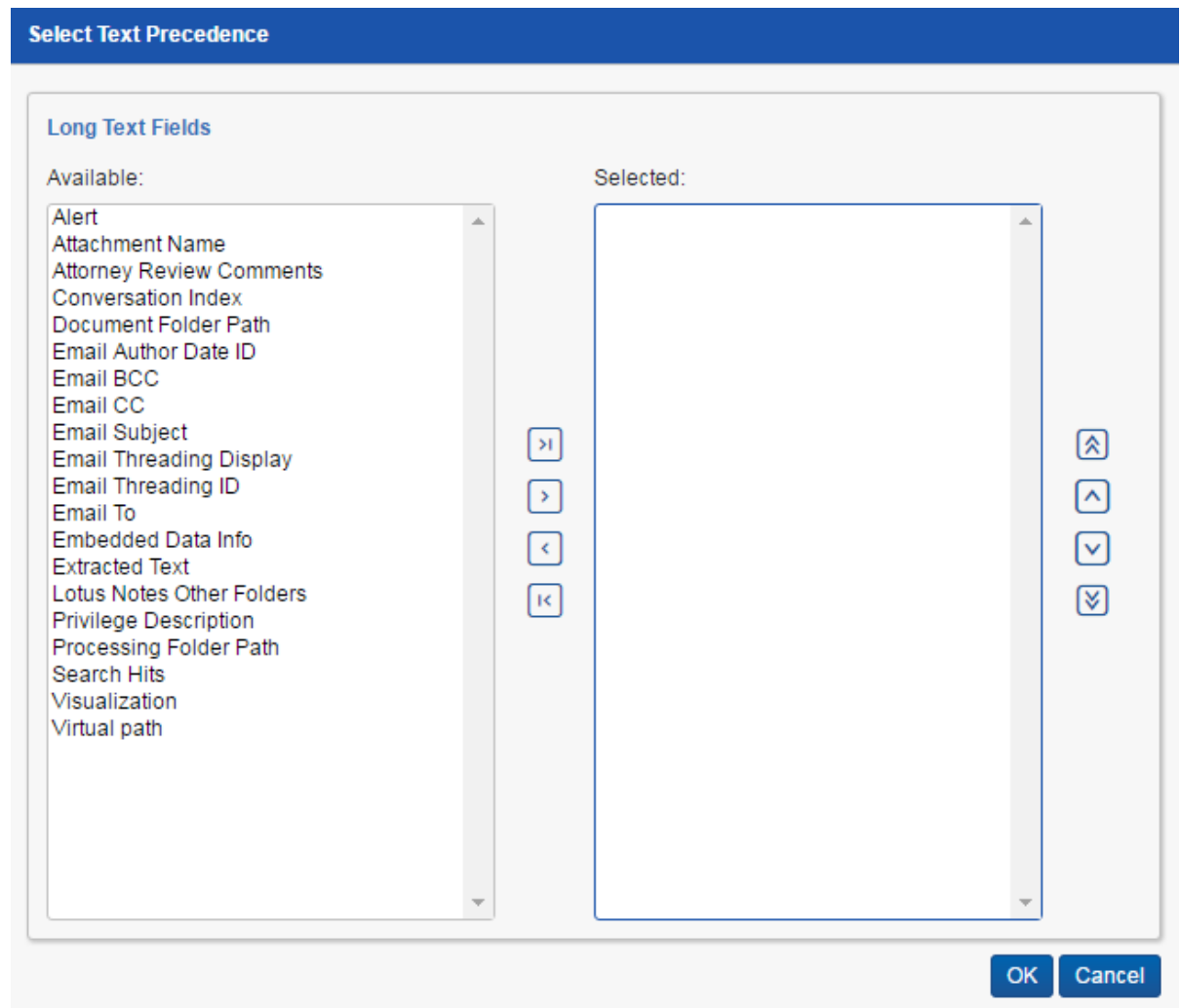
Image Productions: November Production

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.



The dialog box is titled "Select Text Precedence" in a blue header bar. Below the header, there is a section titled "Long Text Fields". This section contains two list boxes: "Available:" on the left and "Selected:" on the right. The "Available:" list box contains the following items: Alert, Attachment Name, Attorney Review Comments, Conversation Index, Document Folder Path, Email Author Date ID, Email BCC, Email CC, Email Subject, Email Threading Display, Email Threading ID, Email To, Embedded Data Info, Extracted Text, Lotus Notes Other Folders, Privilege Description, Processing Folder Path, Search Hits, Visualization, and Virtual path. Between the two list boxes are four buttons: ">|", ">", "<", and "<|". To the right of the "Selected:" list box are four buttons: "⬆", "⬆", "⬇", and "⬇". At the bottom right of the dialog box are two buttons: "OK" and "Cancel".

- **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

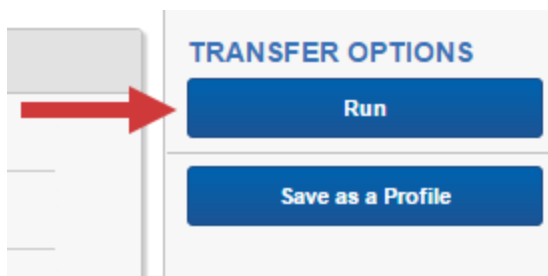
In addition to exporting to a CSV and load file, you have the option of exporting data from one Relativity workspace to another Relativity workspace. For more information on this capability, see [Transferring \(promoting\) data between workspaces on page 344](#).

5.5.6 Running the export job

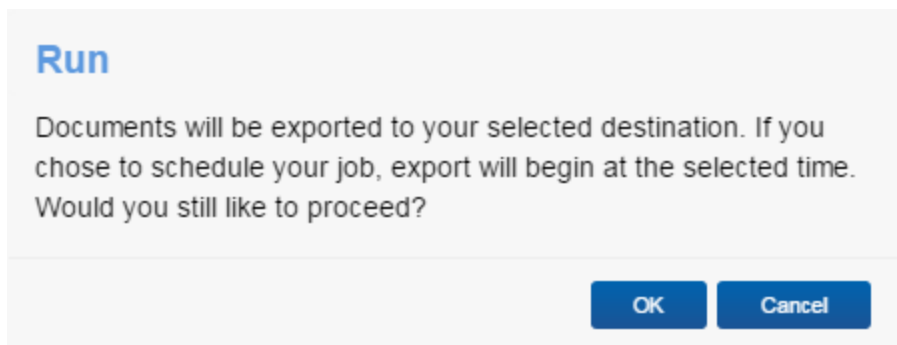
To export your load file based on the export settings you specified above, click **Run** on the Transfer Options console on the saved integration point.

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 265](#).



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 361](#) 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 361](#) 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.

Integration Point Details 

Edit **Delete** **Back** **Edit Permissions** **View Audit**

Record 2 of 12 

Job started

General **Scheduling**

Name: Export Load File **Log Errors:** Yes

Export Type: Load file **Has Errors:** No

Source details: Saved search: All Documents **Email Notification Recipients:**

Destination details: FileShare: .\IEDDS1017022\DataTransfer\Export **Included in ECA Promote List:** Yes

Overwrite files: No **Total of Documents:** 14547

Start at record: 1 **Total of Images:** 0 (0 Bytes)

Load file format: Relativity (.dat); Unicode

File path: Do not include; Relative

Text and Native File Names: Named after: Identifier

Multiple choice as nested: No

TRANSFER OPTIONS

Stop

Save as a Profile

Status

 Items 1 - 2 (of 2) 

Start Time (U...	Artifact ID	Name	Integration Po...	Job Type	Job Status	Destination W...	Destination In...	Items Transfe...	Total Items	Items with Err...
(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)
3/22/2017 1:58 P	1042609	Export Load File	Export Load File	Run	Pending	ECA Dashboard - 1017022	This Instance	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.

Stop Transfer

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.

Stop Transfer **Cancel**

3. Once Relativity stops the job, the Job Status field on the Status view reflects the stopped job.

Status

 Items 1 - 2 (of 2) 

Start Time (UTC)	Artifact ID	Name	Integration Point	Job Type	Job Status	Destination Worksp...	Items Transferred	Total Items	Items with Errors
9/21/2016 7:33 PM	1043050	ECA integration points	ECA integration points	Run	Stopped	Documentation Destination - 2934933	200	733	0
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

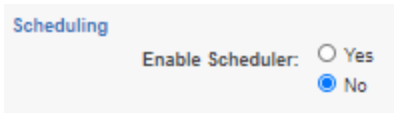
To re-start a stopped job, click **Run**. When you do this, Relativity begins to transfer data again from the beginning but does not remove any data already transferred.

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**.

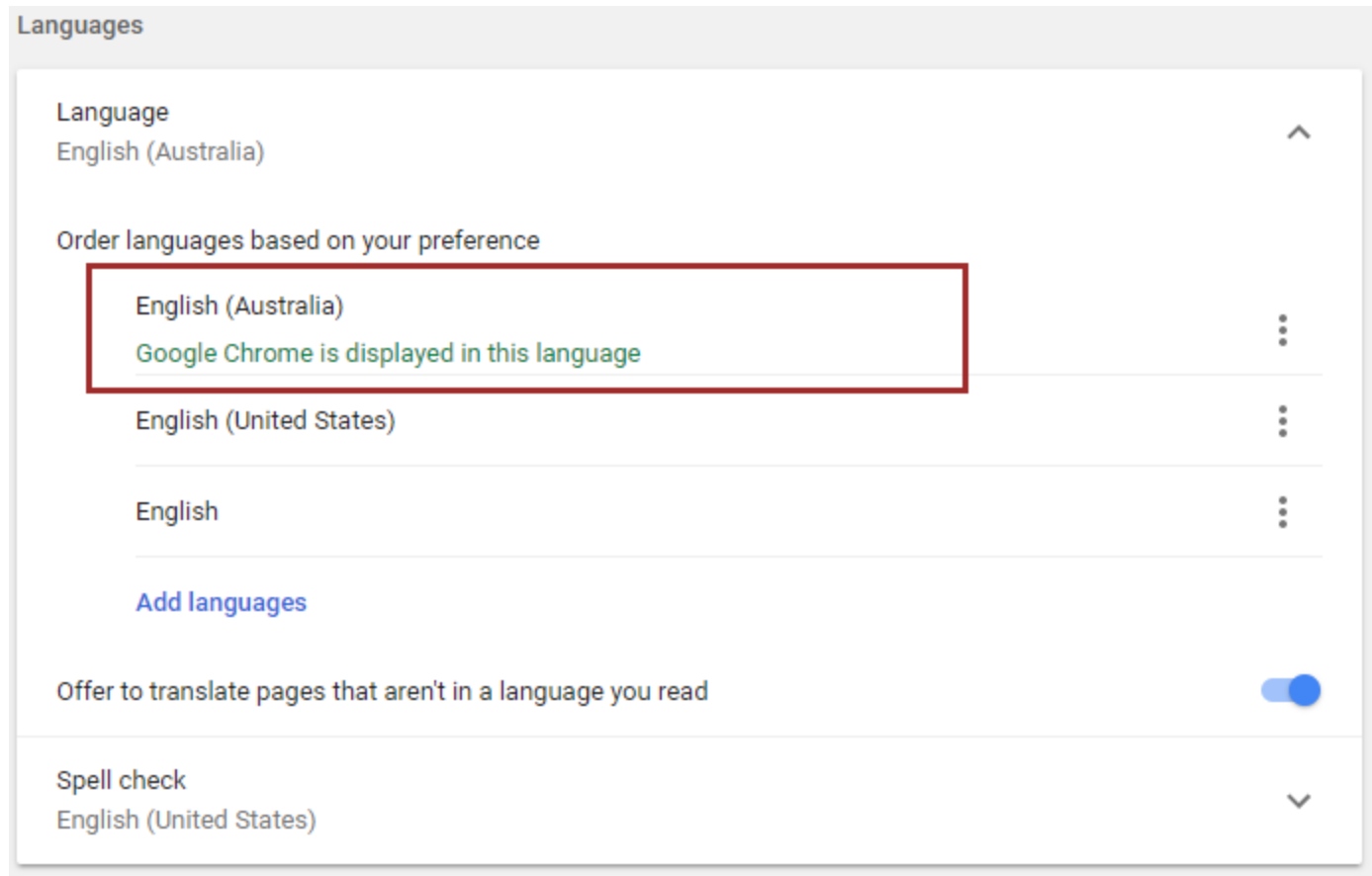
3. From the Import Scheduling section under Enable Scheduler, select **No**. This disables the scheduling mechanism for that integration point.



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.



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:

Start Date:

End Date:

Scheduled Time:

Time Zone:

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.



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
Filter	Filter	Filter	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 Transferring (promoting) data between workspaces

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

You can use Integration Points to transfer, or promote, data from one Relativity workspace to another Relativity workspace. This is as a one-way sync process from a source workspace to a destination workspace. This is 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 transfer 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 transfer data between workspaces. For information, see the Integration Points Guide [Integration Points on page 264](#).

5.6.1 Considerations

For large data transfer workflows, we recommend configuring integration point jobs into batches. The following suggestions can be used when creating job batches:

- We recommend transferring less than 25GB of *long-text data* to reduce risk of job slowness.
 - The summed long-text size is calculated only from mapped long-text fields.
 - Unmapped long-text fields are not included in the calculation.
 - For more information, see [Calculating integration point job statistics on-demand on page 357](#)
- 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.
- The following file types cannot be transferred to a Relativity workspace:
 - **Stored/Searchable PDFs**
 - **Native redactions**—the native file will be transferred without redactions.
 - **Produced natives and PDF**—the production flow allows the transfer of images only.

5.6.2 Exporting to a Relativity workspace

In addition to exporting to a .csv and load file, you have the option of transferring, or exporting, data from a source workspace to a destination workspace in Relativity. This is the most efficient way to move documents from one workspace to another. This process makes it so it does not require you to export and re-import your data.

Complete the following steps to promote data from one workspace to another.

On the Integration Points page:

1. Click **New Integration Point**.
This opens the integration point wizard.
2. Setup the integration point with selecting Relativity as the destination. For more information, see [Setup on the next page](#).
3. Connect your Relativity workspace to another workspace. For more information, see [Connect to Source on page 348](#).
4. Map the source fields to the destination fields. For more information, see [Map Fields on page 350](#).
5. Click **Save**.

After you create an integration point and initiate the export process, you can monitor the job status on the Job History tab and resolve errors on the Job History Errors tab. For more information, see [Monitoring job history and errors on page 361](#).

5.6.2.1 Considerations

Consider the following when exporting data from a source to a destination workspace using Integration Points:

- 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 transferred.
- You can move original images, native documents, or metadata.
- You are not required to have Integration Points installed on the destination workspace.
- The data transfer 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, Test_2
 - Test2_01, Test2_10, Test2_02 will be sorted as : Test2_01, Test2_02, Test2_10
- When transferred fields have associative objects, these objects need to be transferred first to ensure successful promotion of fields having references to them.
- The data transfer process does not transfer custom objects created by users in a workspace.
- The data transfer process cannot transfer complex objects that have relationships to other objects, such as Search Terms Report (STR), structured analytics sets, and Integration Points profiles, because related objects' ArtifactIDs may be different in the source and destination workspaces.
- When you select the **Copy Images** radio button, 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

5.6.2.2 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 fields in the **Setup** layout. For more information, see [Setup fields on the next page](#).

The screenshot shows the 'Setup' layout for creating a new integration point. At the top, there is a progress bar with two steps: 'Setup' (step 1) and 'Complete the Setup' (step 2). The 'Setup' step is currently active. Below the progress bar, the form is organized into three sections: 'General', 'Advanced', and 'Scheduling'.

General Section:

- Name:** Integration Point for Transfer
- Type:** ☐ Import, ☒ Export
- Source:** Relativity
- Destination:** Relativity
- Transferred Object:** Document
- Profile:** Select...

Advanced Section:

- Email Notification Recipients:** Separate by semi-colon
- Log Errors:** ☒ Yes, ☐ No

Scheduling Section:

- Enable Scheduler:** ☐ Yes, ☒ No

At the top right of the form, there are 'Back' and 'Next' buttons. The 'Next' button is highlighted in blue.

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

Setup fields

Complete the following fields in the **Setup** layout:

The screenshot shows the 'Setup' layout for an integration point. At the top, there is a progress bar with two steps: 'Setup' (step 1) and 'Complete the Setup' (step 2). Below the progress bar, the 'General' section contains the following fields:

- Name:** Integration Point for Transfer
- Type:** ☐ Import, ☒ Export
- Source:** Relativity
- Destination:** Relativity
- Transferred Object:** Document
- Profile:** Select...

The 'Advanced' section contains the following fields:

- Email Notification Recipients:** Separate by semi-colon
- Log Errors:** ☒ Yes, ☐ No

The 'Scheduling' section contains the following field:

- 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 **Relativity**.
- **Transferred Object**—select the available Document or non-document object meta data you want to transfer to the destination workspace. The non-document object must already exist in the destination workspace. The data transfer process will not transfer custom objects created by users in a workspace. Refer to the Notes above for additional information.

Note: 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 265](#).
- **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 transfer data once every day.
 - **Weekly**—select this option to transfer 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 transfer 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 transfer data once every month.
 - **Reoccur**—enter the number of month(s) in which this integration point repeatedly transfer data.
 - **Send On:**
 - **Day __ the month**—select the day of the month that you want this integration point to transfer data.
 - **The __ of the Month**—select this option for this integration point to transfer 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 transferring the data.
- **End Date**—(Optional) the date that you want Integration Points to stop transferring 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 transfers data. This time is local to your PC, not to the server.

5.6.2.3 Connect to Source

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

1. Complete the fields in the **Connect to Source** layout. For more information, see [Connect to Source fields on the next page](#).

Setup Connect to Source Map Fields

← Back Next →

Source

Source: Saved Search

Saved Search: All Documents

Destination

Destination Workspace: Select...

Location: ☒ Folder Select... ☐ Production Set Select...

Create Saved Search: ☐ Yes ☒ No

Tag Documents with Job Name: ☒ Yes (Source and Destination Workspaces) ☐ Yes (Destination Workspace Only) ☐ No

NOTE:
Tags enable records to be identified with the job name in the source and destination workspaces. Disabling tags speeds up the job processing.
Smart Overwrite feature requires tags to be disabled or to be enabled in the destination workspace only.

2. Click **Next** to advance to the **Map Fields** layout.

Connect to Source fields

Complete the following fields in the **Connect to Source** layout:

Setup Connect to Source Map Fields

Source

Source: Saved Search

Saved Search: All Documents

Destination

Destination Workspace: Select...

Location: ☒ Folder Select... ☐ Production Set Select...

Create Saved Search: ☐ Yes ☒ No

Tag Documents with Job Name: ☒ Yes (Source and Destination Workspaces) ☐ Yes (Destination Workspace Only) ☐ No

NOTE:
Tags enable records to be identified with the job name in the source and destination workspaces. Disabling tags speeds up the job processing.
Smart Overwrite feature requires tags to be disabled or to be enabled in the destination workspace only.

Source—select **Document** as the transferred object during setup, then select **Saved Search** or **Production** from the drop-down list. If you select any other object as the transferred object during setup, this is automatically set to View.

- **Saved Search/Production/View**—depending on the selected Transferred Object, one of the following fields displays:
 - **Saved Search**—select an existing saved search to use from the drop-down list or click the ellipsis button for an alternative way to select a saved search.
 - **Production Set**—select an existing production set to use from the drop-down list.
 - **View**—select an existing view to use from the drop-down list.
- **Destination Workspace**—select an existing workspace to export your saved search or production to.

Note: Relativity will validate whether the selected object is available in the destination workspace and transfer only objects linked to Relativity Applications installed in the destination workspace. If the selected object is not available in the destination workspace, an error message will appear.

- **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 creating 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, transfer 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 [Considerations on page 344](#) 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.
 - The following fields are populated when you select **Yes**:
 - **Relativity Destination Case**—the workspace ID where the documents were transferred to.
 - **Relativity Source Case**—the workspace ID where the documents were transferred from.
 - **Relativity Source Job**—Integration Points job Artifact ID that moved the document.

5.6.2.4 Map Fields

Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields by following the steps below:

Setup
Connect to Source
3

← Back
Save

Please make sure not to overlay the document images with the 'Links Only' option when transferring from the Review workspace back to the Repository workspace. Doing so may cause the original images to be replaced with their links, which were previously sent to the Review workspace, leading to the deletion of the native file and subsequent data loss. For more details please refer to the [Public Documentation](#)

Field Mappings

Map All Fields
Map Saved Search

Source Fields (264):

Type to Filter Fields

- Alert [Long Text]
- Alias BCC [Multiple Object]
- Alias CC [Multiple Object]
- Alias Email Bcc Domain [Multiple Object]
- Alias Email Cc Domain [Multiple Object]
- Alias Email From Domain [Multiple Object]
- Alias Email Recipients Domain [Multiple Object]
- Alias Email To Domain [Multiple Object]
- Alias From [Multiple Object]
- Alias Participant [Multiple Object]
- Alias Recipient [Multiple Object]
- Alias To [Multiple Object]
- All Custodians [Multiple Object]
- All Custodians (Script) [Long Text]
- All Paths/Locations [Long Text]
- All Source Locations (Script) [Long Text]
- Attachment Document IDs [Long Text]
- Attachment List [Long Text]
- Attorney Review Comments [Long Text]
- Author [Fixed-Length Text(255)]
- Bates Beg [Fixed-Length Text(50)]
- Bates Beg Attach [Fixed-Length Text(50)]
- Bates End [Fixed-Length Text(50)]
- Bates End Attach [Fixed-Length Text(50)]
- CC (SMTP Address) [Long Text]

Selected Source Fields (1):

Control Number [Object Identifier]

Selected Destination Fields (1):

Control Number [Object Identifier]

Destination Fields (244):

Type to Filter Fields

- All Source Locations (Script) [Long Text]
- Attachment Document IDs [Long Text]
- Attachment List [Long Text]
- Attorney Review Comments [Long Text]
- Author [Fixed-Length Text(255)]
- Bates Beg [Fixed-Length Text(50)]
- Bates Beg Attach [Fixed-Length Text(50)]
- Bates End [Fixed-Length Text(50)]
- Bates End Attach [Fixed-Length Text(50)]
- CC (SMTP Address) [Long Text]
- Child MD5 Hash Values [Long Text]
- Child SHA1 Hash Values [Long Text]
- Child SHA256 Hash Values [Long Text]
- Classification Index [Multiple Choice]
- Comments [Long Text]
- Company [Fixed-Length Text(255)]
- Conceptual Index [Multiple Choice]
- Confidential [Single Choice]
- Container extension [Fixed-Length Text(16)]
- Container ID [Fixed-Length Text(255)]
- Container name [Fixed-Length Text(255)]
- Contains Embedded Files [Yes/No]
- Control Number Beg Attach [Fixed-Length Text(50)]
- Control Number End Attach [Fixed-Length Text(50)]
- Conversation [Long Text]

Settings

Overwrite: Append/Overlay

Multi-Select Field Overlay Behavior: Use Field Settings

Copy Images: ☒ Yes ☐ No

Image Precedence: Original Images

Copy Files to Repository: ☐ Yes ☒ No

1. Map fields in the **Field Mappings** wizard. For more information, see [Field Mappings below](#).
2. Complete the fields in the **Settings** category. For more information, see [Settings fields on the next page](#).
3. Click **Save** to save this integration point with these export settings.

Note: If you are transferring RSMF (short message) documents, you must map the Family (Group) Identifier field, the Relativity AttachmentID field, and the document_uuid field in addition to the Unique Identifier and Object Identifier. Omitting these fields will cause attachments and embedded images to be transferred but not display correctly in the Short Message Viewer in the destination workspace.

Field Mappings

In the **Field Mappings** 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 or multiple object fields.
If you have Destination fields that are mapped to Fields in the Field Catalog, Relativity also tries to find name matches between these Catalog Fields.
 - The Field Mappings 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
 - Document.ProcessingFileID.
 - 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 also tries to find name matches between these Catalog Fields.

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.

Settings fields

Complete the following fields in the **Settings** category:

Setup
Connect to Source
3
Map Fields

← Back
Save

Field Mappings
Map All Fields
Map Saved Search

Source Fields (264):

Type to Filter Fields

- Alert [Long Text]
- Alias BCC [Multiple Object]
- Alias CC [Multiple Object]
- Alias Email Bcc Domain [Multiple Object]
- Alias Email Cc Domain [Multiple Object]
- Alias Email From Domain [Multiple Object]
- Alias Email Recipients Domain [Multiple Object]
- Alias Email To Domain [Multiple Object]
- Alias From [Multiple Object]
- Alias Participant [Multiple Object]
- Alias Recipient [Multiple Object]
- Alias To [Multiple Object]
- All Custodians [Multiple Object]
- All Custodians (Script) [Long Text]
- All Paths/Locations [Long Text]
- All Source Locations (Script) [Long Text]
- Attachment Document IDs [Long Text]
- Attachment List [Long Text]
- Attorney Review Comments [Long Text]
- Author [Fixed-Length Text(255)]
- Bates Beg [Fixed-Length Text(50)]
- Bates Beg Attach [Fixed-Length Text(50)]
- Bates End [Fixed-Length Text(50)]
- Bates End Attach [Fixed-Length Text(50)]
- CC (SMTP Address) [Long Text]

Selected Source Fields (1):

Control Number [Object Identifier]

Selected Destination Fields (1):

Control Number [Object Identifier]

Destination Fields (244):

Type to Filter Fields

- All Source Locations (Script) [Long Text]
- Attachment Document IDs [Long Text]
- Attachment List [Long Text]
- Attorney Review Comments [Long Text]
- Author [Fixed-Length Text(255)]
- Bates Beg [Fixed-Length Text(50)]
- Bates Beg Attach [Fixed-Length Text(50)]
- Bates End [Fixed-Length Text(50)]
- Bates End Attach [Fixed-Length Text(50)]
- CC (SMTP Address) [Long Text]
- Child MD5 Hash Values [Long Text]
- Child SHA1 Hash Values [Long Text]
- Child SHA256 Hash Values [Long Text]
- Classification Index [Multiple Choice]
- Comments [Long Text]
- Company [Fixed-Length Text(255)]
- Conceptual Index [Multiple Choice]
- Confidential [Single Choice]
- Container extension [Fixed-Length Text(16)]
- Container ID [Fixed-Length Text(255)]
- Container name [Fixed-Length Text(255)]
- Contains Embedded Files [Yes/No]
- Control Number Beg Attach [Fixed-Length Text(50)]
- Control Number End Attach [Fixed-Length Text(50)]
- Conversation [Long Text]

Settings ?

Overwrite: Append/Overlay

Multi-Select Field Overlay Behavior: Use Field Settings

Copy Images: ☐ Yes ☒ No

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

Use Folder Path Information: No

- **Overwrite**—determines how the system overwrites records once you transfer data to the review workspace.
 - **Append Only**—transfer 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.
- **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.
 - When you click **Yes** to copy images, it removes the option to include natives in your job.
 - To get transfer images and natives to your other workspace, you must run two separate Integration points.
 - The first job where you select images.
 - The second job where you select natives. The second job you will just need to select Append/Overlay.
 - **No**—click if you do not 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.

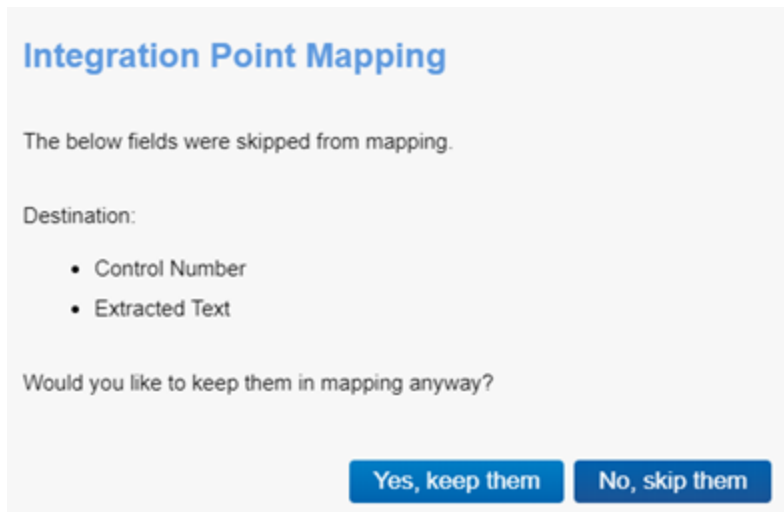
Note: Do not use the *Links Only* option to overlay documents going from a review workspace to a repository workspace. This can replace the original file with just a link, causing data loss.

- No physical files will be copied to the destination workspace but native files will be accessible in the destination workspace Viewer.
- When transferring documents from a repository to a review workspace using *Links Only*:
 - Links in the review workspace will break if you delete the original files or delete or archive the repository workspace.
- To avoid losing files: Before deleting or archiving the repository workspace, copy the actual files, not just links, to the review workspace first.

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 transferred 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 transfer 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 transfer 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 transfer to the review workspace.
 - **Folder Path Information**—specify a metadata field to build the folder structure for the documents that you transfer to the review workspace.
 - You have the option of creating folders or re-folding documents when you select Append/Overlay for the Overwrite field.
 - You have the option of re-folding documents for the Overwrite field through the Move Existing Documents field.
- **Move Existing Documents**—re-folder documents that were previously imported into the destination workspace, but were only placed in the root case folder and not to any subfolders. This field is useful for situations in which you want to add new data to the destination workspace while overlaying existing data.
 - Select **No** if you don't want to re-folder existing documents.
 - Select **Yes** to move existing documents into the folders provided in the Folder Path Information field. For example, you previously imported custodian Sally Smith's files into the destination workspace's root folder. Now, in addition to placing the documents from the saved search specified in this integration point in their subfolder, you also want to move those previously migrated documents into Sally Smith's subfolder, so you would select Yes.

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.

A screenshot of a web interface titled "Integration Point Mapping". The text says "The below fields were skipped from mapping." followed by "Destination:". Below this is a bulleted list: "Control Number" and "Extracted Text". Then it asks "Would you like to keep them in mapping anyway?". At the bottom are two buttons: "Yes, keep them" and "No, skip them".

Integration Point Mapping

The below fields were skipped from mapping.

Destination:

- Control Number
- Extracted Text

Would you like to keep them in mapping anyway?

Yes, keep them **No, skip them**

Another solution that Integration Points data transfer 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 that 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."

After you create an integration point and initiate the export process, you can monitor the job status on the Job History tab and resolve errors on the Job History Errors tab. For more information, see [Monitoring job history and errors on page 361](#).

If you map more than 100 fields, a warning banner appears on the Map Fields page.

- This is not a hard limit. You can still run the job.
- Jobs with more than 100 mapped fields may take longer to complete.
- Avoid slowness by splitting the job into smaller batches with fewer mapped fields.

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 339](#) for details.

5.6.4 Working with transferred documents

To view the documents you transferred to the destination workspace, for which Tag Documents with Job Name option was enabled:

1. Navigate to the destination workspace.
2. Click the **Documents** tab and make sure you are on the **Folders** browser.

3. Note the following fields on Documents view (if these fields are not yet added to the view, edit it and add them in the **Fields** tab):
 - **Relativity Source Case**—the name of the workspace from which the tagged documents were transferred to the destination workspace.
 - **Relativity Source Job**—the name of the Integration Point job that you used to transfer the tagged documents to the destination workspace.
4. If option Create Saved Search had been selected for the transferred documents, you can also view them in the created saved search. To do so:
 - A. Navigate to the **Saved Search** browser.
 - B. Locate Integration Points folder and expand it.
 - C. Click on the saved search with the name of the Integration Point job that transferred the documents.

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 transfer them back into the source workspace through another Integration Point. For example, you could run another transfer 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 transfer 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 transfer job you ran previously:
 - **Destination Workspace**—select the original source workspace, specifically the workspace from which you previously transferred documents to the review workspace.
 - **Saved Search**—select the saved search you created to transfer documents back to the source workspace.
 - **Field Mappings**—map only **Control Number (Object Identifier)** and **Privilege Designation**.
 - **Overwrite**—select **Overlay Only**.
4. Click **Run**.

5.6.5 Calculating integration point job statistics on-demand

You can calculate the number of documents, as well as images and natives if applicable, to be transferred in the scope of a particular Integration Point.

1. Navigate to the **General** tab of **Integration Points > Integration Points Details** for a particular integration point job.

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

Integration Point Details
Edit
Delete
Back
Edit Permissions
View Audit

General
Scheduling

Name
Stats calculation on demand
Log Errors
Yes

Overwrite
Append/Overlay
Has Errors
No

Export Type
Workspace;
Email Notification Recipients

Source Details
Saved Search: Extracted Text Only

Source Workspace
A7 source
Total of Documents
Press 'Calculate statistics' button

Source Relativity Instance
This instance(emrtest)
Create Saved Search
No

Transferred Object
Document

Destination Workspace
A7 destination

Destination Folder
A7 destination

Multi Select Overlay
Use Field Settings

Use Folder Path Info
No

Move Existing Docs
No

Transfer Options
Run
Retry Errors
View Errors
Calculate statistics
Save as Profile

Status
0 - 0 of 0 10 per page

Job ID	Start Time (UTC)	Artifact ID	Name	Job Type	Job Status	Destination Worksp...	It...
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

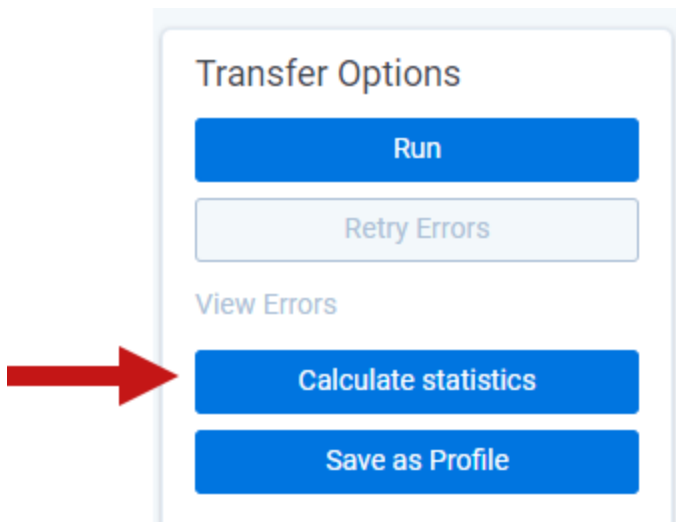
Email Notification Recipients

Total of Documents
Press 'Calculate statistics' button

Create Saved Search
No

Tag Documents
Yes (Source and Destination Workspaces)

- Click the **Calculate statistics** button under Transfer Options in the right-hand panel.
 - If your job includes more than 500,000 documents or more than 25 GB of extracted text across mapped fields, a warning banner appears after the calculation runs.
 - Jobs that exceed these thresholds may take longer to complete. Split the job into smaller batches before running to reduce job time.



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 and time mark of the last calculation will display.
- Depending on the transferred 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: We've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you can no longer write to or access data outside of the four defined staging area folders. The four defined staging area folders: *ARM*, *ProcessingSource*, *StructuredData*, and *TenantVM*. Folders removed in the update include *FTA*, *Temp*, *Export*, and *dtSearch*. In addition to any other folders 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		1		1		1
#	☐ Name	Destination Instance ...	Destination Instance...	Destination Workspac...	Destination Workspac...	Job History		
	Filter	Filter	= Filter	Filter	= Filter	Filter		
1	☐ 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

EditBackEdit PermissionsView 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)

LinkUnlink

Items 1 - 10 (of 1,000)

☐	Artifact ID	Control Number	Relativity Destination Case	Job History
☐	(All)	(All)	(All)	Select...
☐	Edit	1120328	AZIPPER_0007299	This Instance - Documentation [DO NOT DI Documentation
☐	Edit	1120329	AZIPPER_0007300	This Instance - Documentation [DO NOT DI Documentation
☐	Edit	1120333	AZIPPER_0007746	This Instance - Documentation [DO NOT DI Documentation
☐	Edit	1120334	AZIPPER_0007747	This Instance - Documentation [DO NOT DI Documentation
☐	Edit	1120335	AZIPPER_0007748	This Instance - Documentation [DO NOT DI Documentation
☐	Edit	1120336	AZIPPER_0007749	This Instance - Documentation [DO NOT DI Documentation
☐	Edit	1120337	AZIPPER_0007773	This Instance - Documentation [DO NOT DI Documentation
☐	Edit	1120338	AZIPPER_0008358	This Instance - Documentation [DO NOT DI Documentation
☐	Edit	1120339	AZIPPER_0008559	This Instance - Documentation [DO NOT DI Documentation
☐	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.

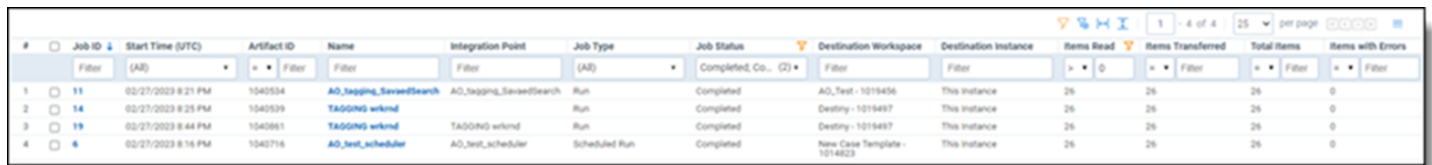
5.8 Monitoring job history and errors

Note: We've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you can no longer write to or access data outside of the four defined staging area folders. The four defined staging area folders: *ARM*, *ProcessingSource*, *StructuredData*, and *TenantVM*. Folders removed in the update include *FTA*, *Temp*, *Export*, and *dtSearch*. In addition to any other folders 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
1	11	02/27/2023 8:21 PM	1040534	AO_tagging_SavedSearch	AO_tagging_SavedSearch	Run	Completed	Co... (2)	Filter	26	26	26	0
2	14	02/27/2023 8:25 PM	1040539	TAGGING wknd	TAGGING wknd	Run	Completed	Destiny - 1019497	This Instance	26	26	26	0
3	19	02/27/2023 8:44 PM	1040561	TAGGING wknd	TAGGING wknd	Run	Completed	Destiny - 1019497	This Instance	26	26	26	0
4	6	02/27/2023 8:16 PM	1040716	AO_test_scheduler	AO_test_scheduler	Scheduled Run	Completed	New Case Template - 1014923	This Instance	26	26	26	0

The Job History tab lists the following information that you can use to monitor the status of an integration point job:

- **Start Time (UTC)**—the date and time that a job started running in Coordinated Universal Time (UTC).
- **Artifact ID**—the artifact ID of the workspace.
- **Name**—the name for a specific job run by the integration point.
- **Integration Point**—the name of the integration point used to run the job.
- **Job Status**—the current status of an integration point job. The following job statuses are available:
 - **[blank]**—the job has not started or was not run.
 - **Pending**—the job has been submitted but has not started yet.
 - **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 was not completed. The integration point may have been able to import some of the records before the error occurred.

- **Completed with Errors**—the import job completed but at least one item-level error occurred. If you set the Log Errors field to Yes for the integration point, you can view the item-level errors in the section called Job History Errors on the Job Details layout. See [Viewing job history details below](#).

Notes: When transferring custodians and associating them to managers, errors can occur. If transferring custodians and the manager is not associated with a custodian, 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 was not 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 Skipped**—the number of records skipped when the job ran.
 - Items skipped count depends on your Overwrite field selection:
 - **Append Only**—documents that already exist in the destination are skipped and counted.
 - **Overlay Only**—documents that do not already exist in the destination are skipped and counted.
- **Items with Errors**—the number of records that the integration point failed to import due to item-level errors.
- **System Last Modified On**—displays the date and time that Relativity last modified the integration point job.

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 271](#).

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

Job Details
Edit
Back
Edit Permissions
View Audit
1 of 25

Job Details

Job ID

83230

Workflow ID

de4392f9-8325-472e-8e27-d490fab13a72

Name

AAD 09152025

Integration Point

AAD 09152025

Job Type

Run

Status

Completed with errors

Start Time (UTC)

5/7/2026 2:02 AM

End Time (UTC)

5/7/2026 2:03 AM

System Last Modified On

5/6/2026 7:03:02 PM MST

Import Statistics

Items Transferred

18

Items with Errors

192

Items Skipped

0

Job History Error

1
- 10 of 192
10 per page

Name	Source Unique ID	Job History	Error	Error Status	Error Type	System Created On
9c2ecece-acc7-4630-	5b7dca00-5136-4ee1-bc74-df8cf02f2861	AAD 09152025	IAP1 - An item with identifier 5b7dca00-5136-4ee1-bc74-df8cf02f2861 already exists in the workspace	New	Item	5/6/2026, 7:03 PM MST
342c4218-70b4-497f-	fc949003-c28d-4e15-b537-8dc1aca18ec3	AAD 09152025	IAP1 - An item with identifier fc949003-c28d-4e15-b537-8dc1aca18ec3 already exists in the workspace	New	Item	5/6/2026, 7:03 PM MST
5b731e79-bf7a-4d22-	406d6005-9c1f-42e9-8f80-5a7e93eca12e	AAD 09152025	IAP1 - An item with identifier 406d6005-9c1f-42e9-8f80-5a7e93eca12e already exists in the workspace	New	Item	5/6/2026, 7:03 PM MST
2a88ff76-ea4e-468c-l	891f1506-af84-47ed-a84b-62255546fc0e	AAD 09152025	IAP1 - An item with identifier 891f1506-af84-47ed-a84b-62255546fc0e	New	Item	5/6/2026, 7:03 PM MST

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.
- **System Created On**—the date and time at which the error was created by the agent during the integration point job.

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.

Error Details	
Name	9c2ecece-acc7-4630-97ef-b5556b42c864
Source Unique ID	5b7dca00-5136-4ee1-bc74-df8cf02f2861
Job History	AAD 09152025
Error	I-API - An item with identifier 5b7dca00-5136-4ee1-bc74-df8cf02f2861 already exists in the workspace
Error Status	New
Error Type	Item
Full Error	I-API - An item with identifier 5b7dca00-5136-4ee1-bc74-df8cf02f2861 already exists in the workspace
System Created On	5/6/2026 7:03:00 PM MST
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 did not 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.
- **System Last Modified On**—a timestamp that updates automatically as the job runs.
 - If this timestamp stops updating, the job may have stalled.
 - Use this field alongside Job Status Description to check on job progress.

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 errors 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** on an integration point that contains item- and job-level errors, the entire job is re-run.
- When you click **Retry Errors** on an integration point that contains item- and job-level errors, the entire job is re-run.

Relativity handles item-level errors in the following way:

- When you click **Run**, the entire job is re-run.
- When you click **Retry Errors**, a retry job starts, including only those documents that caused errors.

Relativity handles job-level errors in the following way:

- It registers only one job-level error for an integration point.
- When you click **Run**, the entire job is re-run.
- The **Retry Errors** button is not available.

Clicking the **Retry Errors** button starts a new job only for documents that caused errors in the previous run. If you edit an integration point settings before running the retry job, they will be applied to the retry job (except data source changes).

You can change, for example, Fields Mapping or Overwrite settings to allow the documents that caused errors to be transferred successfully.

Note: When you run Retry Errors for a job configured to copy physical files like natives or images in Append mode, the retry job mode is automatically set to Append/Overlay. This intended behavior is to ensure consistency between copied metadata and native and image files. It may happen that during a job that has failed, only part of a given document (either metadata or files) has been transferred successfully. In such case, Append/Overlay mode allows transferring all the document data. If you want to have the documents that caused errors transferred in other mode, you need to edit the integration point before running the Retry Errors job.

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:

Integration Point Details

EditDeleteBackEdit PermissionsView Audit

Record 2 of 2

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'.

GeneralScheduling

Name:Bluth Review Data

Export Type:Workspace;

Source Details:Saved Search: All Documents

Source Workspace:Bluth Corp vs. Weyland Inc

Transferred Object:Document

Destination Workspace:Bluth Corp Review Data

Destination Folder:Bluth Corp Review Data

Overwrite:Append Only

Multi-Select Overlay:Use Field Settings

Use Folder Path Info:No

Move Existing Docs:No

Log Errors:Yes

Has Errors:Yes

Email Notification Recipients:

Included in ECA Promote List:No

Total of Documents:5

Create Saved Search:No

TRANSFER OPTIONS

Run

Retry Errors

View Errors

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 mapping for the following field(s): field_1, field_2	Review the fields listed in the error message, and check if you have the same type as expected. If the reason for changing the type was to delete the file and re-create it, then it will be un-mapped. Correct the mapping saved in the Integration Point job, and run the job again.
Destination field(s) mapped may no longer be available or has been renamed. Review the mapping for the following field(s) [field name].	Review if the failing field(s) still exist in the destination workspace, correct the mapping saved in the Integration Point job, and run the job again.
Destination workspace is not available.	Verify if destination workspace exists.
Failed to copy source field into destination field due	Review the list of failing fields, create the child/parent relation

Error	Likely resolution
to missing child object. Review the following destination field(s): [field names]	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.
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.
Data was transferred successfully, but even though the RSMF document transfer was successful, the RSMF message-level metadata transfer operation did not complete successfully. This may only affect RSMF Short Message Search and Message-level Coding search, but the primary sync operation was successful unless otherwise specified.	In this situation, the document transfer completed successfully, or partially successfully, but the RSMF metadata indexing for searching and coding failed. To resolve this, rerun the same job as an append/overlay job.
The maximum length of the {field_name} field is currently set to 255 characters, but the records metadata's length is 450 characters.	Increase the maximum length of the {field_name} field to a higher number of characters and retry.

Error	Likely resolution
The job timed out, often because of document volume or a heavy field mapping.	Reduce documents and simplify mapped fields, then retry. Reduce the number of fields mapped or number of documents being transferred in job, then retry integration point.

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.

You can import Entity (Employee/Custodian) data from Microsoft Entra ID, formerly known as Azure Active Directory, through Integration Points.

Before you begin, complete the following prerequisites:

In Relativity:

- Install Integration Points into your workspace. See [Installing Integration Points](#) for details.
- Install the RIP AAD Provider application from the application library.
 - This adds Microsoft Entra ID as a source within Integration Points.
 - For more information, see Relativity applications documentation.

Completing these two installations adds Integration Points to your workspace and adds Microsoft Entra ID as a source within Integration Points.

In Microsoft Azure:

- Set up an application in Microsoft Azure 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.

Once you complete the prerequisites, import Microsoft Entra ID into Relativity. For more information, see [Importing from Microsoft Entra ID on page 296](#).

Note: This documentation contains references to third-party software, or technologies. While efforts are made to keep third-party references updated, the images, documentation, or guidance in this topic may not accurately represent the current behavior or user interfaces of the third-party software. For more considerations regarding third-party software, such as copyright and ownership, see [Terms of Use](#).

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.

Caution: The listed permissions and roles are required and supported by Relativity.

- Relativity does not support substitutions or reduced permissions.
- You can submit requests for alternative or reduced permissions as product feedback.

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 Relativity aiR 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**

Note: 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**.

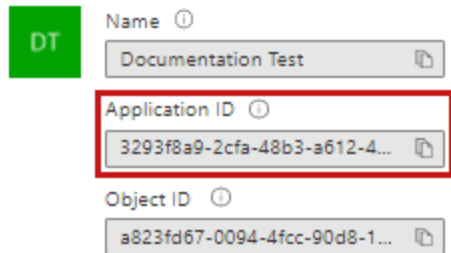
5.9.2 Finding Azure credentials

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.

Properties



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

For information on Staging Area folders, refer to the [Staging Area](#) topic and [Staging Area FAQ](#) article in Community.

Staging Explorer enables you to rapidly transfer large amounts of data to and from Relativity aiR to jump-start and sustain the data pipeline for critical projects. Use it to upload files to a staging area for Relativity aiR or to download files from your Relativity aiR 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.
- **ProcessingSource**—a folder for storing files you want to process into your Relativity aiR workspace.
- **TenantVM**—a folder to temporarily store Utility Server virtual machine (UVM) workflows. Refer to [Utility Server](#) documentation for more information.

Note: User groups have access to all four Staging Area folders. If you need to restrict a group's access, you can do so by limiting their access at a file share level. For details, see [User access permissions to file shares](#).

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.

Refer to these sections to set up Staging Explorer:

- [Permissions below](#)
- [Installing, launching, and updating Staging Explorer on page 386](#)
- [Navigation on page 393](#)
- [Best practices, limitations, and data transfer performance considerations on page 384](#)

6.1 Staging Explorer

For information on Staging Area folders, refer to the [Staging Area](#) topic and [Staging Area FAQ](#) article in Community.

Staging Explorer enables you to rapidly transfer large amounts of data to and from Relativity aiR to jump-start and sustain the data pipeline for critical projects. Use it to upload files to a staging area for Relativity aiR or to download files from your Relativity aiR 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.
- **ProcessingSource**—a folder for storing files you want to process into your Relativity aiR workspace.
- **TenantVM**—a folder to temporarily store Utility Server virtual machine (UVM) workflows. Refer to [Utility Server](#) documentation for more information.

Note: User groups have access to all four Staging Area folders. If you need to restrict a group's access, you can do so by limiting their access at a file share level. For details, see [User access permissions to file shares](#).

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.

Refer to these sections to set up Staging Explorer:

- [Permissions below](#)
- [Installing, launching, and updating Staging Explorer on page 386](#)
- [Navigation on page 393](#)
- [Best practices, limitations, and data transfer performance considerations on page 384](#)

6.2 Permissions

Data Transfer is a modernized feature permission at the instance level. You can only grant or revoke access to Staging Explorer by enabling or disabling the Data Transfer feature permission directly. The underlying granular permissions are locked and controlled by the feature toggle. For details on accessing the Admin Security, see Instance Details in Admin Guide.

Existing groups and their permission configurations are not impacted at this time. However, aligning your groups with the Data Transfer feature permission is recommended. If a group's permissions are out of alignment, a blue banner and lightbulb icon appear in the Permissions UI with migration tooling to help. For details on modernized feature

permissions and the full list of granular permissions controlled by the Data Transfer permission, see Feature Permissions in the Data Transfer Guide or Admin Guide.

Permissions

Admin Security

Groups

Features

Object Security

Tab Visibility

Admin Operations

Selections

Selected Group

Access Management

Features

Permission to align

Modernize your permission setup. We've marked Features to h

Data Transfer

Showing 1 of 16 features

Feature Permission Name

☒

Data Transfer

Granular permissions mapping

Data Transfer - read-only reference

Tab Visibility Items

Staging Explorer

Other Settings: Admin Operations

Access RelativityOne Staging Explorer

Send Email Notification

View Admin Repository

Icon Guide

Enabled permission

Disabled permission

Permission used by multiple Features

Permission not found by name

Review and Save

Revert All

Close

To grant access to Staging Explorer to a user group at the instance level:

1. From the Instance Details tab, click **Manage Permissions**.
2. On the Features tab, select a group from the drop-down.
3. Select Data Transfer permission checkbox for the group.
4. Click **Review and Save**, then click **Save**.

Permissions

Admin Security
Groups
Features NEW
Object Security
Tab Visibility
Admin Operations

Features

Selections

Selected Group
Access Management

Features

Permission to align Modernize your permission setup. We've marked Features to help simplify and streamline access.

Data Transfer

Showing 1 of 16 features

Feature Permission Name

☒ Data Transfer

See details

Review and Save
Revert All
Close

6.3 User access permissions to file shares

Note: The Staging Area permissions managed in Staging Explorer, released in late January, introduce a new model for managing file share access. **You must have completed the transition to the new model by July 1. Otherwise, all users except System Admins lost access to file shares until you configure the new permissions and confirm the transition.** Due to the new permissions model, the StagingPaneOnlyPerClientDomain setting will be deprecated. Please review the new workflow in [Assigning user group access permissions below](#) and begin setting up access for your Staging Explorer user groups in the Staging Explorer tab to prepare for the transition. Also, see this [Community article](#) on upcoming changes.

6.3.1 Prerequisites

Before assigning permissions to file shares in the new model, take the following steps:

- Ensure you have feature permissions set for Staging Explorer at the instance level. For details, see [Permissions](#).
- Ensure that Ads blocking browser extensions bypass the following domains: *.Launchdarkly.com*, *.relativity.com*, and *.relativity.one*. Otherwise, you will not be able to view the Staging Explorer pane in Relativity aiR.

6.3.2 Assigning user group access permissions

Use the steps below to grant user groups permissions to specific file shares in the Staging Explorer pane. This ensures that each user only sees the file shares they have permission to access.

1. Log in to **Relativity aiR**.
2. Type *Staging Explorer* in the search box and select it. A list with all available file shares opens.

3. Select **Manage Access** next to a specific file share to set permissions to it for a user group.

RelativityOne Storage

Manage Staging File Shares Access

The Staging Area permissions managed in Staging Explorer, released in late January, introduce a new model for managing file share access and will replace the process of setting file shares permissions for Client Domains. All RelativityOne customers are required to complete the transition by July 1, as the workflow described in [Granting user access to specific file shares](#) will no longer be valid after this date.

Please review the new workflow in [Assigning user group access permissions](#) and begin configuring access for your RelativityOne Staging Explorer user groups in the Staging Explorer tab to prepare for the transition. Also, see this [Community article](#) on upcoming changes.

Name	
\\files.T001.ukso060000.relativity.one\T001\Files	Manage Access
\\files.T001.ukso060000.relativity.one\T001B\Files	Manage Access
\\files.T001.ukso060000.relativity.one\T001C\Files	Manage Access
\\files.T001.ukso060000.relativity.one\T001D\Files	Manage Access
\\files.T001.ukso060000.relativity.one\T001E\Files	Manage Access

Staging Explorer

☐ I confirm that user permissions have been reviewed and configured.

Switch to new permissions model

Downloads

Download Staging Explorer (exe)

Download Staging Explorer (msi)

4. At the top of the opened dialog, there is the file share path you are managing access permissions for. Complete the following fields:

Manage access to \\files.t081.esus019064.r1.kcura.com\T081\Files\

Add group

Select groups

Set access

Add

Groups with access

	Group Name ↑↓	Access Level ↑↓
☐	Filter	Filter
☐	Test Group	View
☐	System Administrators	Admin

All 2

Remove

Close

Save

- **Select groups**—choose a group to grant access for. For details how to add a user to a group, go to Adding users to groups.
- **Set access**—assign a specific role to the selected group:
 - **View**—allows users to view structure and contents of a file share.
 - **Download**—allows users to download files from the Staging area to their local environment.
 - **Upload**—allows users to upload files and folders into the Staging area.

- **Download and Upload**—allows users to both upload and download files and folders within the Staging area.
- **Edit**—allows users to create, rename, move, copy, zip, unzip, or delete files and folders within the Staging area.
- **Admin**—provides full control over permissions, visibility, and configuration of a file share. Admins can assign groups and manage access at the instance level.

Note: A newly created Client Domain Admin group is automatically granted admin permissions to the staging file share provisioned for that client domain, enabling full file share management (view, upload, download, edit, secure) within their domain's staging area. If you have not migrated to the new permissions model, the system admin must still assign file share permissions for the Client Domain Admin group.

- **All (...)**—select how many entries are shown or apply actions to all listed groups.
1. Click **Add** to add the selected group with the chosen role to the access list. To remove a group, select the checkbox by its name and click **Remove**.

Manage access to \\files.t081.esus019064.r1.kcura.com\T081\Files\

Add group

Second Level Group
Download
Add

Groups with access

	Group Name ↑↓	Access Level ↑↓
☐	Filter	Filter
☒	Test Group	View
☐	System Administrators	Admin

All 2
Remove

Close
Save

2. To edit access permissions for a group, choose a new role for it from the **Access Level** drop-down menu.

Manage access to \\files.t081.esus019064.r1.kcura.com\T081\Files\

Add group

Second Level Group ✕ ▼ Download ▼ Add

Groups with access

	Group Name ↑↓	Access Level ↑↓
☐	Filter	Filter
☐	Test Group	
☐	System Administrators	

All 2 ▼ Remove

View ^

Download and Upload
Can view, download and upload files and folders.

Edit
Can view, edit, download and upload files and folders.

Admin
Can view, edit, download, upload and manage access to files and folders.

Close Save

3. Click **Save** to complete managing access for the file share. Click **Cancel** to discard changes and exit.

After you apply the above changes:

1. Select the **I confirm that user permissions have been reviewed and configured.** checkbox in the Staging Explorer pane. Then, you must click the **Switch to new permissions model** button for the new permission model to take effect. If the *StagingPaneOnlyPerClientDomain* instance setting is set to **True**, it will no longer be considered—permissions will now be managed using the new approach.

RelativityOne Storage

Manage Staging File Shares Access

The Staging Area permissions managed in Staging Explorer, released in late January, introduce a new model for managing file share access and will replace the process of setting file shares permissions for Client Domains. **All RelativityOne customers are required to complete the transition by July 1, as the workflow described in [Granting user access to specific file shares](#) will no longer be valid after this date.**

Please review the new workflow in [Assigning user group access permissions](#) and begin configuring access for your RelativityOne Staging Explorer user groups in the Staging Explorer tab to prepare for the transition. Also, see this [Community article](#) on upcoming changes.

Name

\\files.T001.ukso060000.relativity.one\T001\Files	Manage Access
\\files.T001.ukso060000.relativity.one\T001B\Files	Manage Access
\\files.T001.ukso060000.relativity.one\T001C\Files	Manage Access
\\files.t001.ukso060000.relativity.one\T001D\Files	Manage Access
\\files.t001.ukso060000.relativity.one\T001E\Files	Manage Access

Staging Explorer

☐ I confirm that user permissions have been reviewed and configured.

[Switch to new permissions model](#)

Downloads

[Download Staging Explorer \(exe\)](#)

[Download Staging Explorer \(msi\)](#)

Staging Explorer

☒ I confirm that user permissions have been reviewed and configured.

[Switch to new permissions model](#)

Downloads

[Download Staging Explorer \(exe\)](#)

[Download Staging Explorer \(msi\)](#)

2. Confirm the user groups have appropriate access level.

Switch to the new permissions experience!

Before continuing, make sure all users have appropriate access levels configured in the new Permissions system.

Enabling this feature without configuring permissions may result in users losing access to projects or data.

Once enabled, reverting this change requires assistance from Relativity Support and may not be immediate.

Confirm

Cancel

If you are unable to access specific file shares, please reach out to your Relativity system administrator to confirm that the required permissions have been properly configured. If permissions are confirmed and the issue persists, contact [Customer Support](#) with details of the problem and the validation performed.

For details of a specific permission, refer to Advanced Filtering Audit records in Audit documentation.

6.3.3 Former workflow in Relativity aiR for user access to file shares

In the default Relativity aiR setup, users can access file shares if they're in a group that is added to a workspace that's associated with a resource pool with file shares. In some cases, if a user has access to multiple client domains, you may only want that user to see file shares for his own client domain in the Staging pane and not any file shares from other client domains to which he has access. Refer to the following sections for more information on each scenario.

The normal workflow in Relativity aiR is that a group and its users will inherit access ability to any file shares 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 file shares. As a result, User A can view and access all file shares in the Staging pane via the group's access.

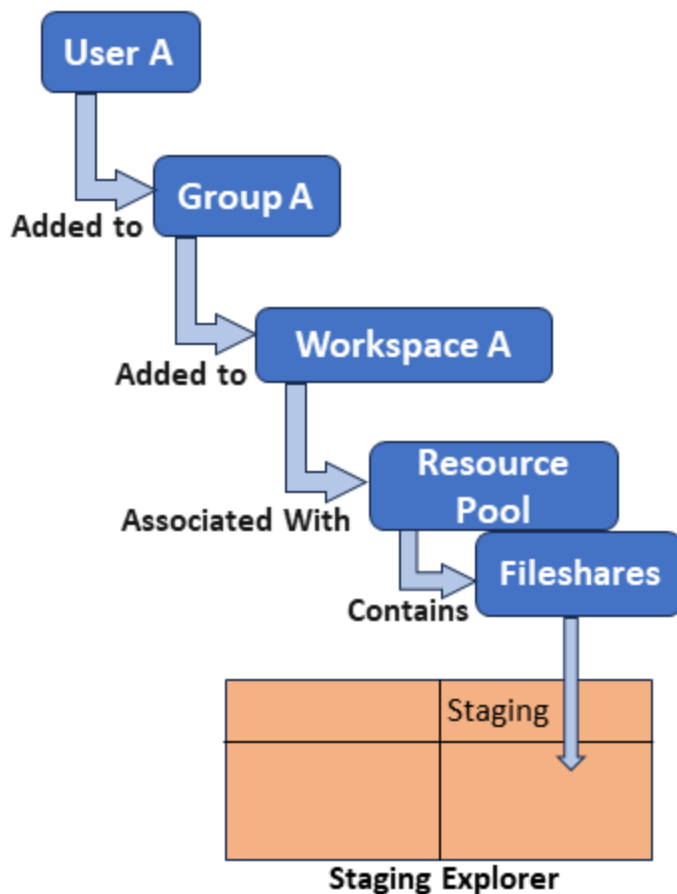


Figure 1: User able to view resource pool file shares

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 file shares. Once the user is assigned to the group, they will have access to any file shares associated with resource pools in the workspace with 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`.

6.3.4 Granting user access to specific file shares

If you have a user who has access to multiple client domain workspaces and you only want them to be able to access file shares 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 file shares to be accessed.

Based on the default workflow in Relativity aiR, as described above, a group and its users will inherit access ability to any file shares 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 file shares.

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 file shares 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.

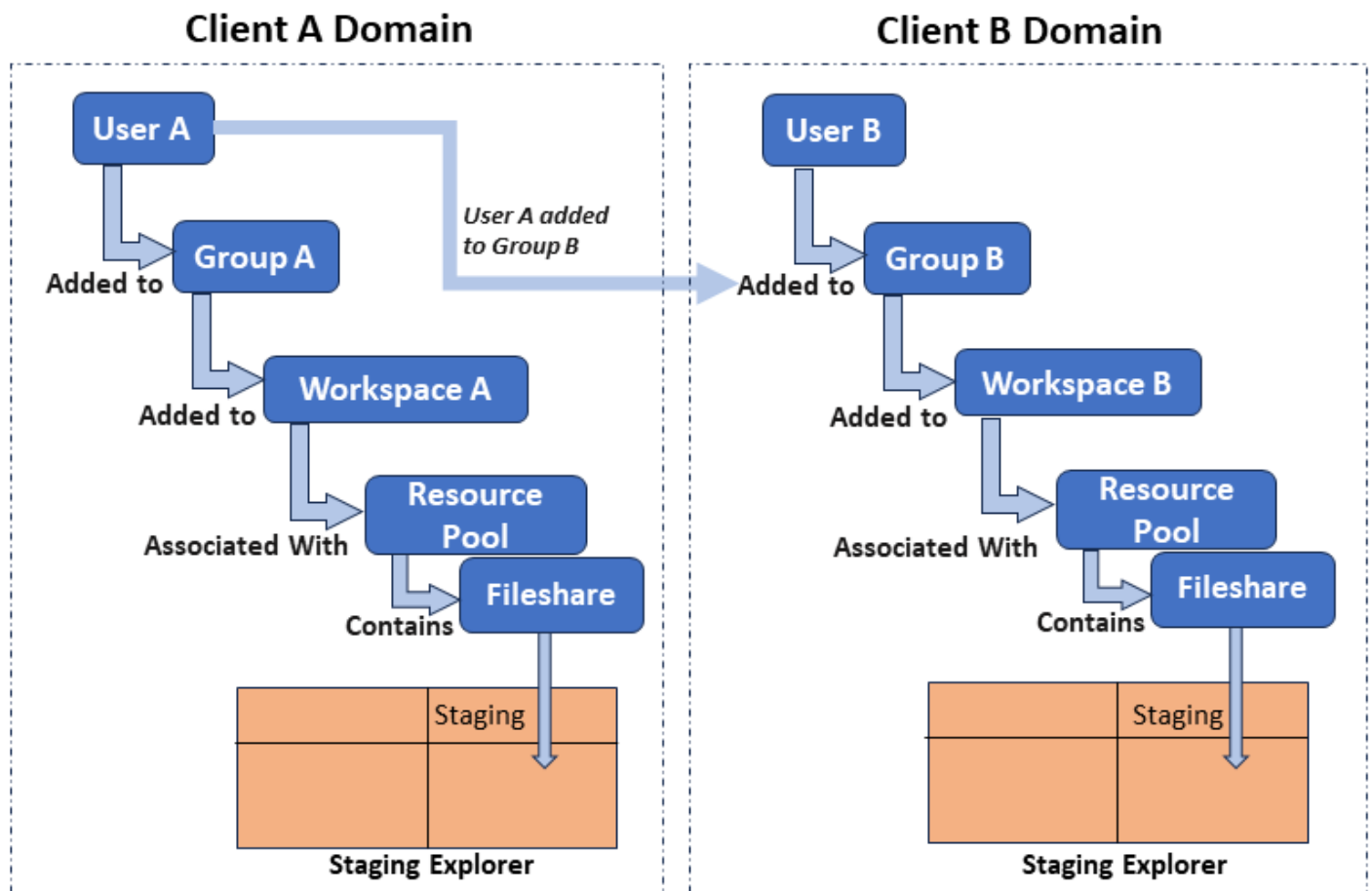


Figure 2: User able to view other client domain file shares.

To ensure that User A only views and accesses file shares from his own domain in the Staging pane and still retain access to the workspace for another client domain but not view its file shares, 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 file shares, 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 file shares in their Client A Domain. By being added to Group B2, User A is still able to view Workspace B but cannot view its file shares. For User B to only view her client domain's file shares, 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 file shares.

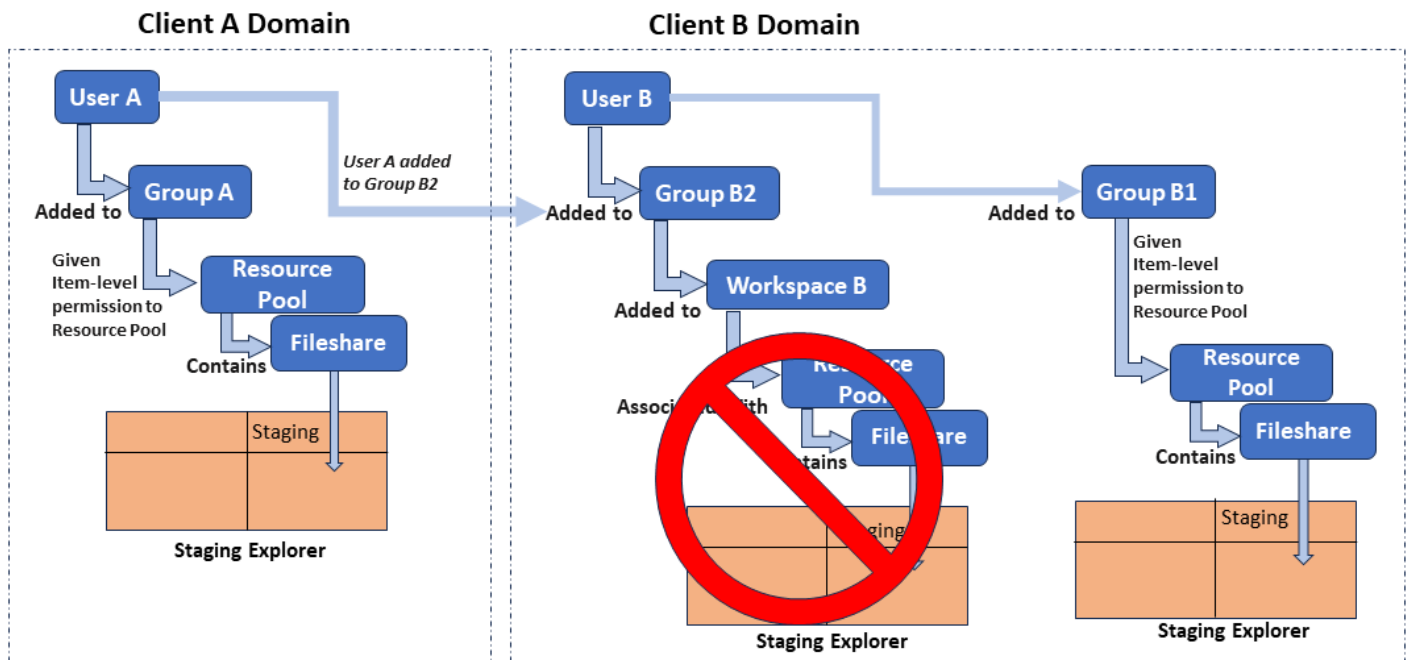


Figure 3: User prevented from viewing other client domain file shares.

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 Relativity aiR, see [Security and permissions](#).

To grant access to specific file shares, 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 file shares.

Step 1 Configure the `StagingPaneOnlyPerClientDomain` Instance Setting

The default Relativity aiR set up does not contain the Instance setting `StagingPaneOnlyPerClientDomain`. Therefore, the application will respond as described in the [Former workflow in Relativity aiR for user access to file shares on page 378](#) 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:

The screenshot shows a web interface with two main sections: 'Instance Setting Information' and 'Instance Setting Details'. The top navigation bar includes tabs for 'Authentication Provider Type', 'Workspace Upgrade Queue', 'Choices', 'Agents', 'Errors', 'Instance Details', and 'Resource Files'. Below the navigation bar are buttons for 'Save', 'Save and New', 'Save and Back', and 'Cancel'. The 'Instance Setting Information' section contains three fields: 'Name' (with value 'StagingPaneOnlyPerClientDc'), 'Section' (with value 'Relativity.DataTransfer'), and 'Machine' (empty). The 'Instance Setting Details' section contains four fields: 'Value Type' (dropdown menu with 'True/False' selected), 'Value' (radio buttons with 'True' selected), 'Initial Value' (radio buttons with 'True' selected), and 'Description' (empty text area).

- **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 file shares in other client domain workspaces. If it is set to False, the opposite occurs and users will inherit access to any file shares 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 file share 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 file shares 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 file shares 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 file shares.

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 file shares you want to allow users to access.
3. Click the **File Repositories** tab to review the available file shares assigned to the selected resource pool.

The screenshot shows the Relativity interface for managing Resource Pools. The top bar includes the title 'Relativity' and 'Resource Pools' with a star icon. Below this are buttons for 'Edit', 'Delete', 'Back', 'Edit Permissions', and 'View Audit'. The main content area has three tabs: 'Resource Pool Information', 'Other', and 'Record History'. The 'Resource Pool Information' tab is active, displaying details for 'ResourcePool_T002B', including its 'Client' (RelativityOne Client T002B) and 'Visible in Dropdown' status (Yes). Below this is a horizontal tab bar with options: 'Agents and Worker Servers', 'SQL Servers', 'File Repositories' (highlighted with a red box), 'Cache Location Servers', 'Analytics Servers', and 'dtSearch Index Share Locations'. Under the 'File Repositories' tab, there are 'Add' and 'Remove' buttons, followed by a table with columns 'Name' and 'URL'. The table has a 'Filter' input for each column. A single row is visible with a checkbox (highlighted with a red box) in the first column, the name '\\files\\T002B\\' in the second column, and the URL '\\files.t002...' in the third column.

4. Click the box next to the desired file share 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 is not displayed, toggle the **Override Inherited Security** option ON.

The screenshot shows the 'Permissions' dialog box with the 'Groups' tab selected. The 'Selected Item' is \\files.t017.esus025. The 'Group List' contains the following groups: AEI Administrators, Everyone, First Level Group, Level 2, and ManagementConsoleServiceGroup. Each group has 'View Users' and 'Edit Permissions' buttons. The 'Override Inherited Security' toggle is turned on. The 'Add / Remove Groups' button is highlighted with a red box.

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 file shares. They will only be able to access the specific file shares configured and will still retain access to workspaces for another client domain but not be able to view their file shares. See [Security and permissions for Item-level permissions](#) for more information.

Notes:

- Access to the resource pool does not automatically make the Resource Pool object visible to the users. To see the resource pool, they will need to also have access granted to the Resource Pool object tab in Admin Mode settings.
- The resource pool will not be assigned to the new workspace if you move the workspace to another client domain or delete the workspace.

6.4 Best practices, limitations, and data transfer performance considerations

The following are some good practices, limitations, and performance factors to consider when using Staging Explorer. For information on Staging Area folders, refer to the [Staging Area](#) topic and [Staging Area FAQ](#) article in Community.

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 Relativity aiR. This may cause slowness and connection issues.
- For high-volume file transfers from or to external disks, we recommend formatting the disk with the NTFS file system. NTFS provides better handling for large file sets and improved stability during intensive import/export operations.
- 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 417](#).
- 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, contact [Support](#) for assistance. See the Community article [Performance considerations for data transfers](#).

- **Run on local machine:** Staging Explorer should not be run on a Relativity aiR 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 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 417](#) 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, that is 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. Relativity aiR 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

For information on Staging Area folders, refer to the [Staging Area](#) topic and [Staging Area FAQ](#) article in Community.

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

These system requirements apply to Staging Explorer:

- Hardware requirements

Required item	Minimum	Recommended
RAM	4 GB	8 GB
CPU	4-core 64-bit Intel or AMD processor	8-core 64-bit Intel or AMD processor

- Disk space—depends on the transfer scale

Transfer scale	Minimum	Recommended
Small (< 100k files, < 100 GB)	2 GB	8 GB
Medium (up to 1M files, up to a few TB)	5 GB	20 GB
Large (10M+ files, multi-TB)	20 GB	100 GB

Disk space values in the table are in addition to the space required for downloaded files. For example, downloading a 100 GB dataset on a workstation expected to handle up to 1 million files requires 100 GB for the dataset plus 5 GB (minimum) or 20 GB (recommended) for journal headroom.

Note: The minimum free disk space values are approximate. Journal size varies based on transfer behavior and file count. If you regularly transfer large numbers of small files or experience frequent retries, allocate additional disk space beyond the minimum values listed.

- Operating system and runtime requirements

Required item	Minimum	Recommended
Operating system	Windows 7 SP1, 8.1, 10, 11, Server 2012 R2 or newer (64-bit)	Windows 10 1809+, Windows 11, or Server 2016+
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 Supported browsers

Relativity aiR supports the following internet browsers*.

Browser requirements	Supported Version
Chrome	Latest release**
Firefox	Latest release**
Safari	Latest release**
Edge	v79+ (Chromium-based)

*Screen resolutions of 1366x768 (minimum) to 2560x1440 (maximum) are supported

**Recent earlier versions will likely still function as expected but full support is reserved for the latest release

Notes:

- Using your internet browser to zoom to any size other than 100% while using the Viewer is not supported and can cause unexpected behavior.
- Internet Explorer is not supported.

6.5.1.3 Port requirements

To ensure that transfers can occur, take the following into consideration:

- You must make firewall changes to allow outbound connections to the server on **TCP port 443**, which is required to be opened.
- 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](#).

For more detailed port considerations, see [this](#) Community article.

See Relativity aiR network access in the Relativity aiR technical overview for detailed information about all of the network considerations for data transfer in Relativity aiR, 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 **Relativity aiR**, and log in with your Relativity aiR 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)**.

RELATIVITY DOWNLOADS
Staging Explorer
[Download Staging Explorer \(exe\)](#)
[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.
- Your default browser must be supported by Relativity aiR.
- Before you begin using Staging Explorer, review [Best practices, limitations, and data transfer performance considerations on page 384](#) 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 select **Connect with a browser**.

Note: Make sure your default browser is supported by Relativity aiR. Refer to [Supported browsers on the previous page](#).

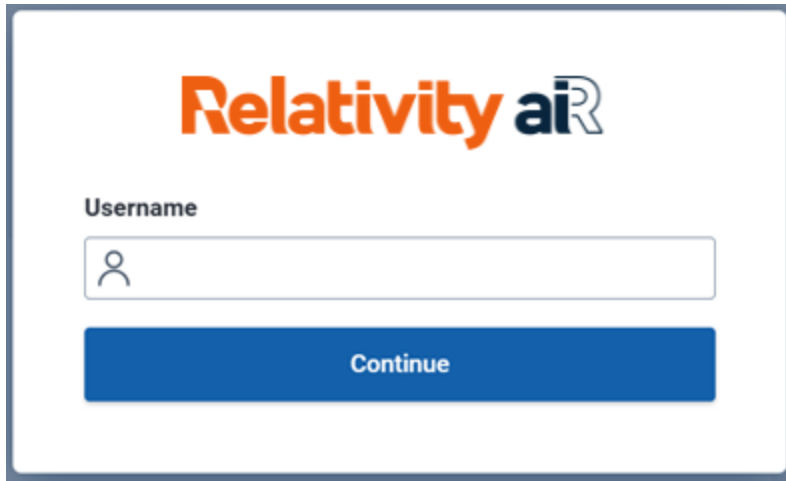
Instance Selection

Instance URL *

Note: Domain URL is sufficient, for example: <https://kcura.relativity.one> or <https://relativity-uk.relativity.one>.

3. In the newly opened page, enter your credentials and log in – the same way that you would log in directly to Relativity aiR. If you have already been logged in to the selected instance within the open browser session, you will not have to authenticate again and will be redirected to the authentication completion page automatically.

Note: Users log in with the same provider method as they have with Relativity. The Staging Explorer browser log in method now supports all of Relativity authentication providers, such as password, Integrated Authentication, OpenID Connect, and SAML.

A screenshot of the Relativity aiR login interface. At the top is the Relativity aiR logo, with 'Relativity' in orange and 'aiR' in blue. Below the logo is the label 'Username' in a small, dark font. Underneath the label is a white input field with a light gray border and a small person icon on the left. Below the input field is a solid blue button with the word 'Continue' in white text.

4. Next, you will be redirected to the authentication completion page, informing you that the login has been successfully completed. If the authentication process does not complete successfully, a page is displayed with additional guidelines to follow to complete the authentication.



Login successfully completed

You can close this window now.

RelativityOne Staging Explorer is being launched and will be ready to use shortly.

Current version 1.0.181

5. If a browser message box appears, asking to allow the site to open Staging Explorer, click **Open RelativityOne Staging Explorer** to proceed. If you do not do this, then Staging Explorer will not be able to complete the authentication process.

Note: To always allow your system to open the link to Staging Explorer, select the "Always allow" checkbox, and the message box will not appear anymore.

Open RelativityOne Staging Explorer?

<https://esus019064-t044.r1.kcura.com> wants to open this application.

☐ Always allow esus019064-t044.r1.kcura.com to open links of this type in the associated app

Open RelativityOne Staging Explorer

Cancel

6. If applicable, the New Option Available window is displayed. Select **Do not show this in the future** if you do not want the window to be displayed the next time Staging Explorer is opened.

New Option Available!

A new option is available to automatically update RelativityOne Staging Explorer when new versions are ready. This option is turned on by default and can be turned off by navigating to the Settings menu.

Please note that you have to be an administrator of this machine for this option to work. You will be notified about new versions, without the possibility to install them, if you are not an administrator.

☐ Do not show this in future

Ok

7. 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 file share 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 file share and its contents.
- If applicable, Staging Explorer will open to the last Staging file share you visited.
- If the file share does not exist, the root folder of that file share 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

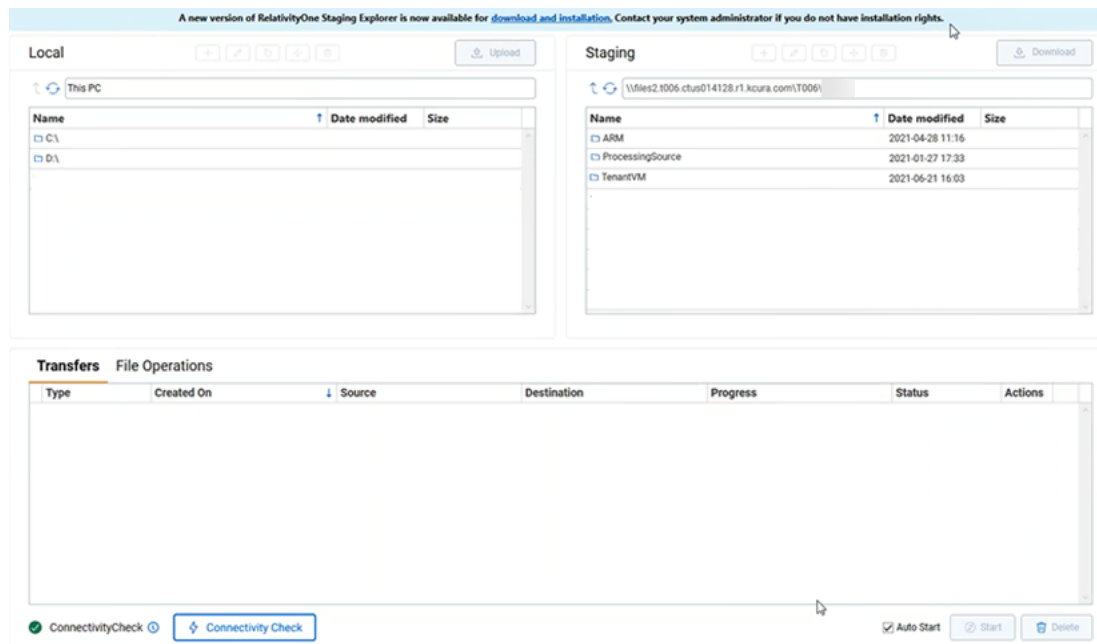
6.5.4 Manually updating Staging Explorer

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 is displayed at the top of the application. If the version update is critical, a yellow banner appears.
- If you have [Automatic Update](#) enabled in Settings, the update will be completed automatically.

1. Launch **Relativity aiR**, and log in with your Relativity aiR credentials.



2. If a message appears 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 389](#) 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 Staging Explorer](#).
2. Click the **Settings** button in the user drop-down menu next to your name. The Settings window is displayed.

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... x +

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

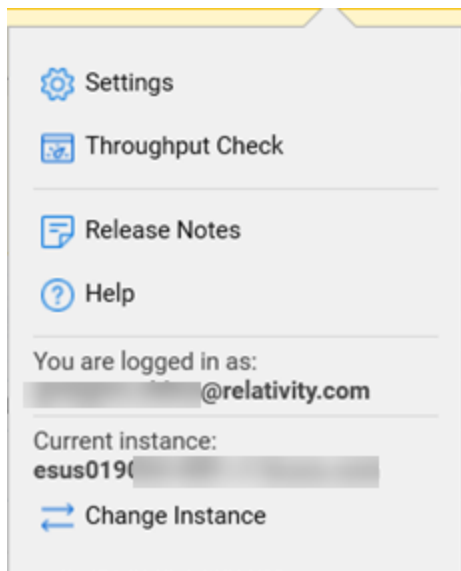
3. Select **Enable Automatic Update** to automatically have Staging Explorer update to the newest version available. If you change your mind and want to do the updates [manually](#), clear the checkbox.
4. Click **Save**.

6.6 Navigation

For information on Staging Area folders, refer to the [Staging Area](#) topic and [Staging Area FAQ](#) article in Community.

6.6.1 User drop-down menu

When you open Staging Explorer, there is user drop-down menu next to your name.

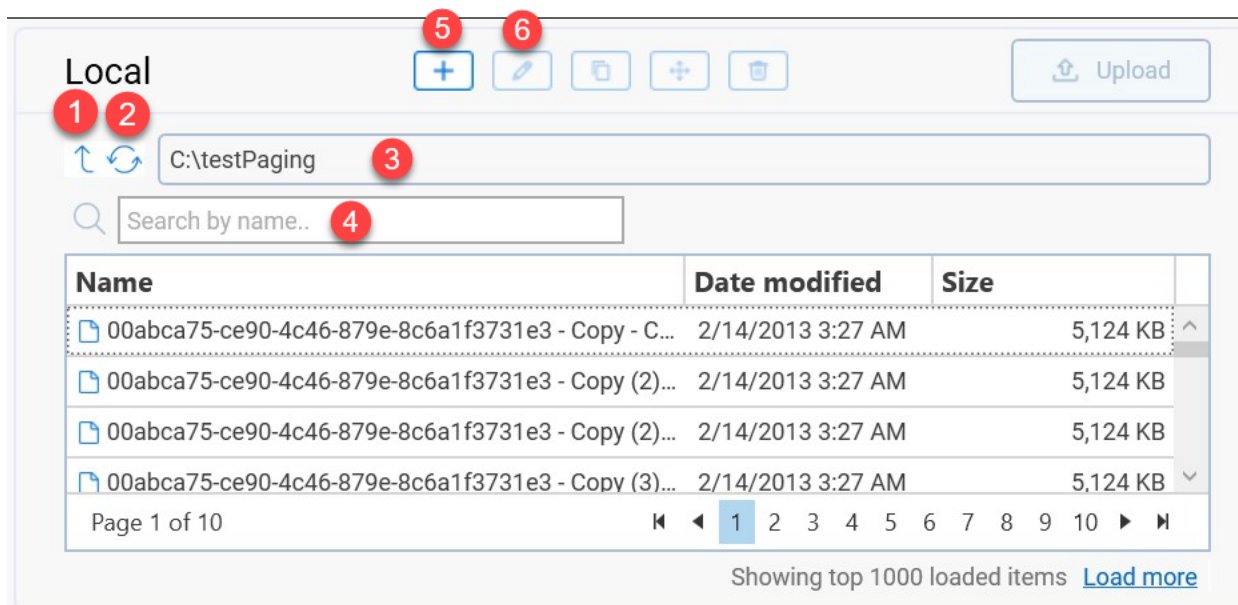


Use the drop-down menu to do the following:

- View the logged in email address.
- View the current Instance's name.
- **Settings**—open the Settings window where you can configure the [Transfer Settings](#) and [Automatic update](#) option.
- **Throughput Check**—open the Throughput Check window.
- **Release Notes**—open the Relativity aiR Release Notes page where you can filter the list to browse recent changes in the Staging Explorer.
- **Help**—launch the Staging Explorer documentation on the Relativity Documentation website.
- **Change Instance**—open 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 \(copy, move, delete, zip, unzip\) on page 404](#)

[Calculating folder size in Local/Staging panes on page 419](#)

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.

The screenshot shows the 'Staging' pane of the software. At the top, there's a toolbar with icons for adding, editing, deleting, and other actions, along with a 'Download' button. Below the toolbar is a search bar labeled 'Search by name..'. The main area displays a table of files with columns for 'Name', 'Date modified', and 'Size'. The table lists four files: file1.dat, file10.dat, file100.dat, and file1000.dat, all dated 7/2/2020 11:49 AM and 1 KB in size. At the bottom of the table, there's a pagination control showing 'Page 1 of 10' and a series of page numbers from 1 to 10. The number '1' is highlighted, indicating the current page. Below the pagination control, it says 'Showing top 1000 loaded items' and a 'Load more' link.

6.7 Transfer workflows

For information on Staging Area folders, refer to the [Staging Area](#) topic and [Staging Area FAQ](#) article in Community.

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 384](#) 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 417](#).

6.7.1 File and folder naming rules

Follow the rules below referring to names of files and folders you upload to and later use in Staging Explorer:

- File and folder names are case-preserving and case-sensitive.
- File and folder component names must be no longer than 255 bytes.
- File and folder paths must be no longer than 1,024 bytes.
- The following characters are not allowed: " \ / : | < > * ?
- Control characters, for example, U+0001-U+001F, U+007F-U+009F, are not allowed. Note that this includes the tab character.
- Code points, for example, U+E000, are not valid Unicode characters and are not valid in Staging Explorer.
- File and folder names must not end with a dot character (.).
- The following file and folder names are not allowed: LPT1, LPT2, LPT3, LPT4, LPT5, LPT6, LPT7, LPT8, LPT9, COM1, COM2, COM3, COM4, COM5, COM6, COM7, COM8, COM9, PRN, AUX, NUL, CON, CLOCK\$, dot character (.), two dot characters (..), or space character.
- File and folder names must not start with .fuse_hidden. This is a reserved filename prefix.
- We strongly discourage use of the following bidi control characters:
 - U+200E Left-to-right mark (LRM)
 - U+200F Right-to-left mark (RLM)
 - U+202A Left-to-right embedding (LRE)
 - U+202B Right-to-left embedding (RLE)
 - U+202C Pop directional formatting (PDF)
 - U+202D Left-to-right override (LRO)
 - U+202E Right-to-left override (RLO)

6.7.1.1 Unsupported characters

See which characters in names of files and folders are not supported in Staging Explorer
The following characters in names of files and folders are rejected in Staging Explorer:

- U+002F (/)
- U+005C (\)
- U+007F
- U+0081
- U+008D
- U+008F
- U+009D
- U+D800 to U+DFFF
- U+FDD0
- U+FDDD

- U+FFFE
- U+FFFF
- U+4FFFE
- U+4FFFF
- U+8FFFE
- U+8FFFF
- U+CFFFE
- U+CFFFF
- U+10FFFE
- U+10FFFF

If you encounter issues with unsupported characters in file and folder names while working in Staging Explorer, you may do the following:

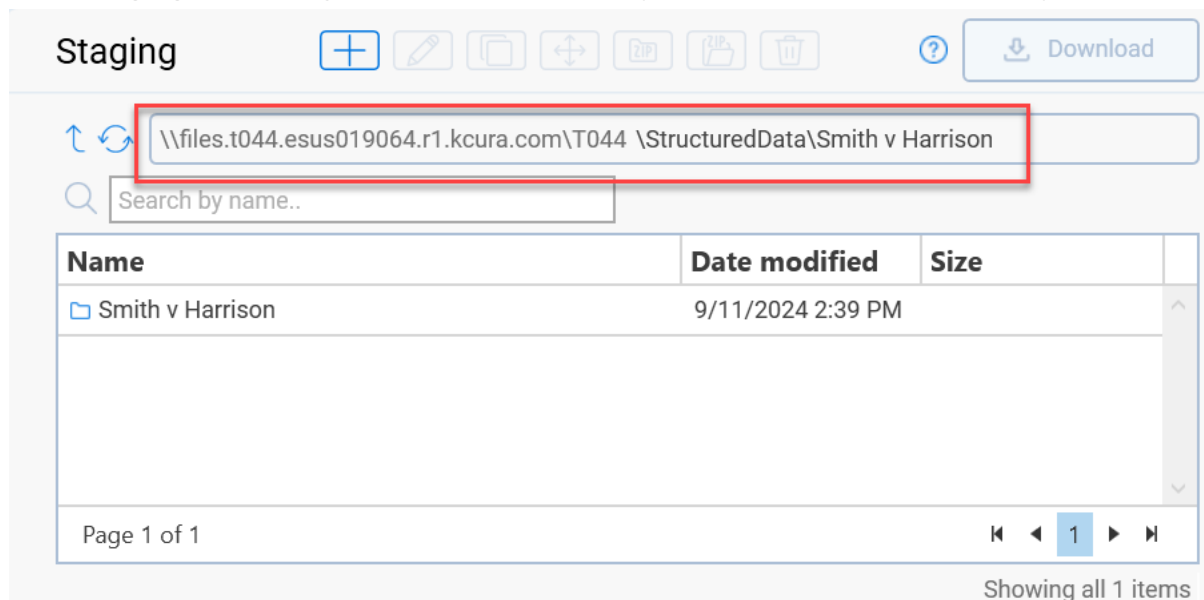
1. Review the naming rules and the list of unsupported characters.
2. Rename file and/or folders accordingly.
3. Retry the operation or start a new job.
4. If the problem still occurs, contact [Relativity Support](#).

6.7.2 Uploading files

Note: The Staging Explorer transfer currently supports individual file sizes up to 4.75 TB. Files exceeding this limit may fail to process.

To upload files:

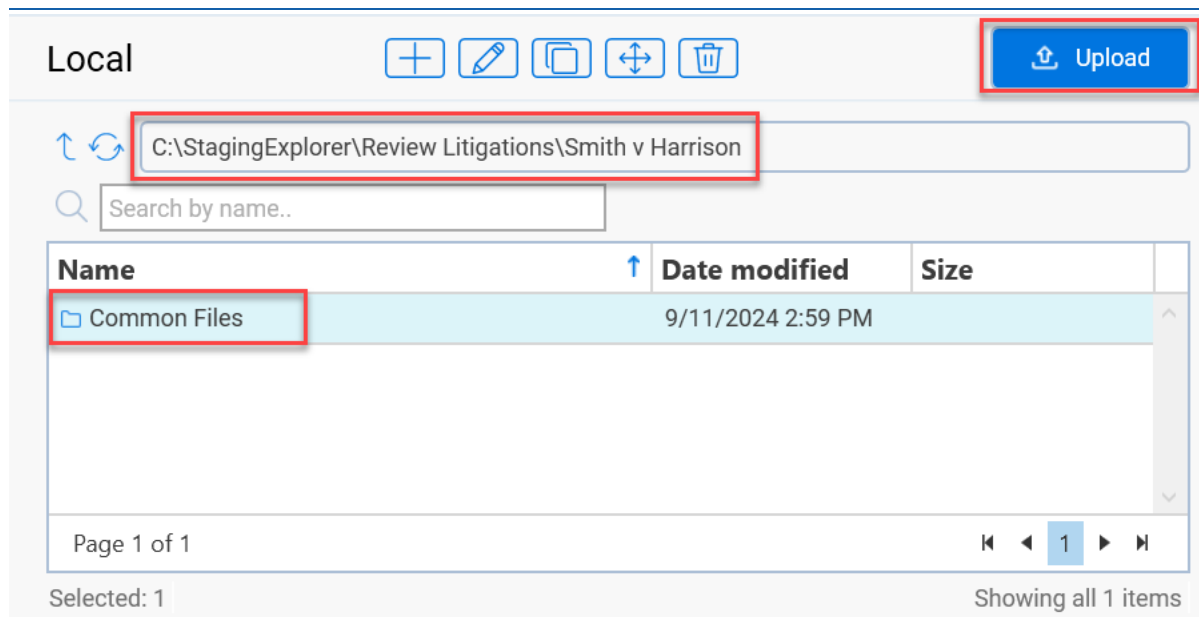
1. [Launch the Staging Explorer](#).
2. In the **Staging** pane, navigate to the location where you want to upload the files from your local drive.



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. For more information, see [Starting and canceling a transfer on page 401](#). If the system detects a potential issue with the transfer job, a warning window is displayed. 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 file shares, or if the destination folder is a root of the file share.
- 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]`.



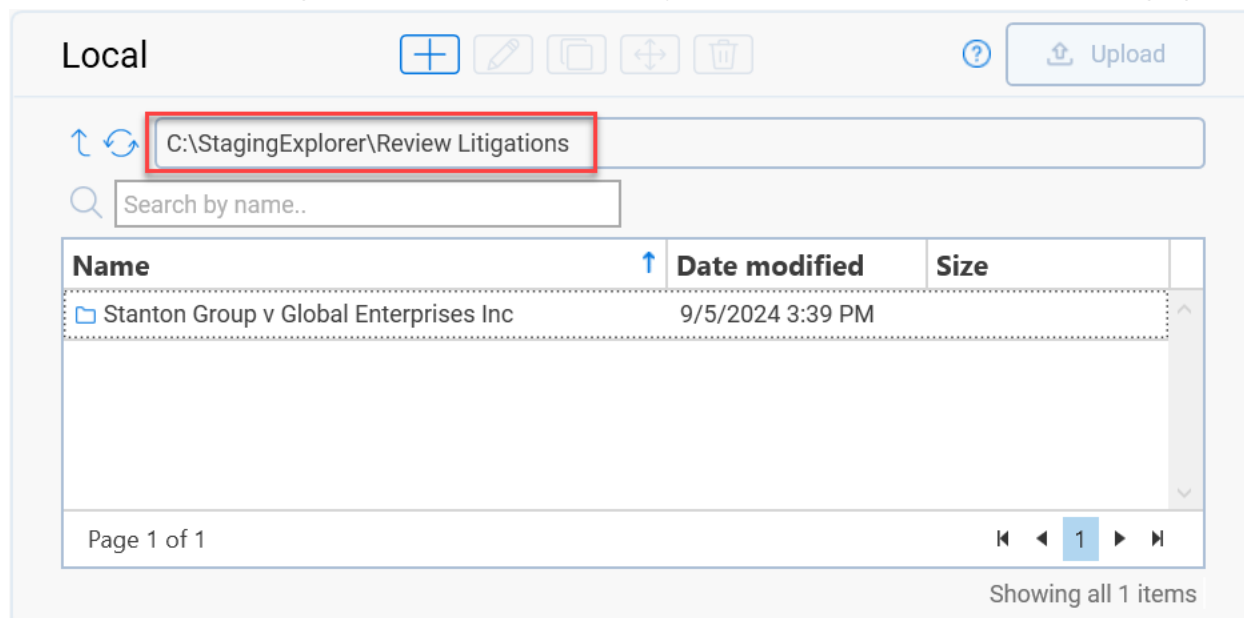
4. From the **Transfers** tab, monitor upload progress via the **Progress** and **Status** columns displayed for the transfer. When the transfer successfully completes, a circled green check mark  is displayed. You can click the expand plus button to next to a transfer row to view the transfer details. See [Transfer workflows on page 396](#).

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.

6.7.3 Downloading files

To download files:

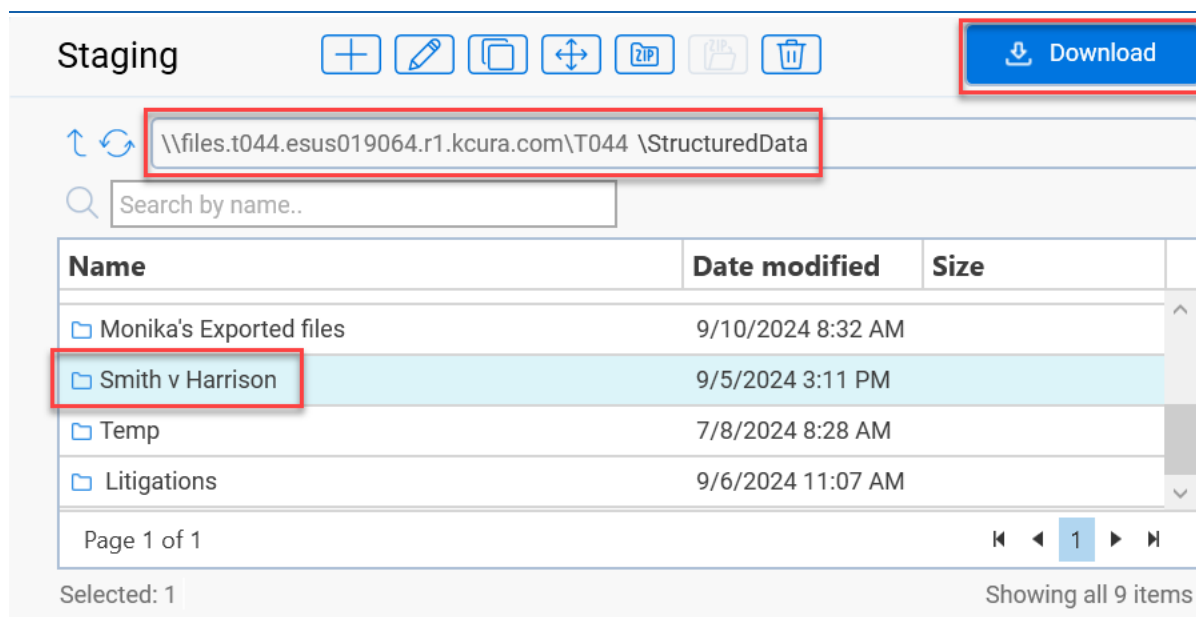
1. [Launch the Staging Explorer.](#)
2. In the **Local** pane, navigate to the location into which you want to download the files from Staging.



3. 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. For more information, 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 is displayed. 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  is displayed. You can click the expand plus button to next to a transfer row to view the transfer details. See [Transfer workflows on page 396](#).

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.

6.7.4 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. You may also 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.

6.7.5 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 started. 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.

6.7.6 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. You may also 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 the Transfers tab. Removing a transfer from this tab is irreversible.

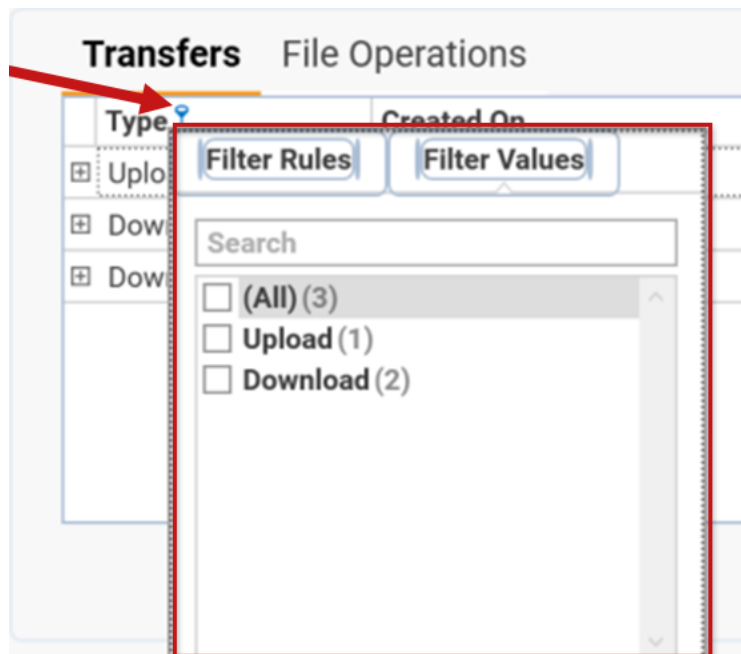
6.7.7 Viewing transfer history

When opening Staging Explorer, all of the transfers you previously ran are displayed 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	
5:39:37 PM	\\files.t044.esus019064.r1.kcura.com\t044\StructuredData\Monika's Exported fi...	C:\StagingExplorer\Review Litigations\Smith v Harri...	100%	Finished		
5:39:06 PM	C:\StagingExplorer\Review Litigations\Smith v Harris	\\files.t044.esus019064.r1.kcura.com\t044\Structur...	100%	Finished		
5:08:08 PM	\\files.t044.esus019064.r1.kcura.com\t044\StructuredData\Smith v Harris	C:\StagingExplorer\Review Litigations	100%	Finished		

6.7.8 Viewing and editing transfer details

Refer to the sections below for how to view and edit transfer details.

6.7.8.1 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.

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 is displayed. However, if the transfer finishes with failed paths the  icon is displayed.
 - Click Skipped/Failed details link to download a CSV file with to your local drive. The file contains information about the skipped or failed items.
-
- **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 417](#) 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.

6.7.9 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 **Skipped / Failed details**  [Skipped / Failed details](#) button. The saved file contains information about the phase when the issue occurred, that is Calculation or Transfer, the error message, and the path that was skipped or failed.

6.8 File and folder operations (copy, move, delete, zip, unzip)

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, delete, zip or unzip 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 file shares that you are permitted to use.
- You can search for details of a specific file operation (copy, move, delete) on Audit page in Relativity aiR. Refer to Advanced Filtering Audit records in the Audit documentation and the Community article Staging Explorer: Move, Copy, Delete viewed in Audit for details.

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

For information on Staging Area folders, refer to the [Staging Area](#) topic and [Staging Area FAQ](#) article in Community.

6.8.1 Button legend

The list below identifies the buttons in Staging Explorer.

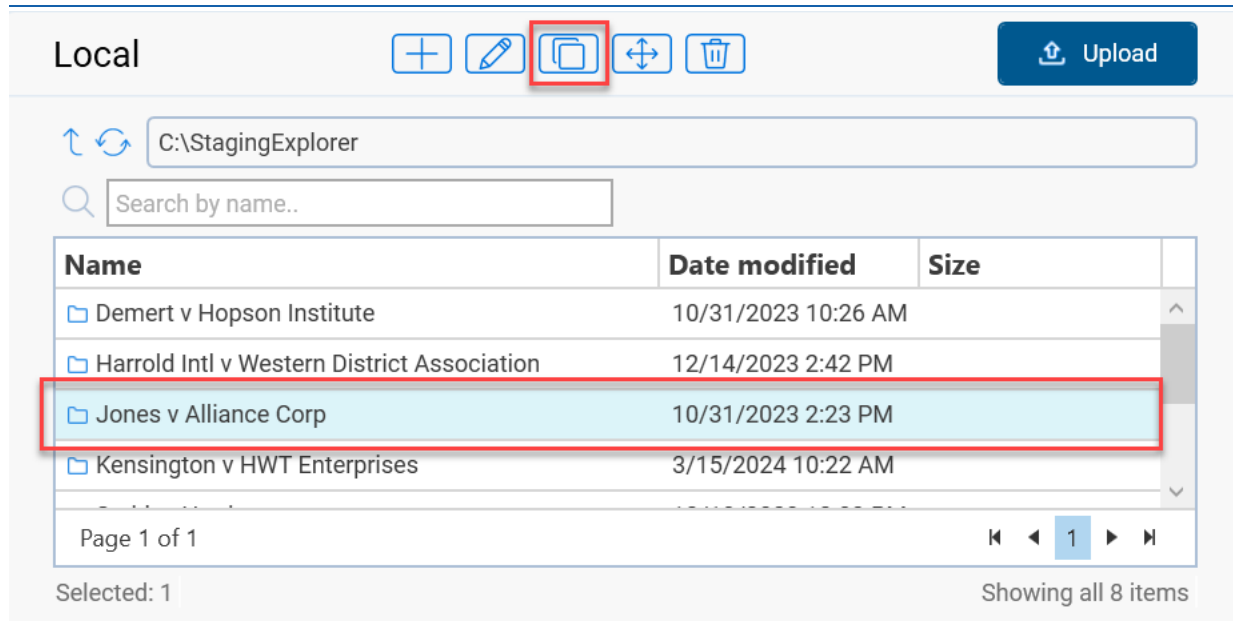
-  — Add a new folder to the path location
-  — Rename the folder
-  — Copy the selected folders or files
-  — Move the selected folders or files
-  — Delete the selected folders or files
-  — Compress (zip) files
-  — Extract (unzip) files
-  — Move up one folder level
-  — Refresh list

6.8.2 Copying files and folders

To copy one or more folders or files in Staging Explorer:

1. Select the folder or file in the **Local** or **Staging** pane, 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.

Copy

Copy dialog box showing the path **C:\StagingExplorer\Review Litigations** selected. The dialog displays a table with the following information:

Name	Date modified	Size
Stanton Group v Global Enterprises Inc	9/5/2024 3:39 PM	

Page 1 of 1
Selected: 1
Showing all 1 items

Place **Cancel**

3. 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...	100%	Finished		
Status:Finished Duration:00:00:05 Started On:9/5/2024 3:43:32 PM Finished On:9/5/2024 3:43:38 PM Job ID:7ed2567c-1143-4d2c-836a-f8422ef11285 Copied Data:1 GB / 1 GB Copied Files:32 / 32 Path IssuesFailed: 0							

- **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, that is 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:

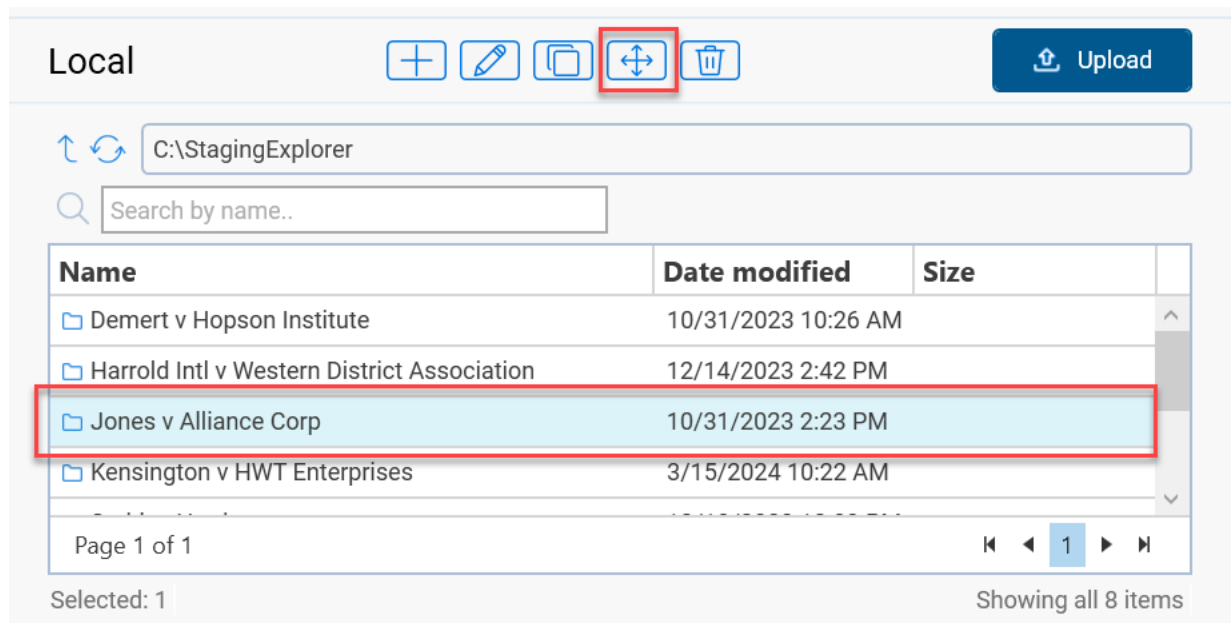
-  icon indicates the operation Failed with failed path issues.
 -  icon indicates the operation finished with skipped paths, but no failed paths.
 - For active operations, if there are any path issues, failed or skipped, the  icon is displayed. However, if the operation finishes with failed paths, the  icon is displayed.
-

6.8.3 Moving files and folders

To move one or more folders or files in Staging Explorer:

1. Select the folder or file in the **Local** or **Staging** pane, 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.

Move

C:\StagingExplorer\Review Litigations

Search by name..

Name	Date modified	Size
Stanton Group v Global Enterprises Inc	9/5/2024 3:39 PM	

Page 1 of 1

1

Selected: 1

Showing all 1 items

3. 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...	100%	Finished	
Status:Finished Duration:00:00:02 Started On:9/6/2024 1:31:31 PM Finished On:9/6/2024 1:31:33 PM Job ID:093b7f7e-b8c2-43d9-84be-7e381f1f121a Moved Data:1 GB / 1 GB Moved Files:32 / 32 Path IssuesFailed: 0						

- **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, that is 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.

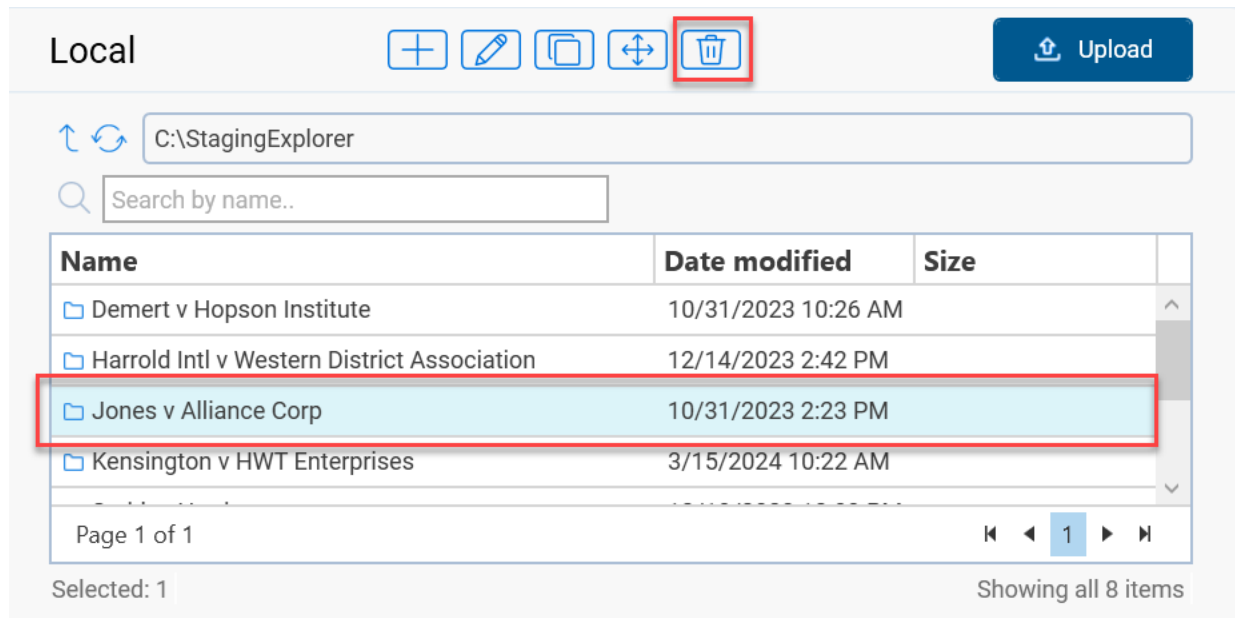
Notes:

-  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 is displayed. However, if the operation finishes with failed paths, the  icon is displayed.

6.8.4 Deleting files and folders

To delete one or more folders or files in Staging Explorer:

1. Select the folder or file in the **Local** or **Staging** pane, 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	
Delete	9/6/2024 1:48:32 PM	C:\StagingExplorer		100%	Finished	 	
Status: Finished Duration: 00:00:01 Started On: 9/6/2024 1:48:32 PM Finished On: 9/6/2024 1:48:33 PM Job ID: 0706174e-1dcd-4c0a-832e-0b882ac48141 Deleted Data: 1 GB / 1 GB Deleted Files: 32 / 32 Path Issues Failed: 0							

- **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, that is 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 is displayed. However, if the operation finishes with failed paths, the  icon is displayed.

6.8.5 Zipping (compressing) and unzipping (extracting) files and folders

You can compress archive data for uploading to the Staging Explorer by using the Zip option in the Staging pane. The file extension for the compressed files will be ".zip." Conversely you can extract the files from a zipped file or folder by using the Extract (unzip) option in the Staging pane. Zipping and unzipping files and folders in this manner preserves metadata, enables faster importing time, and improves data management.

Note: The zip/unzip option is now available in Relativity aiR Government instances within Staging Explorer. It is designed for fast, reliable compression and decompression, supporting jobs up to 250 GB and uses the Zip compression format.

6.8.5.1 Considerations and Limitations

The following are some considerations and limitations when zipping (compressing) and unzipping (extracting) in Staging Explorer:

- Compression and extractions usage factors with Zip are as follows.

Note: Starting June 25, 2026, Staging Explorer no longer supports the extraction of RAR or 7-Zip file types. You need to repackage any data stored in RAR or 7-Zip files to Zip format before uploading it to Staging Explorer on or after June 25, 2026.

Usage factor		Zip
Compression (Zip)	Plain	✓
	Password protected	✓
	Multipart (Split type)	✓
	Multipart (Span type)	✗
	Compression level	✓
Extraction (Unzip)	Plain	✓
	Password protected	✓
	Multipart (Split Type)	✓
	Multipart (Span Type)	✗
	Preserve metadata	✓

- Execution time varies according to the number and size of input files.
- Source data for compression must not exceed 250 GB. For datasets near or above this limit, we recommend splitting the compressed data and executing multiple jobs. The same limit applies to extraction—Zip files must also be under 250 GB.
- Compress/extract jobs cannot exceed 48-hour runtime. Jobs running longer are automatically canceled.
- Relativity aiR instance limits:
 - Maximum 20 concurrent jobs at the same time
 - Maximum 100 jobs per 24 hours
- Split (multipart) zip file option is turned off by default. Minimum part size is 500 MB (10242 bytes).
- Two compression levels are available: 6-Normal and 0-Store. By default, the Compression Level is set “6-Normal,” which means a parity between performance and compression. Compression Level “0-Store” adds files to zip archive with maximum possible speed, but without any compression.
- Any empty directories and empty files are not included during compression.
- A canceled extraction job will leave partially extracted files/directories.

- During extraction, any filenames containing special or unsupported characters will be replaced with underscore character “_” (U+005F).

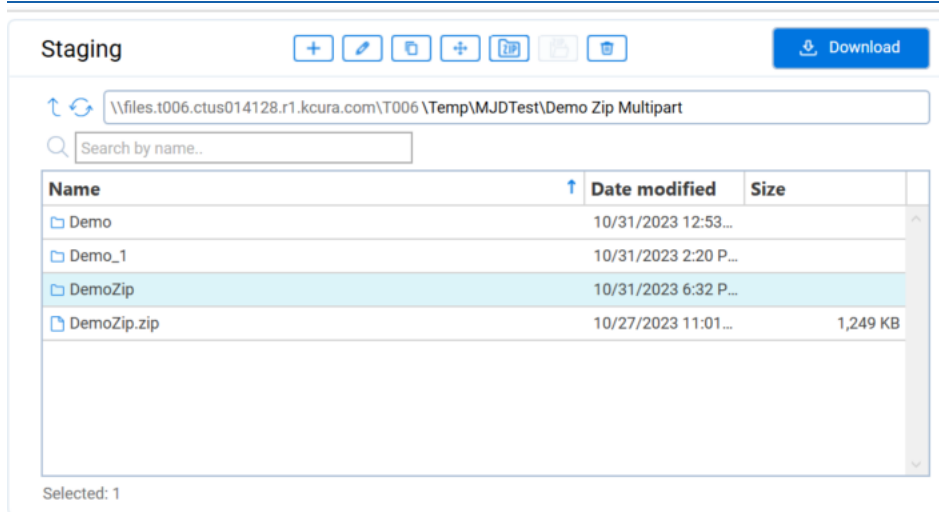
For more information on compressing in Staging Explorer, see [Staging Explorer Compressing Large Matters \(Zipping\)](#) article in Community.

6.8.5.2 Zipping (compressing) files and folders

To zip (compress) files and folders:

1. In the Staging pane, select the file or folder to be zipped (compressed), and click the **ZIP**  button.

Note: You cannot zip files at the root directory level.



2. Do the following:

Create a name for your zip files

Create a name*

Compress Level

Split zip file ☐

Set a password ☐

- **Create a name**—type a unique name for the zip file.
- **Compress Level**—select whether or not to compress the files in the archive zip file. Every compression method supports several levels of compression. Staging Explorer uses two levels: 6-Normal and 0-Store. The zip extraction (unzipping) process is the same for both options.
 - **Normal**—this is the default value. The files will be compressed using the standard zip compression process. There will be parity between performance and compression. Typically, compressed files are smaller, take up less storage space, and can be easier to transport than

uncompressed files; however, the compressing process may take longer, depending on the files being compressed.

- **Store**—select this option to group multiple files together into a single archive zip file without compressing them. This option adds files to the zip archive with maximum possible speed, but without compression. It can be used when compressing files is not necessary or when the compression process will take too long and use too much RAM.
- **Split zip file** (multipart zip files)—this toggle is off by default. Toggle it on if you want to compress the data into multiple smaller zip files. Files are zipped with the maximum possible speed, but without any compression. If selected, enter the appropriate size (integer value) for each file in the Split to size field and choose MB (1024^2 bytes) or GB (1024^3 bytes) from the drop-down list. The minimum split part size is 500 MB. The filename format for each zip file will be <Filename>.zip.001, <Filename>.zip.002, <Filename>.zip.003, and so forth. Splitting large zips files into smaller zip files can:
 - improve the transfer process and time.
 - avoid difficulty transferring large zip files.
 - help if you have size limitations for transferring, sharing, or storing data.
 - help in the event of an interruption during the transfer process, as only the parts (files) that did not transfer will need to be resent, instead of having to resend a very large zip file.
- **Set a password**—this toggle is off by default. Toggle it on if you want to password protect the file. Then, enter a password in the Password field that appears. The password can consist of up to 1000 characters. AES-256 is used for encryption.

3. Monitor the progress on the **File Operations** tab via the **Progress** and **Status** columns. When the compressing process is complete, you can click expand plus  button to view more details.

Transfers		File Operations					
Type	Created On	Source	Destination	Progress	Status	Actions	
Compress	10/31/2023 2:37:54 PM	\\files.t006.ctus014128.r1.kcura.co...		100%	Finished		
Status: Finished Duration: 00:00:34 Started On: 10/31/2023 2:37:54 PM Finished On: 10/31/2023 2:38:29 PM Job ID: 0775a909-ba8a-4811-b08a-40541ea553d9 Compressed Files: 32 / 32 Failed Files: 0							

- **Status**—the status of the process (such as, In Queue, In Progress, Finished, Canceled, Failed).
- **Duration**—the length of time the process took to complete.
- **Started On**—the date and time the process started.
- **Finished On**—the date and time the process completed.
- **Job ID**—the unique identification number of the operation.
- **Compressed Files**—the total number of compressed files out of the total number of files in the job.
- **Failed Files**—the total number of files that failed to compress.

6.8.5.3 Unzipping (extracting) files and folders

To unzip (extract) files and folders:

1. In the Staging pane, select the file or folder to be unzipped (extracted). You can only unzip one item at a time.

Note: To extract a multipart zip file, select its first part.

2. Click the **Extract**  button at the top of the **Staging** pane.

Staging         Download

  \\files.t006.ctus014128.r1.kcura.com\T006\Temp\MJDTest\Demo Zip Multipart

 Search by name..

Name	Date modified	Size
Folder Demo	10/31/2023 12:53...	
Folder Demo_1	10/31/2023 2:20 P...	
File DemoZip.zip	10/27/2023 11:01...	1,249 KB

Selected: 1 | 1 MB (1,278,005 B)

3. For protected archives, enter password. Otherwise, leave this field empty.

Password protect

Provide a password. Leave it empty if the file is not password protected.

Enter password

Extract

Cancel

Note: You can only enter a password for 7-Zip (7z) or ZIP archives.

4. Click **Extract**.
5. Monitor the progress on the **File Operations** tab via the **Progress** and **Status** columns. When the extracting process is complete, you can click expand plus  button to view more details.

Transfers		File Operations				
Type	Created On	Source	Destination	Progress	Status	Actions
Extract	10/31/2023 2:32:42 PM	\\files.t006.ctus014128.r1.kcura.co...		100%	Finished	
Status: Finished						
Duration: 00:00:24						
Started On: 10/31/2023 2:32:42 PM						
Finished On: 10/31/2023 2:33:06 PM						
Job ID: f66779d2-33eb-40f7-9ea0-65c7af2e116c		Extracted Files: 32 / 32				
		Failed Files: Failed: 0				

- **Status**—the status of the process, such as, In Queue, In Progress, Finished, Canceled, Failed.
- **Duration**—the length of time the process took to complete.
- **Started On**—the date and time the process started.
- **Finished On**—the date and time the process completed.
- **Job ID**—the unique identification number of the operation.

- **Extracted Files**—the total number of extracted files out of the total number of files in the job.
- **Failed Files**—the total number of files that failed to be extracted.

6.9 Requesting a Throughput Check

Throughput Check is used to provide reference transfer throughput based on your current connection.

- The Throughput Check runs automatically when users click **Throughput Check** in the user drop-down menu next to your name.
- If applicable, click **Close** to cancel the Throughput Check.
- The Throughput Check performs a sample transfers (upload) of 500 files, each 500 kB.
- The Throughput Check test results are shown under Throughput Check summary.
- The green number is your current network's speed available upload to Relativity aiR.

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

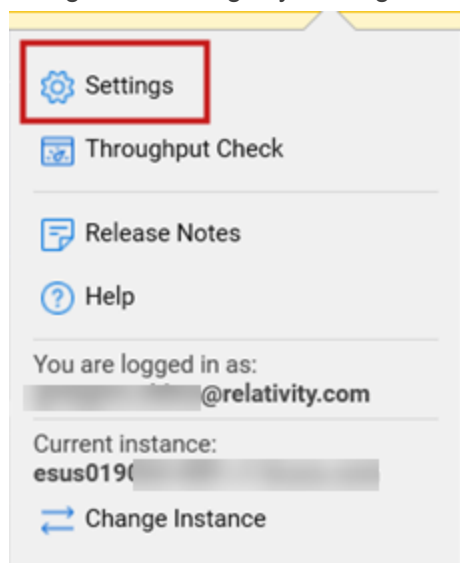
Check Again

Close

6.10 Updating Transfer Settings

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.
-

- Optionally, select **Enable Automatic Update** to automatically permit Staging Explorer to update to the newest version when it's available.
- Click **Save**.

6.11 Calculating folder size in Local/Staging panes

For information on Staging Area folders, refer to the [Staging Area](#) topic and [Staging Area FAQ](#) article in Community.

6.11.1 Calculating folder size

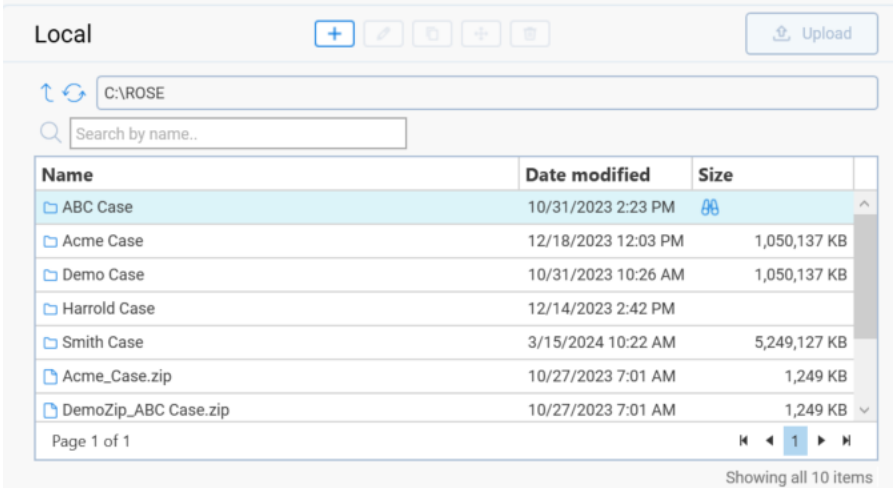
Note: You must enable View Client Domain Staging Reports permission in Admin Operations to be able to utilize the Calculate Size function.

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 is displayed under the Size column. The **Calculating...** status appears briefly under the Size column during calculation. When finished, the size of the folder is displayed 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 appear 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, because 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.



The screenshot shows a file explorer interface with a table of files and folders. The table has three columns: Name, Date modified, and Size. The first row is highlighted in blue. The interface also includes a search bar, an 'Upload' button, and a pagination control showing 'Page 1 of 1'.

Name	Date modified	Size
ABC Case	10/31/2023 2:23 PM	
Acme Case	12/18/2023 12:03 PM	1,050,137 KB
Demo Case	10/31/2023 10:26 AM	1,050,137 KB
Harrold Case	12/14/2023 2:42 PM	
Smith Case	3/15/2024 10:22 AM	5,249,127 KB
Acme_Case.zip	10/27/2023 7:01 AM	1,249 KB
DemoZip_ABC Case.zip	10/27/2023 7:01 AM	1,249 KB

Page 1 of 1

Showing all 10 items

Proprietary Rights

This documentation (“**Documentation**”) and the software to which it relates (“**Software**”) belongs to Relativity ODA LLC and/or Relativity’s third party software vendors. Relativity grants written license agreements which contain restrictions. All parties accessing the Documentation or Software must: respect proprietary rights of Relativity and third parties; comply with your organization’s license agreement, including but not limited to license restrictions on use, copying, modifications, reverse engineering, and derivative products; and refrain from any misuse or misappropriation of this Documentation or Software in whole or in part. The Software and Documentation is protected by the **Copyright Act of 1976**, as amended, and the Software code is protected by the **Illinois Trade Secrets Act**. Violations can involve substantial civil liabilities, exemplary damages, and criminal penalties, including fines and possible imprisonment.

©2026. Relativity ODA LLC. All rights reserved. Relativity® is a registered trademark of Relativity ODA LLC.