

Import/Export Guide

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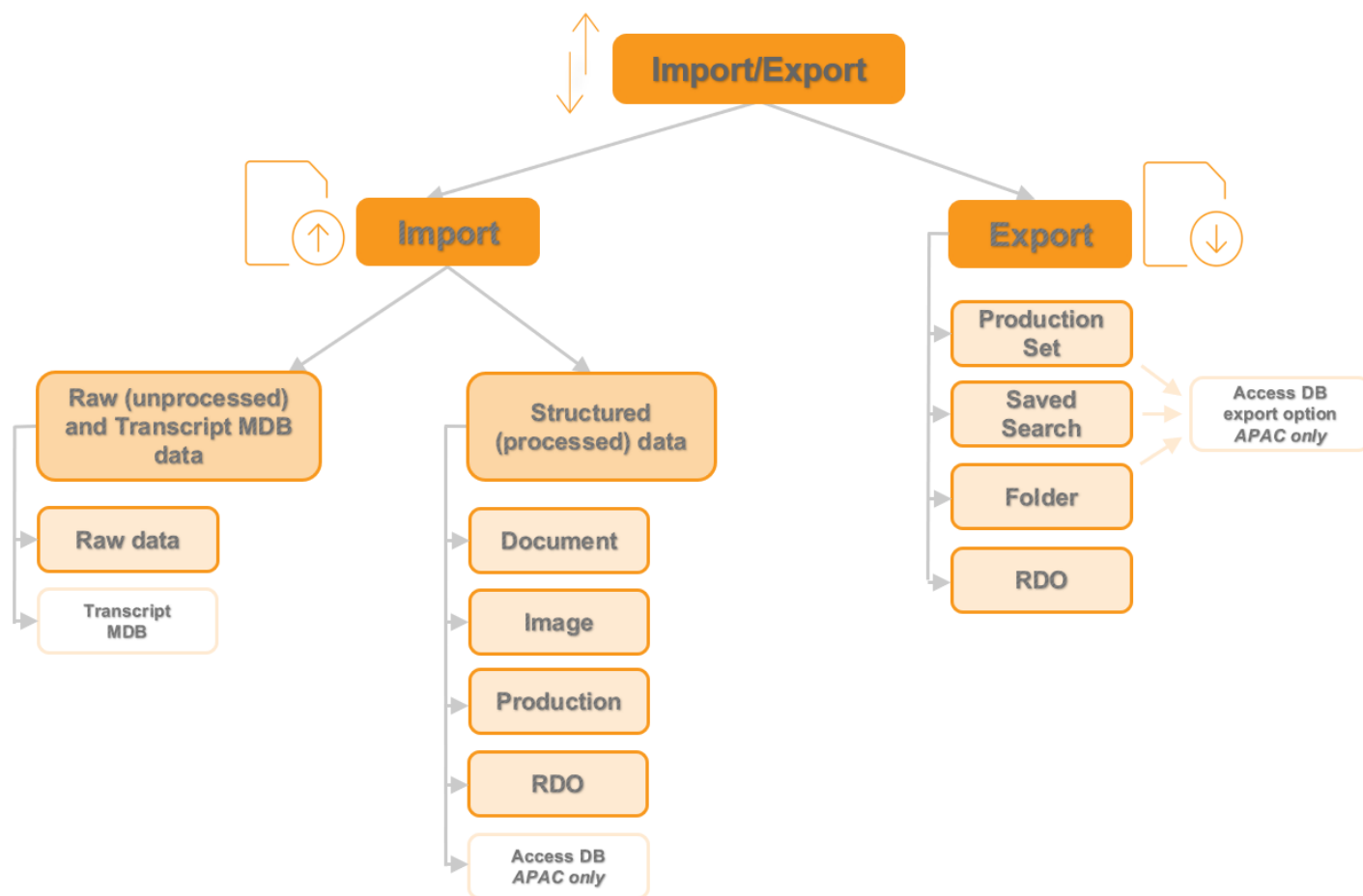
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1 Import/Export overview

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 30](#) 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.

1.1 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](#).

1.2 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)

1.3 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.

1.4 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.

1.5 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 27](#).

1.6 Data upload size limitation

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

1.7 Concurrent and consecutive jobs

The concurrent or consecutive nature of a job depends on what stage the job is at, which data transfer mode you 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](#).

2 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.

2.1 Requirements

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

2.1.1 Workspace requirements

When using Import/Export, you need the following 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.

2.1.2 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.

2.2 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 30](#) and [Activating Express Transfer on page 44](#) for more information.

3 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.

3.1 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

Workspace Security

Groups

Features

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

Import Data

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		Admin operations

Object Security	Tab Visibility	Other Settings
• OCR Language—View • Processing Data Source—Add, Edit, View • Processing Error—Add, Edit • Processing Set—Add, Edit, View • Quick Create Set—Add, Edit		• 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.

3.2 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.

3.2.1 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.

3.2.2 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 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.

4.1 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

4.2 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.

4.2.1 Encoding

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

- Arabic (ASMO 708)
- Arabic (ISO)
- Arabic (Windows)
- Baltic (ISO)
- Baltic (Windows)
- Central European (ISO)
- Central European (Windows)
- Chinese Simplified (GB18030)
- Chinese Simplified (GB2312)
- Chinese Traditional (Big5)
- Cyrillic (DOS)
- Cyrillic (ISO)
- Cyrillic (KOI8-R)
- Cyrillic (KOI8-U)
- Cyrillic (Mac)
- Cyrillic (Windows)
- Estonian (ISO)
- Greek (ISO)
- Greek (Windows)
- Hebrew (ISO-Logical)
- Hebrew (ISO-Visual)
- Hebrew (Windows)
- Japanese (EUC)
- Japanese (JIS 0208-1990 and 0212-1990)
- Japanese (JIS)
- Japanese (JIS-Allow 1 byte Kana - SO/SI)

- Japanese (JIS-Allow 1 byte Kana)
- Japanese (Shift-JIS)
- Korean
- Korean (EUC)
- Latin 3 (ISO)
- Latin 9 (ISO)
- Thai (Windows)
- Turkish (ISO)
- Turkish (Windows)
- Ukrainian (Mac)
- Unicode (UTF-16)
- Unicode (Big-Endian)
- Unicode (UTF-8)
- US-ASCII
- Vietnamese (Windows)
- Western European (ISO)
- Western European (Mac)
- Western European (Windows)

4.2.2 Header row

Import/Export does not require load file header rows. However, they are strongly recommended to ensure accuracy. The field names in your header do not need to match the field names in your workspace.

4.2.3 Fields

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:

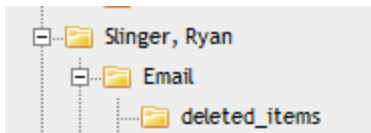
- **Identifier**—the unique identifier of the record.
- **Group Identifier**—the identifier of a document's family group.
 - The group identifier repeats for all records in the group.
 - Usually, this is the document identifier of the group's parent document. For example, if an email with the document 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.

4.2.4 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.
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	

Entry in Load File	Object Type	Definition
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

4.2.5 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:

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

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:

Privilege: ☒ 01. Yes

- ☐ a. Litigation
- ☒ b. Solicitor/Client
- ☐ c. Without Prejudice

☐ 02. No

☐ 03. Discuss

☒ 04. Redact

Manage

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

4.2.6 Default delimiters

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

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

4.2.7 ZIP archive with extracted text and natives

To import any text or native file when not using Express Transfer, you need to zip the files and upload the zip file in the Choose Load File And Location dialog in Import/Export. The zip file structure can be either flat or hierarchical with multiple levels of sub-folders. You must ensure that file paths in the related load file match the zip file's structure. 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^

4.3 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.

4.3.1 Supported image file formats

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

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

4.3.2 Load file format

The Opticon load file is a page-level load file 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.

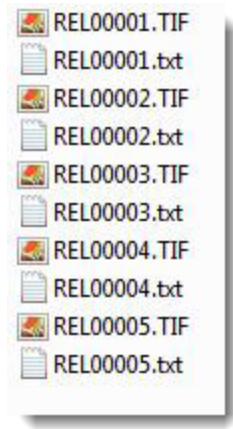
4.3.3 ZIP archive with images

To import images when not using Express Transfer, you need to zip the image files and upload the zip file in the Choose Load File And Location dialog in Import/Export. The zip file structure can be either flat or hierarchical with

multiple levels of sub-folders. You must ensure that image file paths in the related load file match the zip file's structure.

4.3.4 Importing extracted text during an image load

You can also import extracted text during the image import process by setting 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:



4.4 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 Numberp[REDACTED]pAttachmentp[REDACTED]pAttachment Parent IDp[REDACTED]pAuthorp[REDACTED]pCategorizationp[REDACTED]pCategorization F
pAMEYERS_0000001p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p01C9D027DAA6A2F2823541C44E6FA79C3DD05
pAMEYERS_0000003p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]pPK Petersonp[REDACTED]p01C9D027DAB52FC39F785D16475E
pAMEYERS_0000004p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]pJ Calzarp[REDACTED]p01C9D027DACAFF1A068C7705D47CAA5
pAMEYERS_0000005p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]pdeal 539246.1 Reliant HLP dms 7634/7636p[REDACTED]
pAMEYERS_0000006p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p0.69p[REDACTED]p[REDACTED]pNon Responsive;p[REDACTED]p[REDACTED]pInfo on some cuts for 05
pAMEYERS_0000007p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p0.69p[REDACTED]p[REDACTED]pNon Responsive;p[REDACTED]p[REDACTED]pInfo on some cuts for 05
pAMEYERS_0000008p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p0.64p[REDACTED]p[REDACTED]pResponsive;p[REDACTED]p[REDACTED]pTAG #22872p[REDACTED]p01C9D027B28A4
pAMEYERS_0000009p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]pNEW PAC Numbersp[REDACTED]p01C9D027B2966CFD0EBC93
pAMEYERS_0000010p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]pDates to Keep in mindp[REDACTED]p01C9D027B29647CD3
pAMEYERS_0000011p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p0.76p[REDACTED]p[REDACTED]pResponsive;p[REDACTED]p[REDACTED]pAccomplishments and Goals 20
pAMEYERS_0000012p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p0.77p[REDACTED]p[REDACTED]pResponsive;p[REDACTED]p[REDACTED]pLV Cogen cut for HE 19p[REDACTED]p0
pAMEYERS_0000013p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p0.83p[REDACTED]p[REDACTED]pNon Responsive;p[REDACTED]p[REDACTED]pCut on TAG 2384ip[REDACTED]p01C
pAMEYERS_0000014p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p0.89p[REDACTED]p[REDACTED]pNon Responsive;p[REDACTED]p[REDACTED]pTAG 25883p[REDACTED]p01C9D027B2
pAMEYERS_0000015p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p0.75p[REDACTED]p[REDACTED]pNon Responsive;p[REDACTED]p[REDACTED]pTAG 26235p[REDACTED]p01C9D027B2
pAMEYERS_0000016p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]pFrontier Unit Outage for 07/21/01p[REDACTED]p01C9E
pAMEYERS_0000017p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]pTag #27652 & 27656p[REDACTED]p01C9D027B2C0BC9E9AED1
pAMEYERS_0000018p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]p[REDACTED]pLV COGEN for 07/21/01p[REDACTED]p01C9D027B2C090DE

```

4.5 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.

4.6 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.

Import/Export

< 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.

4.7 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_Extras	Additional data fields for each document

- **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.

4.7.1 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

Field	Data type	Explanation—document types, coding method, and possible values	If mandatory
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

4.7.2 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> , <i>BCC</i> .	Yes
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

4.7.2.1 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

4.7.3 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 field is set to "1".	No

4.7.4 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

Relativity field type	MDB theCategory value
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.

4.7.4.1 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.

4.7.5 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.

5 General recommendations for structured data import and export jobs

The following are recommendations for importing and exporting load files.

5.1 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.

5.2 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.

6 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 47](#).

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 31](#) 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 48](#) for details.

6.1 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.

6.2 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.

6.3 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 47](#).

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 48](#) for details.

6.3.1 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.

6.3.2 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.

6.4 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](#).

6.4.1 Requirements

The following sections describe necessary requirements for Express Transfer.

6.4.1.1 System requirements

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

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

6.4.1.2 Port access

Express Transfer requires TCP port 443 to be open 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.

6.4.2 Prerequisites

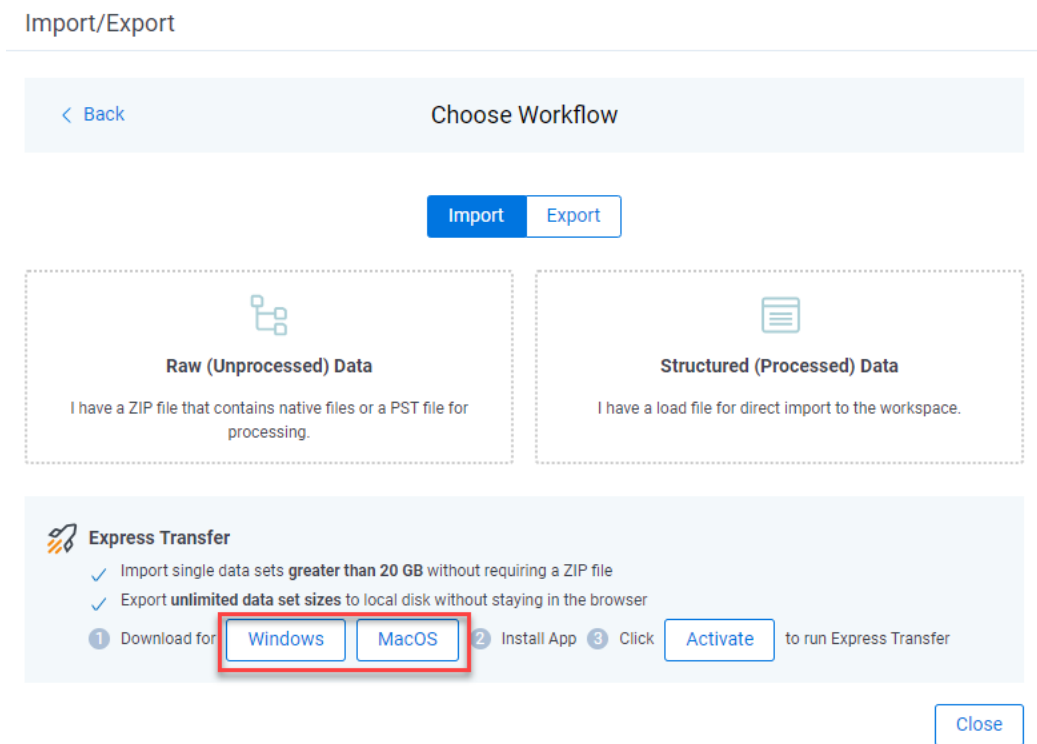
To use Express Transfer, complete the following in this order:

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.

6.4.3 Installing Express Transfer

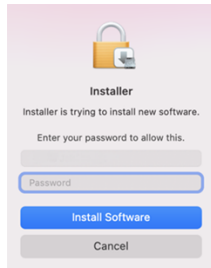
To install the Express Transfer application on your computer for use with Import/Export:

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

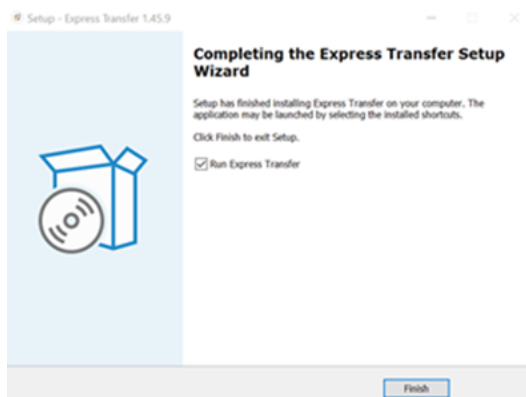


4. For macOS systems, you need to have administrative privileges to use and install the software, as well as to receive automatic software updates. On the Installer dialog, enter your user name and password. Then, click

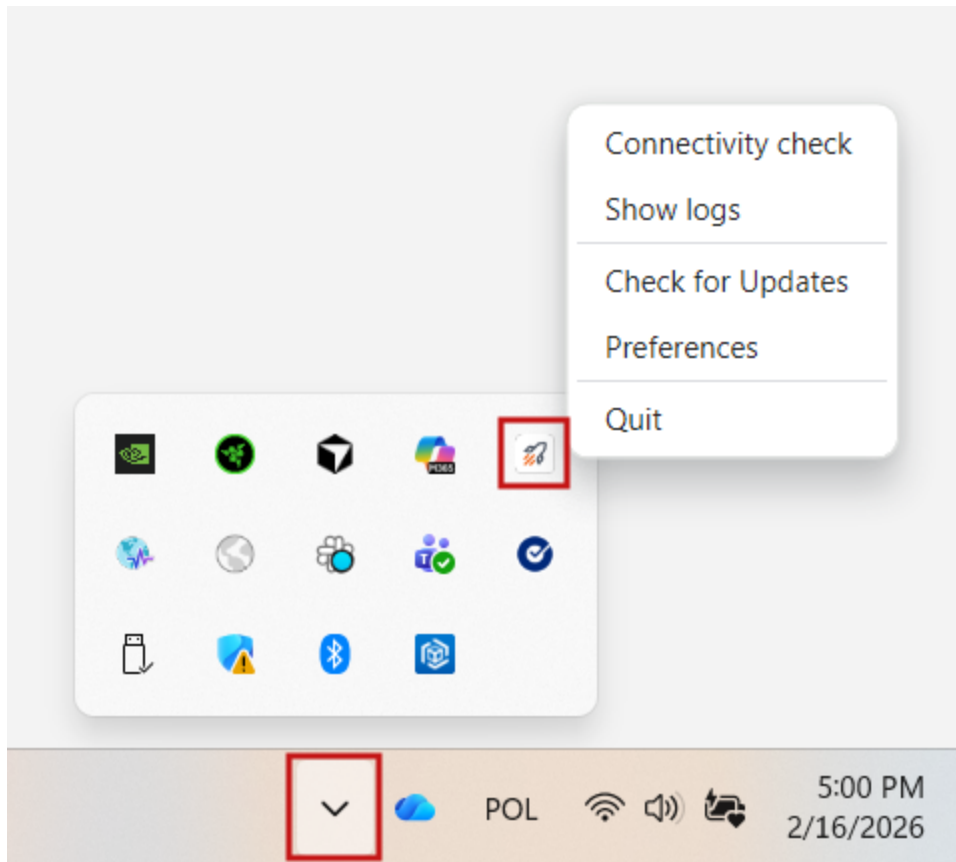
Install Software.



5. Navigate to the folder on your computer where the installer file was downloaded. Depending on the 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**
6. 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.
7. Click **Next**.
8. Use the default destination folder already displayed or click **Browse** to select a different location for the Express Transfer application.
9. Click **Next**.
10. (Optional) On the Select Additional Tasks dialog, do any of the following:
 - **Autostart Express Transfer on system startup**—select this 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 42](#) 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.

6.4.4 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:

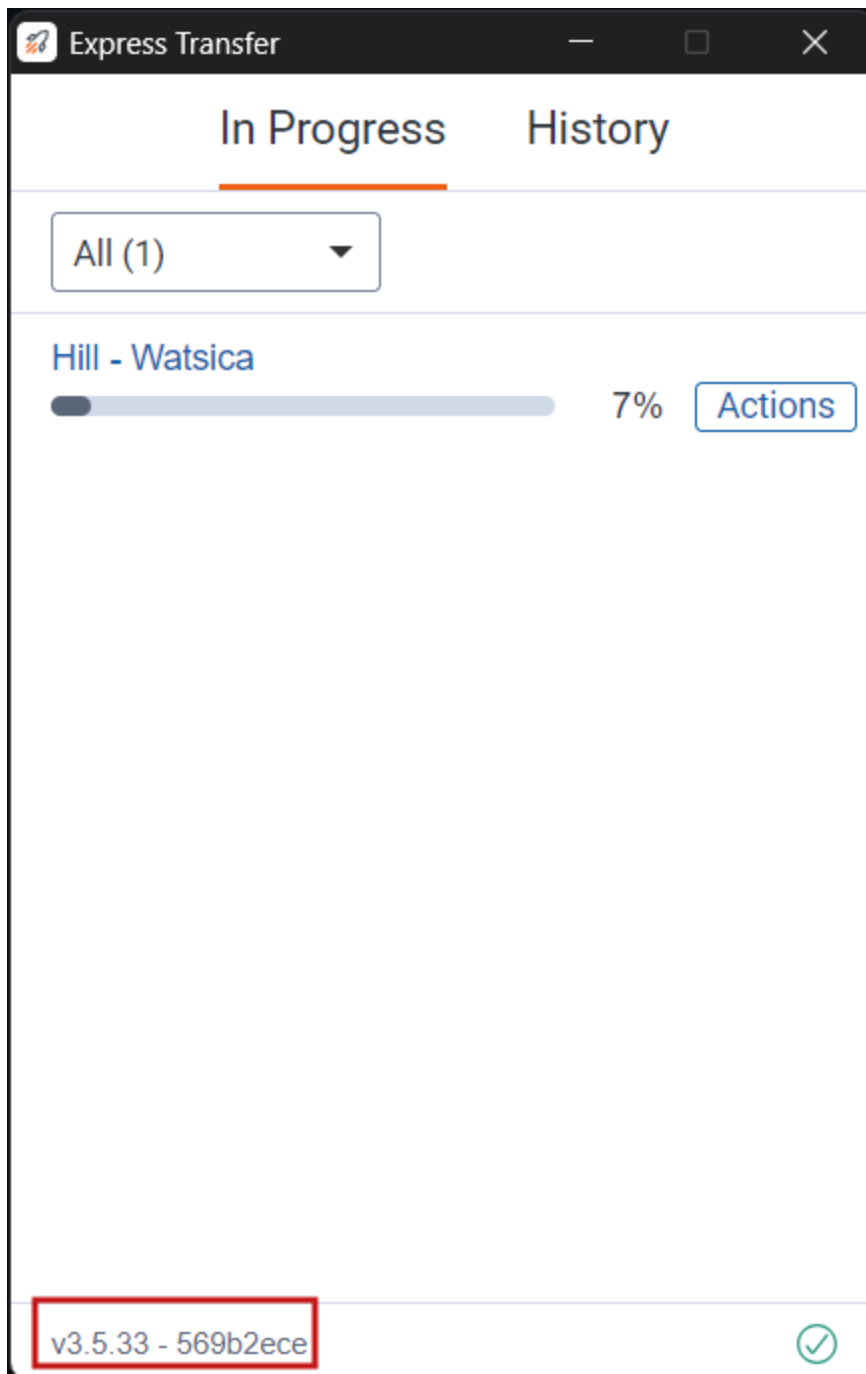
- Windows OS installed.
- Administrator rights to run the command prompt.
- Knowledge of how to use command line interface (CLI) tools.
- Downloaded Express Transfer installer file for Windows OS, which is **Express Transfer Setup.exe**. See [Installing Express Transfer](#) for more information on how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

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

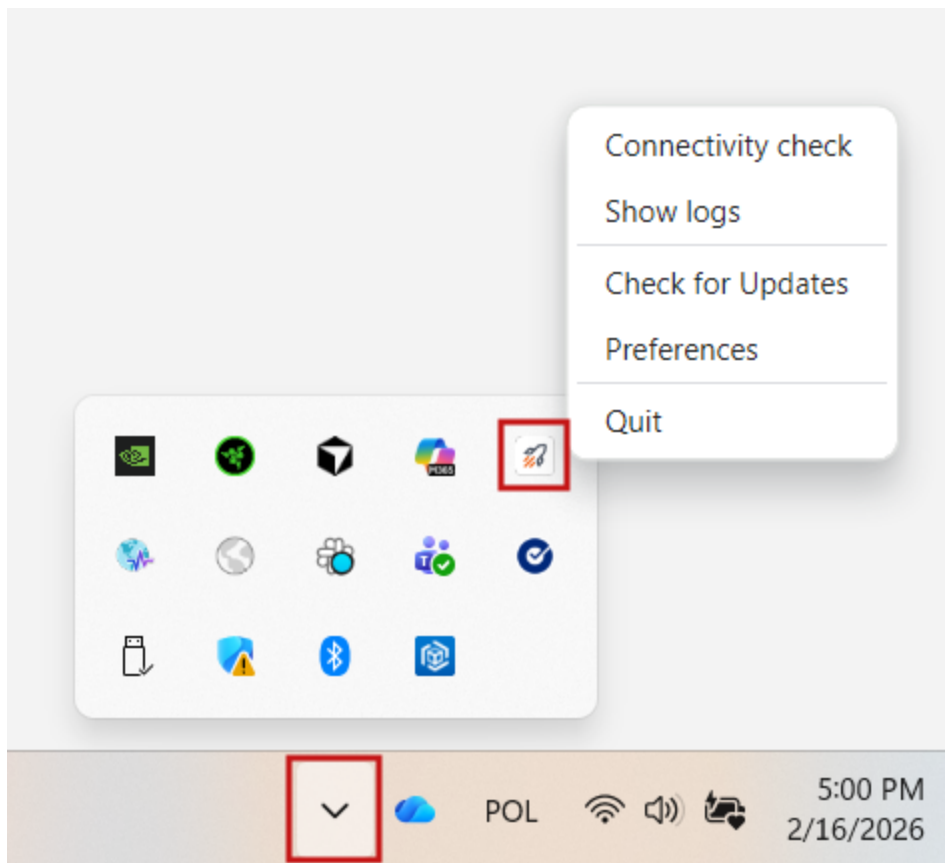
- **/silent**—this option displays the installation wizard as it goes through the installation process. All the default options are automatically selected.
- **/verysilent**—this option does not display the installation wizard as it goes through the installation process. All default options are selected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

6.4.5 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**.



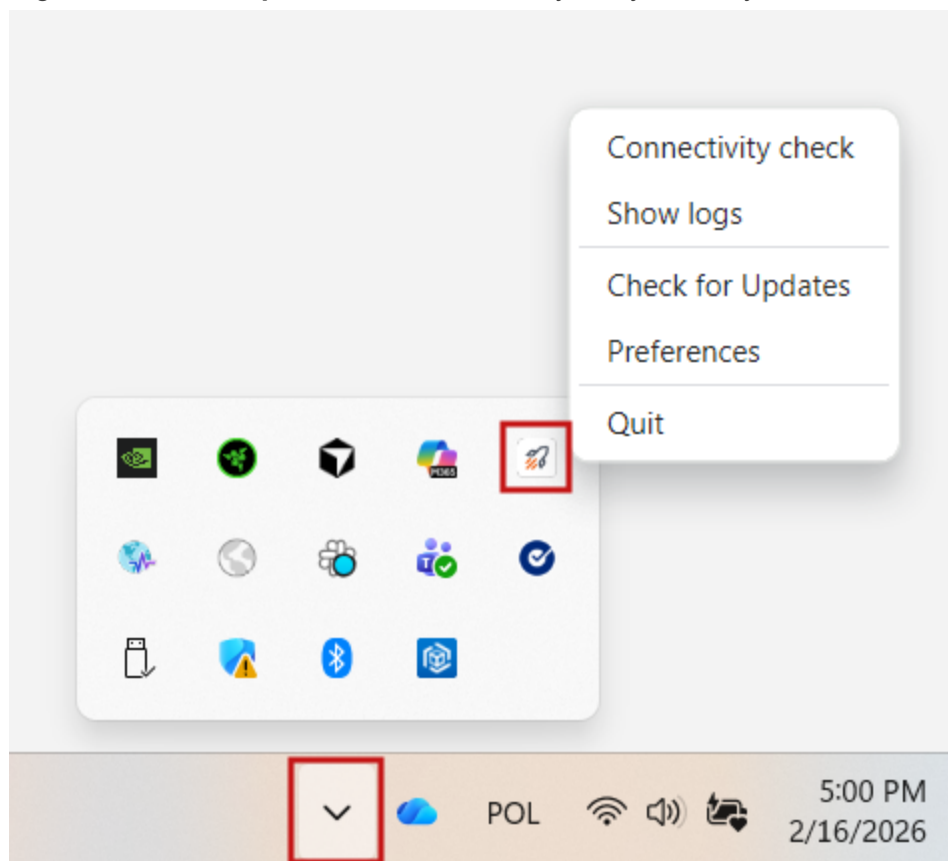
The Express Transfer software version number is contained in the first few numbers after the "v", for example "v2.49.0." The numbers after the hyphen are session identifiers that change each time you launch Express Transfer after quitting the application. These numbers may be used by Customer Support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

6.4.6 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 42](#) 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

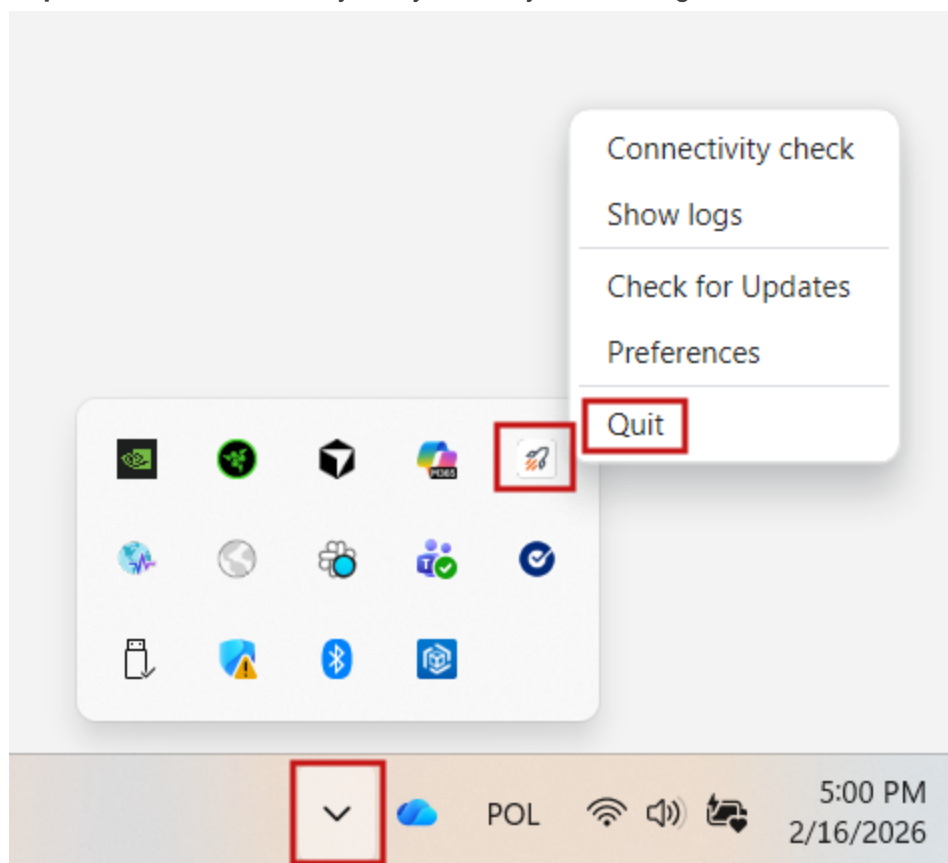
Leave app running in notification area when the window is closed

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.

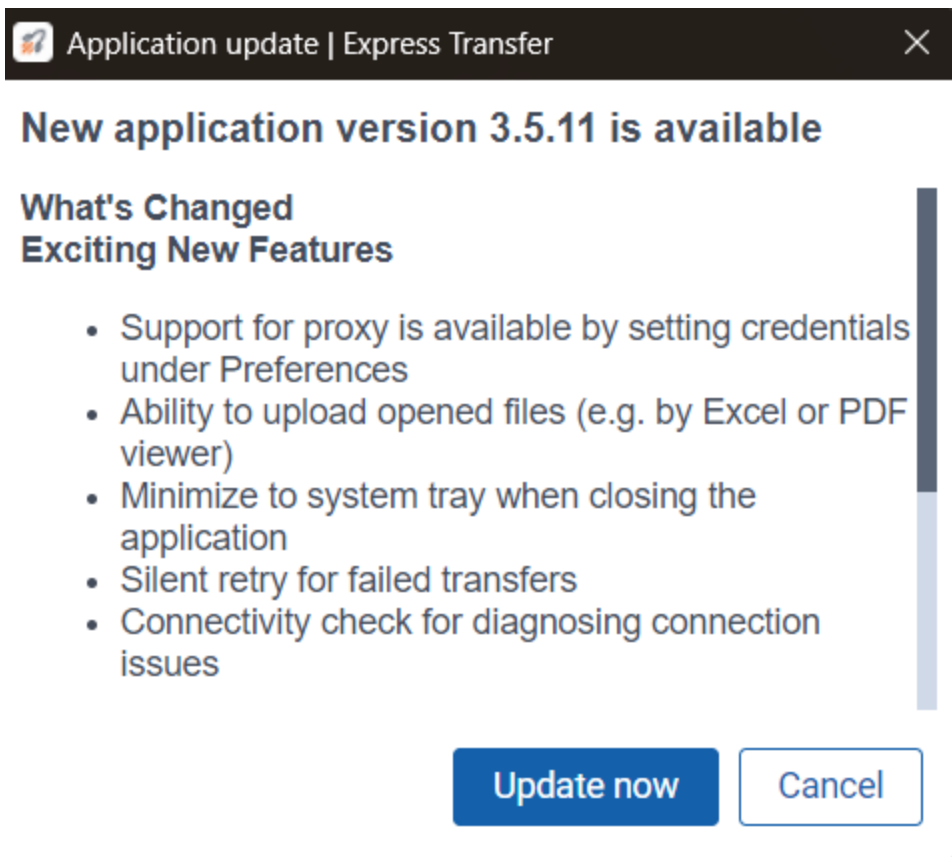
Note: We recommend keeping this option on. If it is off, your Express Transfer version may not contain the latest features. Also, you need to regularly use the Check for Updates option in the Express Transfer system tray to determine if your software version is current. See [Manually checking for software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



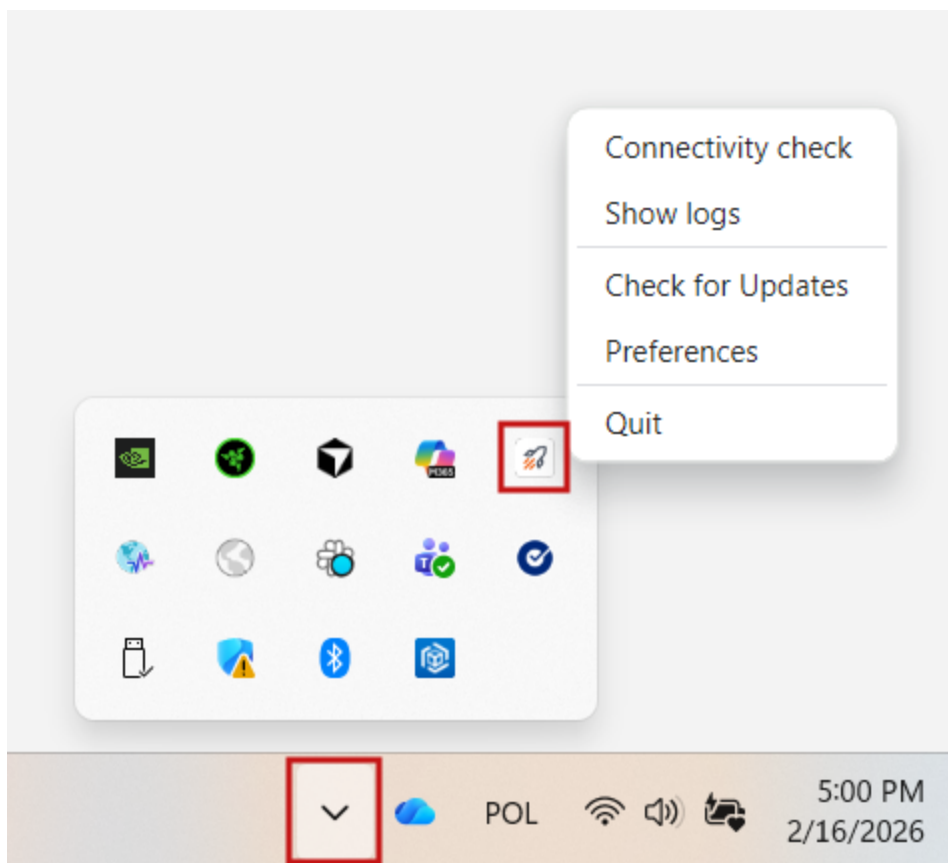
6. Reopen the application by double-clicking on its desktop shortcut, if you saved one for it, or select it from your computer's list of programs.

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 32](#) steps to complete the installation.

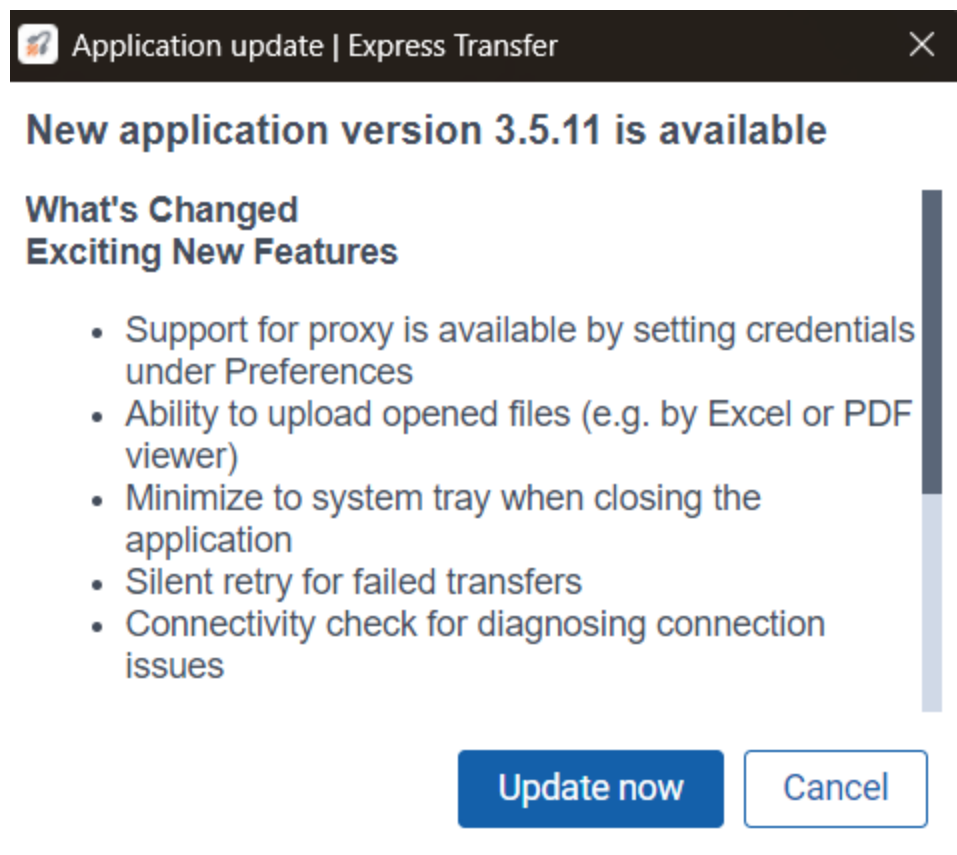


6.4.7 Manually checking for software updates

You can check for software updates anytime by right-clicking on the **Express Transfer icon** in your system tray and clicking **Check for Updates**. If your software version is current, a message 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 32](#) steps to finish installing the update.



6.5 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.

6.5.1 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.

6.5.2 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.

6.5.3 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?

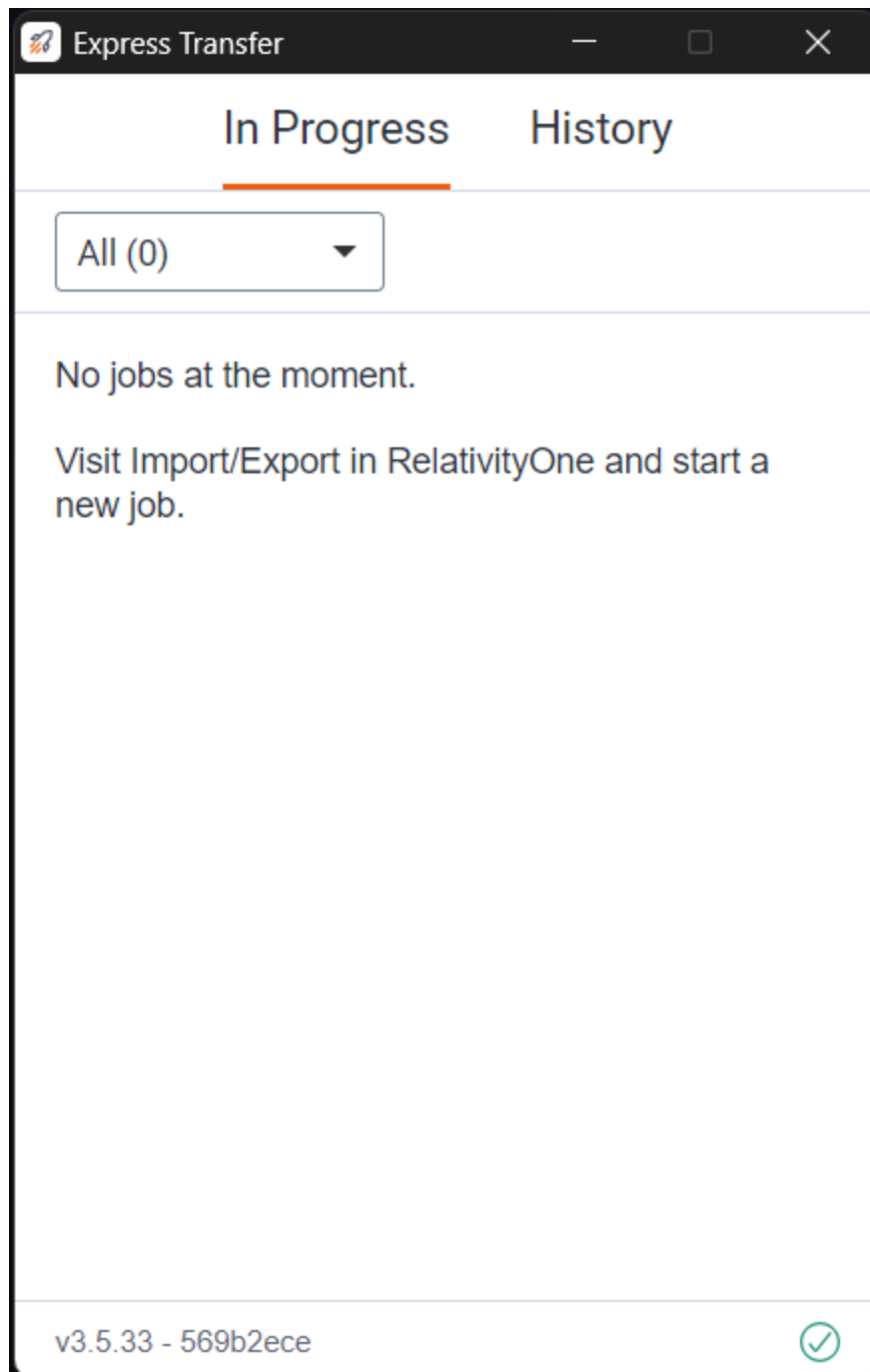
[Choose a different application.](#)

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

Open Link Cancel

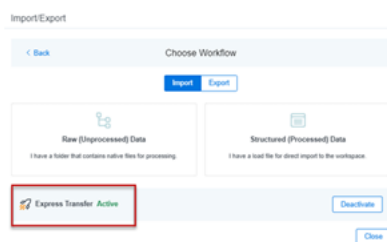
Note: If the activation process fails, click the **Complete activation** button on the message that appears to initiate the activation process. Refer to [Express Transfer connectivity check on page 70](#) for more information on connection status information.

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



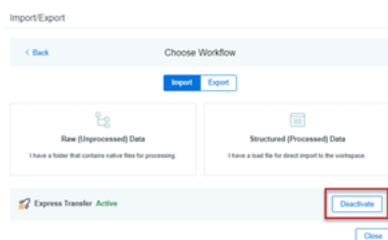
6. Return to the Import/Export application. The Express Transfer status changes to **Active** on the Choose Workflow dialog.

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.



6.5.4 Deactivating Express Transfer

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



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

6.5.5 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.

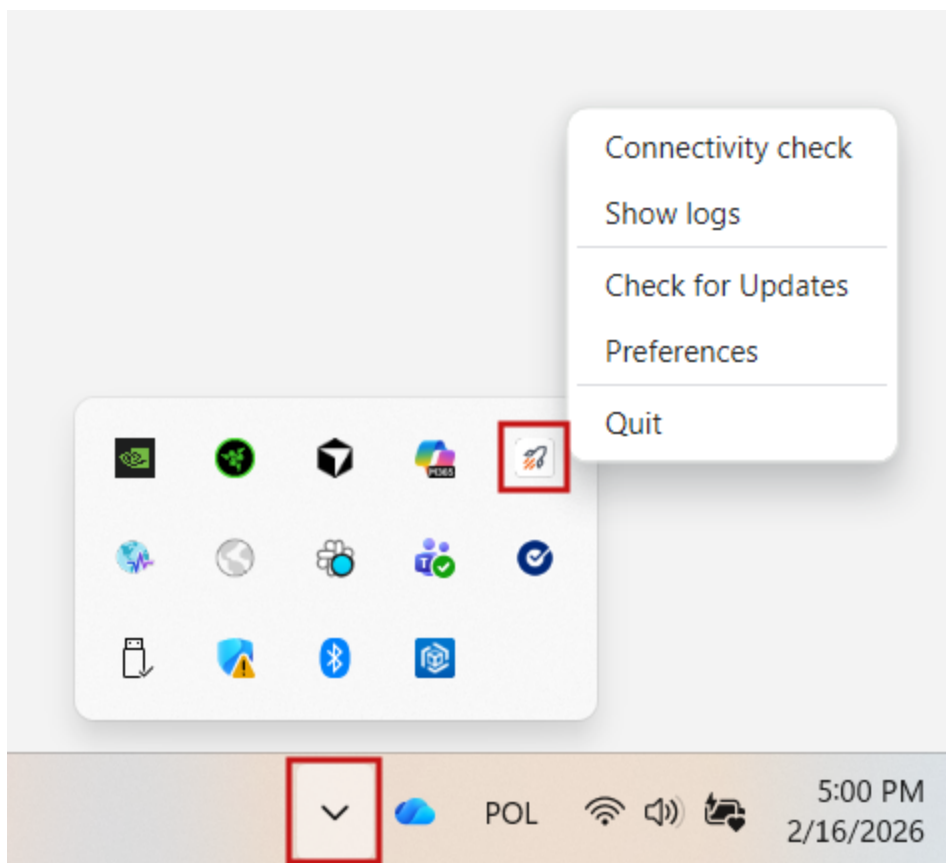
If you experience issues despite following the information below, contact [Support](#) for assistance. See the Community article [Performance considerations for data transfers](#).

- **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.

6.6 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 42](#) 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 31](#) 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.

6.7 Express Transfer Preferences

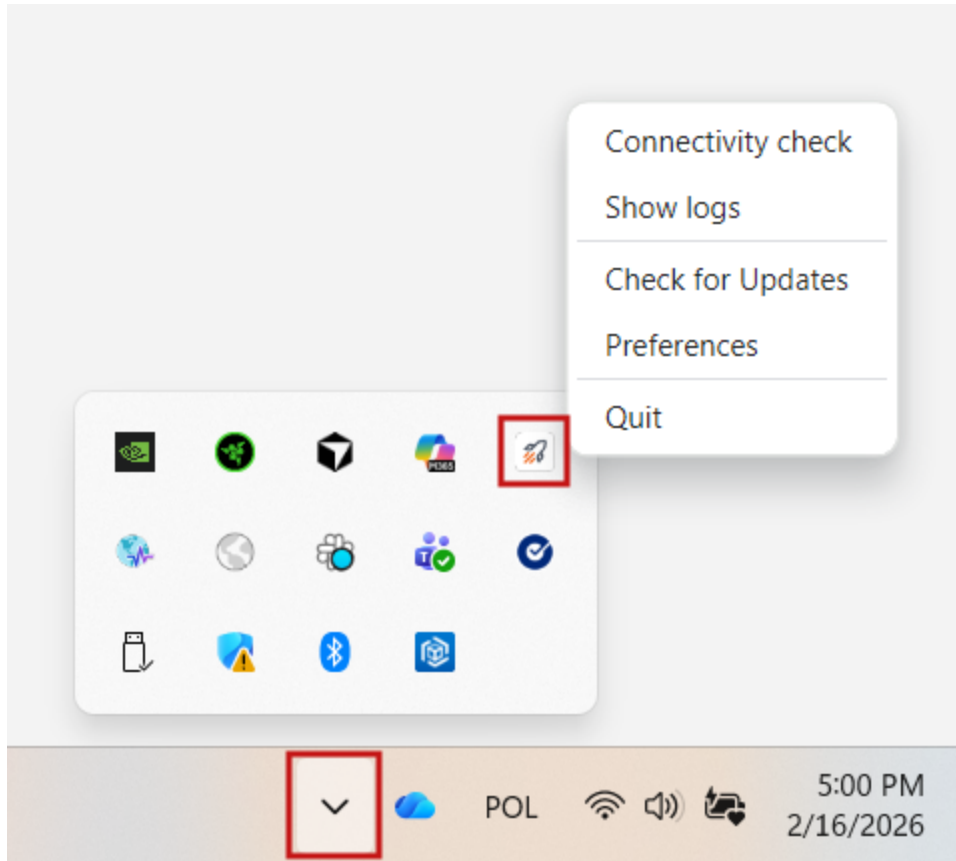
Use Express Transfer Preferences to modify the Check for Updates setting, limit bandwidth, exclude temporary Microsoft Office files from data import, configure proxy settings, and choose the **Close** button behavior.

6.7.1 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 42](#) 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

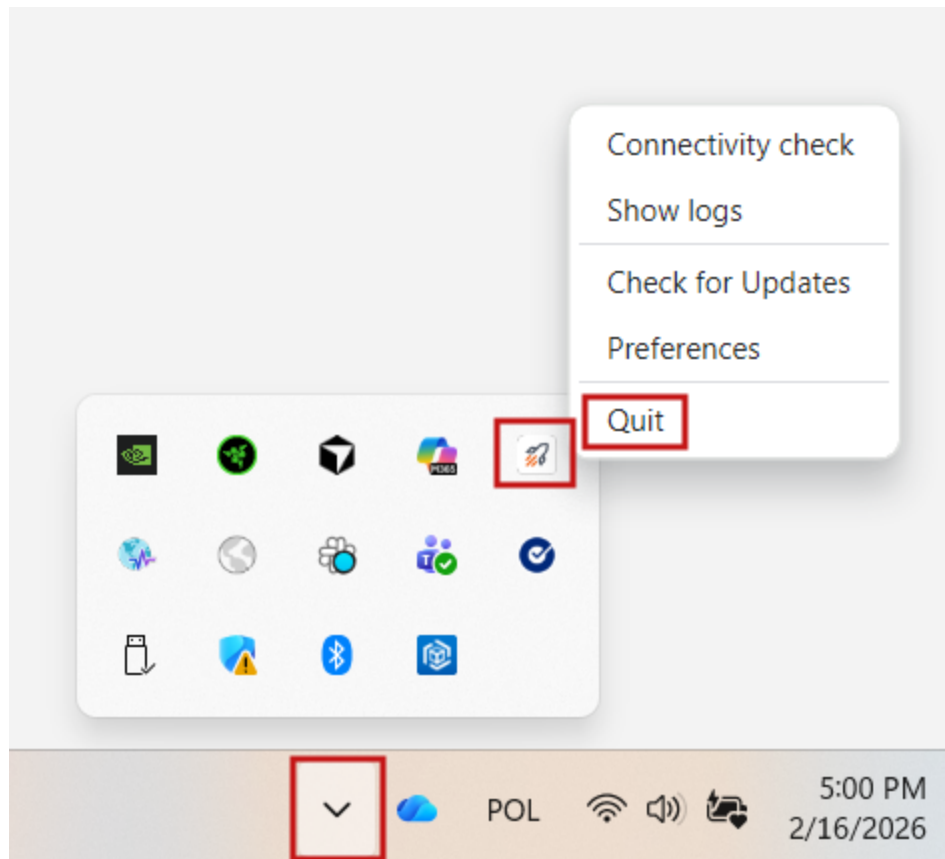
Leave app running in notification area when the window is closed

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.

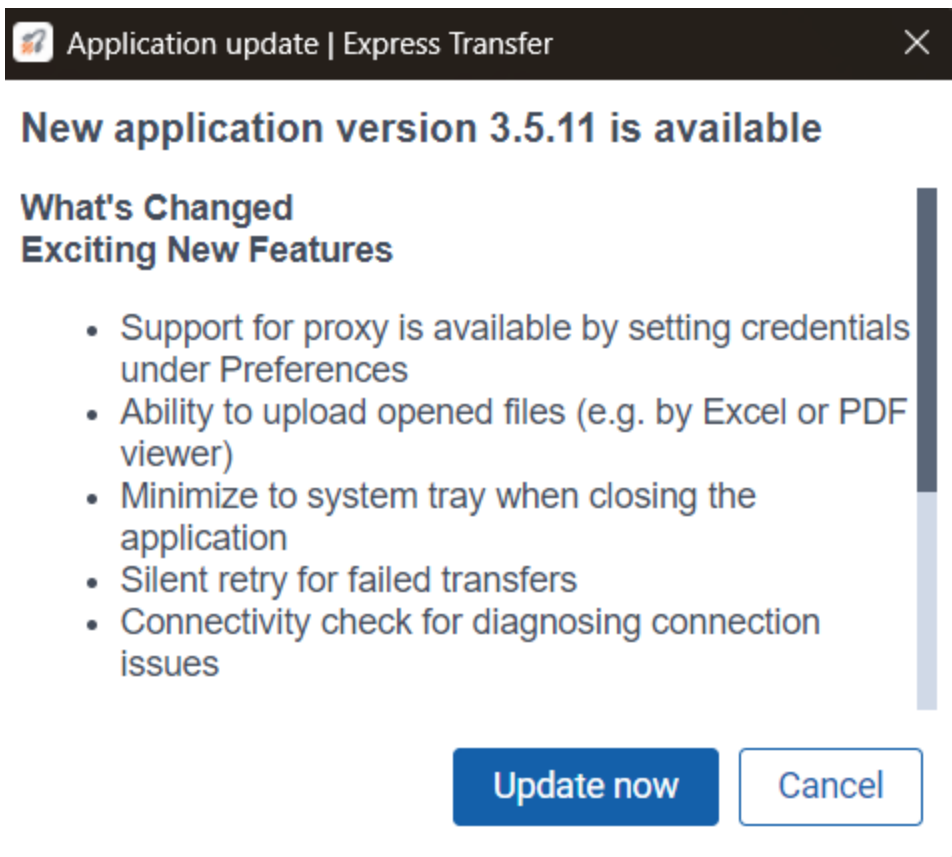
Note: We recommend keeping this option on. If it is off, your Express Transfer version may not contain the latest features. Also, you need to regularly use the Check for Updates option in the Express Transfer system tray to determine if your software version is current. See [Manually checking for software updates on page 42](#) 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 49](#) steps to complete the installation.

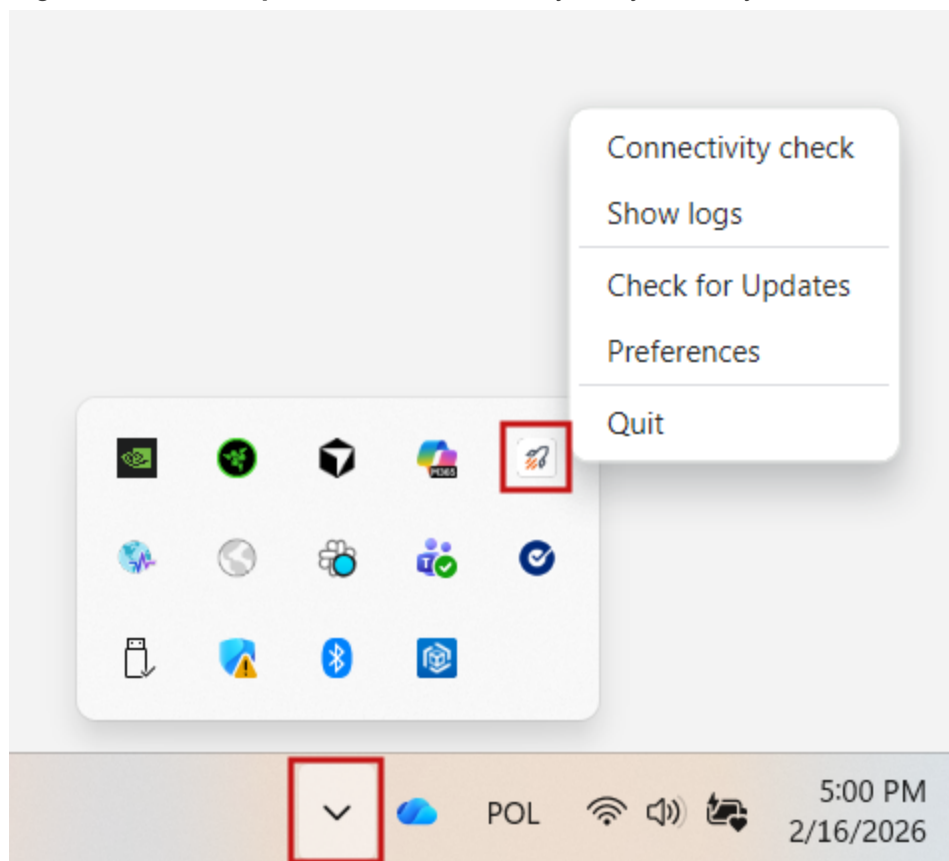


6.7.2 Limit bandwidth

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)**

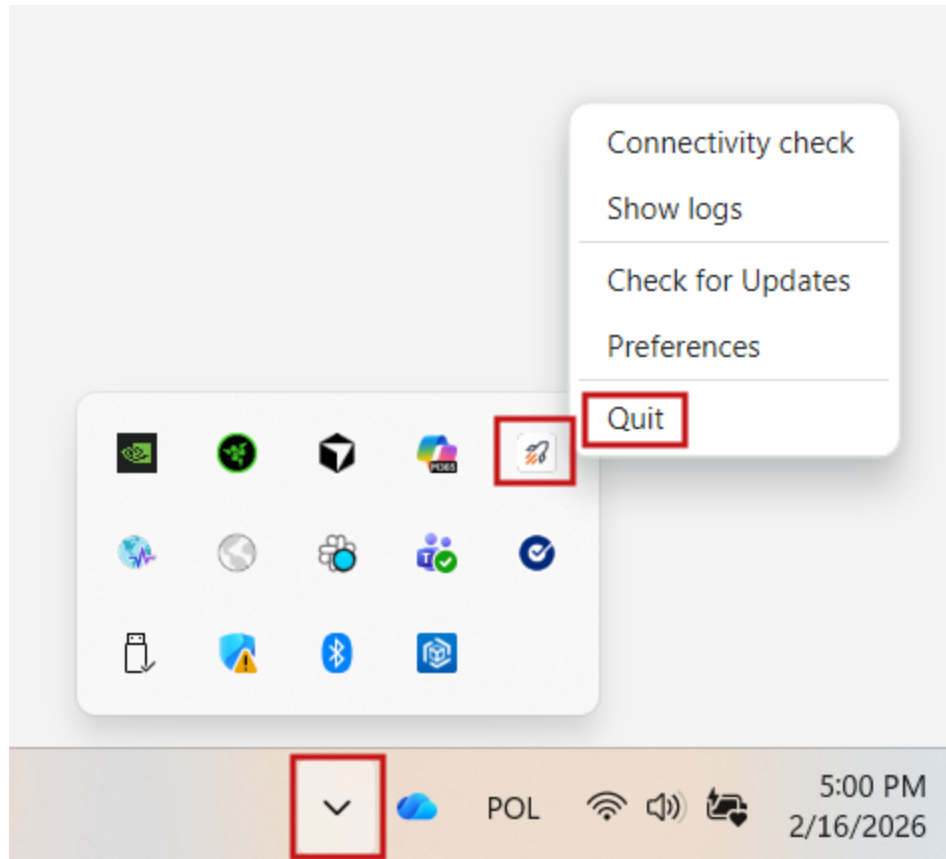
Exclude [temporary Microsoft Office file\(s\)](#)  from import data

**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.

6.7.3 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

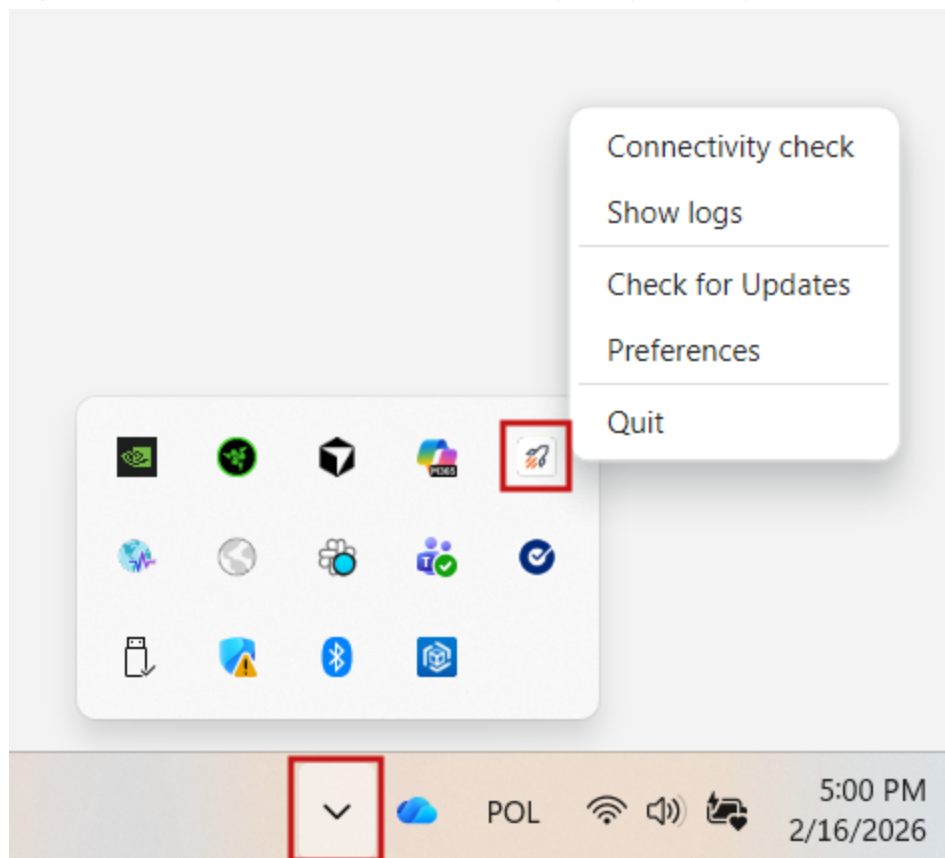
Select Data Sources 1 - 4 of 4 100 per page

☐ Name	Custodian
☐ deora_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)**

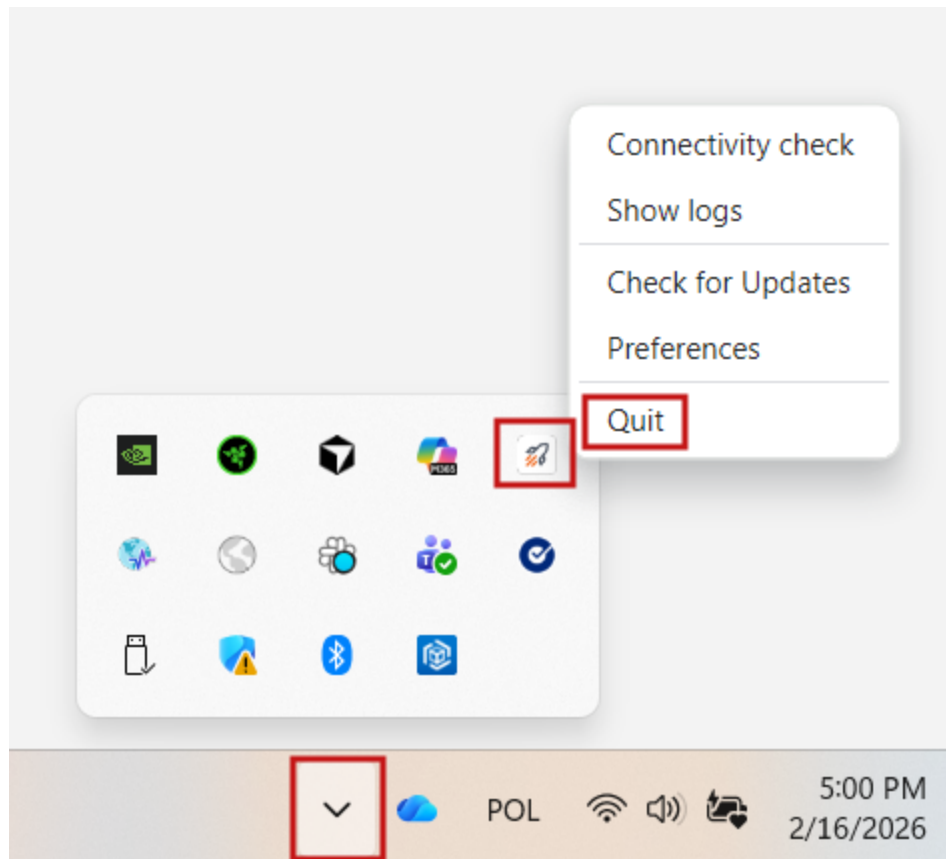
Exclude [temporary Microsoft Office file\(s\)](#)  from import data

**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.

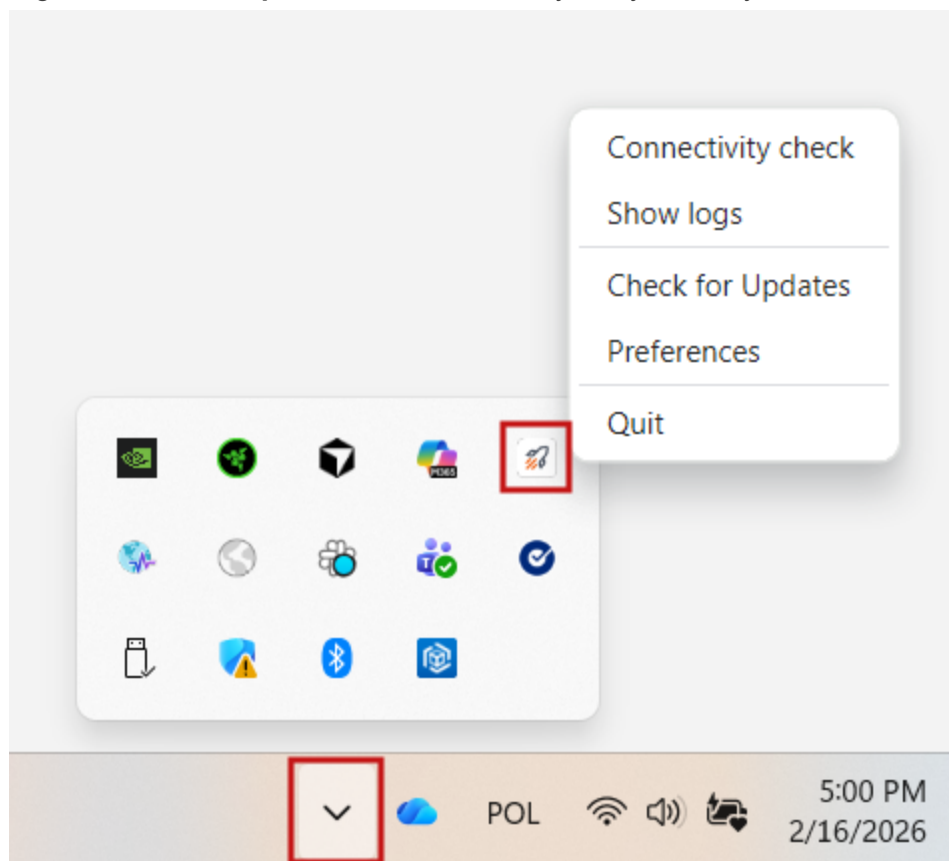
6.7.4 Configuring proxy settings

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

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 32](#) 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

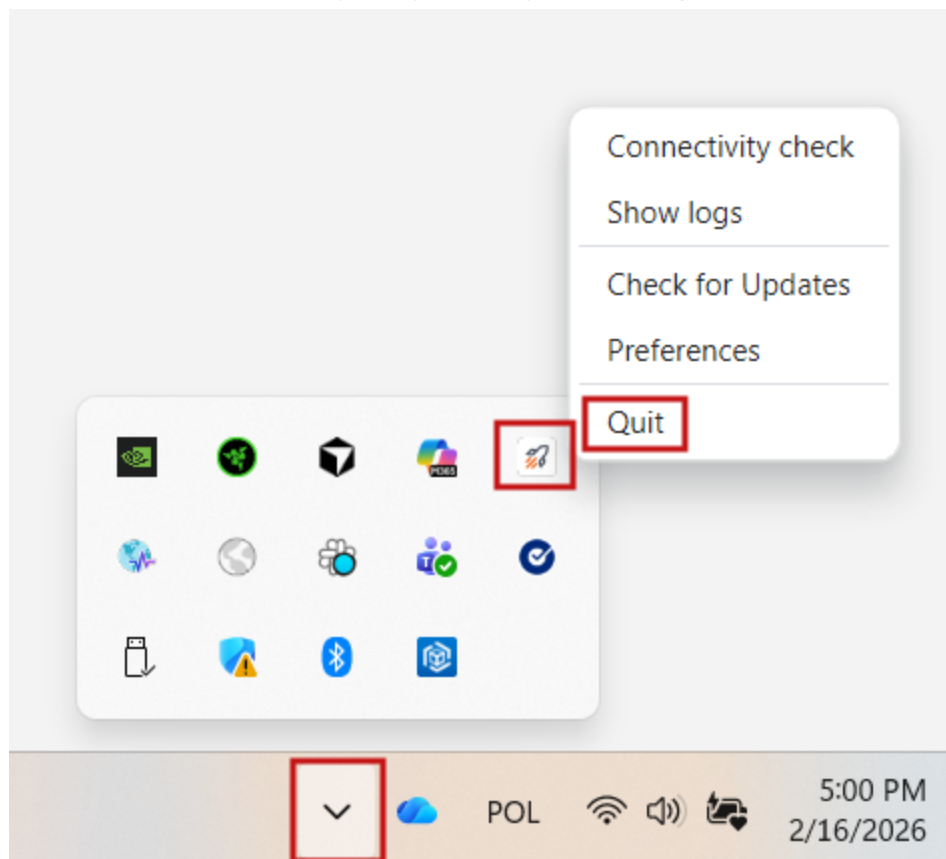


Minimize on close

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**.

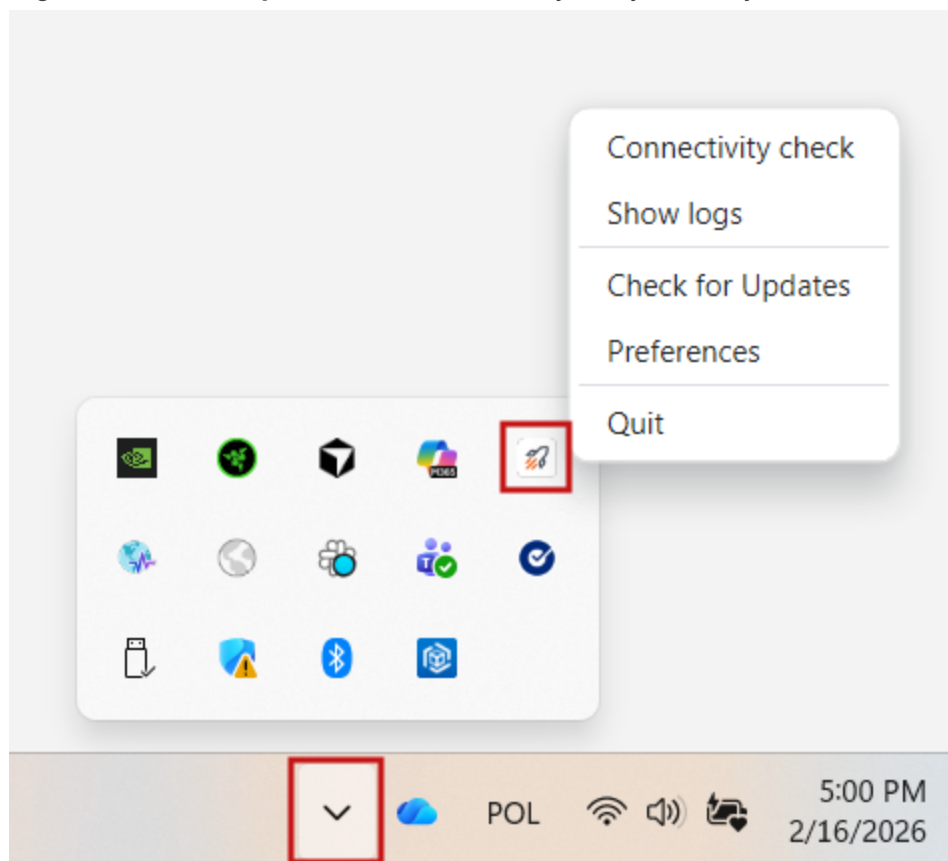


6. Reopen the application by double-clicking on its desktop shortcut, if you saved one for it, or select it from your computer's list of programs.
7. Perform a [Connectivity Check](#) to make sure Express Transfer is connected to the Internet. If it is not, the proxy settings are incorrect and you need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

6.7.5 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)**

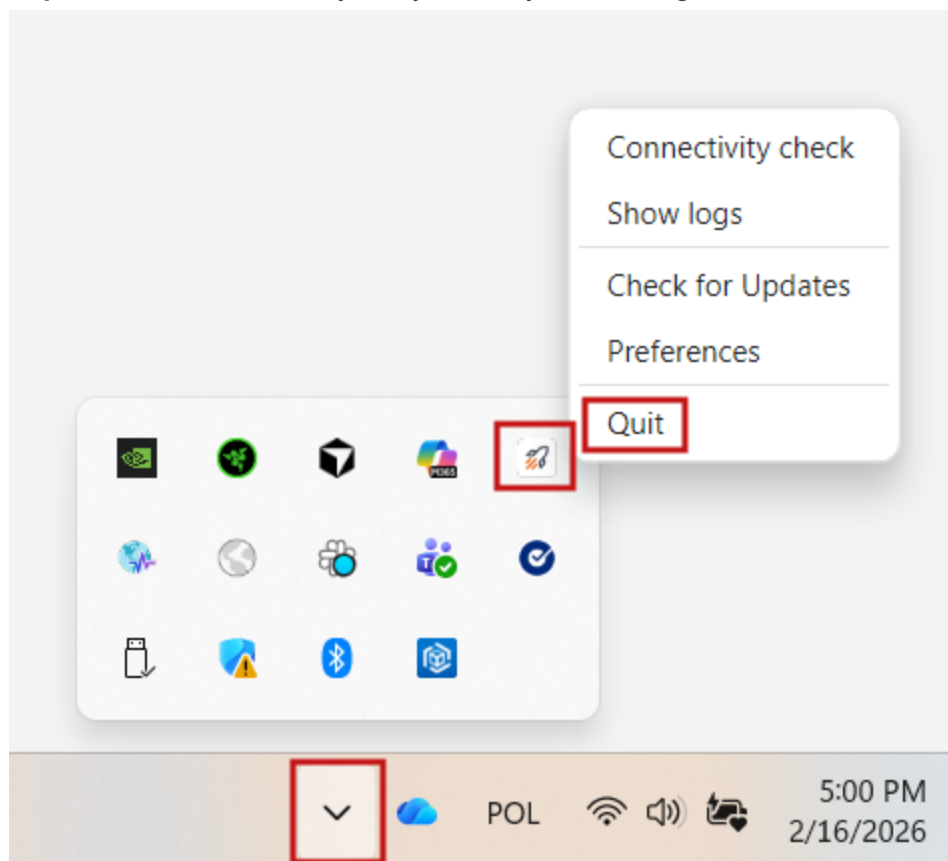
Exclude [temporary Microsoft Office file\(s\)](#)  from import data

**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.

6.8 Express Transfer connectivity check

Connectivity check ensures that the Express Transfer desktop application authenticates and successfully accesses the Internet, the necessary ports, and the Import/Export application to transfer data. This check 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:

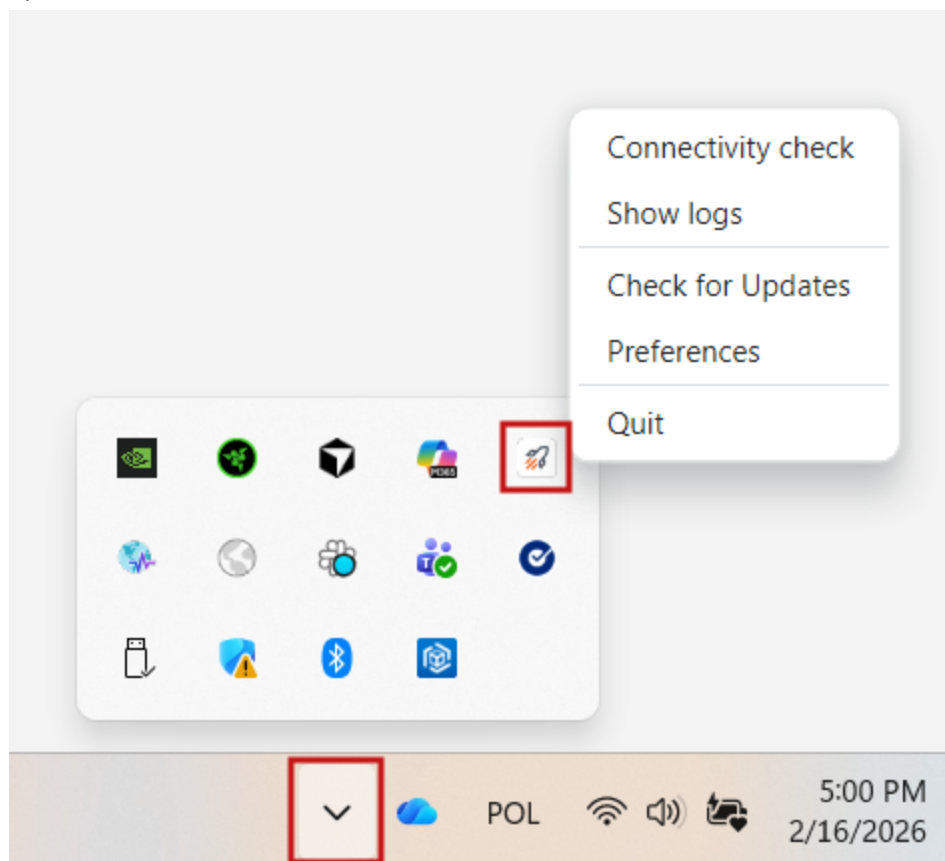
Connectivity check	Description
Internet connection	Confirms your system is connected to the internet. If this step fails, there is either no internet connection available or the proxy or firewall is blocking the connection for Express Transfer. Contact your IT department for help.
Access to	Confirms 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
Express Transfer 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.

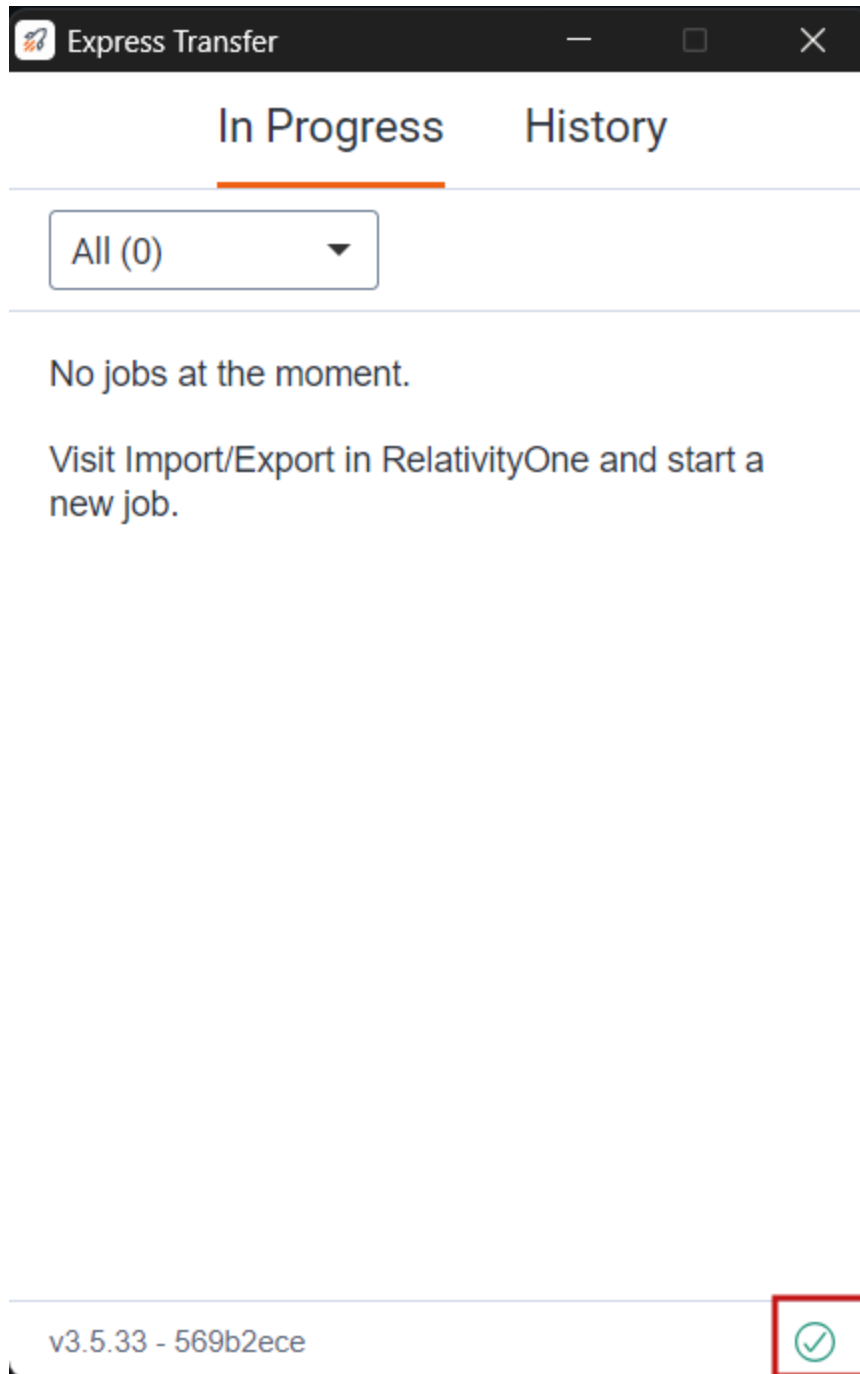
Note: If you perform a connectivity check before activating Express Transfer in Import/Export, only the Internet connection is checked and other system checks display the no connectivity  icon. Express Transfer must be [active](#) to perform the full connectivity check.

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.

6.8.1 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.

6.9 Express Transfer Job tracking and history

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

6.9.1 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.

6.9.1.1 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



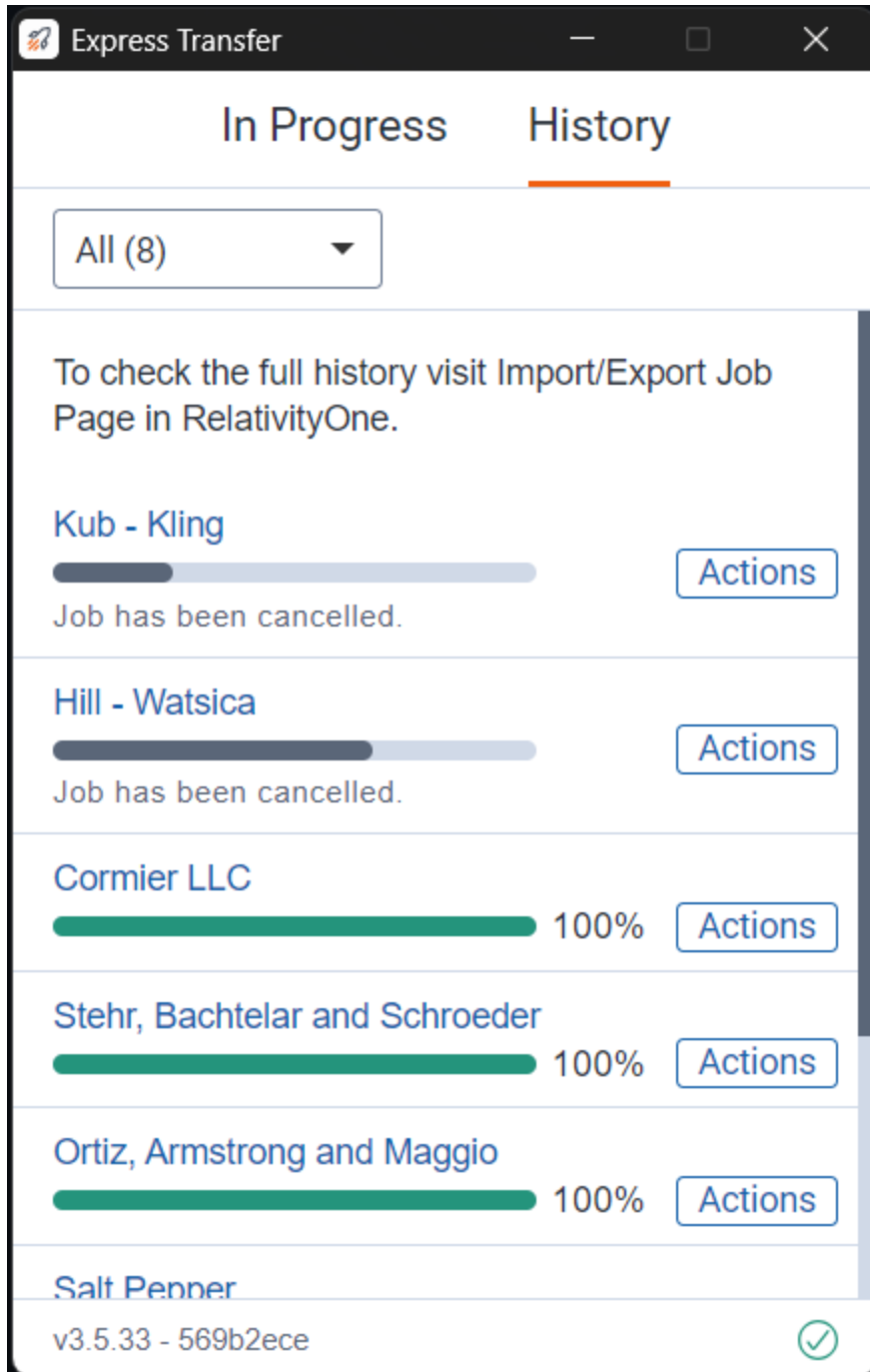
- **Job Name**—displays the name of the job. Click the job name to view more information about the job on the Job Details window. Or, click **Actions** next to the transfer line, then click **View details**. See [Viewing and copying details of Express Transfer jobs](#).
- **Transfer progress bar**—displays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

6.9.1.2 History tab

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



- **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](#)

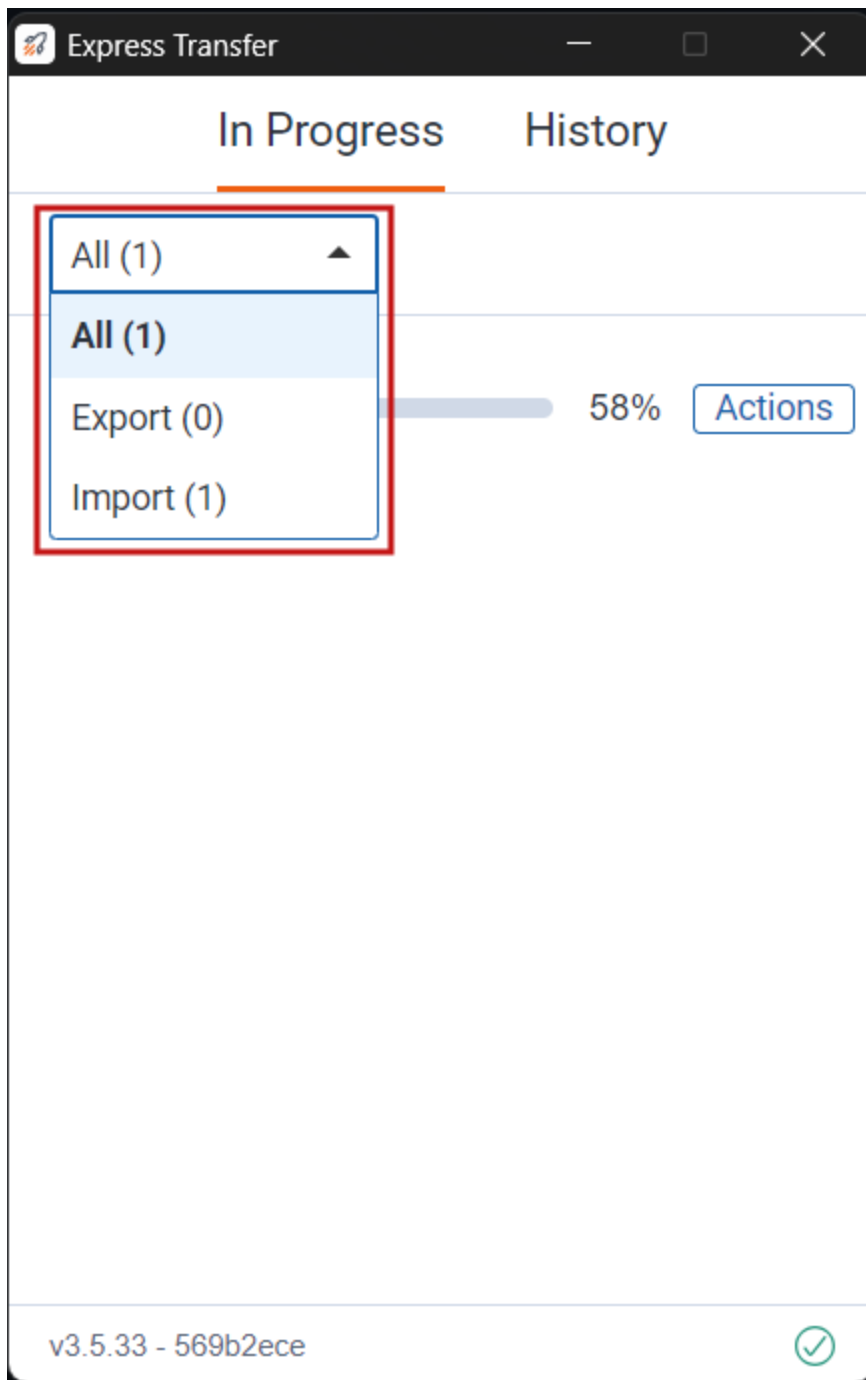
[errors](#) for more information. To view job details, click **Actions** next to the transfer line and then click **View details**.

- **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".

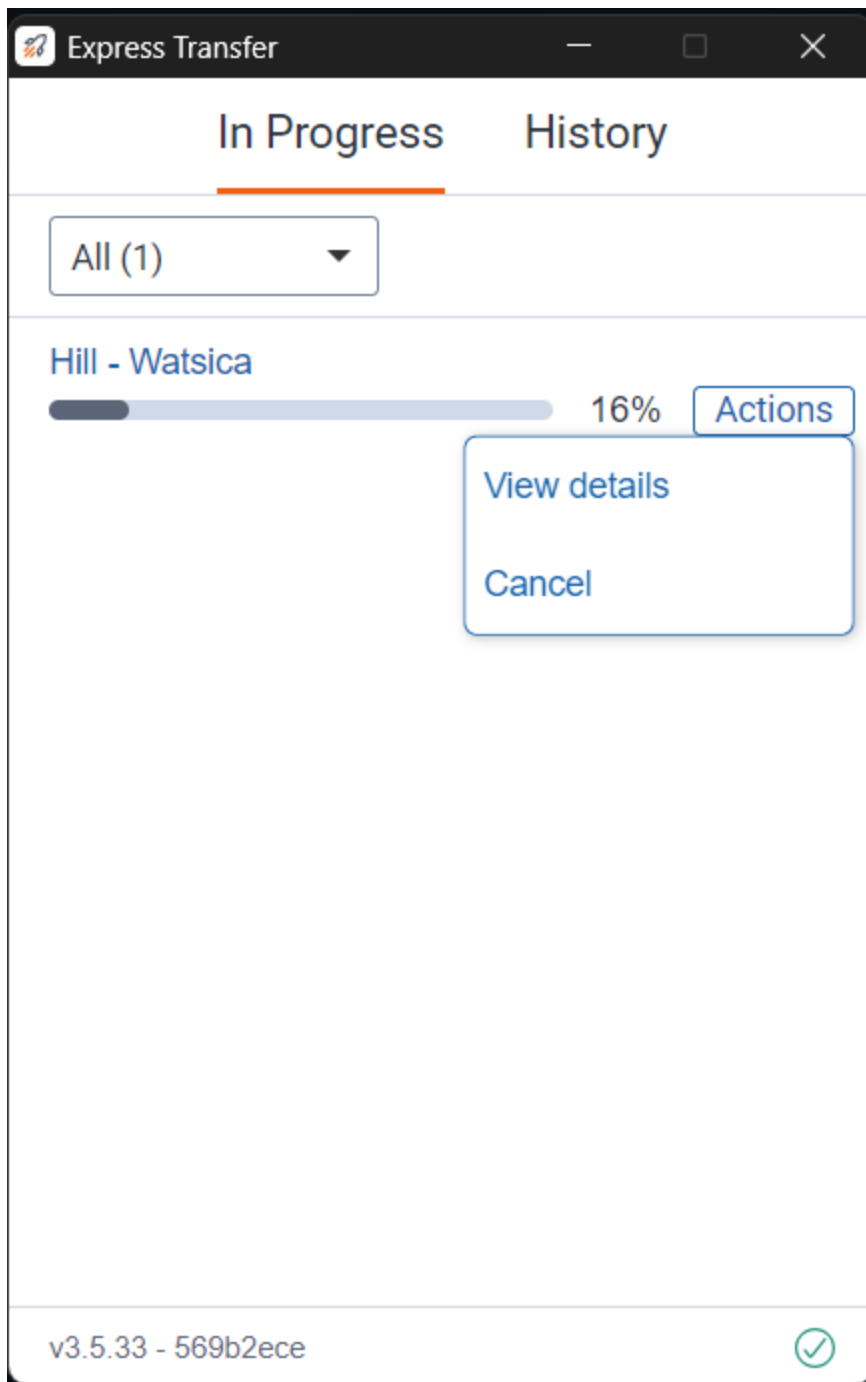
6.9.1.3 Filtering Express Transfer jobs

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.



6.9.1.4 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

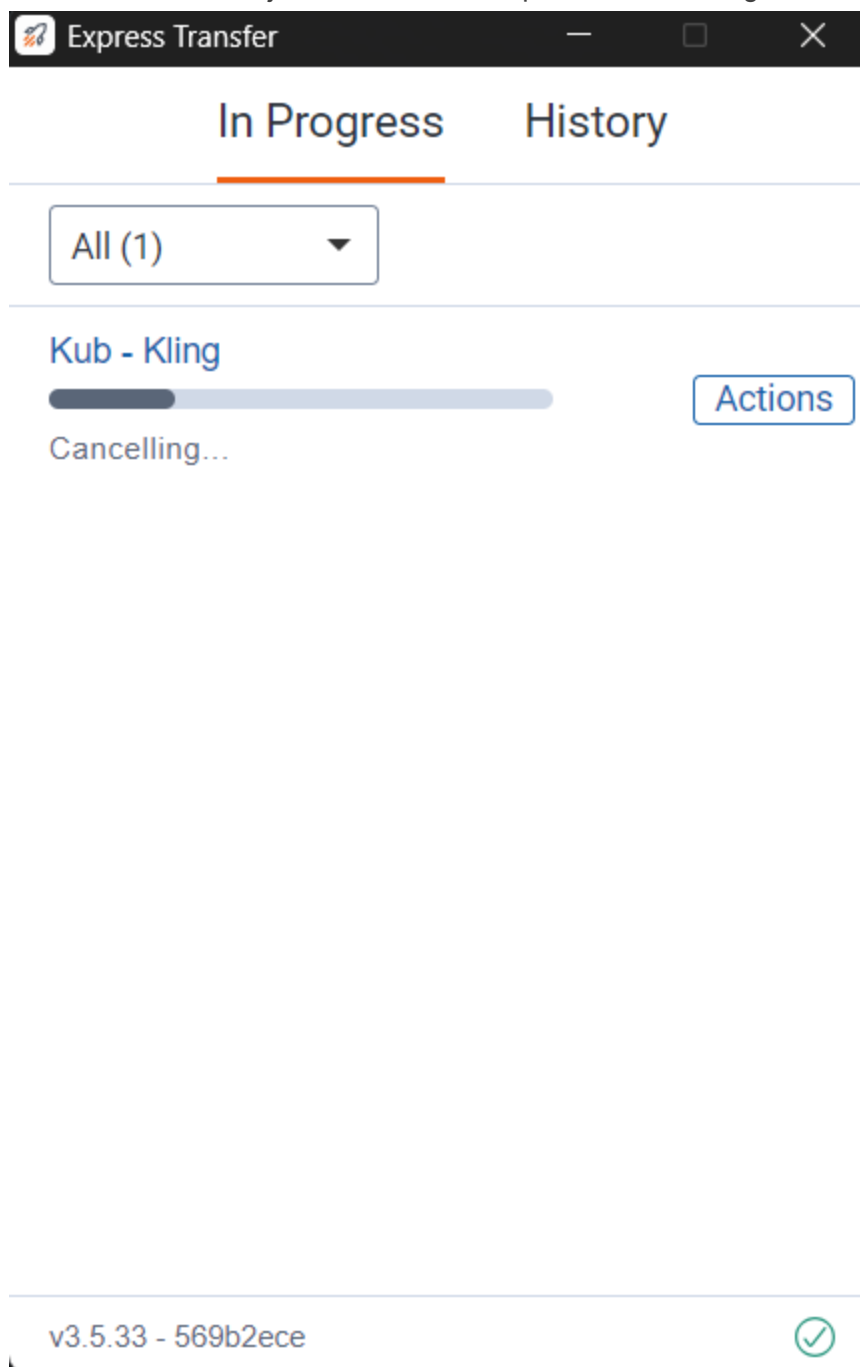
 Completed Upload**Duration:** 00:06:04**Started on:** 11/9/2023 5:26:03 pm**Finished on:** 11/9/2023 5:32:07 pm**Transferred data:** 1.08 GB / 1.08 GB**Transferred files:** 4/4**Transferred empty directories:** 2**Job ID:** fad0e3d6-bd03-4878-bbeb-
0153579b658b**Workspace ID:** 1026384**Catalog path:**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

6.10 Express Transfer reporting jobs failed or completed with errors

When using Express Transfer with Import/Export, if a job fails to finish or completes with errors, you can generate a report from Express Transfer Job Details. 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 35](#) 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.

 Express Transfer ×

Are you sure you want to skip failed files?

Skip failed files is advised if a Retry failed files has been attempted and the job still fails. Once you Skip failed files, the Retry failed files won't be available.

Skip failed files excludes 1 failed files, allowing the process to continue with the rest. Ready to proceed?

7 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 9](#) for details about load files. Also, see [General recommendations for structured data import and export jobs on page 27](#).

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.

7.1 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

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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

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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](#).

7.2 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.

7.2.1 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.

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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

7.2.2 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.

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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

7.2.3 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.

7.3 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 9](#) for details about load files. Also, see [General recommendations for structured data import and export jobs on page 27](#).

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.

7.3.1 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

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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

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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](#).

7.3.2 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.

7.3.2.1 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.

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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

7.3.2.2 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.
Error on line: 29 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0005837_04.tif not found in zip.

Import

Cancel

7.3.2.3 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.

7.4 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.

7.4.1 References

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

- [Express Transfer overview on page 30](#), 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 9](#) for more information regarding import of load files. Also see [General recommendations for structured data import and export jobs on page 27](#). Also see [Load file import recommendations on page 27](#).

7.4.2 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

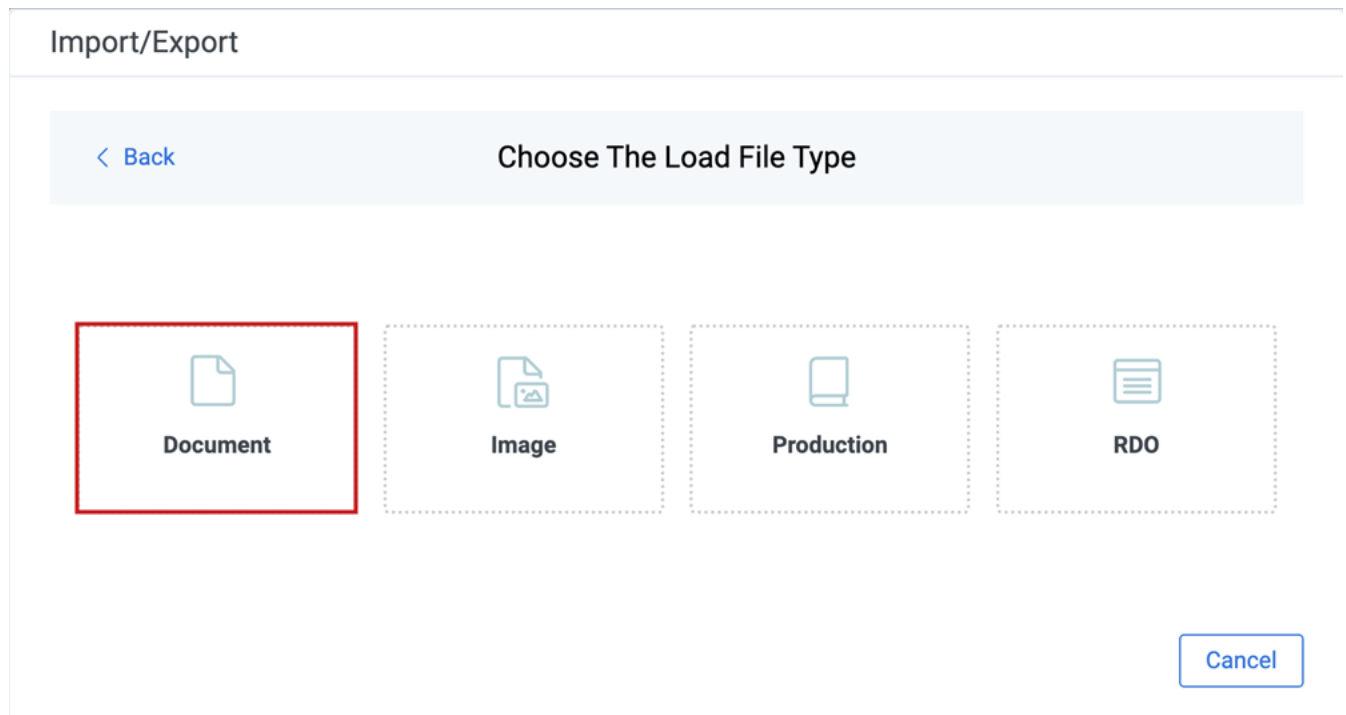
Note: If you activated Express Transfer, the Express Transfer section displays a status of **Active**. See [Activating and deactivating Express Transfer on page 44](#) for more information.

Relativity aiR

Import/Export Guide

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- On the Choose the Load File Type dialog, click the **Document** box to import a document 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 96](#).
- 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 97](#). Also, see [Import/Export load file specifications](#) for details on load files.
- Select delimiters and encoding on the Load File Settings dialog, then click **Continue**. For more information, go to [Load File Settings fields on page 99](#).
- 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 100](#).
- Configure your import on the Import Settings dialog. For more information, go to [Import Settings fields on page 102](#).
- (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 103](#).
- 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

Destination Folder

Regional Settings

Load File Name

Job configurations and errors 3

TS Test [DO NOT DELETE]/Tabs

English (United States) | en-US

saltpepper_mod_wrong_paths.dat

Delimiters and Encoding

File Encoding

First Line Contains Column Names

Column

Quote

Newline (Long Text Fields)

Multi-Value

Unicode (UTF-8)

Yes

| (Vertical-bar, vbar, vertical line or vertical slash)

^ (Caret or circumflex accent)

® (Registered sign)

; (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 105](#).

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.

7.4.2.1 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 47](#).

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

7.4.2.2 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.

- **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.

7.4.2.4 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
	Filter		Filter		
0100101	Control NR	Review	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.

7.4.2.5 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.

Import/Export

< Back Import Settings

Start Line

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

Import Precheck Load File Download Profile (.se) Cancel

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

7.4.2.6 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.

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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

7.4.2.7 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

OverviewJob 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

Relativity 

Import/Export Guide

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7.5 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](#).

7.5.1 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.

7.5.2 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 30](#), 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 9](#) for more information regarding import of load files. Also see [Load file import recommendations on page 27](#).

7.5.3 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](#).

7.5.4 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.

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

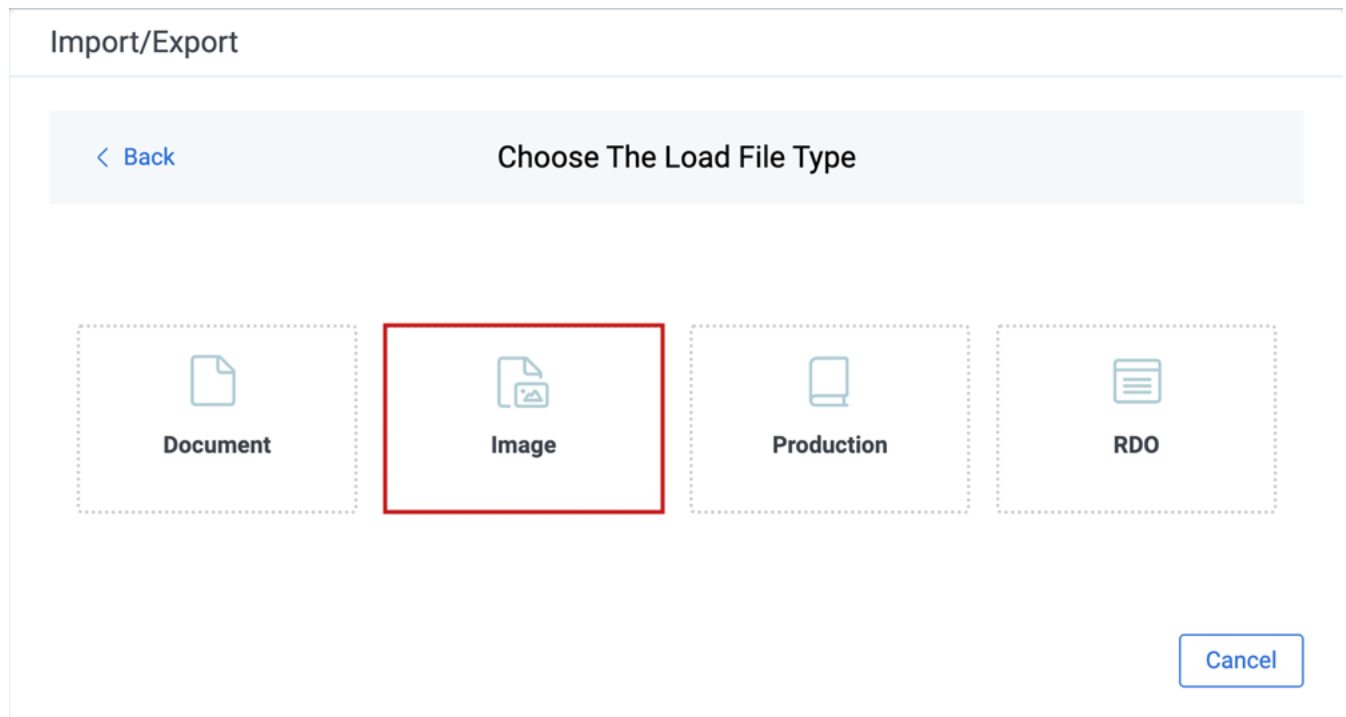
Activate

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 44](#) 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 110](#).
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 111](#).
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 113](#).
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 114](#).
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 115](#).

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.

7.5.4.1 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 47](#).

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

7.5.4.2 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 21](#).
- (Optional) **Notification Addresses**—enter the email addresses of the people you want to notify after the job completes, fails, or is canceled.

7.5.4.3 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.

7.5.4.4 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.

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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.
 Error on line: 29 Column: Column (3) File VOL00001\IMAGES\IMG000001\LKITCHEN_0005837_04.tif not found in zip.

Import

Cancel

7.5.4.5 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\Web\ImportExport\ImportSource\d6ba9412-24cb-4343-93a4-0901a5a6157e\VOL00001\NATIVES\NATIVE00001\AZIPPER_0007291.htm

New Load File Select Download Error Load File Close

7.6 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.

7.6.1 References

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

- [Express Transfer overview on page 30](#), 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 9](#) for more information regarding import of load files. Also see [General recommendations for structured data import and export jobs on page 27](#). Also see [Load file import recommendations on page 27](#).

7.6.2 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.

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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

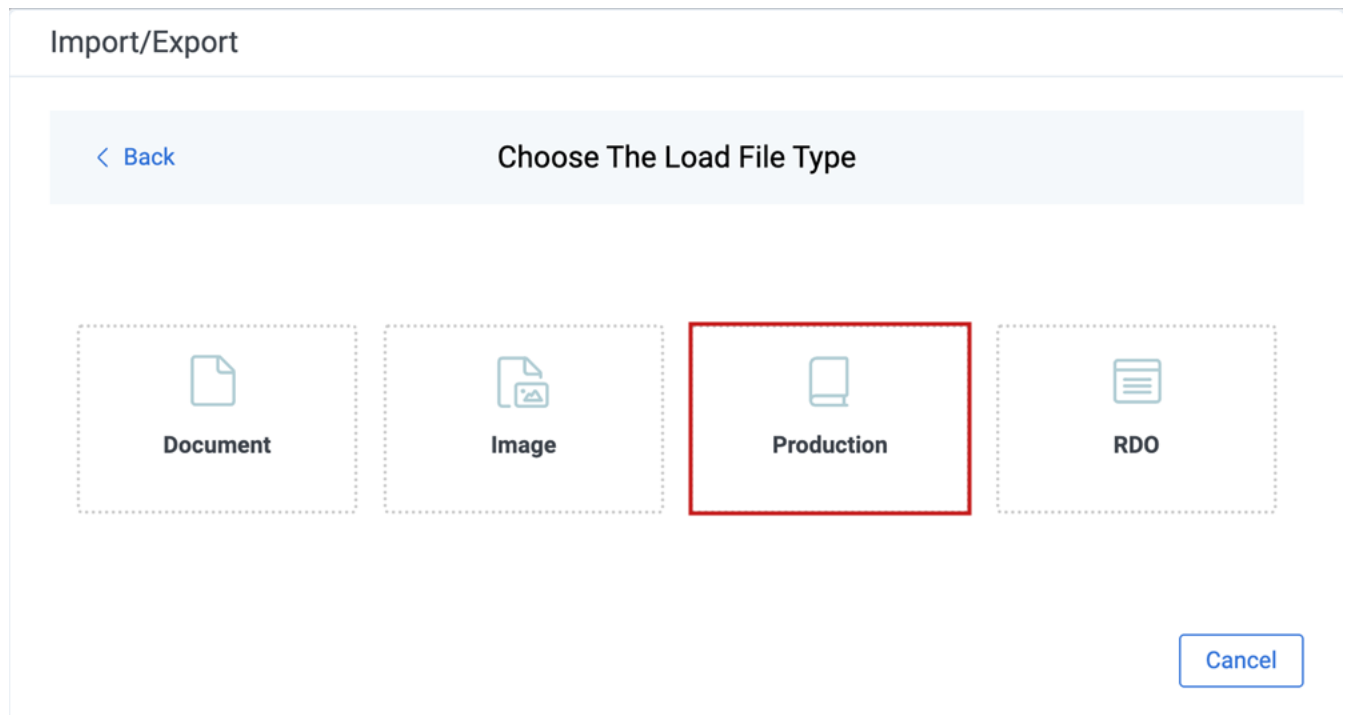
Activate

 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 44](#) 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 120](#).
- 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 121](#). 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 123](#).
- (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 124](#).
- 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 125](#).

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.

7.6.2.1 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 47](#).

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

7.6.2.2 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 21](#).
- (Optional) **Notification Addresses**—enter the email addresses of the people you want to notify after the job completes, fails, or is canceled.

7.6.2.3 Import Settings fields

Complete fields on the Import Settings dialog

Import/Export

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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.

7.6.2.4 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.

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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

7.6.2.5 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:
 - Select **Download Error Load File**.
 - Review the errors and correct them as needed.
 - When you have finished, upload the file with the corrected data by clicking **Select** on the Importing dialog next to New Load File.
 - Navigate to the load file on your local drive to select it.
 - 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

7.7 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.

7.7.1 References

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

- [Express Transfer overview on page 30](#), 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 9](#) for more information regarding import of load files. Also see [General recommendations for structured data import and export jobs on page 27](#). Also see [Load file import recommendations on page 27](#).

7.7.2 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.

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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

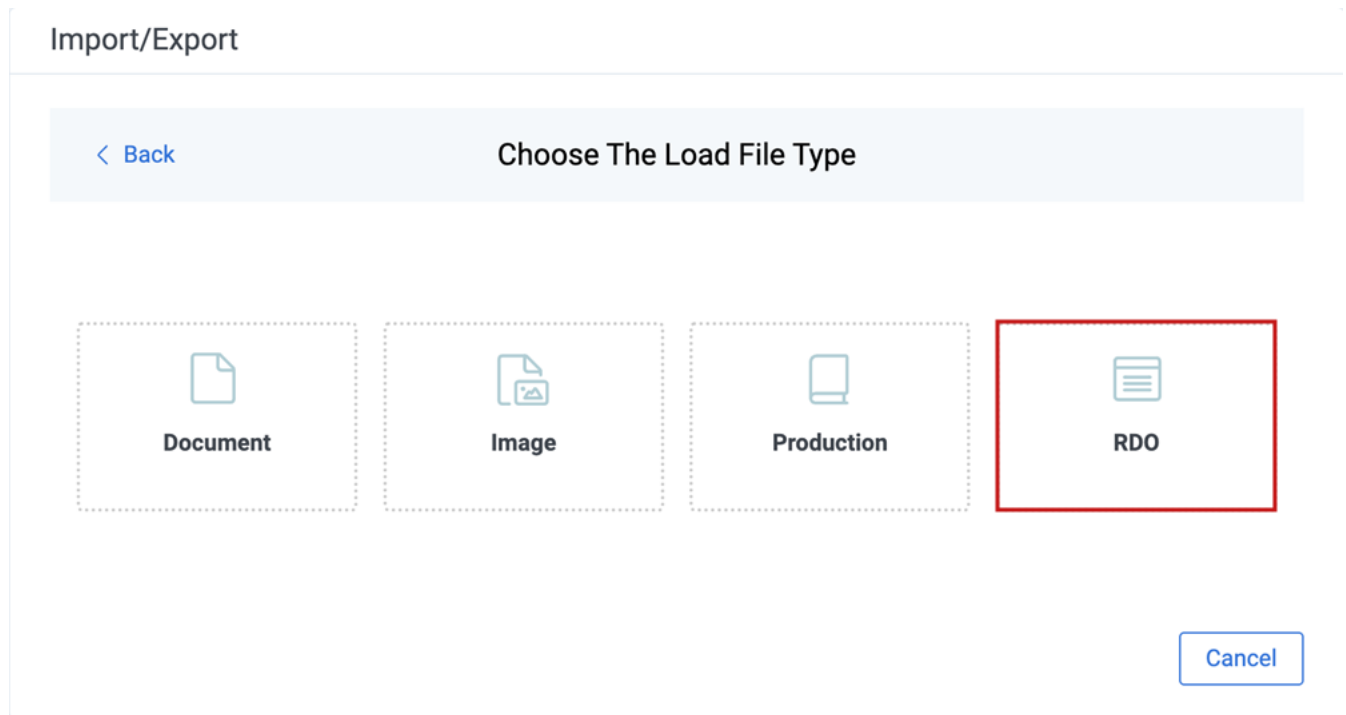
Activate

 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 44](#) for more information.

- 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 130](#).
- 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 131](#). 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 133](#).
- 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 134](#).
- Configure your import on the Import Settings dialog. For more information, go to [Import Settings fields on page 136](#).
- (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 136](#).
- 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 138](#).

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.

7.7.2.1 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 47](#).

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

7.7.2.2 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 ?*

Choose...

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](#).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

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.

- **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 load file with RDO data 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 20](#)
- **(Optional) Notification Addresses**—enter the email addresses of the people you want to notify after the job completes, fails, or is canceled.

7.7.2.3 Load File Settings fields

Complete fields on the Load File Settings dialog

The File Column Headers Preview pane helps you choose the proper settings.

Load File Settings

File Encoding: Unicode (UTF-8)

File Line Continuation: ☒ **Yes**

Columns: Default (tab, other vertical line or vertical space)

Quoted: Quote (or unquote as needed)

Reading Long Text Fields: By Paragraph(s)

Multi Select: Don't Select

Insert Index: Don't Insert

File Columns Header Preview

Date	Author	Name	Email Address	Phone Number	Department	Title	Location
10/1/2012	John Doe	John Doe	John.Doe@contoso.com	555-555-5555	Engineering	Software Engineer	Redmond, WA
10/1/2012	Jane Smith	Jane Smith	Jane.Smith@contoso.com	555-555-5555	Marketing	Marketing Manager	Redmond, WA
10/1/2012	Bob Johnson	Bob Johnson	Bob.Johnson@contoso.com	555-555-5555	Finance	Finance Analyst	Redmond, WA
10/1/2012	Alice Brown	Alice Brown	Alice.Brown@contoso.com	555-555-5555	Human Resources	Human Resources Manager	Redmond, WA
10/1/2012	Charlie Davis	Charlie Davis	Charlie.Davis@contoso.com	555-555-5555	Operations	Operations Manager	Redmond, WA
10/1/2012	Diana Prince	Diana Prince	Diana.Prince@contoso.com	555-555-5555	Legal	Legal Counsel	Redmond, WA
10/1/2012	Frank Miller	Frank Miller	Frank.Miller@contoso.com	555-555-5555	IT	IT Support	Redmond, WA
10/1/2012	Grace Wilson	Grace Wilson	Grace.Wilson@contoso.com	555-555-5555	Sales	Sales Representative	Redmond, WA
10/1/2012	Henry Green	Henry Green	Henry.Green@contoso.com	555-555-5555	Product Development	Product Manager	Redmond, WA
10/1/2012	Ivy Adams	Ivy Adams	Ivy.Adams@contoso.com	555-555-5555	Customer Support	Customer Support Representative	Redmond, WA
10/1/2012	Jack Black	Jack Black	Jack.Black@contoso.com	555-555-5555	Training	Training Manager	Redmond, WA
10/1/2012	Karen White	Karen White	Karen.White@contoso.com	555-555-5555	Quality Assurance	Quality Assurance Manager	Redmond, WA
10/1/2012	Leo Brown	Leo Brown	Leo.Brown@contoso.com	555-555-5555	Security	Security Analyst	Redmond, WA
10/1/2012	Mia Green	Mia Green	Mia.Green@contoso.com	555-555-5555	Compliance	Compliance Manager	Redmond, WA
10/1/2012	Noah White	Noah White	Noah.White@contoso.com	555-555-5555	Facilities	Facilities Manager	Redmond, WA
10/1/2012	Olivia Black	Olivia Black	Olivia.Black@contoso.com	555-555-5555	Procurement	Procurement Manager	Redmond, WA
10/1/2012	Peter Green	Peter Green	Peter.Green@contoso.com	555-555-5555	Transportation	Transportation Manager	Redmond, WA
10/1/2012	Quinn White	Quinn White	Quinn.White@contoso.com	555-555-5555	Communications	Communications Manager	Redmond, WA
10/1/2012	Rachel Black	Rachel Black	Rachel.Black@contoso.com	555-555-5555	Public Relations	Public Relations Manager	Redmond, WA
10/1/2012	Sam Green	Sam Green	Sam.Green@contoso.com	555-555-5555	Investment Management	Investment Manager	Redmond, WA
10/1/2012	Tina White	Tina White	Tina.White@contoso.com	555-555-5555	Asset Management	Asset Manager	Redmond, WA
10/1/2012	Uma Black	Uma Black	Uma.Black@contoso.com	555-555-5555	Portfolio Management	Portfolio Manager	Redmond, WA
10/1/2012	Victor Green	Victor Green	Victor.Green@contoso.com	555-555-5555	Risk Management	Risk Manager	Redmond, WA
10/1/2012	Wendy White	Wendy White	Wendy.White@contoso.com	555-555-5555	Investment Analysis	Investment Analyst	Redmond, WA
10/1/2012	Xavier Black	Xavier Black	Xavier.Black@contoso.com	555-555-5555	Financial Planning	Financial Planner	Redmond, WA
10/1/2012	Yara Green	Yara Green	Yara.Green@contoso.com	555-555-5555	Accounting	Accountant	Redmond, WA
10/1/2012	Zoe White	Zoe White	Zoe.White@contoso.com	555-555-5555	Tax	Tax Manager	Redmond, WA

- **File Encoding**—select an encoding format for the load file. Consult your processing vendor or department to determine the correct encoding option, if necessary.
The File Column Headers Preview pane automatically updates when you select the File Encoding type. 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 tab.
- **First Line Contains Column Names** toggle—select this option if the first line contains column names.
- Select the delimiters and encoding values used by your load file:
 - **Column**—select the character used to separate columns.
 - **Quote**—select the character used as the text qualifier.

- **Newline (Long Text Fields)**—select the character used to indicate the end of a line in any extracted text or long text field.
- **Multi-Value**—select the character used to separate choices within a field.
- **Nested Value**—select the character used to separate the different levels of a multi-choice hierarchy.

7.7.2.4 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
	Filter		Filter	
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.

7.7.2.5 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.

7.7.2.6 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

7.7.2.7 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

7.8 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.

7.8.1 References

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

- [Express Transfer overview on page 30](#), 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 9](#) for more information regarding import of load files. Also see [General recommendations for structured data import and export jobs on page 27](#). Also see [Load file import recommendations on page 27](#).

7.8.2 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

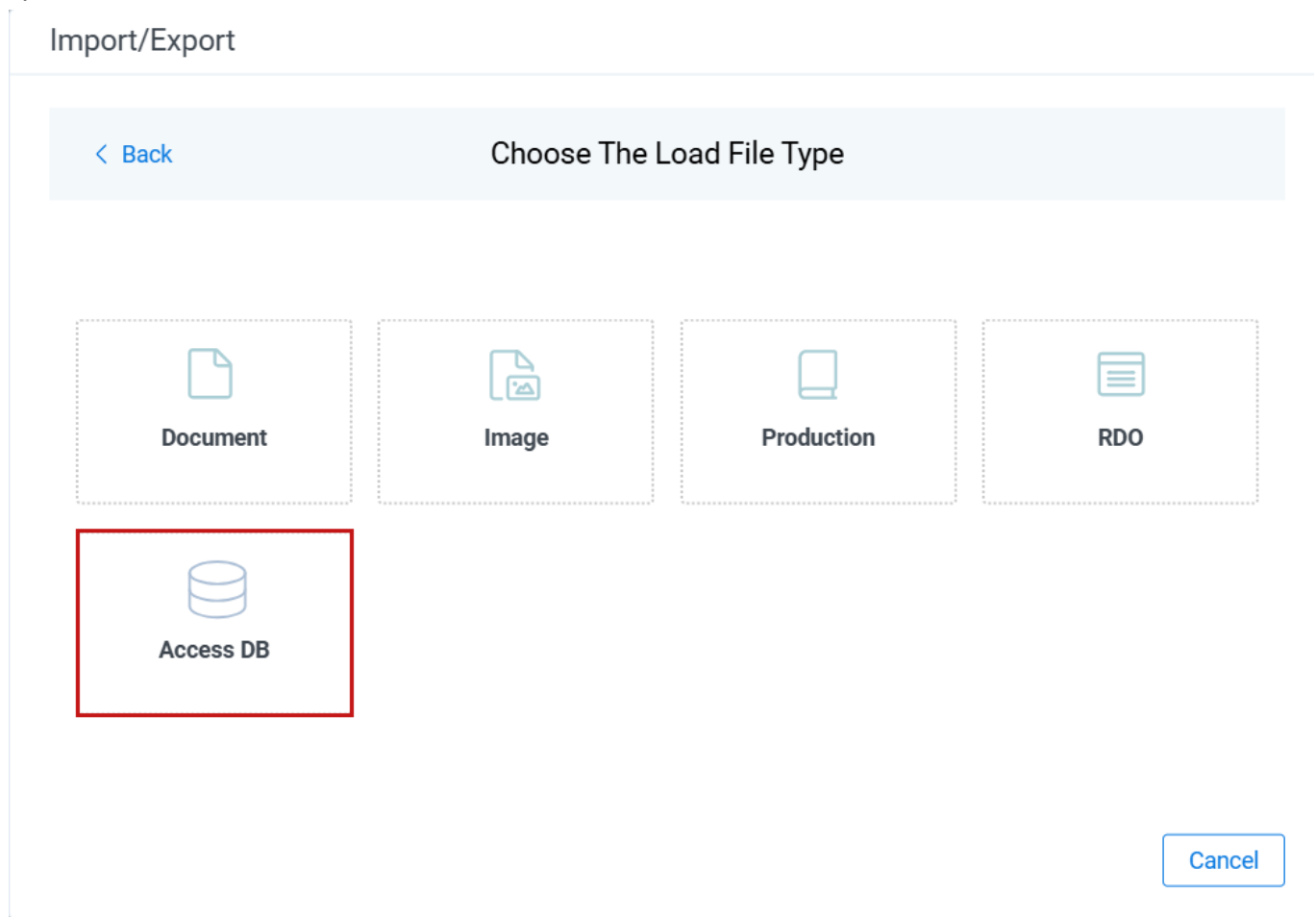
Activate

 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 44](#) 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 143](#).
- 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 144](#). 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 146](#).
- 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 147](#).
- Configure your import on the Import Settings dialog. For more information, go to [Import Settings fields on page 148](#).
- (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

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

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 149](#).

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.

7.8.2.1 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 47](#).

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](#)

7.8.2.2 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

email@domain.com, other@domain.com

[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.

7.8.2.3 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.

7.8.2.4 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.

7.8.2.5 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.

7.8.2.6 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

7.9 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.

7.9.1 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.

7.9.2 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-- CEO's 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	360.679992678	0.000000000
2	145603, Sample Files (Vol. 01) - 08/29/2024	20231130_Rep. Obernolte Delivers Remarks at Missing the Target-- CEO's Meritless Selection of SBTI		331.929992678	360.679992678
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	662.609985352
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	361.260009796	1.063.969970703
5	145603, Sample Files (Vol. 01) - 08/29/2024	20240613_Chairman Obernolte Delivers his Opening Statement at Environmentalism Off the Rails		361.329995572	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		285.799999014	1.786.560558594
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	167.720001121	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	309.380004893	2.240.050046828

- 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 30](#) for more information.

7.9.3 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

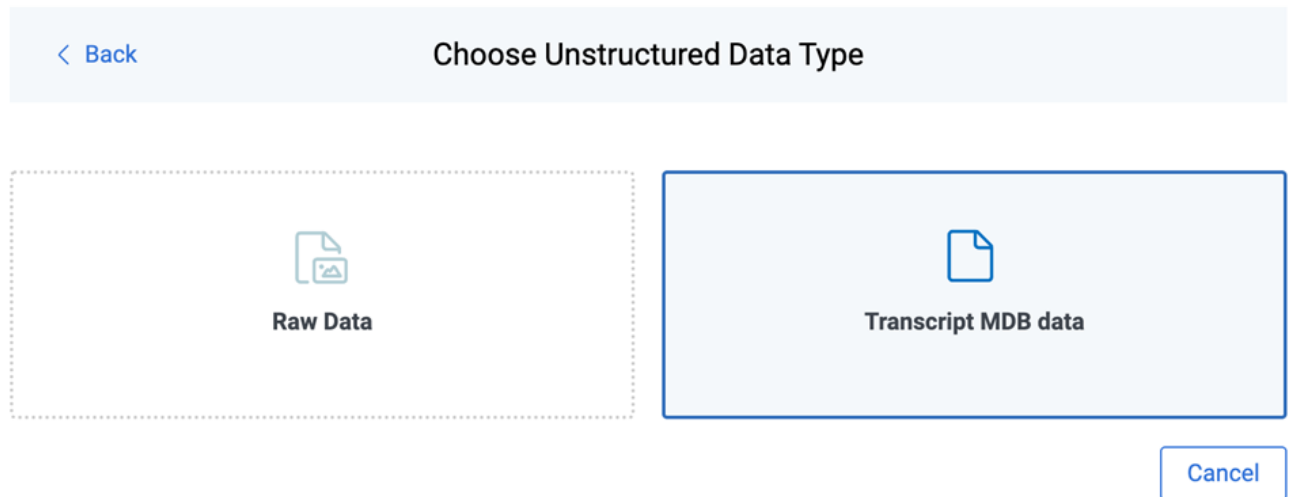
 to run Express Transfer

Close

Note: If you activated Express Transfer, the Express Transfer section displays a status of **Active**. See [Activating and deactivating Express Transfer on page 44](#) for more information.

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

Import/Export



- Select the transcript data files to import depending on the Express Transfer activation status. For more information, go to [Selecting transcript data files below](#).
- Complete fields on the Transcript Import and Processing dialog. For more information, go to [Transcript Import and Processing fields on page 155](#).
- 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.

- Review the importing progress on the Importing & Processing dialog. For more information, go to [Import & Processing options on page 156](#).

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.

7.9.3.1 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**.

7.9.3.2 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.

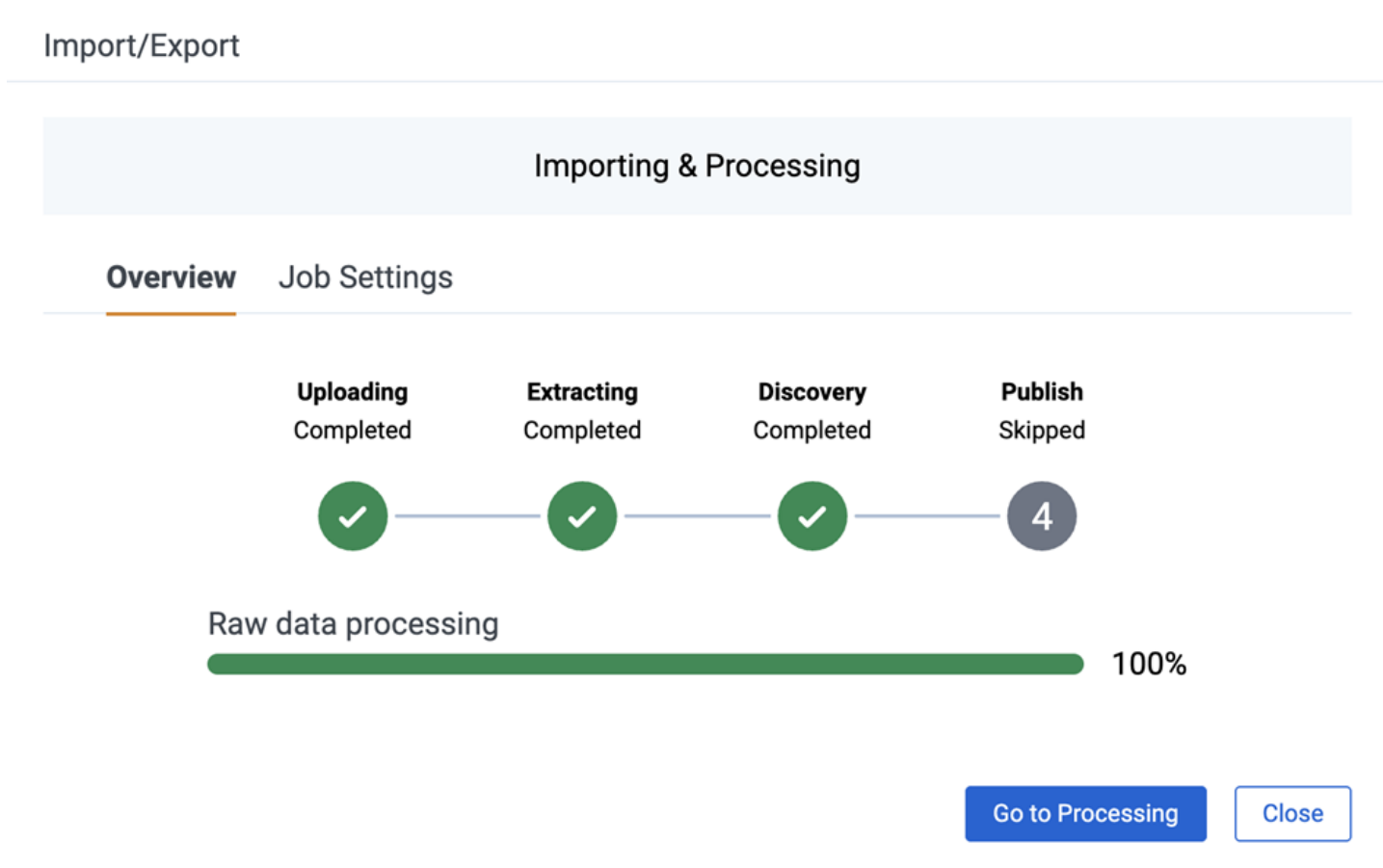
Note: The Deponent drop-down list shows custodians available in the workspace. When you create a new deponent with the **Add Deponent** button, it is stored in the Entity Object as a custodian.

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

7.9.3.3 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.



- 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.

7.10 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 30](#) 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 44](#) 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 10](#) page for more information.

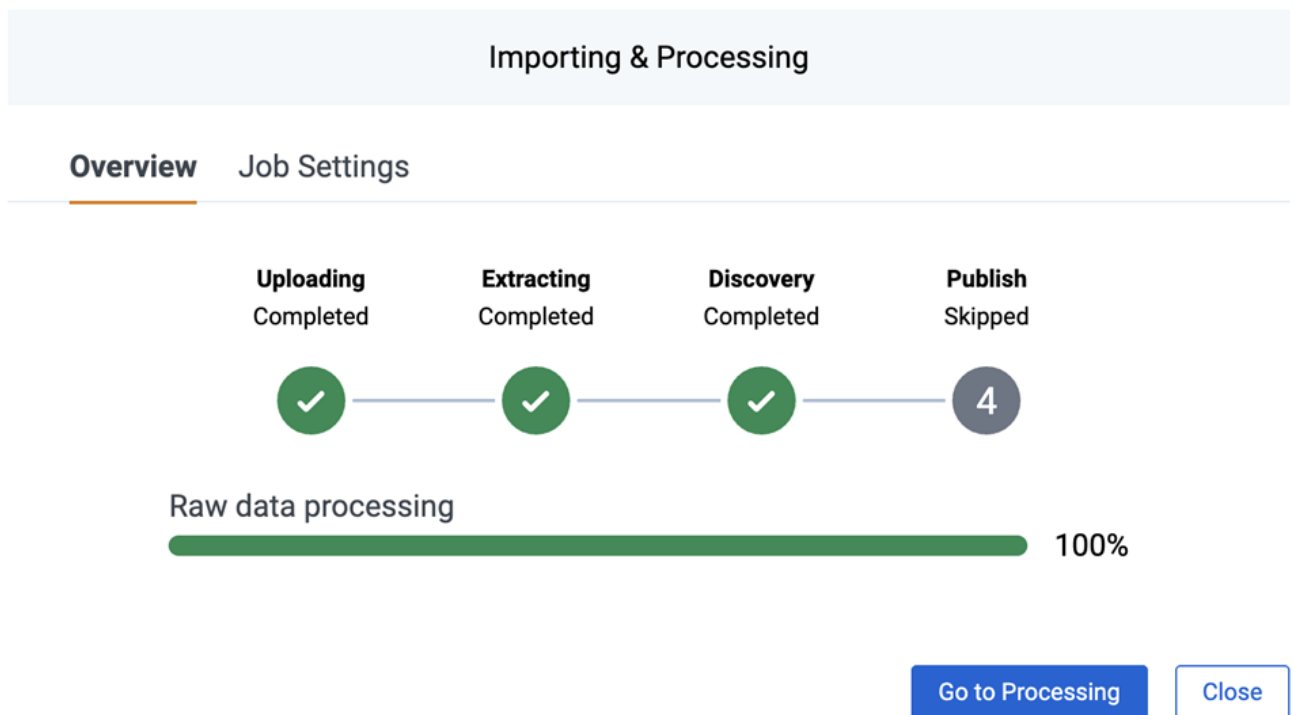
6. On the Create Processing Job dialog, complete fields, select data sources and assign custodians. For details, see [Create Processing Job on page 162](#).
7. Click **Run Job** to start importing data.

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.



- 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.

7.10.1 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

☐	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 167](#) 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**.

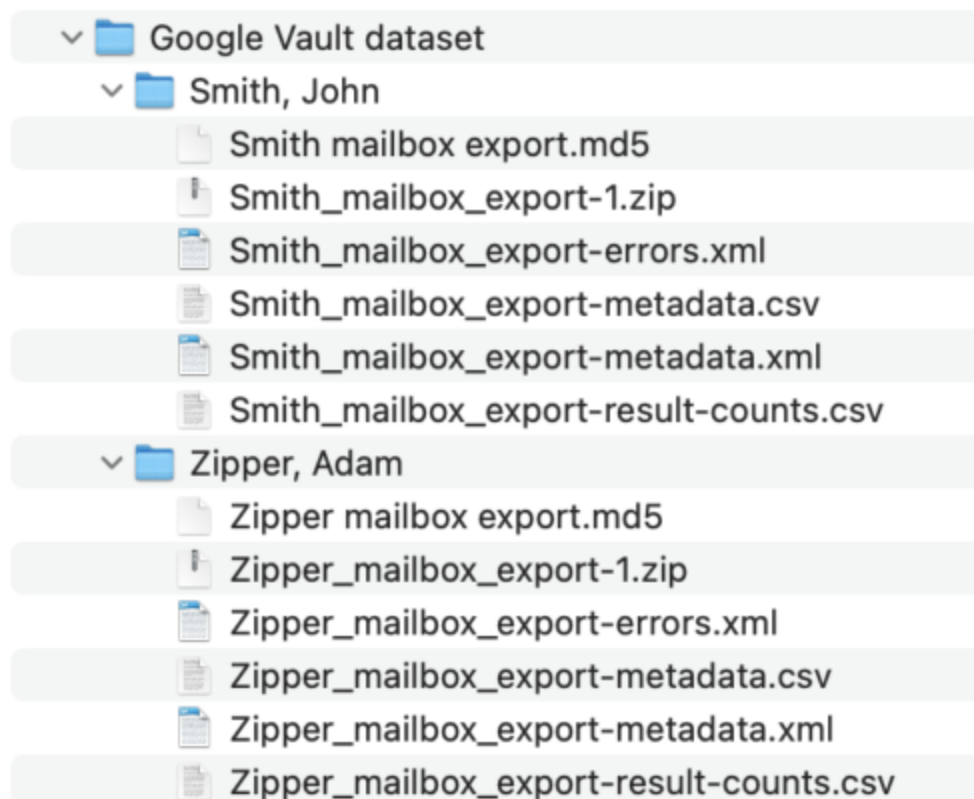
- **(Optional) Notification Addresses**—enable email notifications by providing the email addresses of those who should get notified once the job completed, failed, or canceled.

- 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 58](#) 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 *

Add Custodian Cancel

- a. Select the custodian **Type**:
 - **Person**—select this option to enter a First Name and Last Name of the individual acting as custodian of the data to be processed.
 - **Other**—select this option if the custodian of the data to be processed is not an individual but is, for example, an entity or company name. Then, enter the name in the Full Name field. You can also select this option if you wish to enter an individual's full name without having that name include a comma once you export the data associated with it.
- b. Click the **Add Custodian** button. The newly created custodian will be added to the Custodian drop-down list. Then, you can select and assign the custodian to the data source.

7.10.2 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 44](#) 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.

8 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 27](#).

8.1 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 27](#).

8.2 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 30](#) 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 9](#).

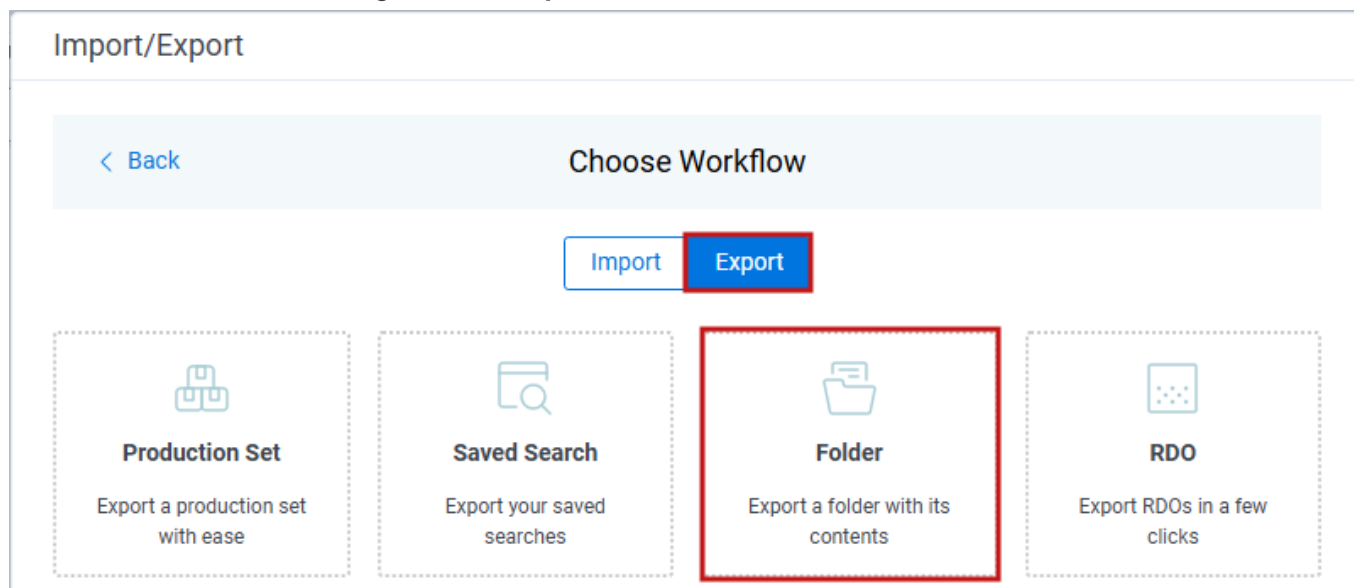
Refer to [Import/Export load file specifications](#) for more information regarding load files. Also see [General recommendations for structured data import and export jobs on page 27](#).

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 44](#) 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

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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

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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**.

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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**.

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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.



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.

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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

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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

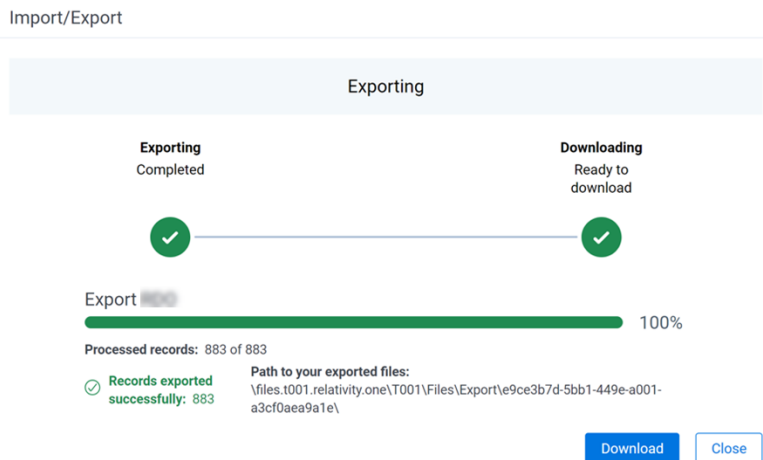
16. (Optional) Click **Save Settings** on the Export Job Configuration Summary dialog to export the job configuration settings entered thus far to its own profile file (.ie file extension) and save it on your computer. This way you can reuse these settings when creating a new export job with Import/Export.

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.

8.3 Exporting a production set load file

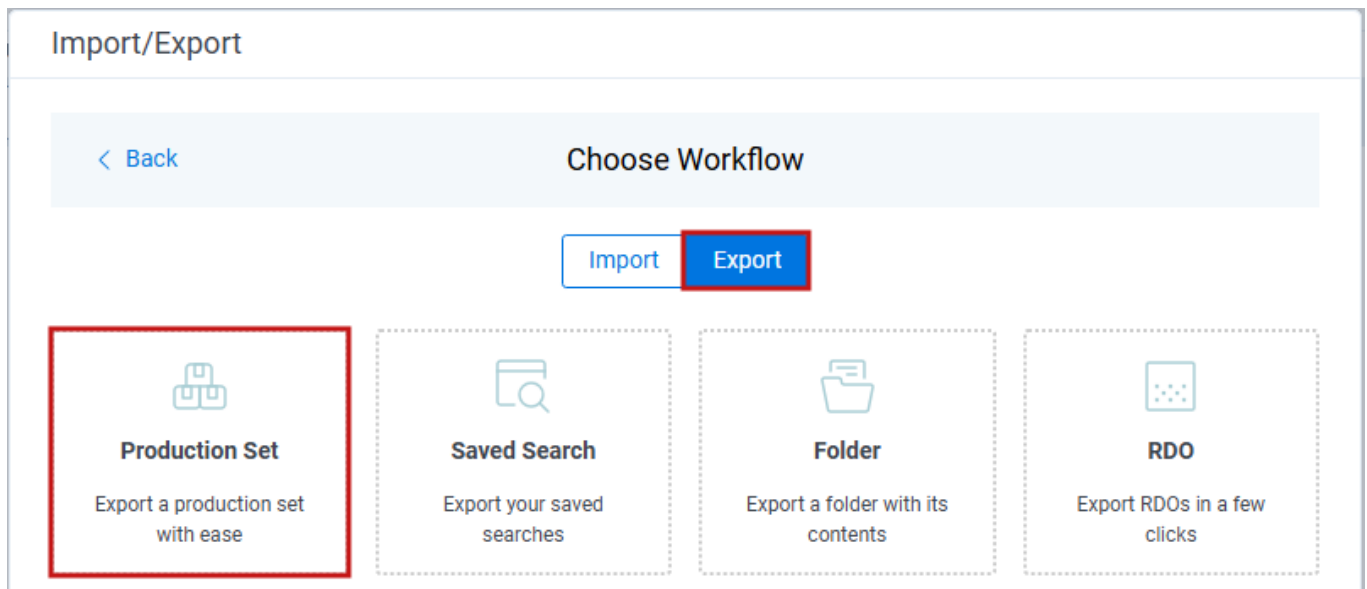
You can use Import/Export to export a production set load file out of Relativity aiR.

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 30](#) 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 9](#).

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 27](#).

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 44](#) for more information.

4. Complete fields on the Export Settings dialog, then click **Continue**. For details, see [Export Settings on page 191](#).

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

Import/Export

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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.

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.
- **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

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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**.

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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**.

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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

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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

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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.

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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

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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

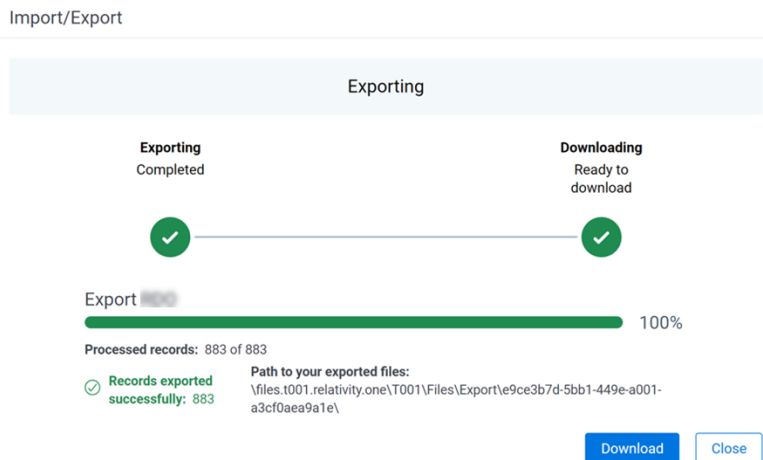
14. (Optional) Click **Save Settings** on the Export Job Configuration Summary dialog to export the job configuration settings entered thus far to its own profile file, .ie file extension. Save it on your computer so you can reuse these settings when creating a new export job with Import/Export.

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.

8.3.1 Export Settings

Complete the following fields on the Export Settings dialog

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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.

8.4 Exporting an RDO load file

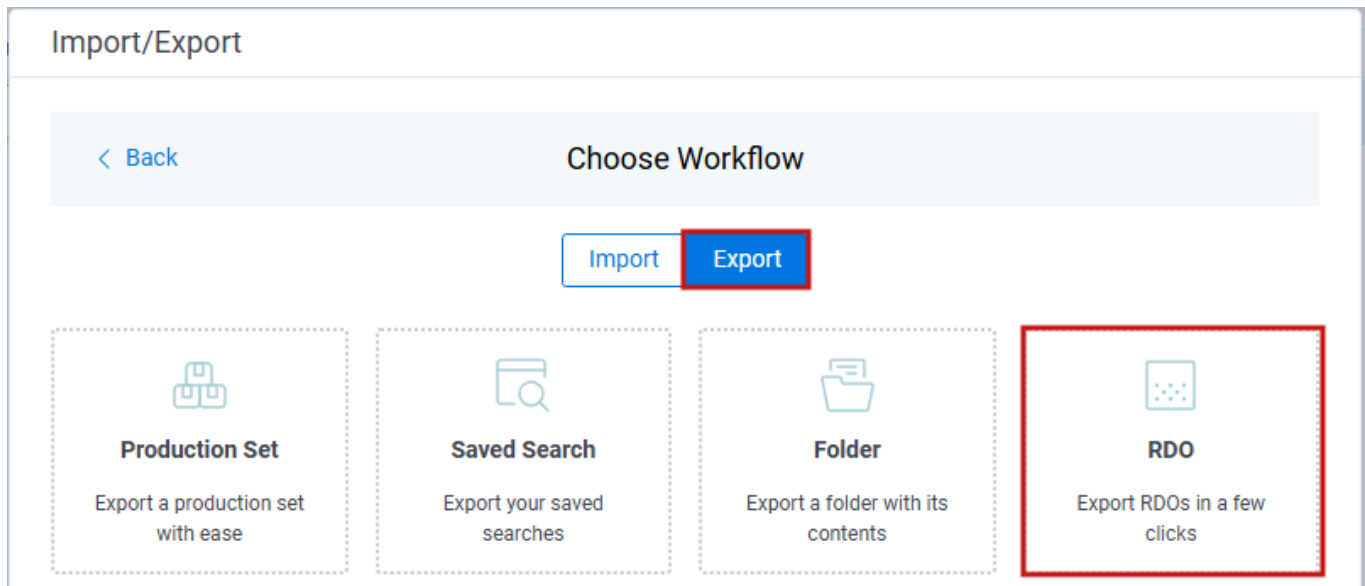
You can use Import/Export to export Relativity's dynamic objects (RDO) load file out of Relativity aiR.

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 30](#) 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 9](#).

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 27](#).

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 44](#) for more information.

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

Import/Export

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Export Settings

Data Source

Job Name*

Profile*

☒ None

☐ From Local Disk

Relativity Object Type*

Choose...▼

View*

Choose...▼

Location And Files

Export Location Type*

☒ Local Disk

☐ Staging Area

Notifications

Notification Addresses

email@domain.com, other@domain.com

Continue

Cancel

- Data Source:

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

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

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

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

- **Profile**—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

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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

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Select Fields

Workspace 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

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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.

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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

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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

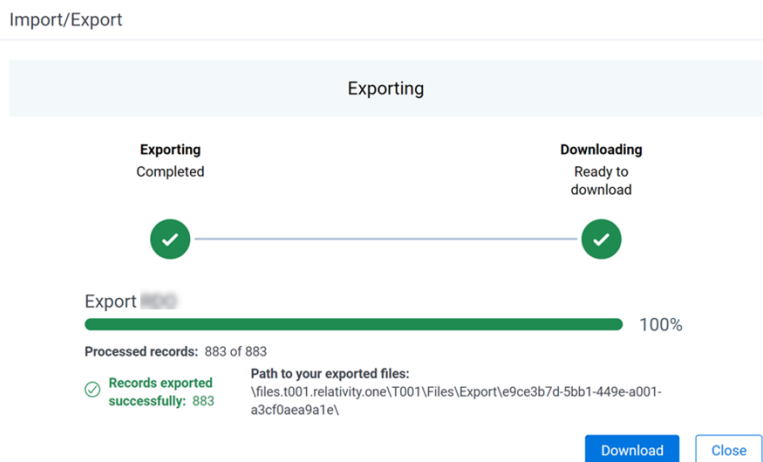
14. (Optional) Click **Save Settings** on the Export Job Configuration Summary dialog to export the job configuration settings entered thus far to its own profile file, .ie file extension. Save it on your computer so you can reuse these settings when creating a new export job with Import/Export.

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.

8.5 Exporting a saved search load file

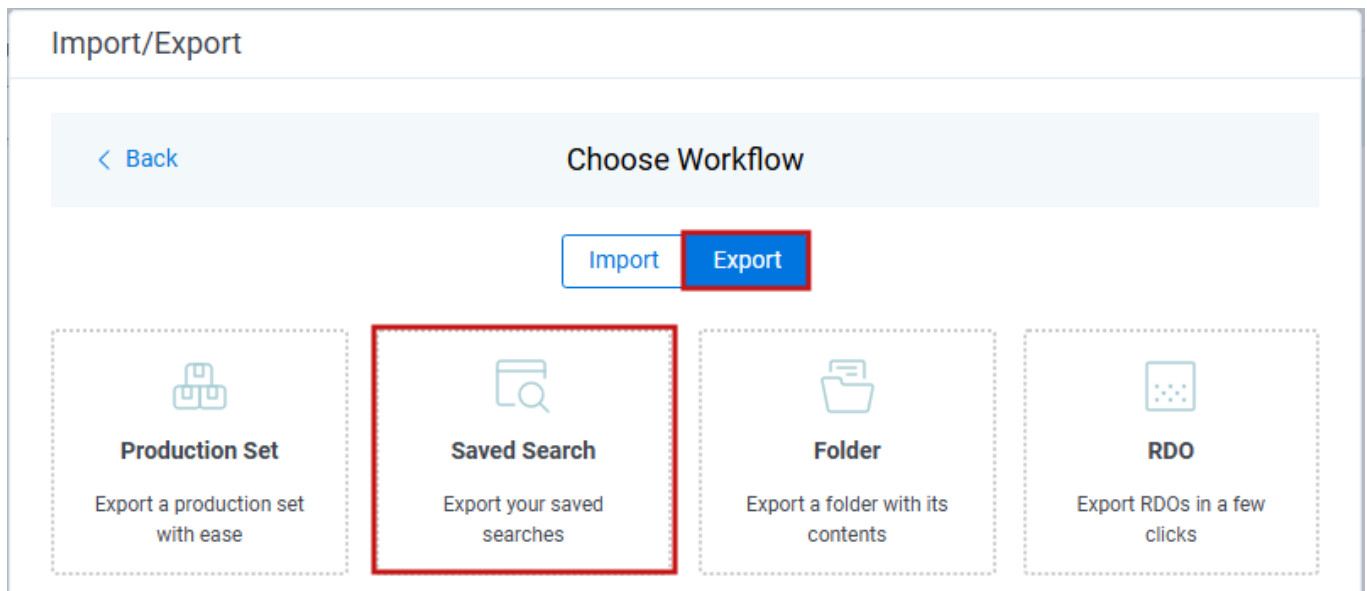
You can use Import/Export to export a saved search load file out of Relativity aiR.

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 30](#) 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 9](#).

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 27](#).

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 44](#) for more information.

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

Import/Export

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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

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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

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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**.

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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**.

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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

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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

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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.

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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

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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

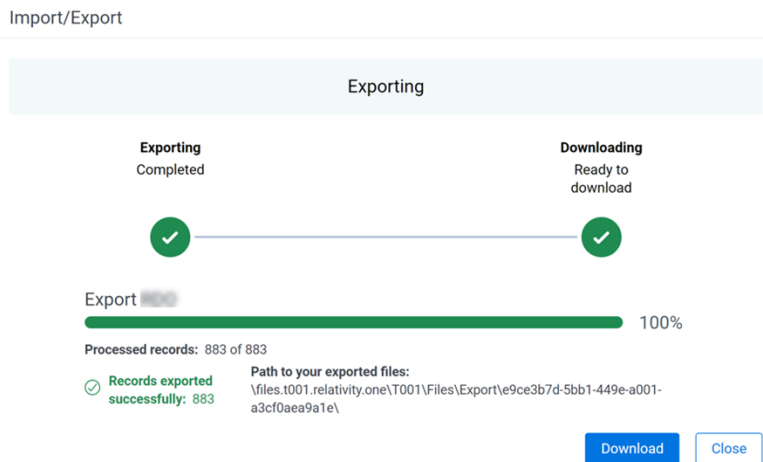
16. (Optional) Click **Save Settings** on the Export Job Configuration Summary dialog to export the job configuration settings entered thus far to its own profile file (.ie file extension) and save it on your computer. This way you can reuse these settings when creating a new export job with Import/Export.

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.

8.6 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.

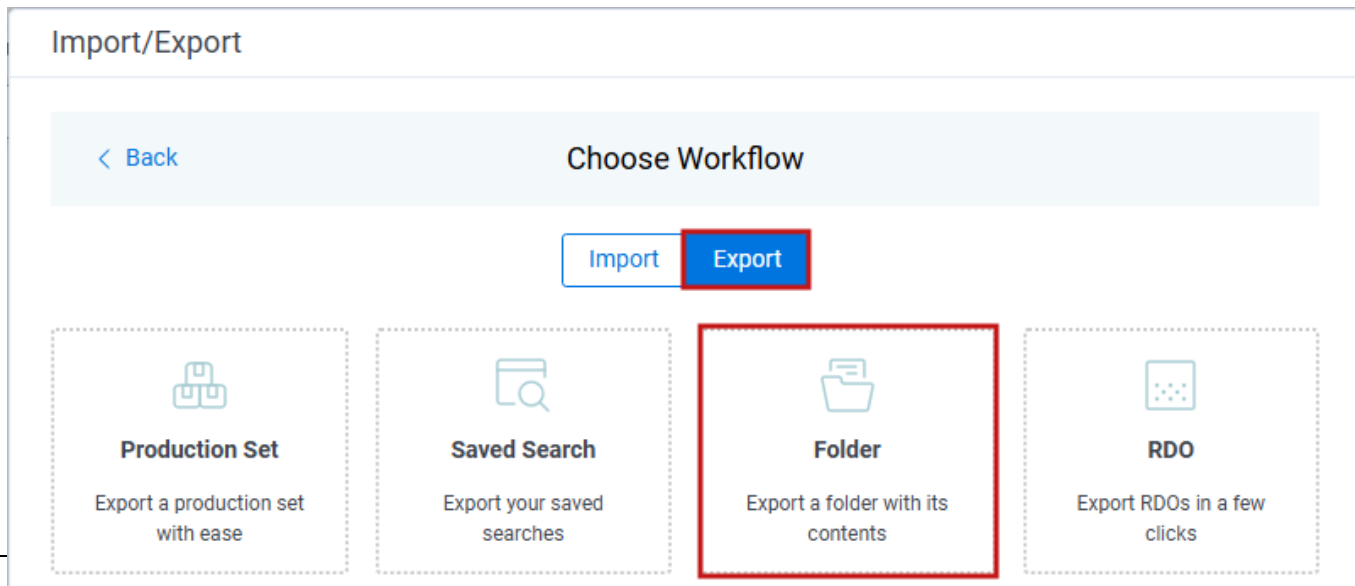
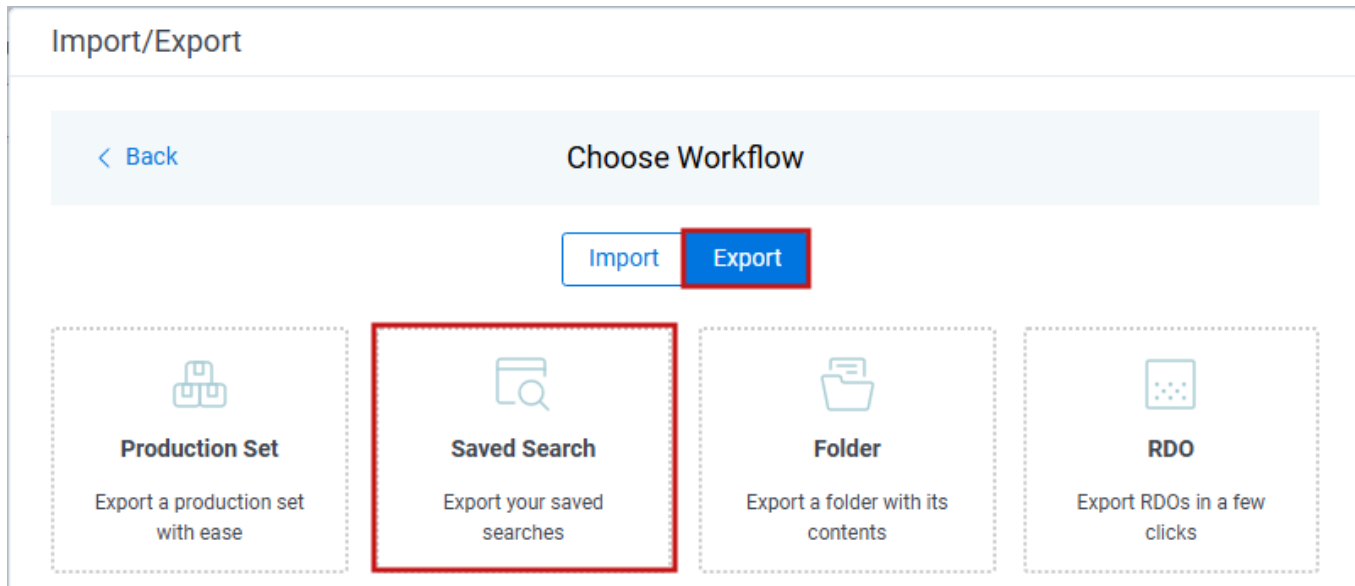
You can use Import/Export to export a saved search or a folder with MDB load file out of Relativity aiR.

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 30](#) 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 9](#).

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 27](#).

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 44](#) for more information.

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

Import/Export

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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

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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

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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 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...	
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

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.

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

Import/Export

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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**.

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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

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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

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Text File Settings

Basic Settings

Export Text Field as Files

☒

Text File Encoding

Unicode (UTF-8)

Text Fields Precedence

Add Fields ^{*}

Production OCR

Add

00
00
00

Extracted Text

🗑

00
00
00

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**

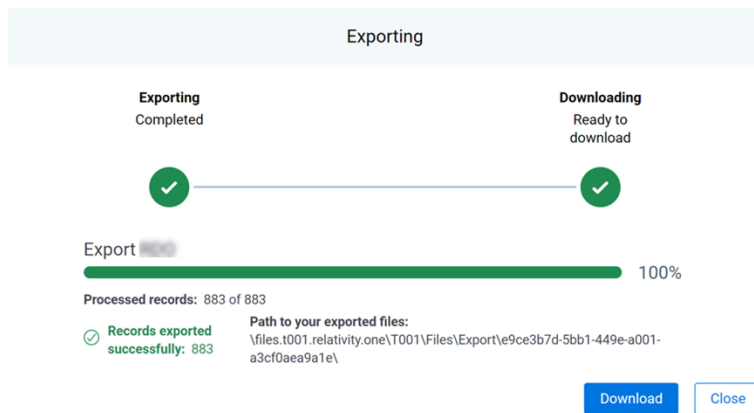
13. (Optional) Click **Save Settings** on the Export Job Configuration Summary dialog to export the job configuration settings entered thus far to its own profile file (.ie file extension). Save it on your computer so you can reuse these settings when creating a new export job with Import/Export.

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.

8.7 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.

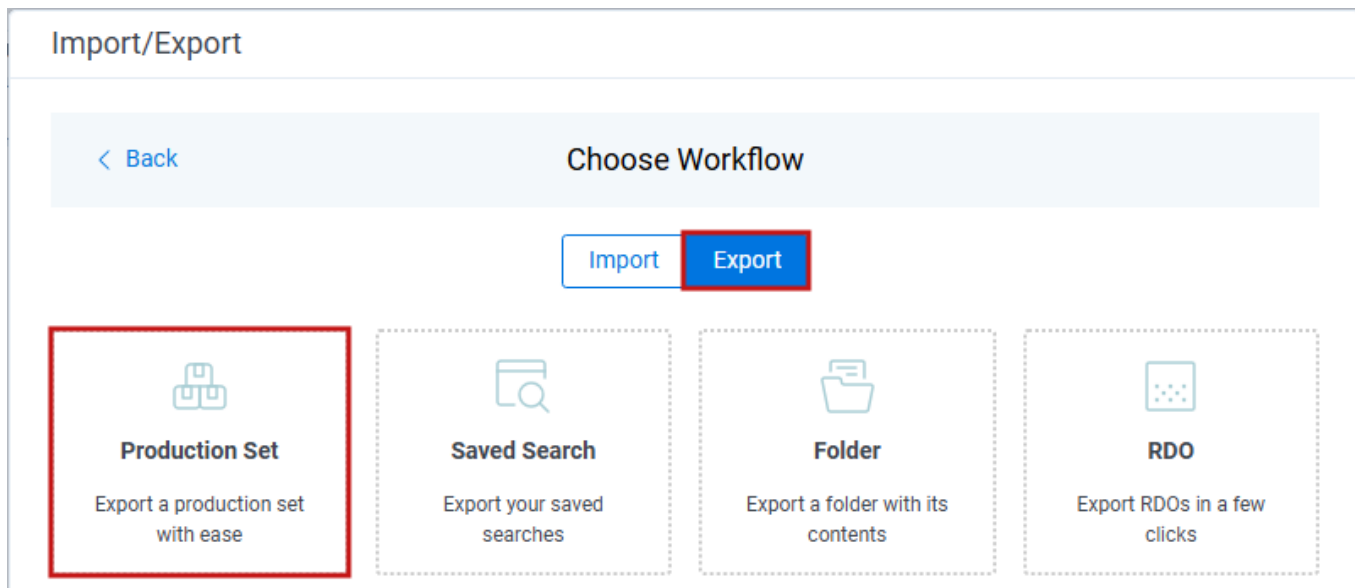
If you want to use Import/Export with Express Transfer, which is the recommended method for data transfer, refer to [Express Transfer overview on page 30](#) for more information. With Express Transfer activated, you can run up to five concurrent export jobs on a single client machine. For more information, see [Concurrent and consecutive jobs on page 9](#).

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 27](#).

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 44](#) for more information.

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

Import/Export

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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

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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**.

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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

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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

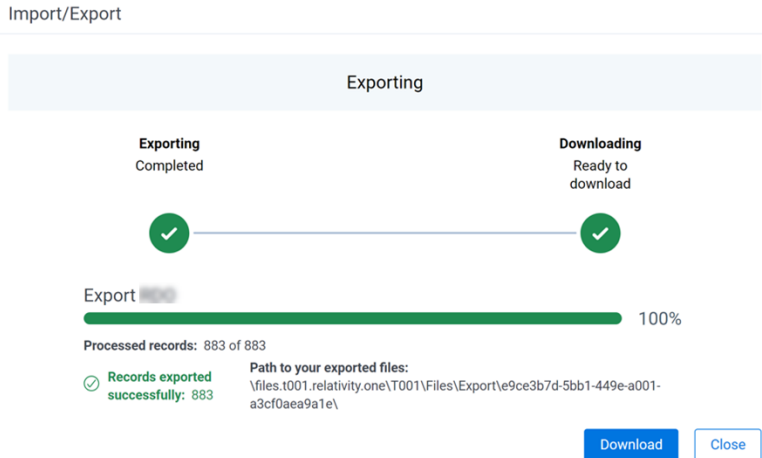
11. (Optional) Click **Save Settings** on the Export Job Configuration Summary dialog to export the job configuration settings entered thus far to its own profile file (.ie file extension). Save it on your computer so you can reuse these settings when creating a new export job with Import/Export.

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.

9 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 241](#).

9.1 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 Complete	Na	7/10/2023, 10:02 AM	7/10/2023, 10:04 AM	7a8ec271-a279-45ee-a709-ac...
2	LF-003-N	Document Import	Import Job Complete	Na	7/10/2023, 10:02 AM	7/10/2023, 10:04 AM	e5816156-36ee-475e-86d4-c...
3	LF-002-N	Document Import	Import Job Complete	Na	7/10/2023, 10:01 AM	7/10/2023, 10:03 AM	e765027-4770-4968-a98e-5f...
4	LF-001-N	Document Import	Import Job Complete	Na	7/10/2023, 10:00 AM	7/10/2023, 10:03 AM	76498dce-ef64-1ed-8d0c-7a...
5	LF-005-N	Document Import	Import Job Inserting	Na	7/10/2023, 10:03 AM		c8017525-a058-4578-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](#).

9.2 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.

10 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 239](#).

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-dmlib	DiscoveryCompleted WithErrors	Web Import Export - Aero CD	Unprocessed	9/22/2023, 12:21:37 PM	K

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

- **Job Name**—the name of the job, as entered during creation. Click on the link to navigate to the Import/Export job details.
- **Job Status**—the current state of the job, as represented by the following status values:
 - Extraction Requested
 - Extraction In Progress
 - Extraction Completed
 - Upload Requested
 - Upload In Progress
 - Upload Retried
 - Upload Completed
 - Import Job Requested
 - Import Job Idle
 - Import Job Scheduled
 - Import Job Inserting
 - Processing Requested
 - Discovery Not Started
 - Discovery In Progress
 - Discovery Completed
 - Publish Not Started
 - Publish In Progress
 - Transfer Requested
 - Transfer In Progress
 - Transfer Completed
 - Export Job Requested
 - Export Job Scheduled
 - Export Job In Progress
- **Workspace**—the workspace in which the job was created and run.
- **Workflow Type**—the type of Import/Export job, as represented by the following values:
 - Unprocessed—job was initiated using the Raw (Unprocessed) Data workflow option within the Import tab.
 - Document Import—job was initiated using the Structured (Processed) Data workflow>Document option within the Import tab.
 - Image Import—job was initiated using the Structured (Processed) Data workflow>Image option within the Import tab.
 - Production Import—job was initiated using the Structured (Processed) Data workflow>Production option within the Import tab.

- RDO Import—job was initiated using the Structured (Processed) Data workflow>RDO option within the Import tab.
 - Production Export—job was initiated using the Structured (Processed) Data workflow>Production Set option within the Export tab.
 - Saved Search Export—job was initiated using the Structured (Processed) Data workflow>Saved Search option within the Export tab.
 - Folder Export—job was initiated using the Structured (Processed) Data workflow>Folder option within the Export tab.
 - RDO Export—job was initiated using the Structured (Processed) Data workflow>RDO option within the Export tab.
- **Start Date**—the date on which the job was started.
 - **Created By**—the user who started the job.

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