Relativity®

Desktop Client Guide

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For the most recent version of this document, visit our **documentation website**.

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1 Overview

The Relativity Desktop Client (RDC) provides the functionality for importing document load, image, and production files, as well as for exporting production sets, saved searches, and folders. You can also use this utility to import and export object data.

1.1 RDC menu bar

The RDC menu bar appears above the workspace folder structure. It includes the following menu options:

File:

- **Open** - switches between different workspaces.
- **Exit** - closes the RDC.
- **Refresh** - updates the folder browser.

Tools - Import:

- **Image File** - imports images from a page-level load file.
- **Document Load File** - imports native files, document metadata, and extracted text from a document-level load file.
- **Production Load File** - imports productions from a page-level load file.

Tools - Export:

- **Production Set** - exports production sets.
- **Saved Search** - exports from saved searches.
- **Folder** - exports from a specific folders.
- **Folder and Subfolders** - exports from a specific folder and its subfolders.

Options:

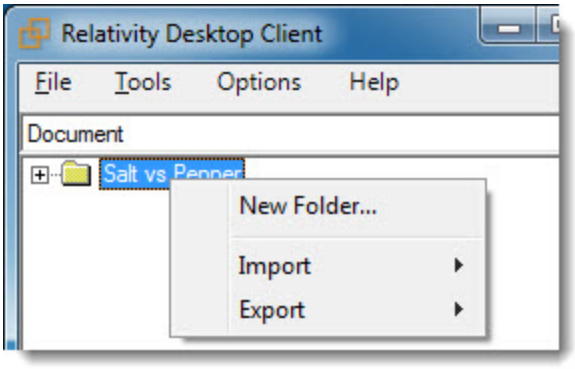
- **Settings** - changes the default value for Force Folder Preview and enter a WebService URL.
- **Check Connectivity** - assists with troubleshooting network and system configuration errors that occurred while importing and exporting.

Help:

- **About** - displays the version of the RDC.
- **Help** - opens the Relativity Desktop Client documentation in your internet browser.

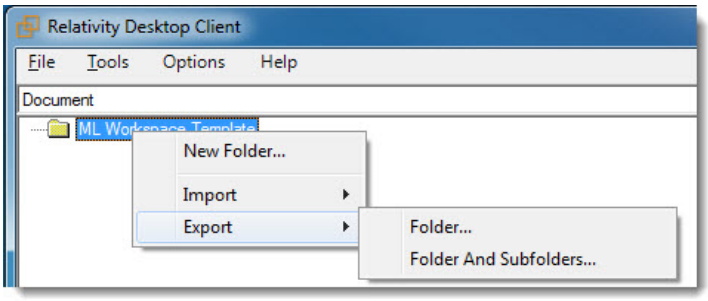
1.2 Workspace folder options

The RDC provides right-click options on folders, which you can use to build the workspace folder structure, or to import and/or export directly to and from a folder.



When you right-click on a workspace or folder, the following menu options display:

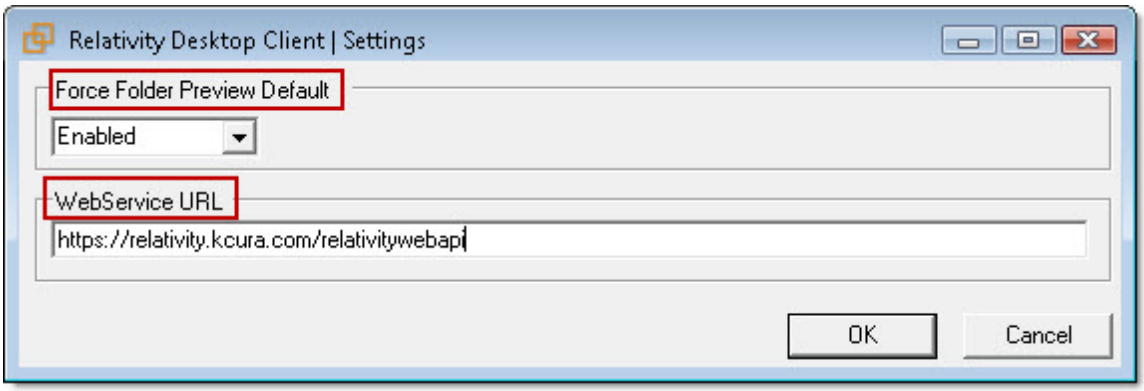
- **New Folder** - create subfolders. In the Add New Folder pop-up, enter a folder name, and then click **OK**. The maximum length for the folder name is 255 characters. Since the folder name is a system field, once you create it, you can't edit it. The new folder is added to the workspace through the RDC.
- **Import** - import an image file, document load file, or production file into a specific folder. Highlight the folder, point to **Import**, and select a file type. If you have metadata, natives and images to load, run the load file import first, then the image file import. See Importing through the RDC.
- **Export** - export a specific folder, or a folder and its subfolders.



1.3 Starting the RDC

To open the RDC:

1. Double-click on the shortcut installed on your desktop. The Settings dialog box appears when you open the application for first time.



2. Select or enter settings for the following options:
    - **Force Folder Preview Default** - options to enable or disable this feature. When enabled, the RDC checks the first 1000 records of the load file after you click **Import**. It then displays the number of folders soon to be created. You can use this information to ensure that the load process is behaving as expected. If a large number of folders are listed, you can stop the load file, and verify that the **Folder Info** field is set correctly. By default, this feature is **Enabled**.

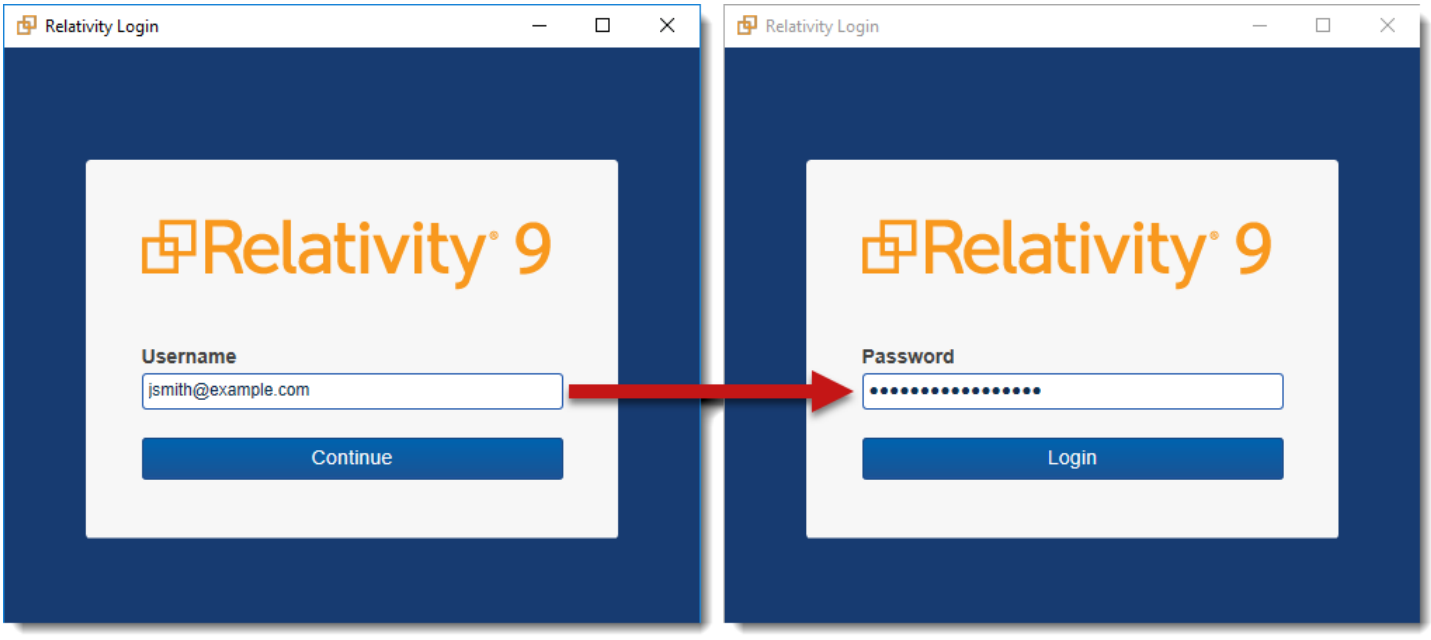
    - **WebService URL** - enter the URL provided by your system admin. This URL is used to establish a connection between the RDC and your server. If the URL path is entered incorrectly, you are unable to connect the RDC to your database.
      The **WebService URL** has the format http or https://<MyServiceName>/RelativityWebAPI/. When you display a Relativity page, you see the web service name listed in the address bar on the browser. For example, if the address bar displayed https://smith.com/Relativity, then your web service URL would be https://smith.com/ RelativityWebAPI/. In addition, you can confirm this URL with your system admin.
3. Click **OK**. These settings are stored in your machine registry and they are retained when you upgrade the RDC.

1.4 Logging on to the RDC

To log in to the RDC, enter your **Username** and click **Continue**. Then, enter your **Password** and click **Login**.

These are the same credentials you use to log in to Relativity. If the server certificate is untrusted, you can allow using untrusted certificate or close the RDC. Additionally, if you have difficulty displaying the login dialog, verify that Relativity is a trusted site in your browser.

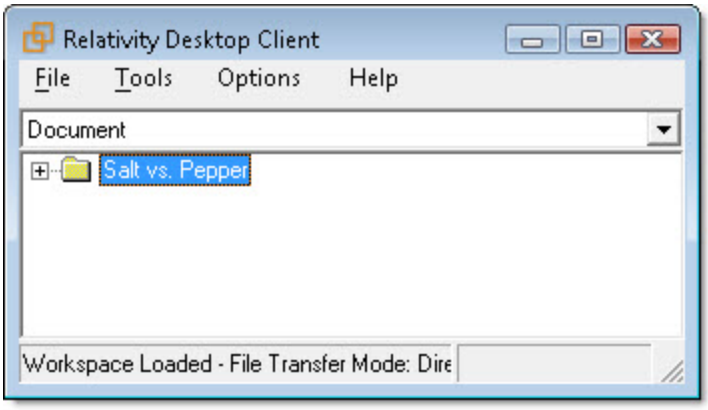
Note: Users log in to the Relativity Desktop Client (RDC) with the same provider method as they have with Relativity. The RDC supports most Relativity authentication providers, such as password, Integrated Authentication, and OpenID Connect, by displaying the Relativity login page within the RDC as a dialog window. The only provider that does not work with the RDC is SAML because the Relativity's IdP-initiated SAML does not display the Relativity login page directly.



After you log in, the RDC displays a list of workspaces where you have access rights. Use the filter bar to narrow the list.

Note: By default, Relativity uses a wildcard to filter workspaces in the RDC. For example, enter ELA to find workspaces named ELAN and Relativity.

Highlight your workspace and click **OK** to open it in the RDC. The folder structure of your workspace displays. A new workspace contains only a root folder, while an existing workspace may contain subfolders that you can display by clicking the plus sign.



Note: In Relativity Desktop Client, Document is selected by default as the type of object for data import or export. You can also select other object types, including Relativity Dynamic Objects.

1.5 RDC OAuth2 client

The RDC uses the OAuth 2.0 authorization framework for verifying your login credentials. The OAuth 2 client offers increased security, because it uses an access token that is valid for only three days. After the token expires, you must log in to the RDC again. Any jobs currently in progress fail when the token expires.

On your SQL server, you can extend the token lifetime by editing the [AccessTokenLifetimeInMinutes] field in the [EDDS].[eddsdbo].[OAuth2Client] view.

For general information about using OAuth2 in Relativity, see OAuth2 clients in the Relativity Admin guide.

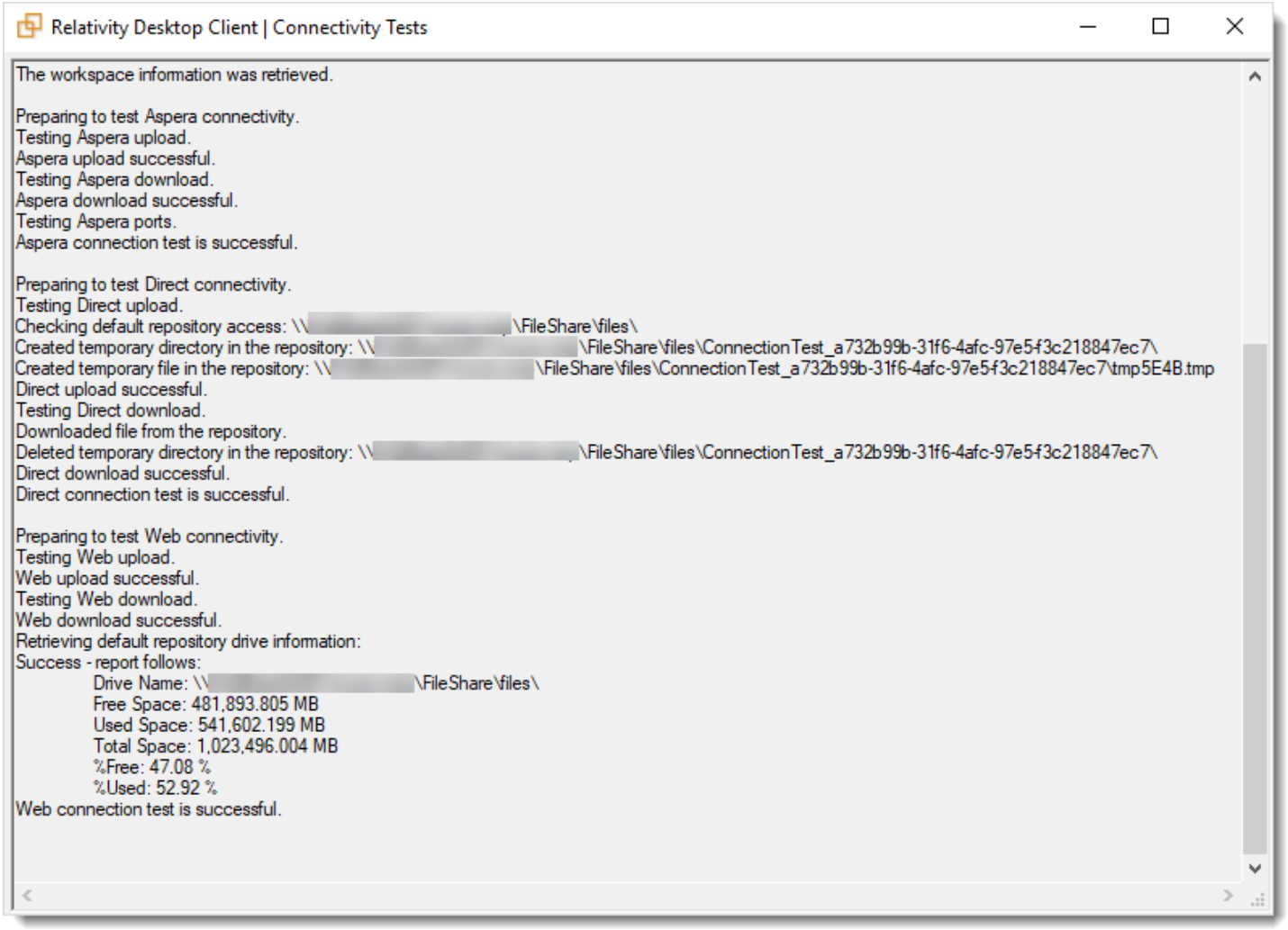
1.6 RDC transfer modes

RDC supports the following data transfer modes:

- **Direct**- uses the file share client. Direct mode provides the fastest transfer speed. Note the following details:
  - Direct mode uses the windows Active Directory account and has direct access to write to the file repository or the BCPPath. This bypasses the need to go through the web server in order to ingest the data, saving a significant amount of time.
  - There are two direct modes to be aware of:
    - Direct Mode for native files - requires read/write access on the workspace file repository (so that native/image import/export is direct to the share).
    - Direct Mode for file metadata - requires Read/Write access on the BCPPath for metadata. Document metadata passes through the BCPPath, not native files.
- **Web** - uses the HTTP client. Because of the limitations of the HTTP protocol and varying network bandwidth, it is the slowest. Note the following details:
  - When you don't have read/write permissions to the BCPPath, Relativity must authenticate via the web server.

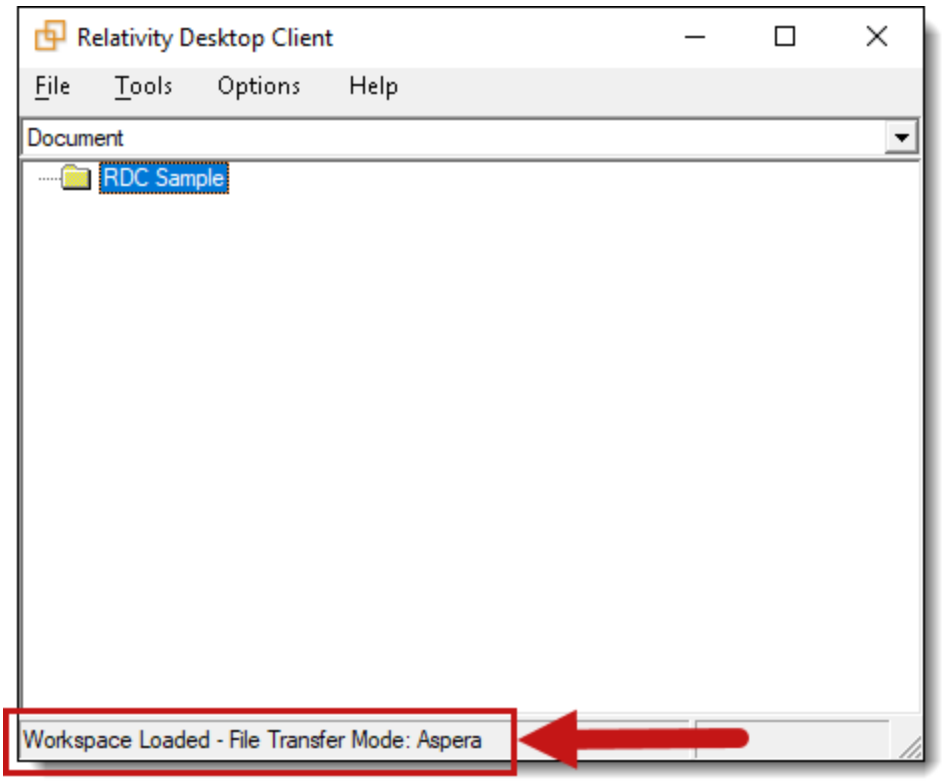
- When you don't have read/write permissions to the workspace file repository, Relativity must authenticate via the web server.
- When loading through web mode, you can see a drastic performance reduction compared direct mode. Web mode is the slowest method of all, it does, however, work without direct access to the BCPPath.

When you select a Relativity workspace, the RDC queries the workspace and performs tests to determine the optimal transfer mode. You can see the details of the tests under **Options > Check Connectivity**:



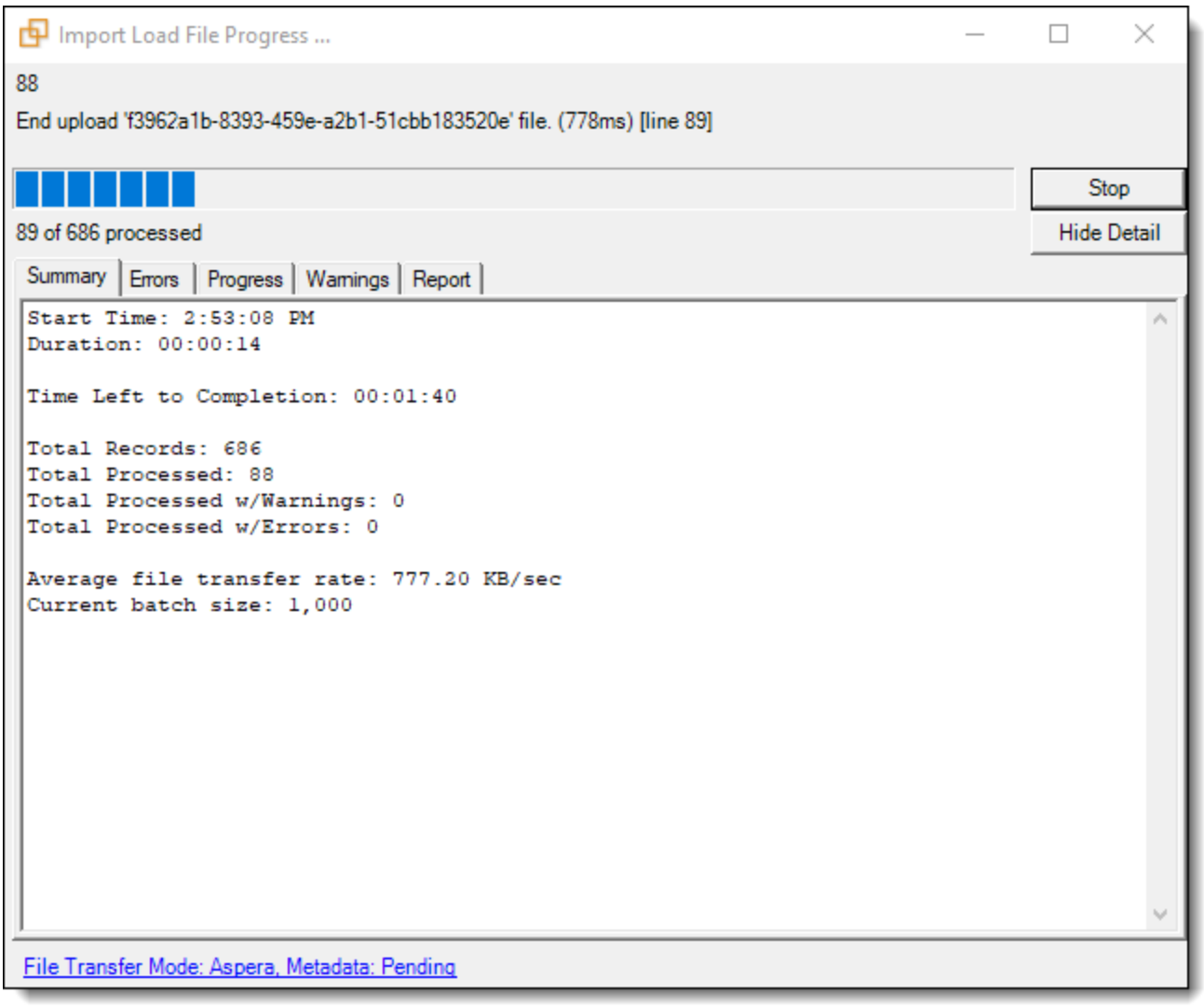
The RDC then automatically selects the optimal available mode for the transfer job.

Note: You can select more than one mode for the transfer job based on your configuration. The fastest mode will be displayed first.



Note: The mode initially selected based on the tests for the workspace may not be used in the actual transfer, for example due to a connection problem. If a problem occurs, RDC falls back to a different mode or displays an error.

The transfer mode also displays on the RDC progress window.



You can also force the RDC to use a specific mode.

1.6.0.1 Transfer Mode Statuses

The following statuses may display during the transfer:

- **Pending** - displays when transfer mode is not yet determined.
- **Disabled** - displays when File Repository Preference is set to not copy files.

1.6.1 Direct mode

Direct mode provides faster performance, but it requires a connection to the network hosting the data, as well as specific Windows group permissions. Direct mode has direct access to write to the file repository, which bypasses the need to go through the web server in order to ingest the data, saving a significant amount of time.

1.6.1.1 Setup

The following conditions must be met in order to load data using direct mode:

- The Active Directory account running the load must have direct access to the Relativity File Repository and BCPPath folder.
- The loaded data must be located on the Relativity system network/domain.
- The computer running the Relativity Desktop Client must be located on the Relativity system network/domain.

- The group of users responsible for uploading documents through the Win Relativity component (Relativity Upload Users) must have Full Control in the Document Repository Share. This allows members of this group to import and export in Direct mode. Non-members can only import and export in Web mode. the Pre-installation guide.

2 Using the RDC installer

To use the Relativity Desktop Client (RDC), you must download a copy of the RDC installer and then install it.

Note: To ensure a safe and stable product experience, effective with the Server 2024 release, we only support the version of RDC that was shipped with the current release as well as one release back. For example, Server 2024 RDC will work with both Server 2023 and Server 2024 but not with any releases prior to Server 2023.

2.1 Software requirements

The RDC installer checks for the software prerequisites. If you're missing any of the prerequisites, your computer must have Internet access, so the RDC installer can fetch the required software. If your computer doesn't have Internet access, the RDC installer can't fetch the required software, so the installation fails.

Note: You do not need Internet access to install the RDC if your computer has all the prerequisites.

The RDC requires the following software:

- Microsoft .NET 4.6.2 or above
- Redistributables listed in the following table:

Operating System	VC++2010 (x86)	VC++2010 (x64)	VC++2017 (x86)	VC++2017 (x64)
32-bit	✓		✓	
64-bit	✓	✓	✓	✓

Note: If you need to perform an offline installation, you must manually install the software required for the RDC listed in this section.

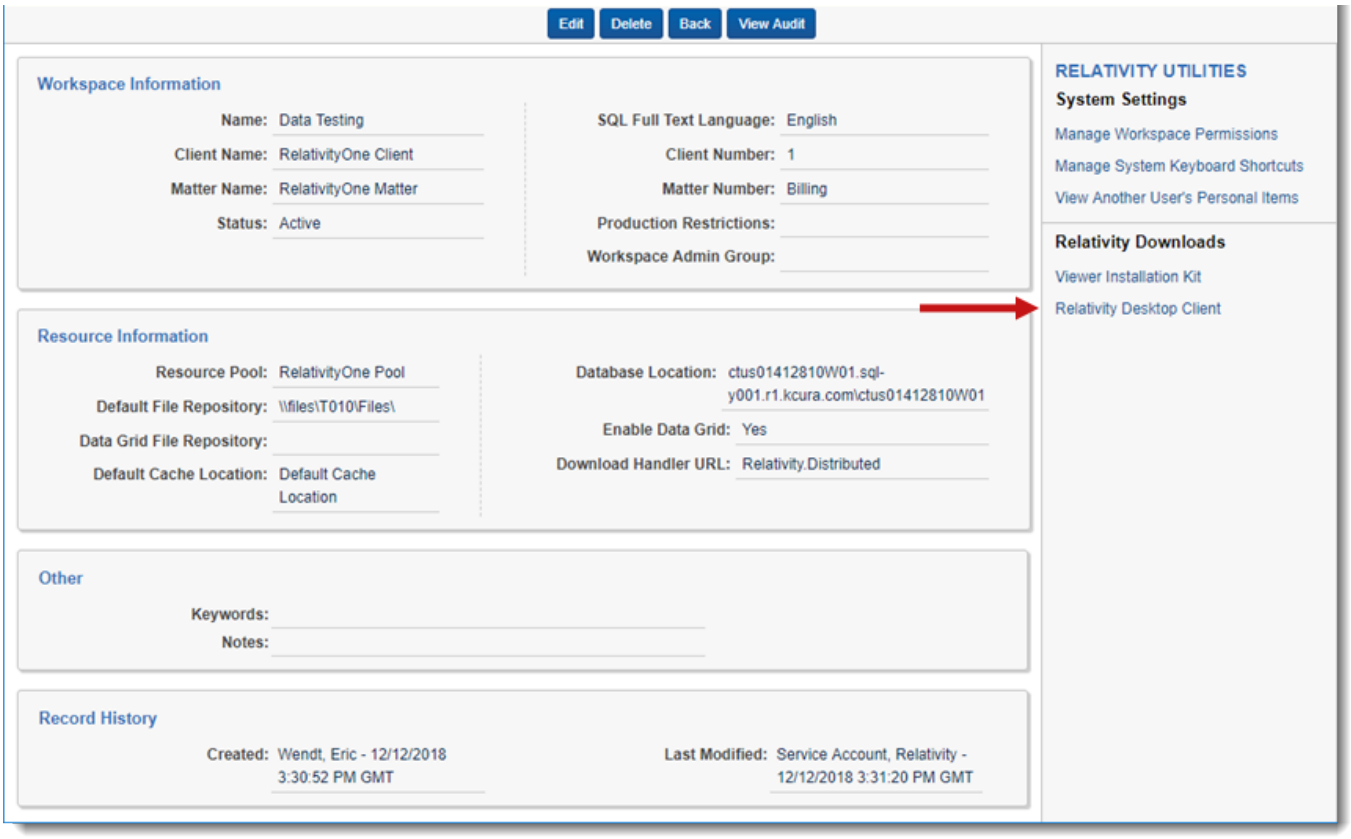
2.2 Downloading the RDC installer

To use RDC, you must first download a single executable file that runs on both 32-bit and 64-bit operating systems.

To download the RDC installer file:

1. Open your workspace in Relativity.
2. Select the **Workspace Admin** tab.

3. Click **Workspace Details** to display the Relativity Utilities Console.



4. Click **Relativity Desktop Client** under the Relativity Downloads selection. Relativity downloads the **Relativity.Desktop.Client.Setup.exe**.
5. Complete the steps for installing the RDC. See Installing the RDC for more information.

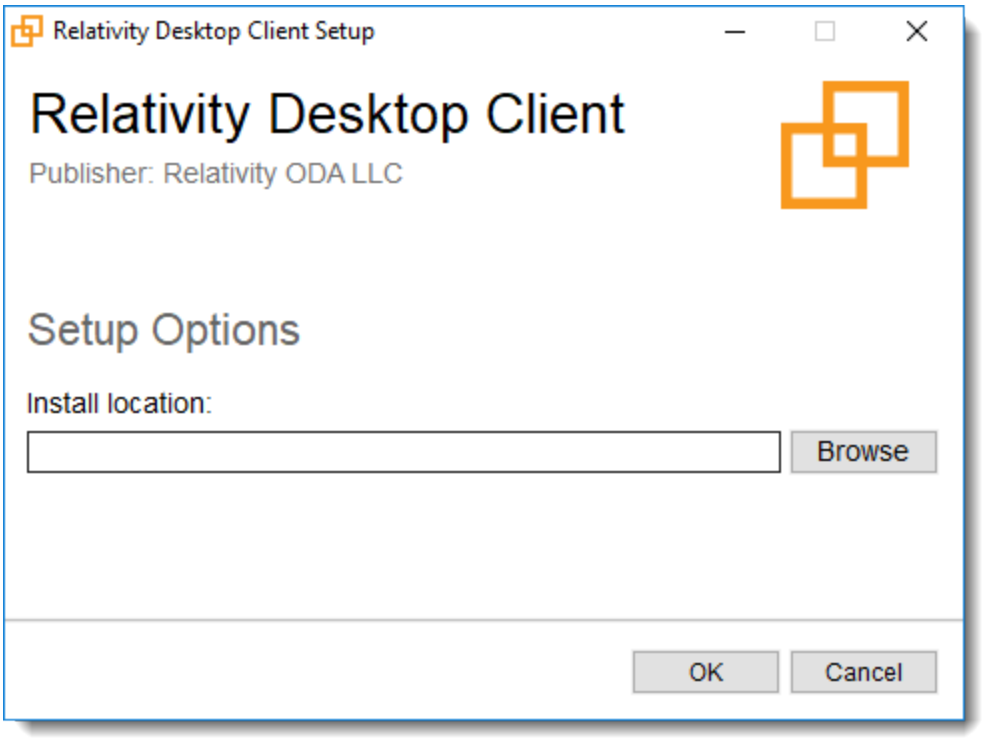
2.3 Installing the RDC

After downloading the installer file, you can proceed with installing it.

To install the RDC:

1. Complete the steps to download the **Relativity.Desktop.Client.Setup.exe** in Downloading the RDC installer.
2. Double-click on **Relativity.Desktop.Client.Setup.exe** to launch the installer.

3. If you want to specify an installation location, complete these steps:
    a. Click **Options**.



    b. Click **Browse** to select a directory where you want the RDC installed. The default installation directories include:
    32-bit—C:\Program Files (x86)\kCura Corporation\Relativity Desktop Client

    64-bit—C:\Program Files\kCura Corporation\Relativity Desktop Client

    c. Click **OK**.

The RDC installer checks for the software prerequisites. If you're missing any of the prerequisites, your computer must have Internet access, so the RDC installer can fetch the required software. If your computer doesn't have Internet access, the RDC installer can't fetch the required software, so the installation fails.

Note: You don't need Internet access to install the RDC if your computer has all the prerequisites.

4. Click **Install** on the RDC setup wizard to start the installation.
5. Click **Close** when the installation has completed.

Note: The executable for the RDC has been renamed to **Relativity.Desktop.Client.exe**. If you use an antivirus scan in your environment, you may want to update your settings to accommodate the renamed RDC executable.

Your desktop now displays a shortcut icon for the RDC, which you can click to launch it.

2.4 Installing the RDC in quiet mode

You can use quiet mode to run unattended RDC installations through the command line. Open a command prompt and enter the following:

```
Relativity.Desktop.Client.exe /q /log InstallLog.txt /INSTALLFOLDER "<RDC_Install-
ation_Directory>"
```

This command takes the following parameters.

Parameter	Description
/INSTALLFOLDER	Specifies a custom installation path. This parameter is optional.
/log	Used to create a log file. Specify a file name and path for the log file. This parameter is optional.
/q	Runs the installation in quiet mode.

2.5 Repairing or removing RDC installation

You can also run the installer to repair, or remove an existing installation of the RDC. Run the installer on a machine where the application is installed. Select one of the following options:

- **Repair**—attempts to fix errors in the most recent installation.
- **Uninstall**—removes the RDC from your machine.

3 Importing through the RDC

You can import document load files, as well as image and production files, through the Relativity Desktop Client (RDC). You need to install the RDC on your computer before you can perform an import.

Note: You must be logged in to a Relativity environment in order to successfully import files.

You may also use the Windows Command Line to import documents into Relativity. With the Windows Command Line you can automate document importing along with other parts of your processing and integration process. See the Command Line Import guide.

3.1 Importing RDC Permissions

The following permissions are required to use the importing feature in Relativity Desktop Client:

Object Security	Tab Visibility	Admin Operations
• Document: View, Add, Edit	• Documents	• Allow Import

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

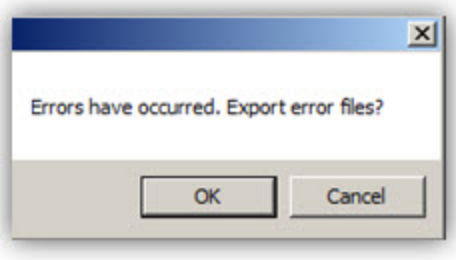
3.2 Importing multiple load files simultaneously

You can safely import multiple load files into the same workspace simultaneously. For best results, use multiple machines and one active instance of the RDC per machine.

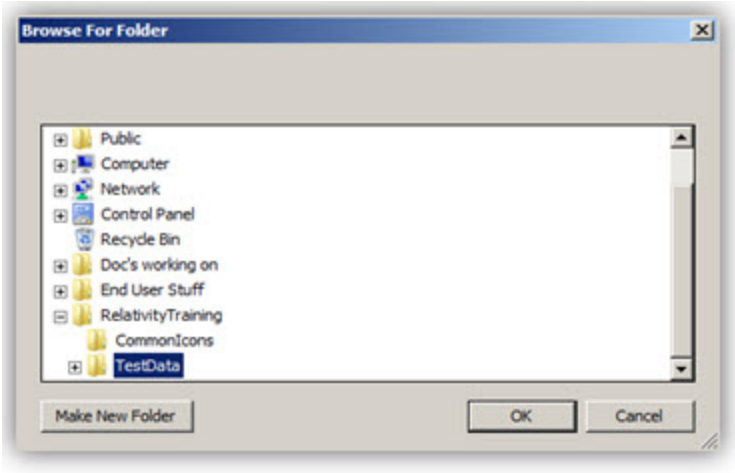
Note: We recommend limiting this to four concurrent imports at a time into one workspace.

3.3 Handling errors

Relativity skips any records with errors that it encounters during the load process. It warns you about any errors that were encountered after all the correct records have loaded.



When you click **OK** in the error warning box, Relativity creates a new document-level load file with only the erroneous records. This file lists all the errors that occurred during the load process. You are prompted to save these records to prevent any loss of data. Choose a path to save your error file and click **OK**.



After you have saved your error file, you can make any necessary corrections to those records, and then perform an **Append Load**. A record of these errors is also available in the Errors tab, referencing the workspace name and Artifact ID.

3.4 Saving import settings

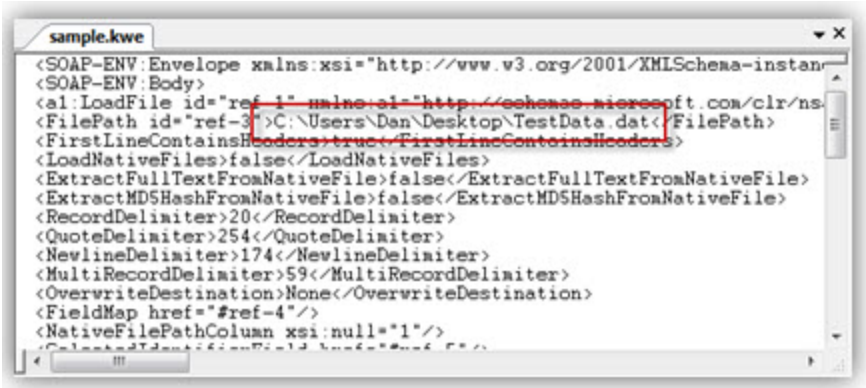
You can save the settings used to import a load file. This option is helpful if you frequently work with your own internal processing tools or with the same processing vendor. To save your import settings, point to the **File** menu, and then click **Save Import Settings**. Choose a location for the document load file (.kwe).

Note: .kwe stands for kCura Win Edds.

The settings for the selected destination path and for copying files to a repository aren't saved in the .kwe file.

When you have an identically formatted load file, you can use your saved .kwe. In the RDC, open the .kwe file, and select the file being loaded.

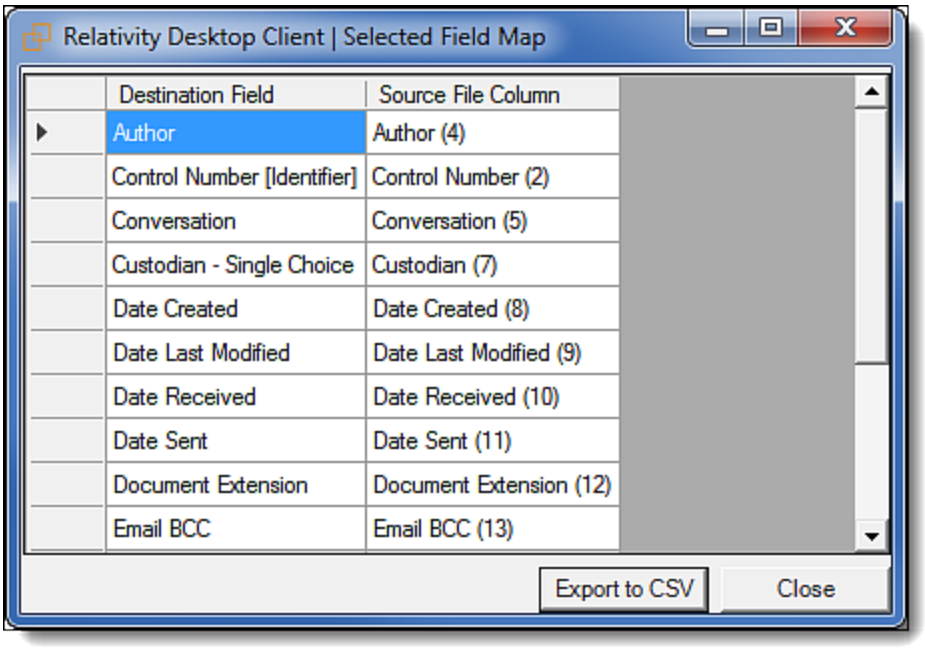
You can also update the path in the .kwe file. The following illustration displays the text of a .kwe file. The fourth line contains an absolute path to the document-level load file to be loaded. Update this section to point to your new load file. After you have updated your .kwe file, select **File** and **Load Import Settings.** Test for any errors, and then load the file.



3.4.1 Saving a field map

You can save the field mapping used to import a load file. The field map is exported as a CSV file that saves the mapping of the Relativity fields to those in the dat file being imported. You can save or view your field map from the Field Map tab or from the File menu in the Import Document Load File window. To save your field map:

1. From the Import Document Load File window, click **View/Save Field Map**. The Selected Field Map window opens.
2. Click **Export to CSV**.



Note: When importing a CSV file with currencies, the formatted column must be Number.

3.5 Viewing audit information for an import

After you import your file, the RDC records and audits this instance in the History tab. Click **Import** to display the settings used for the import. To view the transfer rate of the load file, add the **Execution Time** field to the view, if necessary.

3.6 Load file specifications

Using load files, Relativity can load the following types of files. The sections below detail the load file requirements for the respective file types.

- Metadata, extracted text, and native files
- Image and extracted text files
- Processed data

3.6.1 Supported file types

Relativity accepts only the following load file types:

- .dat
- .csv
- .txt

3.6.2 Metadata, extracted text, and native files

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

3.6.2.1 Encoding

The Relativity Desktop Client (RDC) attempts to determine the encoding of a file, by default, when a load file is first selected. To do this, the RDC checks the byte order mark at the beginning of the file. If there is no byte order mark, it cannot determine the encoding type. The types of byte order marks include:

- Unicode (UTF16)
- Big-Endian Unicode
- UTF8

Everything else is considered undetectable by the RDC and uses the default encoding chosen for the load file or stand-alone extracted text file.

A variety of load file encoding options are supported, including:

- Western European (Windows)
- Unicode
- Unicode (Big-Endian)
- Unicode (UTF-7)
- Unicode (UTF-8)
- Other options, based on your SQL sever

3.6.2.2 Header row

Relativity doesn't require load file header rows. However, they are strongly recommended to ensure accuracy.

The field names in your header don't need to match the field names in your workspace.

3.6.2.3 Fields

Relativity doesn't require any specific load file field order. You can create any number of workspace fields to store metadata or coding. During the load process, you can match your load file fields to the fields in your workspace.

The identifier field is required for each load.

When loading new records, this is your workspace identifier.

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

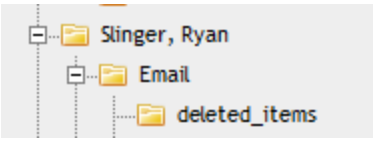
All fields except Identifier are optional; however, you may find some of the following system fields beneficial.

1. **Identifier**—the unique identifier of the record
2. **Group Identifier**—the identifier of a document's family group
    - The group identifier repeats for all records in the group.
    - Usually, this is the document identifier of the group's parent document. For example:
        - If an email with the document identifier of AS00001 has several attachments, the email and its attachments have a group identifier of AS00001.

- If a group identifier for a record is not set, the document identifier populates the group identifier field in the case. This effectively creates a “group” of one document.

3. **MD5 Hash**—the duplicate hash value of the record
    - You can enter any type of hash value (and rename the field in your case).
    - If documents share the same hash value, Relativity identifies the documents as a duplicate group.
    - If a hash field for a record is not set, the document identifier populates the hash field in the case. This effectively creates a “group” of one document.
4. **Extracted Text**—The text of the document. Either the OCR or Full Text.
    - The extracted text appears in the viewer and is added to search indexes. This field can contain either:
        - The actual OCR or Full Text
        - The path to a document level text file containing the OCR or Full Text. The path to a document level text file containing the OCR or Full Text. Both relative and absolute paths are supported (use Windows-style formatting containing backslashes "\").
5. **Native File Path**—the path to any native files you’d like to load.
    - Both relative and absolute paths are supported.
6. **Folder Info**—builds the folder browser structure for the documents.
    - This field is backslash “\” delimited.
    - If not set, the documents load to the root of the case.
    - Each entry between backslashes is a folder in the Relativity folder browser.
    - Each backslash indicates a new subfolder in the browser.

    Note: For example, if the load file contained the following entry in the folder info field: “Slinger, Ryan\Email\deleted_items”
    Relativity would build the following folder structure:

    Each document with the above entry would be stored in the “deleted_items” folder.
7. **Relativity Native Time Zone Offset**—Relativity’s native viewer technology displays all email header dates and times in GMT. This numeric field offsets how email header dates and times appear in the viewer.
    - If the value in this field is blank, or 0, for a document, then the email header date and time appears in GMT.
    - You can enter a whole number in this field – positive or negative – to offset the time from GMT to the local time zone of the document.
        - For example, if the document was collected from US CDT time, enter “-5” in the field, because the CDT offset from GMT is -5.
    - This ONLY applies when viewing email header dates and times in the Relativity Native File Viewer. Your metadata fields display as imported.

3.6.2.4 Accepted date formats

Relativity 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 can't have a zero value. Format dates in a standard date format such as “6/30/2017 1:23 PM” or “6/30/2017 13:23”.

Note: When you import data using a load file with a date format that differs from the format used on your local machine, Relativity follows the locale setting of your local machine to determine how it interprets what is in the load file.

The table below lists the date formats recognized by the Relativity Desktop Client and the Import API. It contains both valid and invalid date formats:

Entry in Load File	Object Type	Definition
12/31/9999	12/31/9999 0:00	
Monday January 4 2018	1/4/2018 0:00	
05/28/2016 7:11 AM	05/28/2016 7:11 AM	
5.08:40 PM	6/30/2019 17:08	The current date will be entered if the date is missing. For this example, assume the import was done on 6/30/2019.
17:08:33	6/30/2019 17:08	The current date will be entered if the date is missing. For this example, assume the import was done on 6/30/2019.
17:08	6/30/2019 17:08	The current date will be entered if the date is missing. For this example, assume the import was done on 6/30/2019.
5:08 PM	6/30/2019 17:08	The current date will be entered if the date is missing. For this example, assume the import was done on 6/30/2019.
14-Apr	4/14/2019 0:00	The current year will be entered if the year is missing.
9-Apr	4/9/2019 0:00	The current year will be entered if the year is missing.
14-Mar	3/14/2019 0:00	The current year will be entered if the year is missing.
1-Mar	3/1/2019 0:00	The current year will be entered if the year is missing.
22-Feb	2/22/2019 0:00	The current year will be entered if the year is missing.
20180420	4/20/2018 0:00	
20180420 2:22:00 AM	4/20/2018 0:00	
4/9/2018 16:13	4/9/2018 16:13	
4/9/2018 8:49	4/9/2018 8:49	
9-Apr-18	4/9/2018	

Entry in Load File	Object Type	Definition
	0:00	
Apr. 9, 18	4/9/2018 0:00	
4.9.2018	4/9/2018 0:00	
4.9.18	4/9/2018 0:00	
4/9/2018	4/9/2018 0:00	
4;9;2018	4/9/2018 0:00	
Wednesday, 09 April 2018	4/9/2018 0:00	
12-31-1753	12/31/1753 12:00 AM	
2014-11-28T17:45:39.744-08:00	11/28/2014 0:00	
4/9/18 13:30 PM		Results in an error
2018-044-09		Results in an error
4/9/2018 10:22:00 a.m.		Results in an error
00/00/0000		Results in an error unless the CreateErrorForInvalidDate value is set to false in the Relativity.Desktop.Client.exe.config file.

In addition, Relativity takes into account the regional settings of the SQL Server where the database resides. For example, you may have an SQL Server residing in the UK that uses the date format DD/MM/YYYY, such as 4/9/2011. When you access a workspace on a PC with UK regional settings, the date appears as 4/9/2011. When you access the same workspace on a PC with US regional settings, the date appears as 9/4/2011.

3.6.2.5 Delimiters

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

The delimiter characters have the following functions:

- **Column**—separates load file columns
- **Quote**—marks the beginning and end of each load file field (also known as a text qualifier)
- **Newline**—marks the end of a line in any extracted or long text field
- **Multi-value**—separates distinct values in a column. This delimiter is only used when importing into a Relativity multi-choice field.
- **Nested-values**—denotes the hierarchy of a choice. This delimiter is only used when importing into a Relativity multi-choice field.

Note: For example, say a load file contained the following entry, and was being imported into a multi-choice field: “Hot\Really Hot\Super Hot; Look at Later”
With the multi-value delimiter set as “;” and the nested value delimiter set as “\””, the choices would appear in Relativity as:

3.6.2.6 Default delimiters

If you generate your own load files, you may choose to use Relativity’s 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)

3.6.3 Image and extracted text files

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

Relativity does not support Unicode .opt files for image imports. When you have a Unicode .opt file, you must resave this file in ANSI/Western European encoding.

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

3.6.3.1 Image file formats

Relativity accepts only the following file types for image loads:

- Single page, Group IV TIFs (1 bit, B&W)
- Single page JPGs

Multi page TIFs and PDFs can be imported into the system, but you must load them as native files.

3.6.3.2 Load file format

The Opticon load file is a page level load file, with each line representing one image.

Below is a sample:

REL00001,REL01,D:\IMAGES\001\REL00001.TIF,Y,,,3
REL00002,REL01,D:\IMAGES\001\REL00002.TIF,,,,
REL00003,REL01,D:\IMAGES\001\REL00003.TIF,,,,

REL00004,REL01,D:\IMAGES\001\REL00004.TIF,Y,,,2
REL00005,REL01,D:\IMAGES\001\REL00005.TIF,,,,

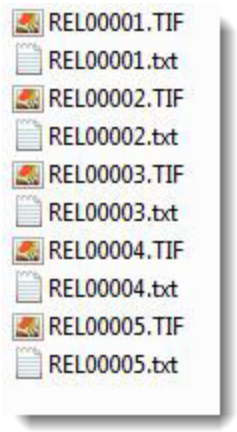
The fields are, from left to right:

- Field One – (REL00001) – the page identifier
- Field Two – (REL01) – the volume identifier is not required.
- Field Three – (D:\IMAGES\001\REL00001.TIF) – a path to the image to be loaded
- Field Four – (Y) – Document marker – a “Y” indicates the start of a unique document.
- Field Five – (blank) – can be used to indicate folder
- Field Six – (blank) – can be used to indicate box
- Field Seven – (3) – often used to store page count, but unused in Relativity

3.6.3.3 Importing extracted text during an image load

You can also import extracted text during the image import process by setting an option in the Relativity Desktop Client. For more information about importing extracted text during an image load, see Importing an image file in the Relativity Desktop Client Guide.

No changes are needed in the Opticon load file. If the aforementioned setting is active, Relativity looks for page level txt files named identical to their corresponding TIFs. For example:

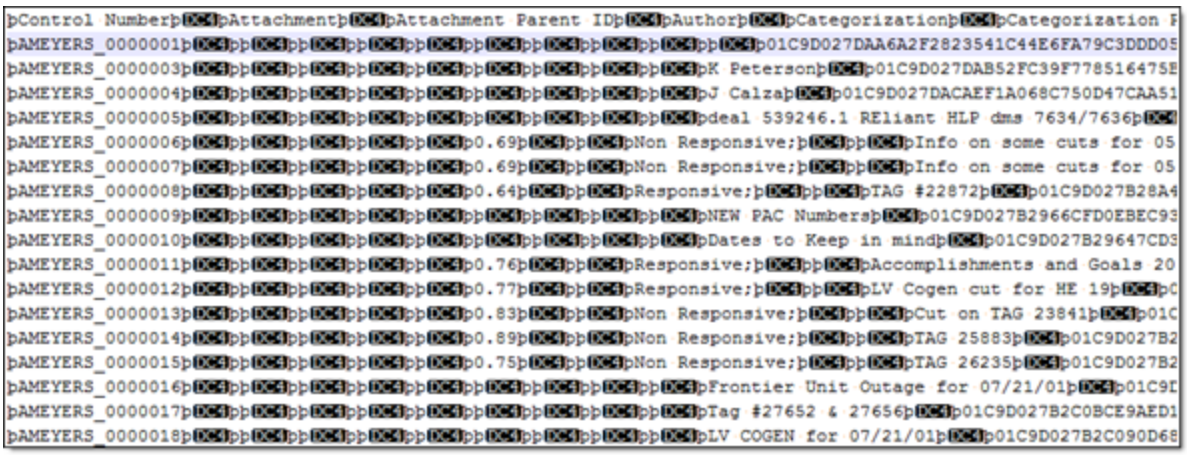


3.6.4 Processed data

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	þ	254
Newline	®	174
Multi-Value	;	059
Nested Value	\	092

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



3.7 Importing document metadata, files, and extracted text

You can use a document-level load file to import document metadata, native files, and extracted text. For large data sets, consider breaking the load file into smaller document counts. Use multiple computers and instances to load the individual load files. It may be helpful to break up the types of information into distinct subgroups; such as load metadata, natives, text, and images. Loading data in smaller amounts can assist with quality assurance. We recommend having no more than four concurrent RDC imports running on the same server or in the same workspace.

In addition, you may see warning or errors during an import under the following conditions:

- **Native file with 0 KB** - The RDC imports native files with the size of 0 KB. In the RDC, the Warnings tab displays a message indicating that the file is empty and only metadata has been loaded for the record. In the viewer, users see extracted text when it exists for the file. If the file has no extracted text, users see a blank placeholder, and no image or viewer options are available. See Configuring the RDC on page 87.
- **Long file path names** - If the load file contains a field used to set the folder path on the folders browser, and the field is longer than 255 characters for a document, the RDC displays an error message for that document on the Errors tab. The RDC doesn't import the document into Relativity. The RDC continues to import any other documents in the load file with fields shorter than 255 characters.

3.7.1 Importing RDC Permissions

The following permissions are required to use the importing feature in Relativity Desktop Client:

Object Security	Tab Visibility	Admin Operations
• Document: View, Add, Edit	• Documents	• Allow Import

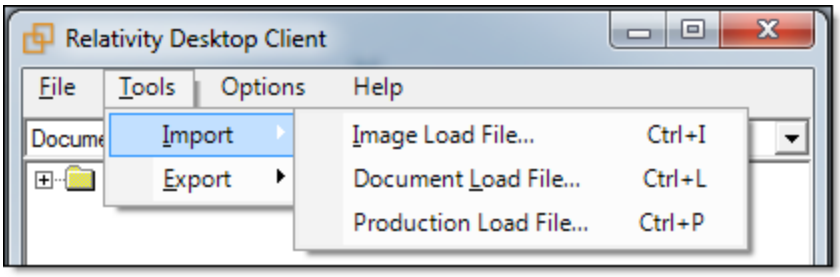
Note: You must also be part of a group that has access to the parent folder of the workspace or you will receive an error when selecting that workspace in the RDC.

3.7.2 Importing documents

Use the following steps to import documents:

1. Open the RDC and select a workspace.
2. On the **Tools** menu, point to **Import** and then click **Document Load File**. (In the RDC browser, you can right-click on a specific folder, point to **Import** and click **Load File**.) The Load File tab in the Import Document Load

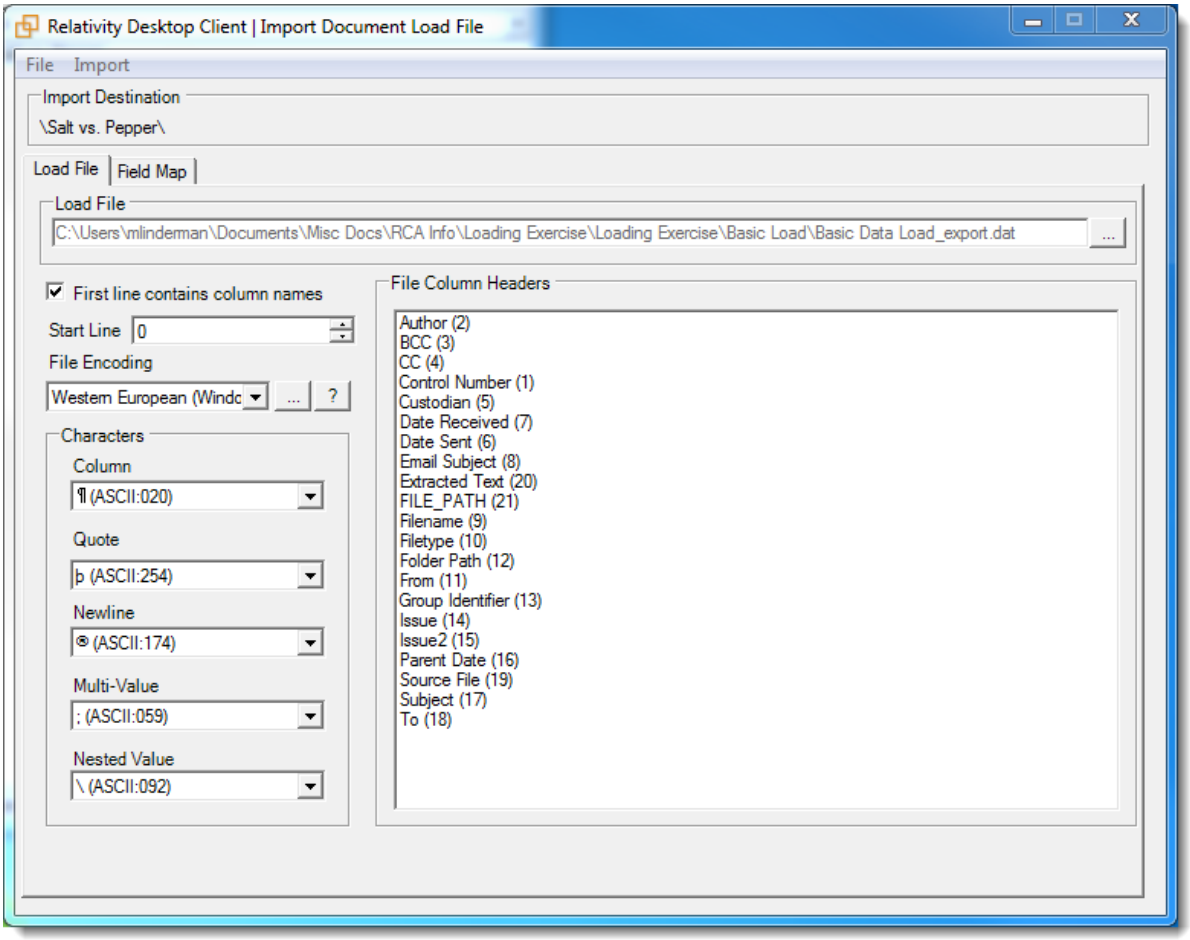
File window appears.



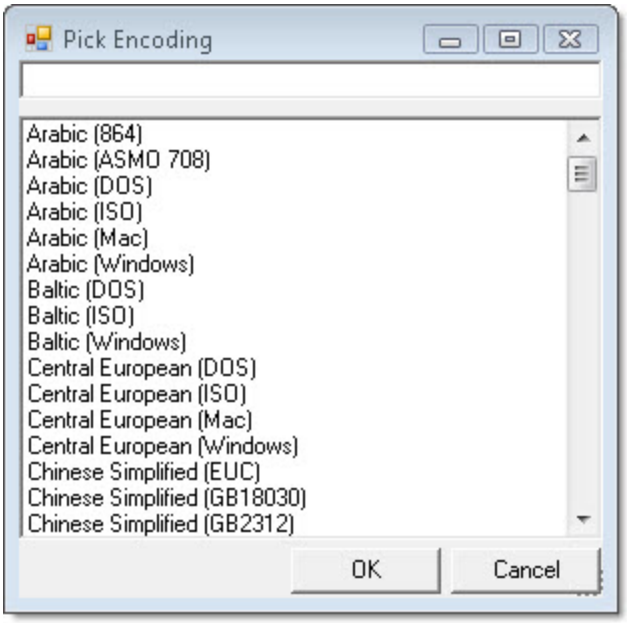
3. (Optional) To use settings in from an existing import file, use these steps:
   a. On the Import Document Load File dialog, click the **File** menu, and select **Load Import Settings**.
   b. Browse for your load field map file (.kwe) in the **Open Saved Field Map** dialog, and then click **Open**.
   c. Click **OK** on the kCura.EDDS.WinForm dialog. Click **Open** on **Choose Load File** dialog. Settings from the file are used to populate fields in the Load File and Field Map tabs. (You can also modify any settings on these tabs as necessary.)
   d. Continue with step 7.

4. Click to browse for a document load file on the Load File tab. Set the other options as necessary.
On the Load File tab, set the following options to indicate how your load file is configured:

   - **First line contains column names** — select this option if your load file has a header.

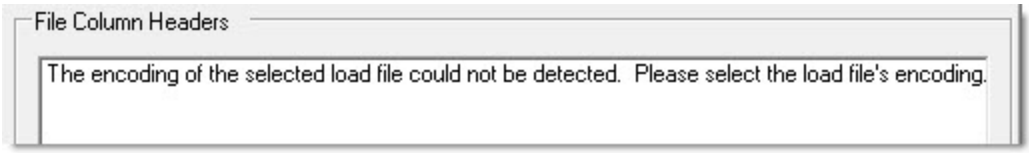


- **Start Line** - select the line number in the load file where you want the import process to begin. The default value is 0, which results in loading the entire file.
- **File Encoding** - select an encoding for the document load file. (Consult your processing vendor or department to determine the correct encoding option, if necessary.) If your file contains a language other than English, choose a Unicode option. Click ... for additional options or click ? for additional information about encoding.

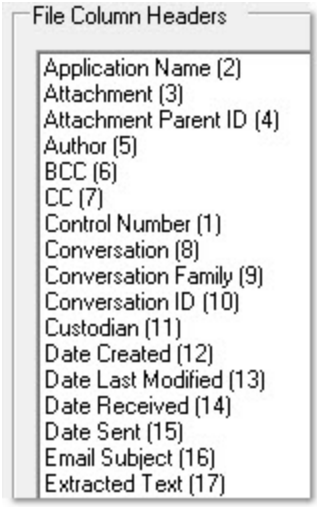


Review the following information about how the encoding of load files is handled:

  - Relativity uses auto-detection to determine the encoding of your text files. If it finds a different file type in your text files, it changes to the appropriate method.
  - Relativity immediately applies any changes that you make to the encoding of a load file, and displays these changes in the column header preview.
  - Relativity provides you with the ability to audit the encoding of a load file.
  - Relativity includes the functionality for previewing the import file as well as the encoding of the extracted text files.
- **File Column Headers** - Relativity automatically updates this section of the Load File tab when you select the file encoding. This section may display the following message before you select an encoding for the load file.



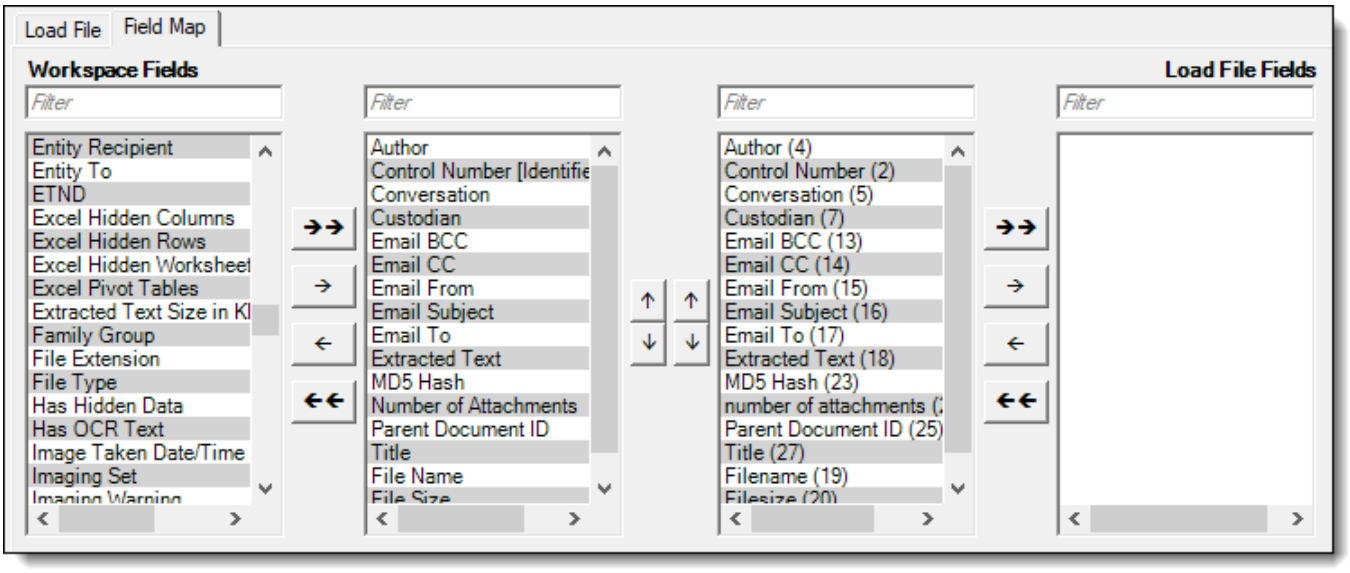
After you select the encoding, this section displays the fields in the load file. The column headers in the file display as vertical list. The fields display in alphanumeric order. The numeric value in parentheses indicates the position of the field within the file. For example, the control number is the first column in this illustration, while the Application Name is second.



Since the load file is parsed based on the delimiter set, you may need to check delimiters used in the load file if the column headers are not lined up correctly. Determine the delimiters used in the file, and then select them in the Character section of this tab.

- **Characters** - select the delimiters used by your load file:
  - **Column delimiter** - select the character used to separate columns.
  - **Quote** - select the character used as the text qualifier.
  - **Newline** - select the character used to indicate the end of a line in any extracted text or long text field.
  - **Multi-value delimiter** - select the character used to separate choices within a field.
  - **Nested value** - select the character used to separate the different levels of a multi-choice hierarchy.
    For example, you might import a field with following values: “Hot\Really Hot\Super Hot; Look at Later”. Using a semi-colon (;) as a multi-value delimiter, and a backslash (\) as a nested value delimiter, Relativity displays the choices as illustrated below:

5. Click the **Field Map** tab. To automatically map fields, click **Auto Map Fields** below the lists of fields. The fields from the load file are mapped to any existing fields of the same name in the workspace.



Only fields matched in the center columns are loaded into the workspace. Other fields in the Workspace Fields and Load File Fields lists are ignored. You must always match the identifier field for the load file.

Consider the following when auto-mapping fields:

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

Note: You can also manually map fields in the load file to existing fields in the workspace. To manually map fields, highlight a field from the Workspace Fields list and click the right arrow to move the field into the center column. Then, highlight the corresponding field in the Load File Fields list and click the left arrow to move the field into the center column. You can move all fields in a list into a new column by clicking the double arrow buttons. Use the up and down arrow buttons to reorder the fields.

Review these additional guidelines when you map fields for a workspace and load file:

- Before importing relational fields, review the Import Behavior option on the New or Edit Field form. You can use this option to determine how blank values are handled in relational fields.
- If you are importing a field that contains more than 200 choices, you will see these choices automatically displayed in a Popup Picker. You will see an error if duplicate choices exist for the field.

Overwrite and Overlay identifiers:

In the Overwrite section, select one of these options to indicate the type of load:

- **Append Only** - loads only new records.
- **Overlay Only** - updates existing records only. You must include an **Overlay Identifier** in an overlay load. This field acts as a link indicating to Relativity where to import the data.
- **Append/Overlay** - adds new records and overlays data on existing records

If you are performing an overlay or append/overlay, select an **Overlay Identifier** to specify the field that links your overlay load file to the workspace.

Note: The fields in the drop-down menu are fixed-length fields with a manually-applied SQL index. This is NOT the same as adding the field to the full-text index. Contact your SQL database administrator to apply an index to a field.

Multi-Select Field Overlay Behavior:

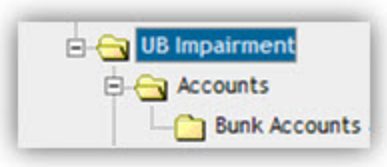
The following fields are only available if you select the Append / Overlay or Overlay only Overwrite option:

- **Merge Values** - merges all values for multi-choice and multi-object fields in the load file with corresponding multi-choice and multi-option fields in the workspace. The fields are merged regardless of the overlay behavior settings in the environment.
- **Replace Values** - replaces all values for multi-choice and multi-object fields in the load file with corresponding multi-choice and multi-option fields in the workspace. The fields are merged regardless of the overlay behavior settings in the environment.
- **Use Field Settings** - merges or replaces all values for multi-choice and multi-object fields in the load file with corresponding multi-choice and multi-option fields in the workspace. The fields are merged according to the overlay behavior settings in the environment.

Folder Info:

In the **Folder Info** section, select **Folder Information Column** if you want to use a metadata field to build the folder structure for the workspace. In the drop-down box, choose the field that you want Relativity to use for building the folder structure. This field is commonly a source or folder path field. All folders are built under the Import Destination folder.

When building the folder structure, Relativity looks for backslashes to indicate a new sub-folder. The following folder structure would result from a field containing field with the value UB Impairment\Accounts\Bunk Accounts:



Before importing, you can use the **Preview Choices and Folders** option to check the number of choices and folders created by importing the records to the workspace.

Note: The number of folders reported during preview is inaccurate if the folder name contains a backslash. Avoid using backslashes in folder names.

Note: Do not select **Folder Information Column** if you do not want to build a folder structure based on metadata. When this option is not selected, Relativity loads all documents directly into the folder indicated by the import destination.

Parent Info:

The **Parent Info** section will display instead of the **Folder info** section if you are importing an object or objects that are children of other objects such as Search Terms Results. If desired, you can check **Parent Information Column** and select an object from the drop-down list to determine which parent object you would like to map it to. Alternatively, you can leave this option unchecked if you do not wish to map the object with a parent object.

Note: The **Parent Information Column** can only be unchecked if **Overlay only** is selected in the **Overwrite** section.

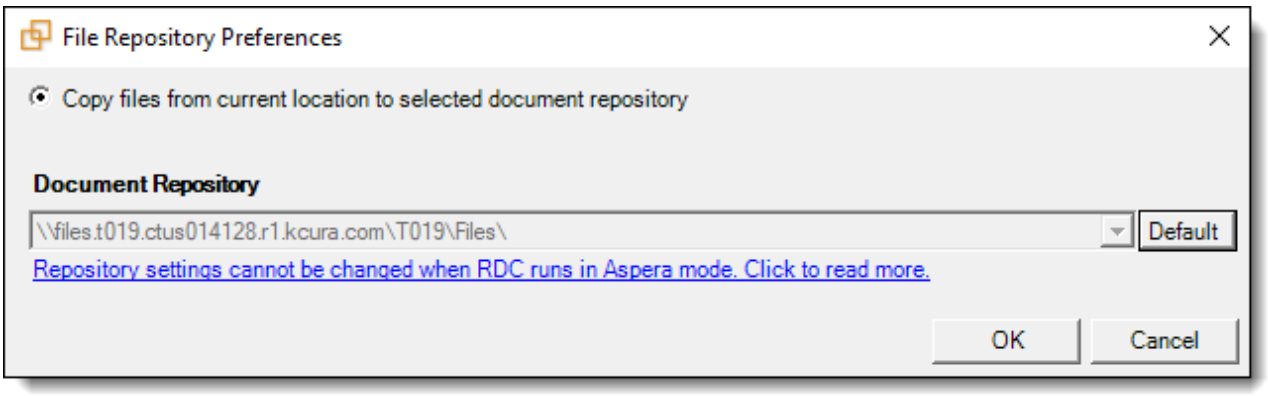
Native File Behavior:

In the Native File Behavior section, select **Load Native Files** if you want to load native files along with database records. (Do not select this option if you do not have any native files to load.)

In the **Native file paths contained in column** drop-down box, select a field from your load file that contains a relative or absolute path to the native files. If the native files reside in a Relativity-accessible location, click **Repository**, and select one of these options:

- **Copy files from current location to selected document repository** - select this option to copy files from the location in the selected load file field to the selected document repository.

  Note: You can use the **Default** option to configure an environment level. See the CopyFilesToRepository instance setting.



- **Do not copy files to a Relativity document repository** - select this option if the native files have already been copied to their final location, which is accessible by Relativity.

  Note: Selecting this option causes the transfer mode to display as disabled.

Extracted Text:

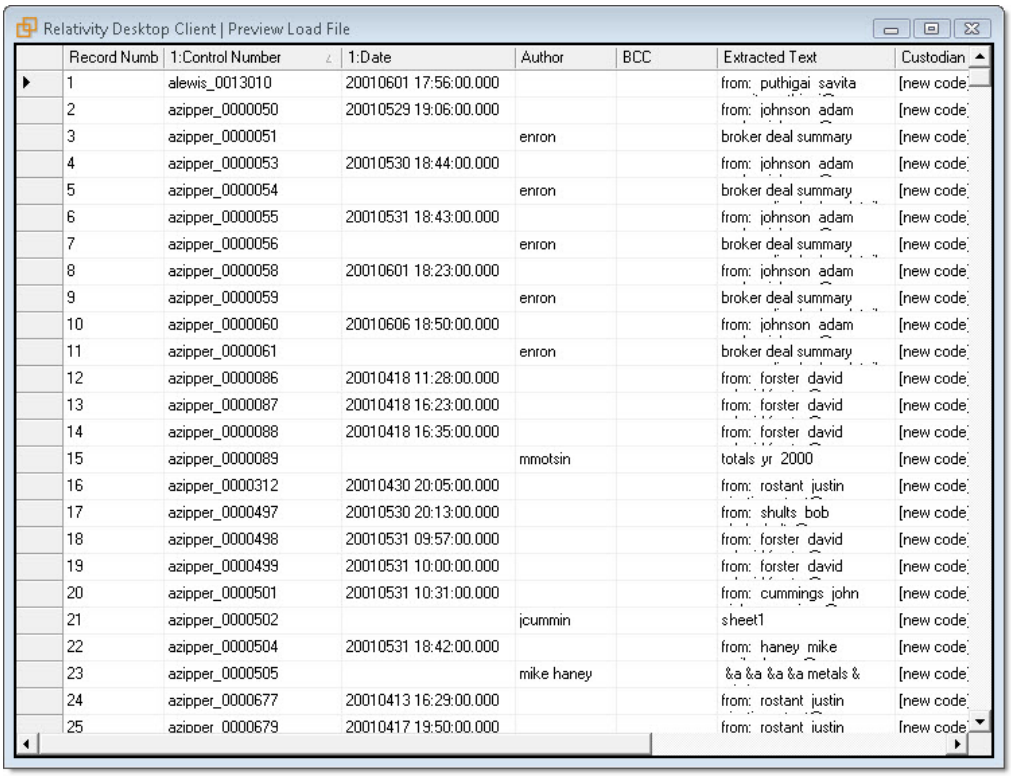
In the Extracted Text section, set the following options to control how the Full Text or OCR is loaded into the database. You can import full text or OCR into any long-text field that has been mapped. These options are only available for selection if you've already mapped a long-text field:

- **Cell contains file location**- select this option if your extracted text is in document-level text files, and your load file contains a path to those text files. You don't need to select this option if a field in your load file contains extracted text.
- **Encoding for undetectable files**- select an encoding for the text file. Click ... for additional language options or click ? for additional information about encoding.
  - **Western European (Windows)**- indicates the Windows standard encoding for English.
  - **Unicode** - utilizes more than 107,000 characters covering 90 scripts.
  - **Unicode (Big-Endian)**- is the same as Unicode, except that the byte order is reversed.

- **Unicode (UTF-7)**- represents Unicode text using a stream of ASCII characters to guarantee that the high bit will always be zero.
- **Unicode (UTF-8)**- represents all characters in the Unicode character set using 8-bit bytes.

Note: A warning message appears if you are missing information required to run the import. Update the settings for the required options, and click **Import File** again.

6. (Optional) To preview information about the content you are importing to the workspace, select **Import**, and click one of these options:
   - **Preview File** - displays the first 1000 documents in the load file. Only mapped fields appear. Make sure that matched fields that appear in the preview are correct.



Record Numb	1:Control Number	1:Date	Author	BCC	Extracted Text	Custodian
1	alewis_0013010	20010601 17:56:00.000			from: puthigai savita	[new code
2	azipper_0000050	20010529 19:06:00.000			from: johnson adam	[new code
3	azipper_0000051		enron		broker deal summary	[new code
4	azipper_0000053	20010530 18:44:00.000			from: johnson adam	[new code
5	azipper_0000054		enron		broker deal summary	[new code
6	azipper_0000055	20010531 18:43:00.000			from: johnson adam	[new code
7	azipper_0000056		enron		broker deal summary	[new code
8	azipper_0000058	20010601 18:23:00.000			from: johnson adam	[new code
9	azipper_0000059		enron		broker deal summary	[new code
10	azipper_0000060	20010606 18:50:00.000			from: johnson adam	[new code
11	azipper_0000061		enron		broker deal summary	[new code
12	azipper_0000086	20010418 11:28:00.000			from: forster david	[new code
13	azipper_0000087	20010418 16:23:00.000			from: forster david	[new code
14	azipper_0000088	20010418 16:35:00.000			from: forster david	[new code
15	azipper_0000089		mmotsin		totals yr 2000	[new code
16	azipper_0000312	20010430 20:05:00.000			from: rostant justin	[new code
17	azipper_0000497	20010530 20:13:00.000			from: shults bob	[new code
18	azipper_0000498	20010531 09:57:00.000			from: forster david	[new code
19	azipper_0000499	20010531 10:00:00.000			from: forster david	[new code
20	azipper_0000501	20010531 10:31:00.000			from: cummings john	[new code
21	azipper_0000502		jcummin		sheet1	[new code
22	azipper_0000504	20010531 18:42:00.000			from: haney mike	[new code
23	azipper_0000505		mike haney		&a &a &a &a metals &	[new code
24	azipper_0000677	20010413 16:29:00.000			from: rostant justin	[new code
25	azipper_0000679	20010417 19:50:00.000			from: rostant justin	[new code

   - **Preview Errors** - checks all documents for potential loading errors, but displays only the first 1000 errors. If your file does not contain errors, a **no errors** message appears.

Note: You can use the error report to correct any errors, and then you can re-add the file to the RDC. Relativity only loads valid records. Records with errors are skipped. You can export the records for correction and reload. See Handling errors on page 16.

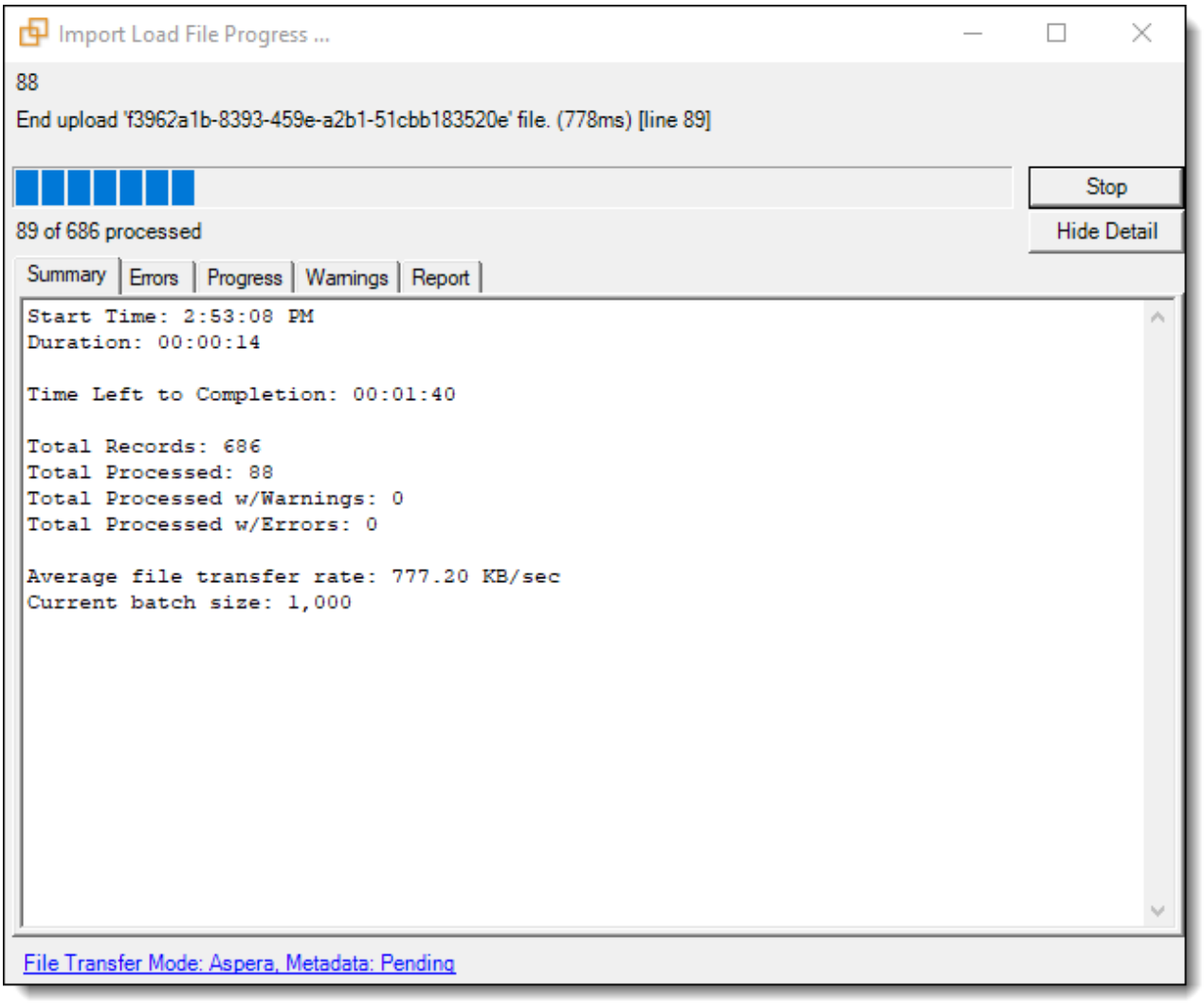
   - **Preview Choices and Folders** - displays the number of choices created in the browser and the number of choices created by importing the records.

7. On the Import menu, click **Import File**.

Note: If **Force folder preview** is selected, a confirmation message appears, which contains information about the number of folders that will be created. Click **OK** to continue with the import.

8. Review the progress of the import.
   You can view the progress of an import through the RDC. Select the following tabs to display specific information:

- **Summary** - displays general information about the number of records, processing warnings, and errors. The following screen shot displays file progress for an import job.



- **Errors** - lists any errors encountered during the load. The Errors tab displays any errors that occur when you import content with the RDC.

  Note: When you run an import job, the RDC only imports records with no errors into the workspace.

- **Progress** - displays a detailed view of the load progress.
- **Warnings** - displays information about loading or connection issues.
- **Report** - includes the following files that you can export:
  - **Export Error Report** - exports a .csv file with a summary of errors.
  - **Export Error File** - exports a .dat file, which is a document-level load file containing only records with errors.
- **File Transfer Mode** - displays the following information:
  - **Web mode** - this mode uses the web server and it is the standard.
  - **Direct mode** - this mode provides faster performance, but requires a connection to the network hosting the data, as well as specific Windows group permissions. For more information, see Direct mode on page 10.

9. (Optional) To save your import settings, point to the **File** menu, and then click **Save Import Settings**. Choose a location for the document load file (.kwe). See Saving import settings on page 17.

3.7.3 Importing Yes/No fields on documents

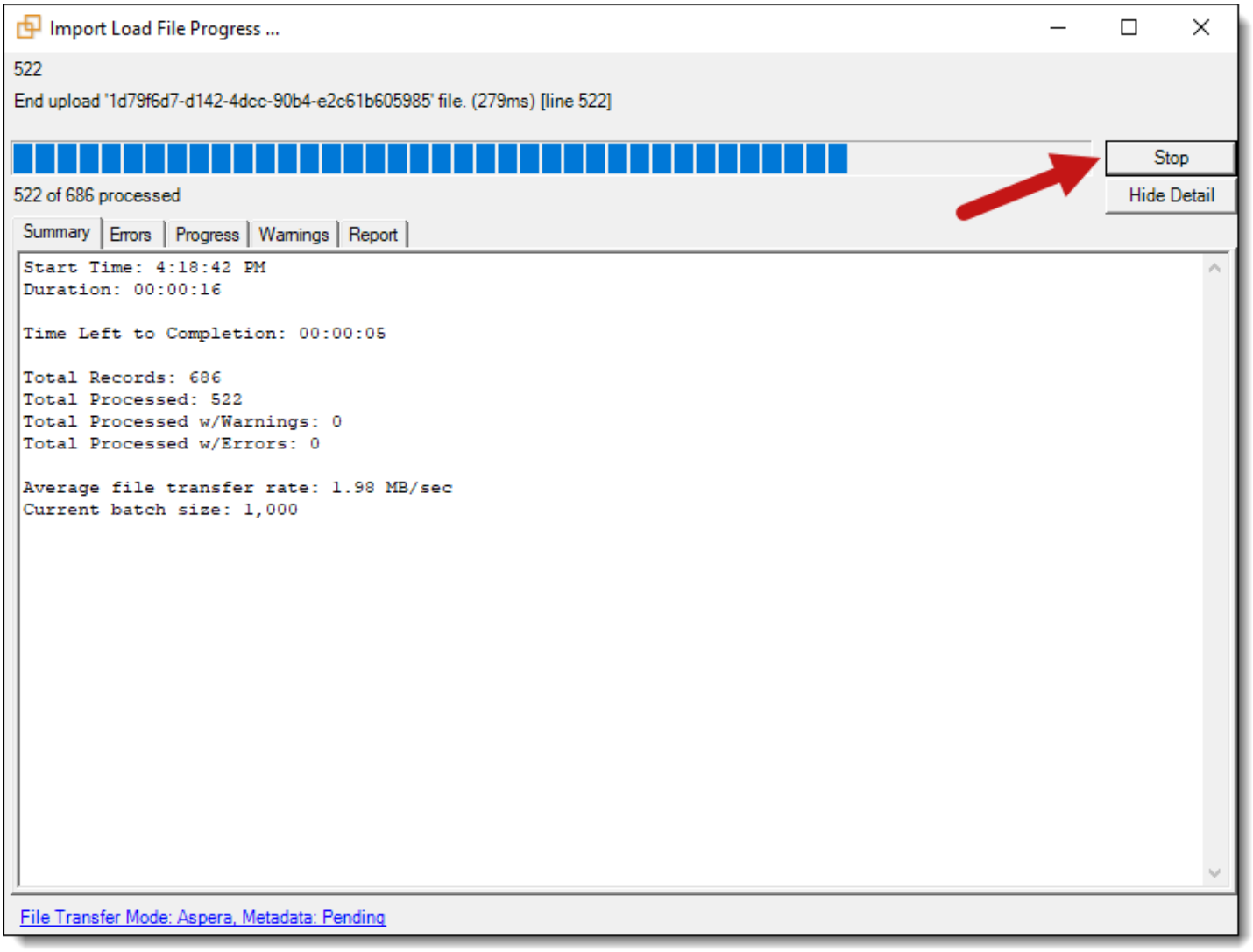
To ensure that you get the correct results when importing into Yes/No fields, use these guidelines:

- **No values** – Import Yes/No fields containing any values except those specified for Yes values.
- **Yes values** – Import Yes/No fields containing only "Yes", "Y", "True", "T", and any non-zero integer. (For example, if you import an "X", the RDC assigns a value of "No" to the documents.)
- **Null values** – Leave the Yes/No field empty.

Note: You can change the display values on a Yes/No field, but your modification doesn't affect how the RDC handles these values during a document import.

3.7.4 Stopping an import or export job

To stop an import or export job in the RDC, click **Stop** on the import load file progress window.



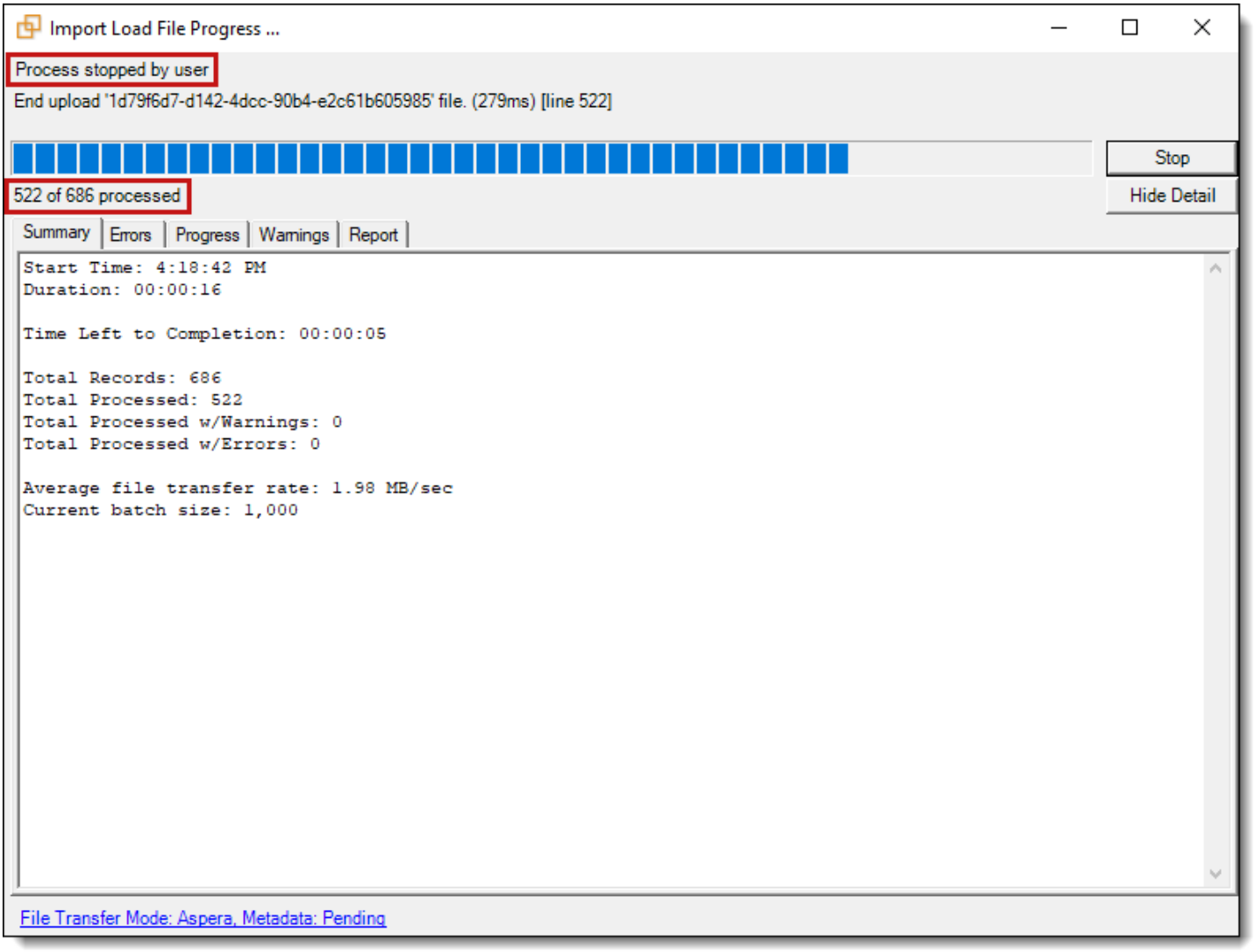
Once you click Stop, note that the **Progress** tab displays the following status messages:

- **Job has been stopped – X documents have been transferred.**
- **Finalizing job...**
- **Job has been finalized.**

Note: Between **Finalizing job** and **Job has been finalized**, you could see a variety of job-specific messages, such as **Native file uploads completed**.

When you stop a job, only the files from the last configured batch are imported/exported, and the progress bar is reverted to display this.

For example, when you clicked Stop, the window displayed that 331 out of 371 files had been processed up to that point; however, because you configured the batch size in the config file to be 10MB, only 263 documents were actually processed because the metadata size for 263 docs is 10MB. Accordingly, the progress window then displayed a message of **Process stopped by user** with a processed count of 263 of 371.



3.8 Importing an image file

You can import image load files that are Opticon-formatted page-level files. Relativity only accepts single page, Group IV TIFs, or JPGs.

3.8.1 Importing RDC Permissions

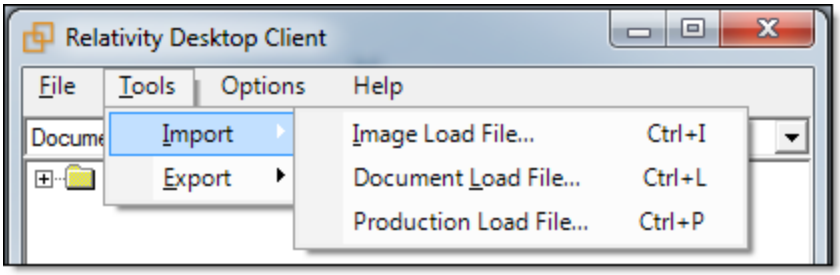
The following permissions are required to use the importing feature in Relativity Desktop Client:

Object Security	Tab Visibility	Admin Operations
• Document: View, Add, Edit	• Documents	• Allow Import

3.8.2 Importing images

To import an image load file:

1. Open the RDC and select a workspace.
2. On the **Tools** menu, point to **Import** and then click **Image Load File**. (In the RDC browser, you can right-click on a specific folder, point to **Import** and click **Image File**.) The Import Production Load File dialog appears.

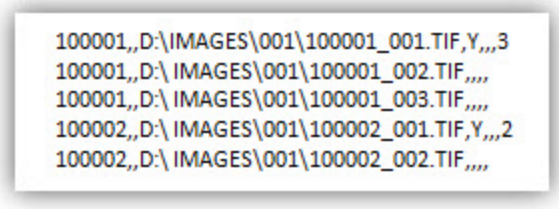


3. (Optional) To use settings in an existing import file, complete these steps:
   a. On the Import Image Load File dialog, click the **Import** menu, and then select **Load Settings.**
   b. Browse for your load settings file (.kwi) in the **Open** dialog, and then click **Open**.

   Note: The RDC denotes all image and production import settings with a .kwi file extension. However, when you select these file types to filter on when you're choosing to save or load the settings file, the RDC denotes these settings with a .kwx file extension.

   c. Click **OK** on the kCura.EDDS.WinForm dialog. Click **Open** on **Choose Load File** dialog. Settings from the file are used to populate fields in the Import Image Load File dialog. (You can also modify the settings on this dialog as necessary.)
   d. Continue with step 5.
4. On the Import Image Load File dialog, set the options as necessary. Select the following options:
   - **Load File** - click ... to browse for your page-level load file. Relativity accepts Opticon format image load files.
   - **Start Line** - select the line number in the load file where you want the import process to begin. The default value is 0, which results in loading the entire 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 TIFFs that share a page identifier for each record. The page identifiers are shared per document and are not unique. The **Auto-number pages** option appends the 01,

.02, and so on to the page-level identifier, creating a unique number per page.



Note: Enable **Auto-number pages** if you are importing productions that use document level numbering without page numbers, and include documents that contain multiple pages.

- **Select Mode** - select one of the following options:
  - **Append Only** - load only new records.
  - **Overlay Only** - update existing records only. You must include a workspace identifier in an overlay load. This field acts as a link indicating to Relativity where to import the data.
  - **Append/Overlay** - adds new records and overlays data on existing records.

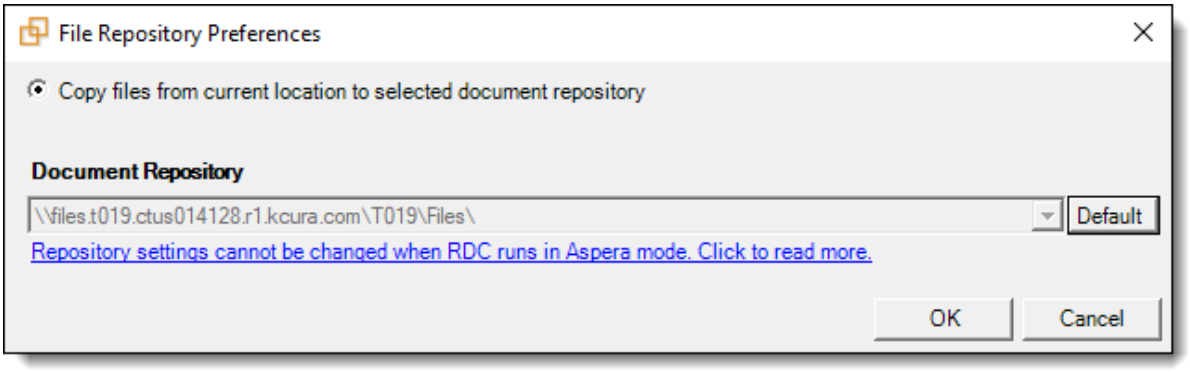
Note: Select Append to import the extracted text and natives from a .dat file. Select overlay when overlaying production images onto the existing documents.

- (Available Only for Production Load Files) **Production** - select a Relativity production that you want to upload images to. Only new production sets without a production source appear in this list.
- (Available Only for Production Load Files) **Overlay Identifier** - select a field that stores overlaid document-level Bates information on the document.

Note: The fields in the drop-down menu are fixed-length fields with a manually-applied SQL index. Note that this is NOT the same as adding the field to the full-text index. Contact your SQL database administrator to apply an index to a field.

- **Repository** - if the native files reside in a Relativity-accessible location, click **Repository**, and select one of the following options. (You can ignore this option if your files are on your desktop or laptop, or if you are a consulting partner loading data into our hosting environment.)
  - **Copy files from current location to selected document repository** - select this option to copy files from the location in the selected load file field to the selected document repository.

Note: You can use the **Default** option to configure an environment level. See the Instance setting guide.



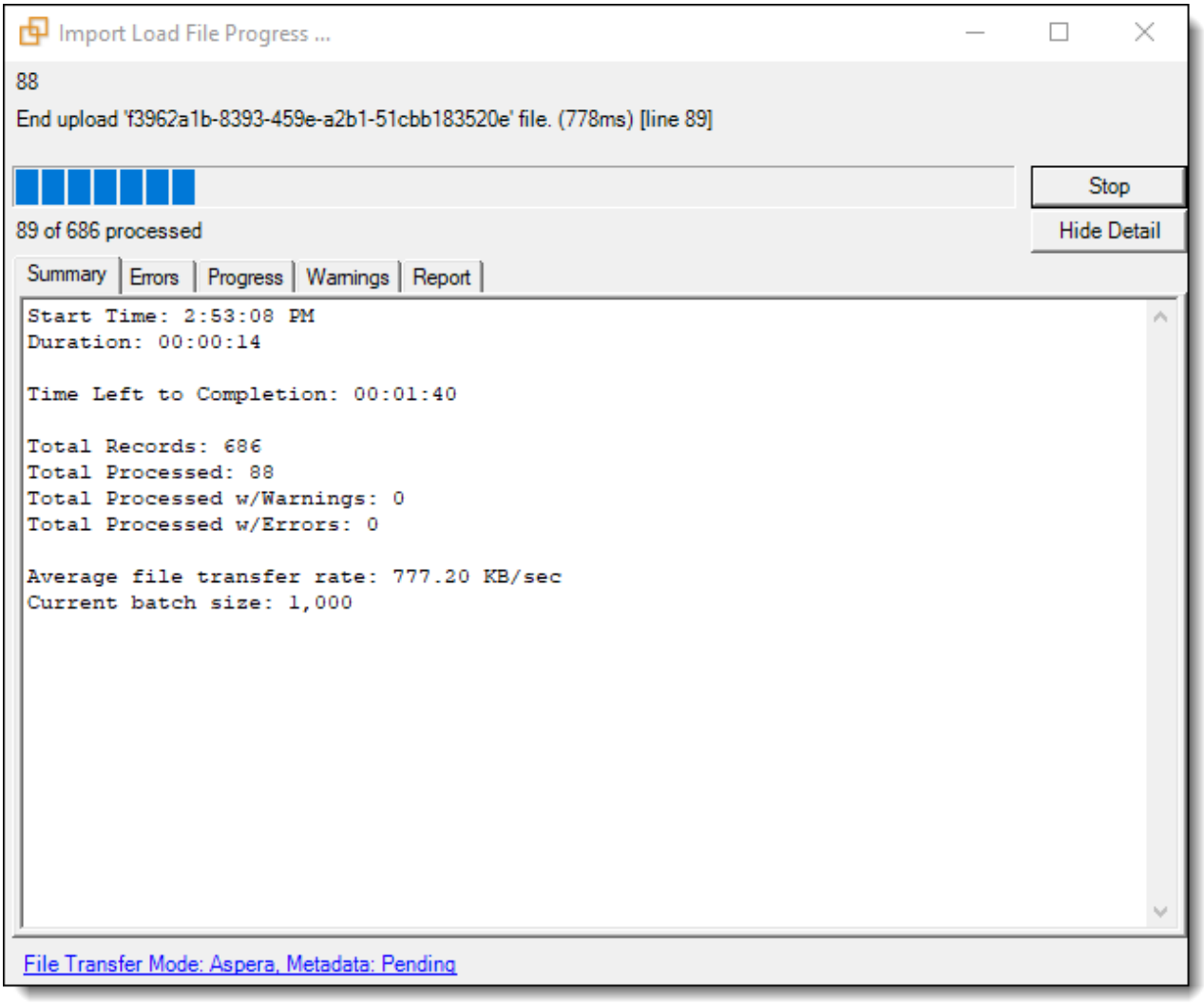
- **Do not copy files to a Relativity document repository** - select this option if the native files have already been copied to their final location, which is accessible by Relativity.

  Note: Selecting this option causes the transfer mode to display as disabled.

- (Available Only for Image Load Files) **Load Extracted Text** - select this option to load new text for Production documents that may be revised based on redactions. The text files must be meet these requirements:
  - Have .txt extensions
  - Stored in the same directory as TIFF files,
  - Named in the same way as the TIFF files
- (Available Only for Image Load Files) **Encoding for undetectable files** - select an encoding for the text file. Click ... for additional language options or click ? for additional information about encoding.
  - **Western European (Windows)** - indicates the Windows standard encoding for English.
  - **Unicode** - utilizes more than 107,000 characters covering 90 scripts.
  - **Unicode (Big-Endian)** - is the same as Unicode, except that the byte order is reversed.
  - **Unicode (UTF-7)** - represents Unicode text using a stream of ASCII characters to guarantee that the high bit will always be zero.
  - **Unicode (UTF-8)** - represents all characters in the Unicode character set using 8-bit bytes.

5. (Optional) To view any errors, click **Import**, and then select **Check Errors**. The preview dialog lists several tabs that may contain information about any errors in your import. See Handling errors on page 16.
6. Click **Import File** on the **Import** menu.
7. Review the progress of the import.
   You can view the progress of an import through the RDC. Select the following tabs to display specific information:

   - **Summary** - displays general information about the number of records, processing warnings, and errors. The following screen shot displays file progress for an import job.



- **Errors** - lists any errors encountered during the load. The Errors tab displays any errors that occur when you import content with the RDC.

  Note: When you run an import job, the RDC only imports records with no errors into the workspace.

- **Progress** - displays a detailed view of the load progress.
- **Warnings** - displays information about loading or connection issues.
- **Report** - includes the following files that you can export:
  - **Export Error Report** - exports a .csv file with a summary of errors.
  - **Export Error File** - exports a .dat file, which is a document-level load file containing only records with errors.
- **File Transfer Mode** - displays the following information:
  - **Web mode** - this mode uses the web server and it is the standard.
  - **Direct mode** - this mode provides faster performance, but requires a connection to the network hosting the data, as well as specific Windows group permissions. For more information, see Direct mode on page 10.

8. (Optional) To save your import settings, point to the **File** menu, and then click **Save Import Settings**. Choose a location for the production load file (.kwi). See Saving import settings on page 17.

3.9 Importing a production file

You can import external productions into Relativity through the Relativity Desktop Client.

This is useful when a case team, after a production goes out the door, needs access to documents as they were in the production and needs them available for searching.

3.9.1 Special considerations

Follow these guidelines when you want to work with externally created production:

- Create a production set in Relativity. The numbering imported with the Opticon file functions as sequential Bates numbering. (The Bates label setting in the imported production is not used.)
- Run the production with the external tool to generate the following files:
  - **Document level control file** - it should minimally contain an identifier field that is also present in the workspace, and a new production or Bates number.

    Note: When loading a production set into Relativity, you may map a production numbering field to the identifier field, as long as it is unique.

  - **Page level Opticon file** - it should use the production or Bates numbering scheme.
- Overlay document level load file in Relativity.
- Loading documents into a 'staging' production marks the production set as produced.
- When loading a production set into Relativity, the systems loads the newly created documents into the root folder. It may be prudent to move these documents to a new folder to ensure proper foldering and security of the documents.
- Using Append/Overlay during the metadata import creates new documents that did not have images, but these documents aren't associated with the production. To associate these files with a production set, create and load an image load file pointing to placeholder images and then overlay the metadata. Using the Overlay Only option shows an error on any document not already loaded, and you can use the error file as a list to identify documents that may not have had images.

3.9.2 Importing RDC Permissions

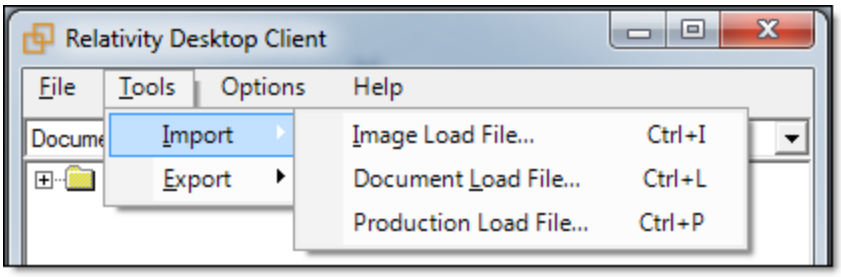
The following permissions are required to use the importing feature in Relativity Desktop Client:

Object Security	Tab Visibility	Admin Operations
• Document: View, Add, Edit	• Documents	• Allow Import

3.9.3 Importing a production

To import a production, use these steps:

1. Open the RDC and select a workspace.
2. On the **Tools** menu, point to **Import**, and then click **Production Load File**. (In the RDC browser, you can right-click on a specific folder, point to **Import** and click **Production File**.) The Import Production Load File dialog appears.



3. (Optional) To use settings in an existing import file, complete these steps:
    a. On the Import Production Load File dialog, click the **Import** menu, and then select **Load Settings.**
    b. Browse for your load settings file (.kwi) in the **Open** dialog, and then click **Open**.

    Note: The RDC denotes all image and production import settings with a .kwi file extension. However, when you select these file types to filter on when you're choosing to save or load the settings file, the RDC denotes these settings with a .kwx file extension.

    c. Click **OK** on the kCura.EDDS.WinForm dialog. Click **Open** on **Choose Load File** dialog. Settings from the file are used to populate fields in the Import Production Load File dialog. (You can also modify the settings on this dialog as necessary.)
    d. Continue with step 5.
4. On the Import Production Load File dialog, set the options as necessary.
    - **Load File** - click ... to browse for your page-level load file. Relativity accepts Opticon format image load files.
    - **Start Line** - select the line number in the load file where you want the import process to begin. The default value is 0, which results in loading the entire 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 TIFFs that share a page identifier for each record. The page identifiers are shared per document and are not unique. The **Auto-number pages** option appends the 01, .02, and so on to the page-level identifier, creating a unique number per page.

        ```
        100001,,D:\IMAGES\001\100001_001.TIF,Y,,,3
        100001,,D:\ IMAGES\001\100001_002.TIF,,,,
        100001,,D:\ IMAGES\001\100001_003.TIF,,,,
        100002,,D:\ IMAGES\001\100002_001.TIF,Y,,,2
        100002,,D:\ IMAGES\001\100002_002.TIF,,,,
        ```

        Note: Enable **Auto-number pages** if you are importing productions that use document level numbering without page numbers, and include documents that contain multiple pages.

- **Select Mode** - select one of the following options:
  - **Append Only** - load only new records.
  - **Overlay Only** - update existing records only. You must include a workspace identifier in an overlay load. This field acts as a link indicating to Relativity where to import the data.
  - **Append/Overlay** - adds new records and overlays data on existing records.

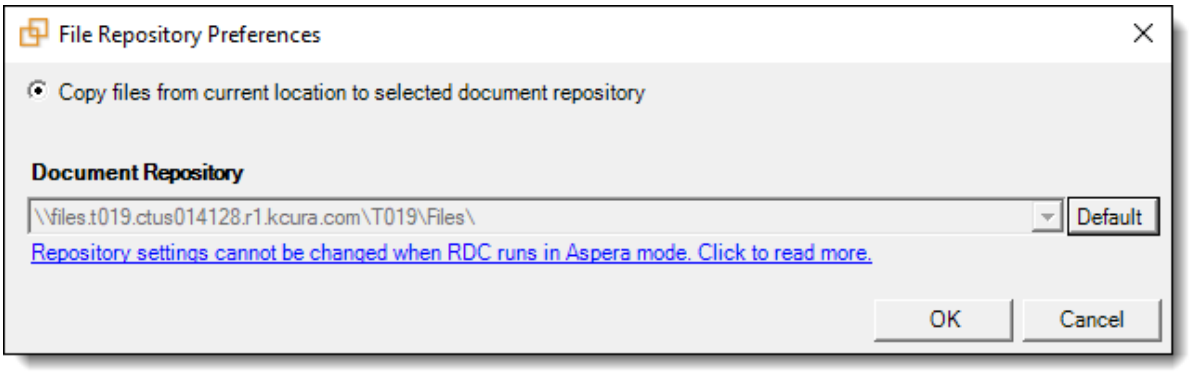
Note: Select Append to import the extracted text and natives from a .dat file. Select overlay when overlaying production images onto the existing documents.

- (Available Only for Production Load Files) **Production** - select a Relativity production that you want to upload images to. Only new production sets without a production source appear in this list.
- (Available Only for Production Load Files) **Overlay Identifier** - select a field that stores overlaid document-level Bates information on the document.

Note: The fields in the drop-down menu are fixed-length fields with a manually-applied SQL index. Note that this is NOT the same as adding the field to the full-text index. Contact your SQL database administrator to apply an index to a field.

- **Repository** - if the native files reside in a Relativity-accessible location, click **Repository**, and select one of the following options. (You can ignore this option if your files are on your desktop or laptop, or if you are a consulting partner loading data into our hosting environment.)
  - **Copy files from current location to selected document repository** - select this option to copy files from the location in the selected load file field to the selected document repository.

Note: You can use the **Default** option to configure an environment level. See the Instance setting guide.



  - **Do not copy files to a Relativity document repository** - select this option if the native files have already been copied to their final location, which is accessible by Relativity.

Note: Selecting this option causes the transfer mode to display as disabled.

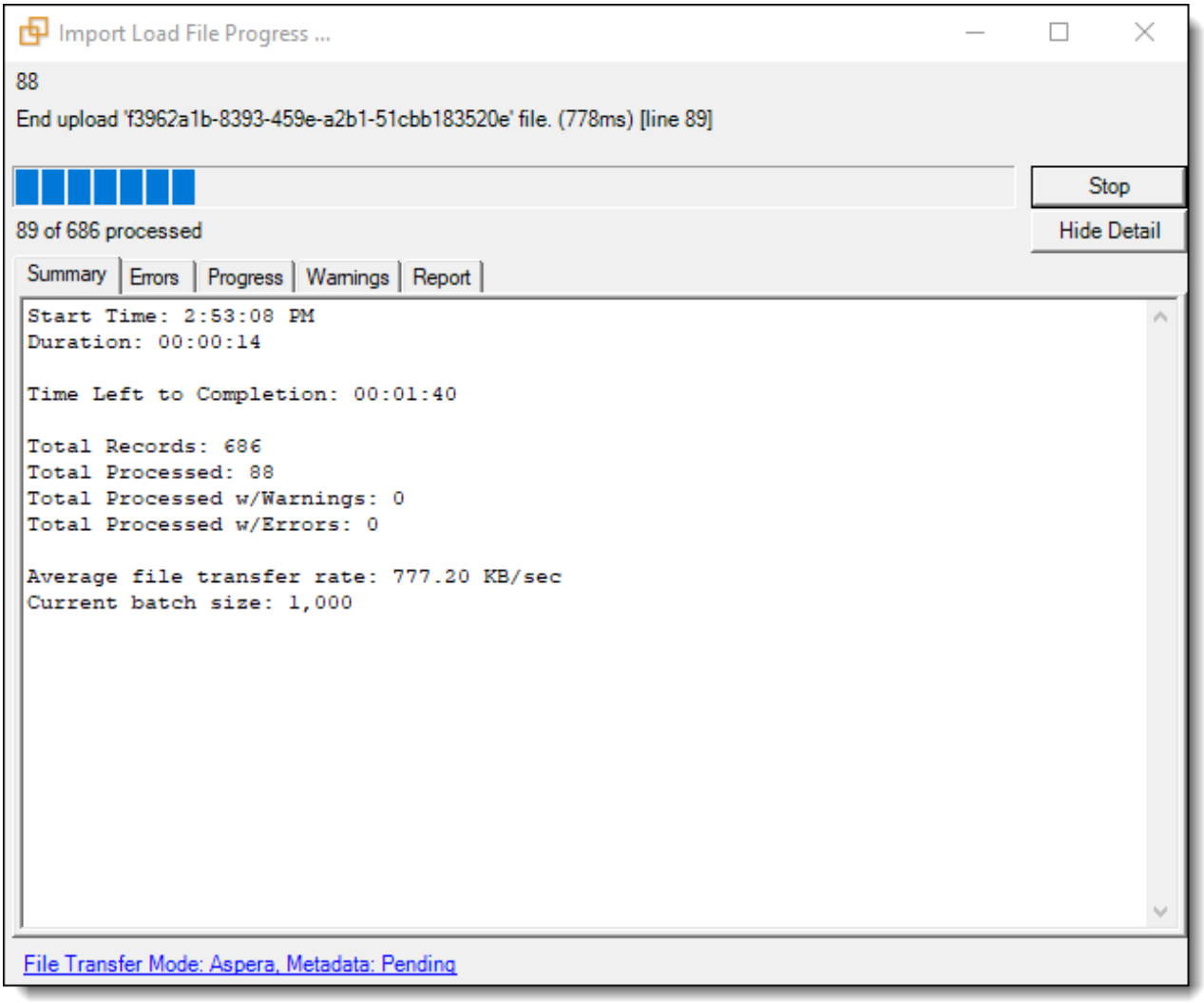
- (Available Only for Image Load Files) **Load Extracted Text** - select this option to load new text for Production documents that may be revised based on redactions. The text files must be meet these requirements:
  - Have .txt extensions
  - Stored in the same directory as TIFF files,

- Named in the same way as the TIFF files

- (Available Only for Image Load Files) **Encoding for undetectable files** - select an encoding for the text file. Click for additional language options or click for additional information about encoding.
  - **Western European (Windows)** - indicates the Windows standard encoding for English.
  - **Unicode** - utilizes more than 107,000 characters covering 90 scripts.
  - **Unicode (Big-Endian)** - is the same as Unicode, except that the byte order is reversed.
  - **Unicode (UTF-7)** - represents Unicode text using a stream of ASCII characters to guarantee that the high bit will always be zero.
  - **Unicode (UTF-8)** - represents all characters in the Unicode character set using 8-bit bytes.

5. (Optional) To view any errors, click **Import**, and then select **Check Errors**. The preview dialog lists several tabs that may contain information about any errors in your import. See Handling errors on page 16.
6. Click **Import File** on the Import menu.
7. Review the progress of the import.
   You can view the progress of an import through the RDC. Select the following tabs to display specific information:

   - **Summary** - displays general information about the number of records, processing warnings, and errors. The following screen shot displays file progress for an import job.



- **Errors** - lists any errors encountered during the load. The Errors tab displays any errors that occur when you import content with the RDC.

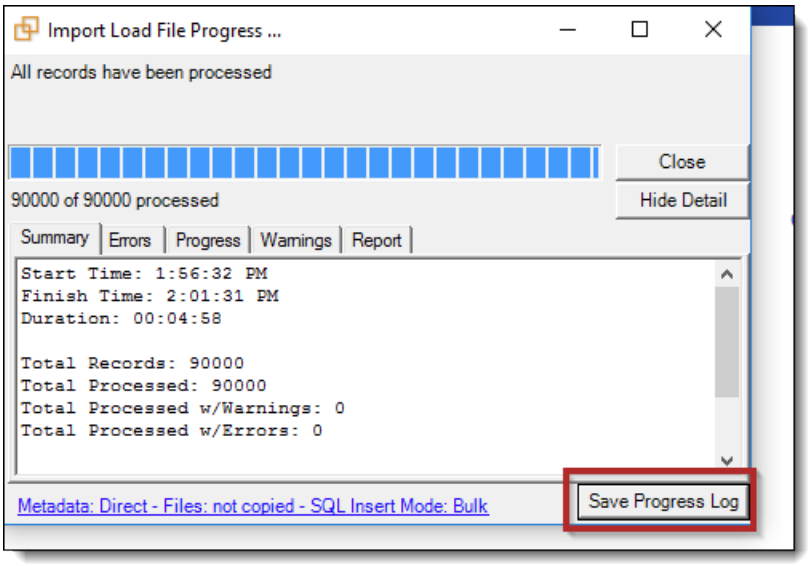
  Note: When you run an import job, the RDC only imports records with no errors into the workspace.

- **Progress** - displays a detailed view of the load progress.
- **Warnings** - displays information about loading or connection issues.
- **Report** - includes the following files that you can export:
  - **Export Error Report** - exports a .csv file with a summary of errors.
  - **Export Error File** - exports a .dat file, which is a document-level load file containing only records with errors.
- **File Transfer Mode** - displays the following information:
  - **Web mode** - this mode uses the web server and it is the standard.
  - **Direct mode** - this mode provides faster performance, but requires a connection to the network hosting the data, as well as specific Windows group permissions. For more information, see Direct mode on page 10.

8. (Optional) To save your import settings, point to the **File** menu, and then click **Save Import Settings**. Choose a location for the production load file (.kwi). See Saving import settings on page 17.

3.9.3.1 Saving the progress log

Once your import or export job is complete, you have the option of saving the event log from that job to your machine. You can do so by clicking **Save Progress Log** on the progress window of the RDC.



Note the following details:

- This log comes in the form of a temp folder containing all the messages displayed in the interface while the import or export job was running.
- The option to save the progress log is only available if you've set the LogAllEvents value to True in the RDC configuration file.

3.10 Import errors for Desktop Client

Note: When an item-level error occurs in a load file, Relativity Desktop Client uses the proper delimiter automatically so that when users access the load file, they will not experience the error.

The following table lists the most common import errors found in the Relativity Desktop Client, including their messages and fixes.

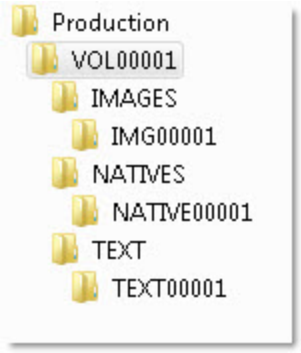
Message	Fix
Invalid date.	Change the date information to one of the standard date formats.
Invalid boolean.	Change data to a YES or NO format.
Invalid decimal.	Change the data to a valid number.
Invalid integer.	Change the data to an integer.
Input length exceeds maximum set length of <max length> for this VarChar field.	Increase the character restriction on the field.
Input length exceeds maximum set length of <max length> for the associated object field <name>.	Increase the character size of associated object.
Error uploading file. Skipping line.	Verify and correct line information.

Message	Fix
File upload failed. Either the access to the path is denied or there is no disk space available.	Verify disk space is available and check permissions on data server.
File '<file name>' not found.	Verify the file is available in path provided.
File '<file name>' contains 0 bytes.	No data exists in the file.
Identifier Value not set.	The Overlay Identifier field has not been mapped. Map the Overlay Identifier field.
Choice name specified twice for this record.	Two choice name fields are titled identically. Each choice name should be unique from all others in the load file.
Proposed choice name exceeds 200 characters.	Rename the specified choice to something less than 200 characters.
User does not exist in the system or is not available for assignment.	Email used in the entity file is not associated with any entity in the system.
Document has been previously processed in this file	Same ID trying to load twice.
Error: full text file specified does not exist.	Verify the path of extracted text file.
There are an invalid number of cells in this row - expecting:<expected>, actual:<actual>.	Remove the extra column delimiter from load file.
- This document identifier does not exist in the system - no document to overwrite	Overlay unavailable. You must append the data.
A document with identifier <document identifier> already exists in the system	The identifier field already exists in the system. You need to do an overlay to overwrite the existing data.
This file identifier exists attached to another document with selected key field {0}	Same ID trying to load twice.
This file identifier exists attached to another document with selected ArtifactID {0}	Same ID trying to load twice.
This file identifier exists attached to another document	Duplicate page ID in a different document.
Document is already in the selected production	The Bates number is already loaded. Because you can't overlay into an existing production, you must create a new production or replace the images manually on the back end.
This document contains redactions or highlights that can't be overwritten	Delete the markups.
There is no image specified on this line	Make sure image id is present in load file.
One of the files specified for this document does not exist	Make sure image files are present for represented path.
The image file specified is not a supported format in Relativity	This can't be loaded without conversion to an approved format.

Message	Fix
The file being uploaded is empty	No data exists in the file so it can't be loaded.
The identifier field for this row is either empty or unmapped	Verify that an identifier exists.
The identifier specified on this line has been previously specified in the file	Make sure the identifier field is unique or overlay data.
The document specified has been secured for editing.	Change security permissions to allow document edit rights.
Your account does not have rights to add a document or object to this case	Change security permissions to allow document add rights.
A non-unique associated object is specified for this new object.	Two objects with the same name exist in the workspace. Identify the duplicates and change one of their names.
Your account does not have rights to add an associated object to the current object.	Change security permissions to allow updates to object.
An object field references a child object which does not exist.	Add a child object.
This record's Overlay Identifier is shared by multiple documents in the case, and cannot be imported.	Use a unique ID to overlay the data

4 Exporting with the RDC

You can use the Relativity Desktop Client (RDC) to export production sets, saved search results, and folders. When you perform an export, the RDC automatically creates top-level folders for images, text, and natives. The RDC exports all documents included in the production set, search result, or folder.



Note: You need to install the RDC on your computer before you can perform an export.

4.1 Exporting RDC Permissions

The following permissions are required to use the exporting feature in Relativity Desktop Client:

Object Security	Admin Operations
• Document: Local Access (Download, Copy Text) **Note:** This is required when exporting long-text cells greater than the value defined by the MaximumLongTextSizeForExportInCell instance setting, the default value of which is 1048576.	• Allow Export

4.2 Technical considerations for .kwx files

Note the following:

- .kwx stands for kCura Win edds eXport.
- The .kwx file you call on when you load export settings is a SOAP-serialized file used to run the export.
- SOAP is a protocol based on XML. It's designed specifically to transport or store procedure calls using XML. It does this by converting fields and properties of an object into the serial format of an XML stream.
- When you run an export, the RDC collects all the inputs from the form into an object in memory. The RDC also passes the object on to the export process.
- When you save an export settings object, Relativity passes that object in memory to a SOAP serializer. The SOAP serializer writes that object's settings to XML.
- When you load export settings, Relativity takes a serialized object and deserializes it to an in-memory settings object. Then it loops over all the properties and sets the actual form values to reflect those settings.

4.3 Exporting a production set

You can export the contents of a production set created in Relativity through the RDC.

4.3.1 Exporting RDC Permissions

The following permissions are required to use the exporting feature in Relativity Desktop Client:

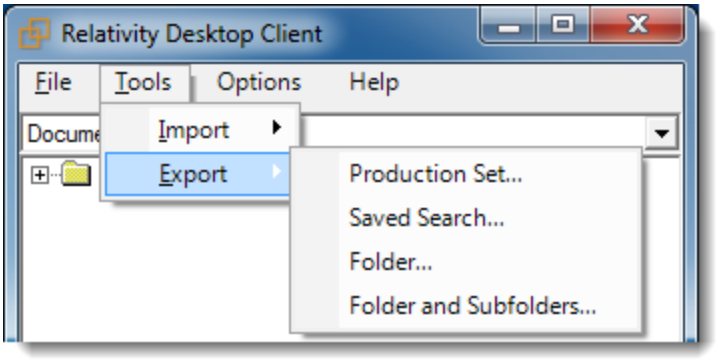
Object Security	Admin Operations
• Document: Local Access (Download, Copy Text) **Note:** This is required when exporting long-text cells greater than the value defined by the MaximumLongTextSizeForExportInCell instance setting, the default value of which is 1048576.	• Allow Export

4.3.2 Exporting a production set

To export a production set:

1. Open the RDC and select a workspace.
2. On the **Tools** menu, point to **Export** and then click **Production Set**.

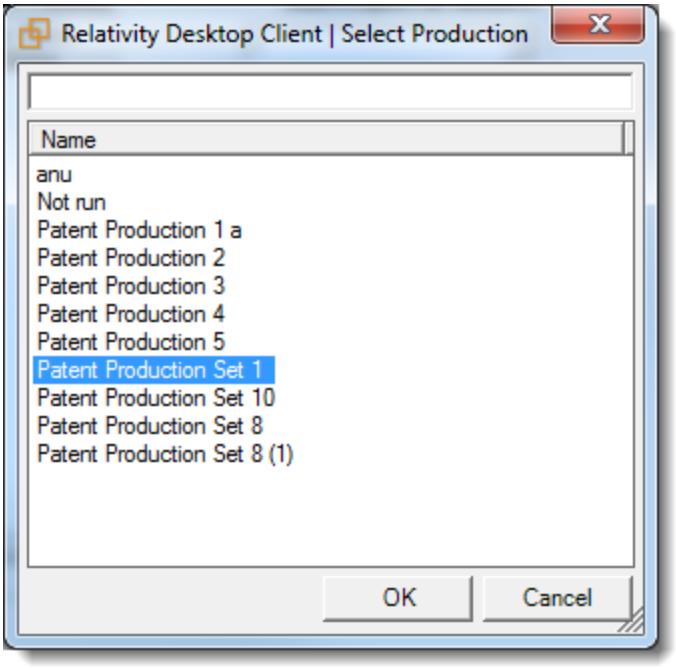
   The Data Source tab in the Export Production window appears.



3. (Optional) To use settings in an existing export file, use these steps:
   a. Click the **File** menu, and select **Load Export Settings**.
   b. Browse for your export settings file (.kwx) in the Open dialog.
   c. Select a production set, and click **OK**. Your production set appears on the Data Source tab, and the settings from the file populate the Destination Files tab. (You can also modify any settings on the Data Source and Destination Files tab as necessary.)

   Note: On the Destination Files tab, you may want to select **Overwrite Files** if you're re-exporting the

same group of files to the previously used location.

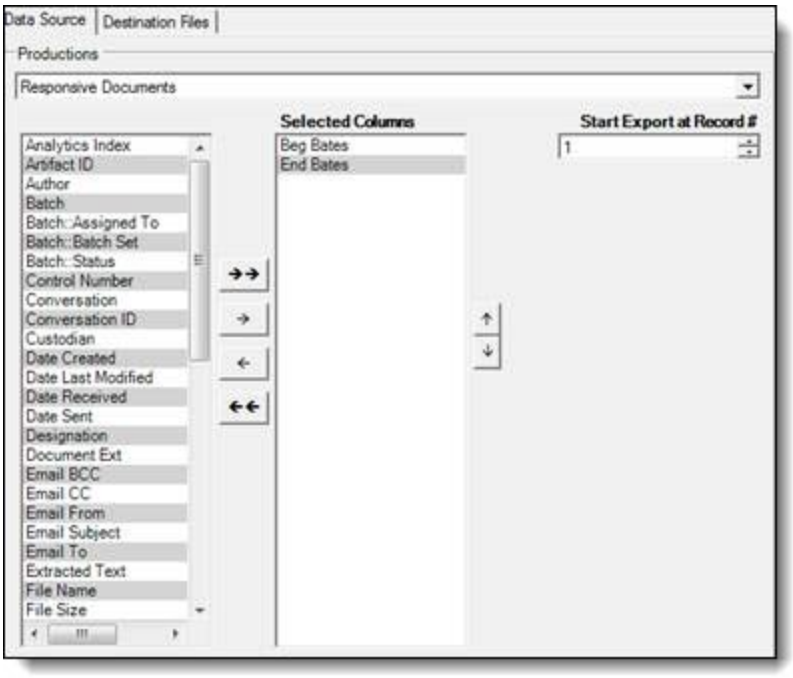


d. Continue with step 7.

4. On the Data Source, select a production set in the **Productions** box. Update the remaining options as necessary.

   The Data Source tab appears when you select the option to export production sets, saved searches, folders, and subfolders. Each of these have similar actions, but you may want to select different settings for them.

   Note: The Production:: Begin Bates and Production:: End Bates reflective fields automatically populate in the Selected Columns.

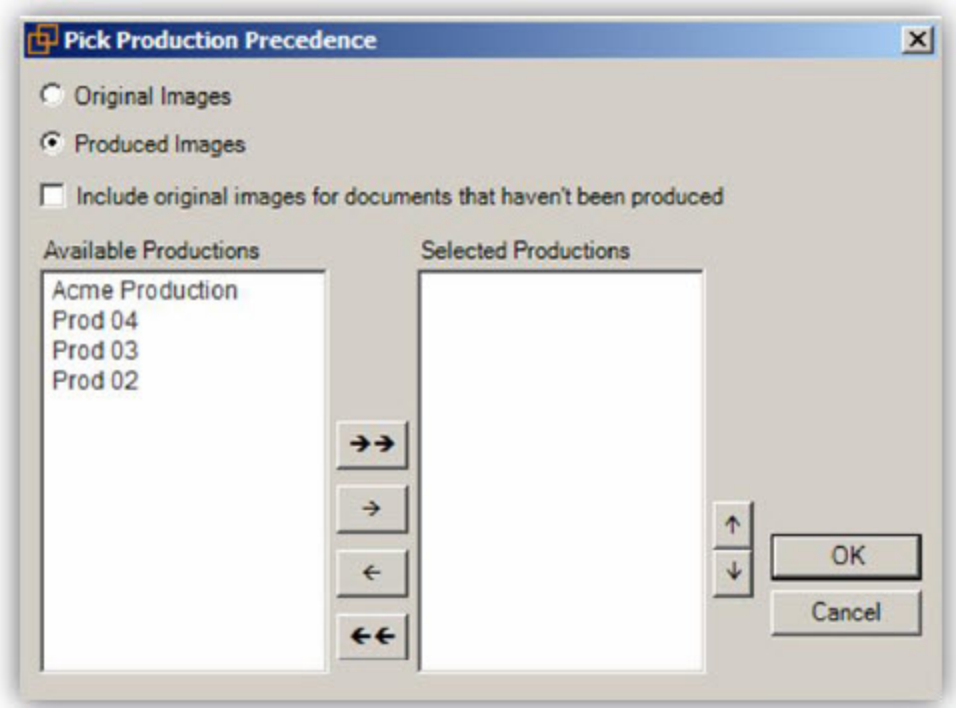


On the **Data Source** tab, you can set the following options for the data that you want to export:

- **Views** - select a view for the data that you want to export.
- **Selected Columns** - choose the fields that you want to export by moving them to the **Selected Columns** box. The box on the right displays all available fields, but the RDC only exports the fields in the **Selected Columns** box.

  Note: If you select any reflected fields, only the value for the production you select displays.

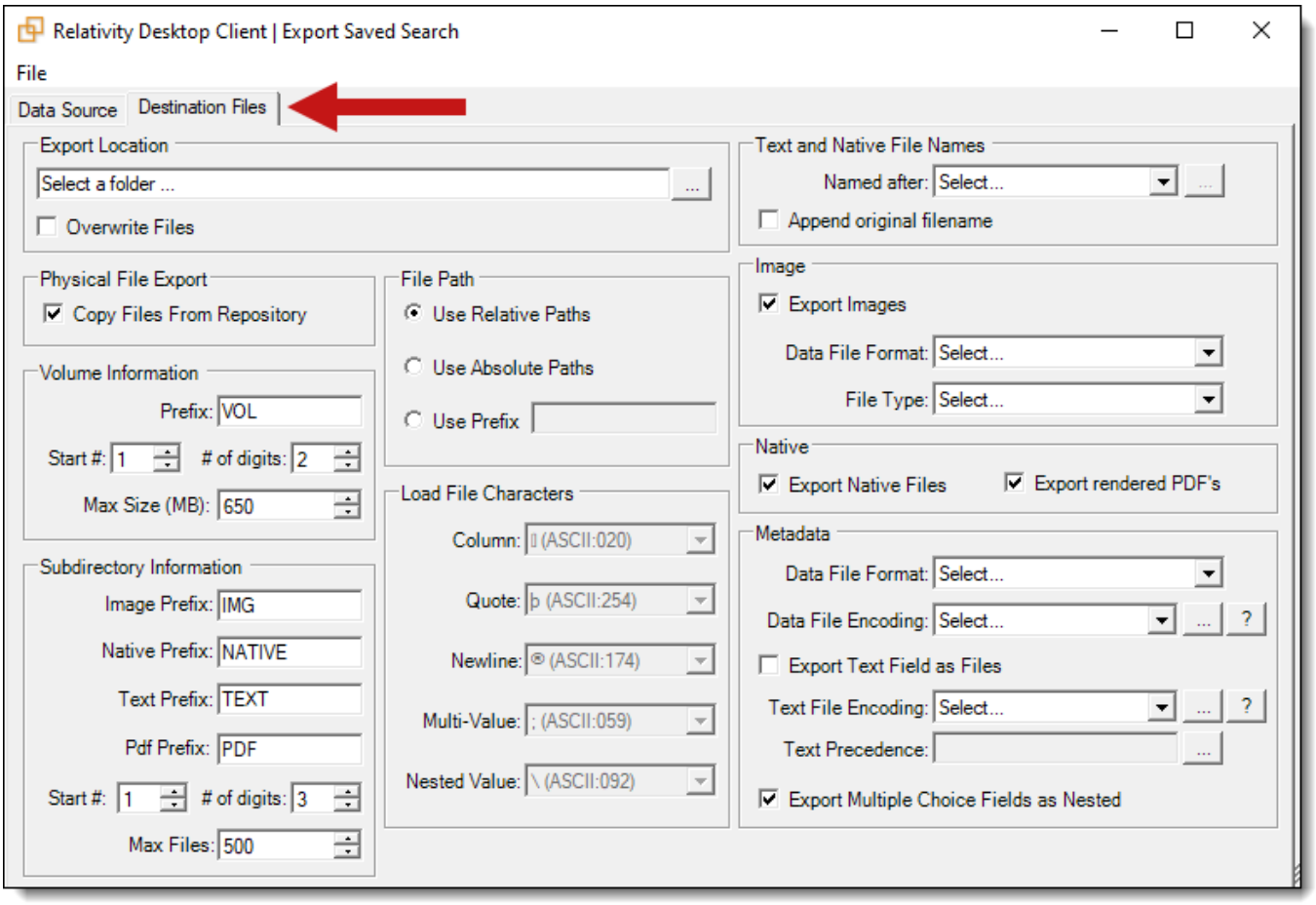
- **Start Export at Record #** - select a record number that identifies the initial document for export. The RDC begins by exporting the document with this record number and continues by exporting documents with subsequent record numbers.
- (Available only for Saved Searches, Folders, and Subfolders) **Production Precedence** - click ... to display the Pick Production Precedence dialog where you can select a group of produced documents for export instead of the original images.



- Select the images that you want to export:
  - **Original Images** - only the original, non-produced images.
  - **Produced Images** - a produced version of the images.
  - **Include original images…** - original images for the documents that are not in a specified production.
- Move the productions that you want exported to the **Selected Productions** box. To move productions between columns, highlight them and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the precedence of the fields.

Note: The RDC only produces one version of each document. The version of the document in the topmost production exports first. If the document doesn't exist in the topmost production, 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 ...** is enabled, then the original document produces.

5. Select the **Destination Files** tab.
   On the Destination tab, you can set options that control how the files in folders, searches, and production sets are exported. The Export dialog displays this tab when you select an **Export** option from the **Tools** menu, or when you right-click on a folder or workspace in the RDC. The Destination tab displays the same options when you export files in folders, searches, or production sets.



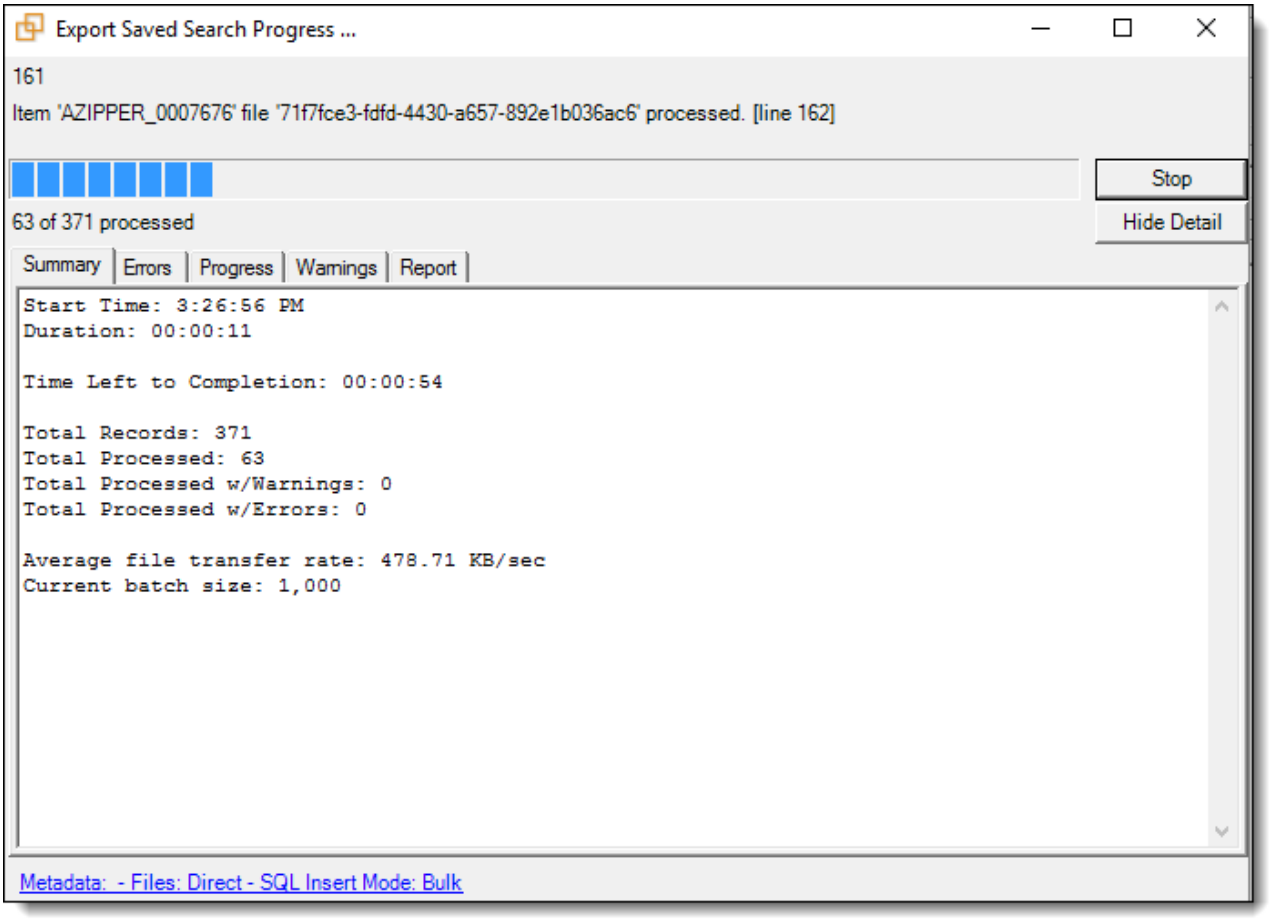
Note: In the Text and Native File Name section, the Named after option is available only for Production Sets.

6. Complete the fields on the Destination Files tab. See Fields on the Destination Files tab on the next page.
7. After you select your export settings, select **File** and click **Run**.

Note: A warning message appears if you are missing information required to run the export. Update the settings for the required options, and click **Run** again.

8. Review the progress of the export.
   You can view the progress of an export through the RDC. Select the following tabs to display specific information:

   - **Summary** - displays general information about the number of records, processing warnings, and errors. The following screen shot displays file progress for an export job.



- **Errors** - lists any errors encountered during the load. The Errors tab displays any errors that occur when you export content with the RDC.
- **Progress** - displays a detailed view of the load progress.
- **Warnings** - displays information about loading or connection issues.
- **Report** - includes the following files that you can export:
  - **Export Error Report** - exports a .csv file with a summary of errors.
  - **Export Error File** - exports a .dat file, which is a document-level load file containing only records with errors.
- **File Transfer Mode** - displays the following information:
  - **Web mode** - this mode uses the web server and it is the standard.
  - **Direct mode** - this mode provides faster performance, but requires a connection to the network hosting the data, as well as specific Windows group permissions. For more information, see Direct mode on page 10.

9. (Optional) To save your export settings, point to the **File** menu, and click **Save Export Settings**. Choose a location for the export settings file (.kwx).

4.3.3 Fields on the Destination Files tab

The Destination Files tab contains the following sections with their respective fields:

- **Export Location** - select a target directory for exporting folders, searches, and production sets. Click to browse for a location. Select **Overwrite Files** to overwrite any existing files of the same name in the target export directory.
- **Physical File Export** - select the **Copy Files From Repository** option. This is the default option and copies files from the file server to the specified export location. If you don't select **Copy Files From Repository**, Relativity doesn't copy the files to the export location. Instead, the exported load files reference the repository location of the files.
- **Volume Information** - 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 #** - select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
  - **# of Digits** - select the number of digits attached to the prefix. (For example, if you select 3, the output is VOL001, VOL002, and so on.)
  - **Max size** - select the maximum size allowed for each volume in MBs.
- **Subdirectory Information** - controls the naming and size of volume subfolders. Set the following options in this section:
  - **Image Prefix** - enter the alpha prefix for the subdirectory that stores exported images.
  - **Native Prefix** - enter the alpha prefix for the subdirectory that stores exported native files.
  - **Text Prefix** - enter the alpha prefix for the subdirectory that stores exported extracted text files.
  - **Pdf Prefix** - enter the alpha prefix for the subdirectory that stores exported extracted PDF files.
  - **Start #** - select the starting number for the subdirectories.
  - **# of Digits** - select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
  - **Max Files** - select the number of files to store in each subdirectory.
- **File Path** - controls how the export path for the files is referenced. Select one of the following options:
  - **Use absolute paths** - paths to exported files are represented as absolute paths. C:\ Desktop\VOL001\NATIVE001\AS000001.msg
  - **Use relative paths** - paths to exported files are represented as relative paths. .\VOL001\NATIVE001\AS000001.msg
  - **Use prefix** - a prefix is added to the relative path, such as a CD drive letter. D:\VOL001\NATIVE001\AS000001.msg
- **Load File Characters** - select the delimiters to use in a document-level load file when **Data File Format** in the **Metadata** section is set to **Custom**. Select the following options as necessary:
  - **Column** - this delimiter separates columns in the load file.
  - **Quote** - this delimiter qualifies the text in each field of the load file.
  - **Newline** - this delimiter signifies the end of any extracted text or long text field in the load file.
  - **Multi-Value** - this delimiter separates different choices within a choice field.
  - **Nested Value** - this delimiter indicates the hierarchy of choices within a choice field.

- **Text and Native File Names** - select the following options for naming exported native and extracted text files:

  Note: The following field types are supported by this feature: Date, Decimal, Fixed-Length Text, Single Choice, Whole Number, and Yes/No.

- (Available Only for Production Sets) **Named after** - select one of the following naming convention for exported files:
  - **Identifier** - select this option to name the files after the identifier for your workspace.
  - **Beginning production number** - select this option to name the files after the production number. (This number may be the Bates number for a production.)
  - **Custom** - select this option to name the native and text files in an export by appending them with either a control number or production begin bates and optionally, a field of your choice.
    To select custom naming options for your exported native and text files, do the following:
    1. Select **Custom** from the Named after drop-down menu.
    2. Click to the right of the Named after drop-down menu.
    3. Select either the control number or production begin bates naming option from the drop-down menu.
    4. Optionally, to append a field or custom text to the file name, click .
    5. Select the desired spacing option from the **_ (underscore)** drop-down menu.
    6. To either add custom text to the name or to add a field to the name, do the following:
       - To include custom text as part of the name, choose the **Custom Text...** option in the drop-down menu and enter the desired custom text in the textbox underneath the **Custom Text...** drop-down menu.
       - To include a field as part of the file names, select the desired field option from the **Custom Text...** drop-down menu. If a field is empty in a workspace it will not display as part of the file name even if selected from the **Custom Text...** drop-down menu.

         Note: If a boolean field is selected, the name of the field will be displayed and not the value. For example: JWOLFE_009_confidential-HAS IMAGES.

    7. Optionally, to add an additional field or custom text after the previously selected options, click .
    8. Select the desired spacing option from the **_ (underscore)** drop-down menu.
    9. To either add additional custom text to the name or to add an additional field to the name, do the following:
       - To include additional custom text as part of the name before a field, choose the **Custom Text...** option in the drop-down menu and enter the desired custom text in the textbox underneath the **Custom Text...** drop-down menu.
       - To include an additional field as part of the name, select the desired field option from the **Custom Text...** drop-down menu. If a field is empty in a workspace it will not display as part of the file name even if selected from the **Custom Text...** drop-down menu.

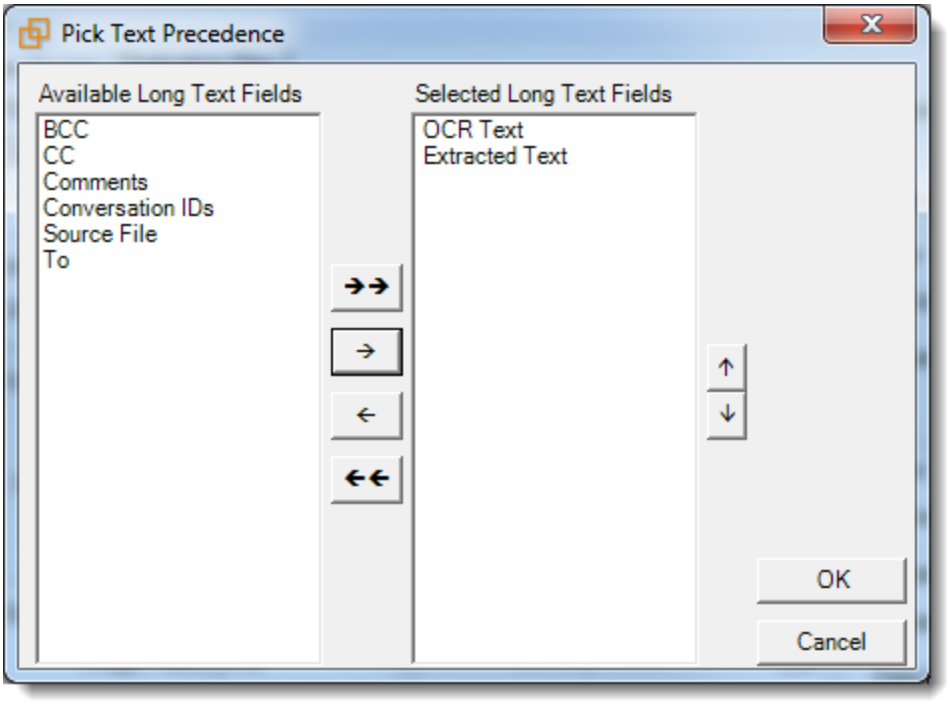
Note: If a boolean field is selected, the name of the field will be displayed and not the value. For example: JWOLFE_009_confidential-HAS IMAGES.

10. Click **Apply** to save the current naming options.

Note: If a file is not found in any of the production sets, the name will revert to the control number or production begin bates regardless of which naming options you have selected.

- **Append original file** - 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.
- **Image** - determines whether to include images in an export and sets the format of the load file. Set the following options:
  - **Check Export Images** - select this option to include images in the export. (You must set the **Data File Format** and the **File Type** when you export images.)
  - **Data File Format** - select one of these formats for image-level load file:
    - Opticon
    - IPRO
  - **File Type** - select one of these file types:
    - Single-page TIF/JPG
    - Multi-page TIF
    - PDF
- **Native** - controls which files are exported by Relativity Desktop Client.
  - **Export Native Files** - select to export native files.
  - **Export rendered PDF's** - select to export PDF files. This option is not available when exporting a Production set.
- **Metadata** - use the following options to control the export of the document-level load file and extracted text:
  - **Data File Format** - select a the format for the document-level load file you're exporting:
    - Comma separated (.csv)
    - Concordance (.dat) - load file exports with the standard Concordance delimiters.
    - Custom (.txt) - load file exports with the custom delimiters that you select in the **Load File Characters** section.
    - HTML (.html) - load file is in HTML and contains hyperlinks to launch any exported files.
  - **Data File Encoding** - select an encoding for the document-level load file from the drop-down box. Click ... for additional options.
  - **Export Text Field as Files** - determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. The RDC includes text as part of your load file if you deselect this option.
  - **Text File Encoding** - select the encoding for the document-level text files. Click ... for additional options.

- **Text Precedence** - select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click ... to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the precedence of the fields.



If you add any fields to the **Selected Long Text Fields** column, Relativity adds the Text Precedence column as the last column in the load file. During an export, Relativity checks the topmost field in the **Selected Long Text Fields** column for text, and if the field is null, it checks the next field in order of precedence for text. When it finds a field that contains text, Relativity adds the contents of that field to the Text Precedence column in the document load file, and then continues checking the fields for the next document.

For example, you want the Text Precedence column in the load file to contain the contents of the OCR Text field when it is available for a document and the contents of the Extracted Text field when the OCR Text for a document is null. In the Pick Text Precedence pop-up, you add the OCR Text as the first field in the **Selected Long Text Fields** column followed by the Extracted Text field.

Note: If you want to improve export performance, you don't need to add all of the long text fields you select in the Pick Text Precedence pop-up to the Selected Columns option on the Data Source tab. When you don't select these fields on the Data Source tab, but you add them to **Selected Long Text Fields** column, the RDC adds the content of these fields to the Text Precedence column as described above. When you add the long text fields on the Data Source tab, Relativity adds these columns to the document level load file.

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

- **Export Multiple-Choice Fields as Nested** - select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.

4.4 Exporting a saved search

	Production		Document	Export options			
	Has native production set	Has image production set			Include original images for documents that haven't been produced	EXPORT results (.opt file)	
Case 1	YES	NO	YES	produced images	YES	empty .opt file	N/A
Case 2	YES	YES	YES	produced images	YES	.opt file contains entries with produced images	for production use image placeholder: when no image exists
Case 3	NO	NO	YES	original images	N/A	.opt file contains entries with original images	N/A
Case 4	NO	NO	NO	original images	N/A	empty .opt file	N/A

4.4.1 Exporting RDC Permissions

The following permissions are required to use the exporting feature in Relativity Desktop Client:

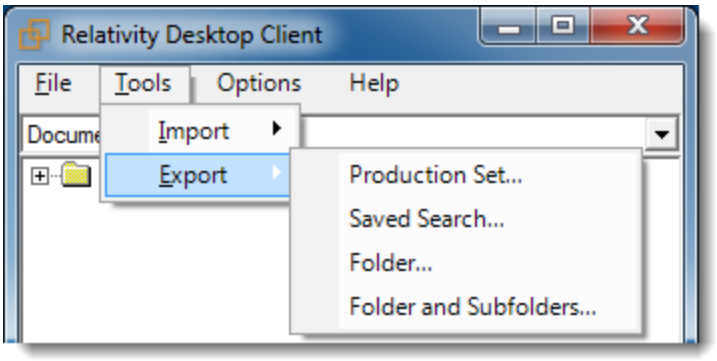
Object Security	Admin Operations
• Document: Local Access (Download, Copy Text) **Note:** This is required when exporting long-text cells greater than the value defined by the MaximumLongTextSizeForExportInCell instance setting, the default value of which is 1048576.	• Allow Export

4.4.2 Exporting a saved search

To export a saved search:

1. Open the RDC and select a workspace.

2. On the **Tools** menu, point to **Export** and click **Saved Search**.
   The Data Source tab in the Export Production window appears.



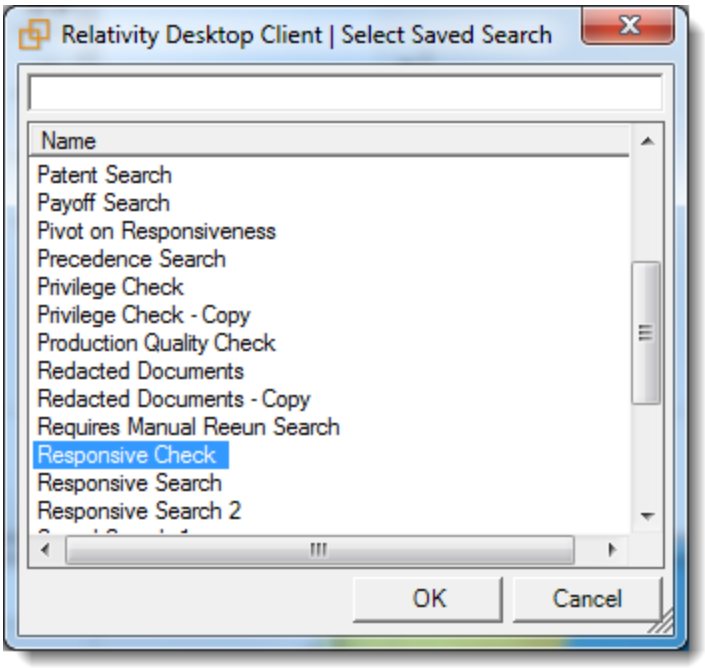
3. (Optional) To use settings in an existing export file complete these steps:

   a. Click the **File** menu, and select **Load Export Settings**.

   b. Browse for your export settings file (.kwx) in the Open dialog.

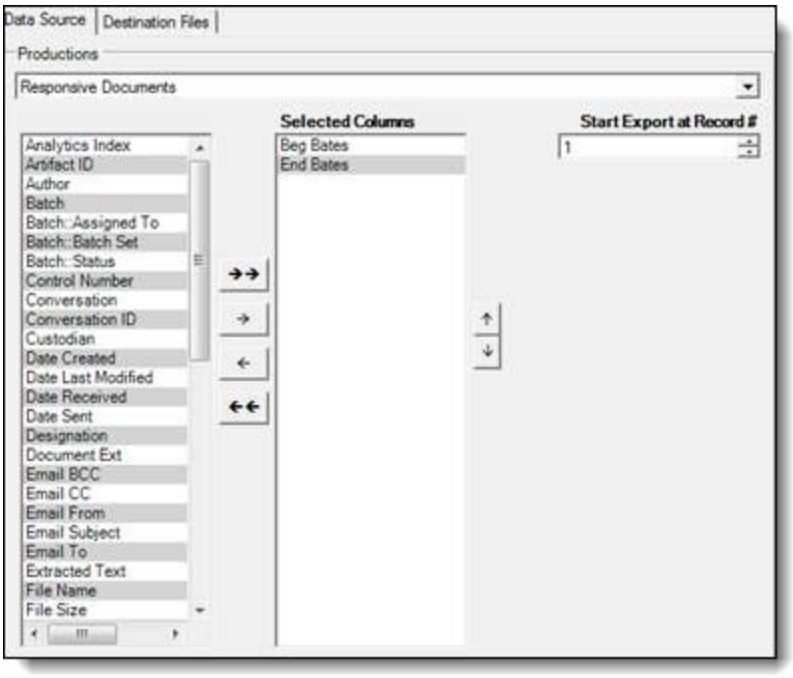
   c. Select a saved search, and click **OK**. Your saved search is listed on the Data Source tab, and the settings from the file are used to populate the Destination Files tab. (You can also modify any settings on the Data Source and Destination Files tab as necessary.)

> **Note:** On the Destination Files tab, you may want to select **Overwrite Files** if you are re-exporting the same group of files to the previously used location.



   d. Continue with step 4.

4. On the Data Source, select a saved search in the **Searches** box. Update the remaining options as necessary. The Data Source tab appears when you select the option to export production sets, saved searches, folders, and subfolders. You will see similar options on the tab for each of these actions, but you may want to select different settings for them. The following screen shot uses a production set as an example, but the settings are the same when exporting production sets, saved searches, folders, and subfolders.

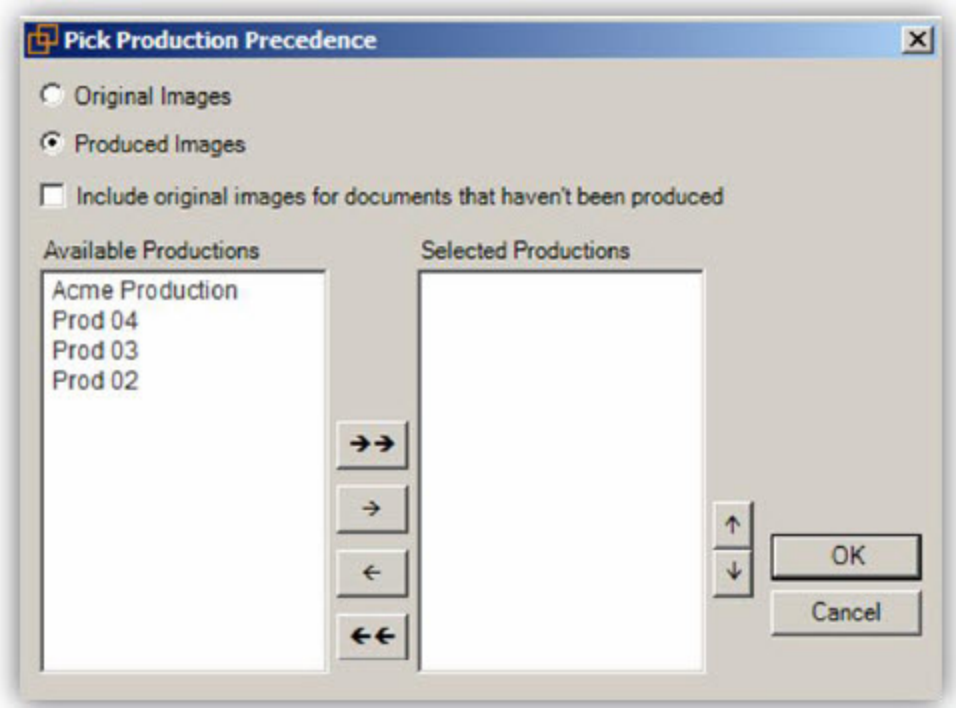


On the **Data Source** tab, you can set the following options for the data that you want to export. Depending on the type of data you want to export, the dropdown updates accordingly. Select from the following:

- **Views - Folders and subfolders** - select a view for the data that you want to export.
- **Searches - Saved Search** - select a saved search you want to export.
- **Productions - Production set** - select a production set you want to export
- **Selected Columns** - choose the fields that you want to export by moving them to the **Selected Columns** box. The box on the right displays all available fields. Only the fields in the **Selected Columns** box are exported.

  Note: If a reflected production field is selected for Selected Column, the RDC doesn't narrow down the field to a specific production. The reflected field for all productions is included.

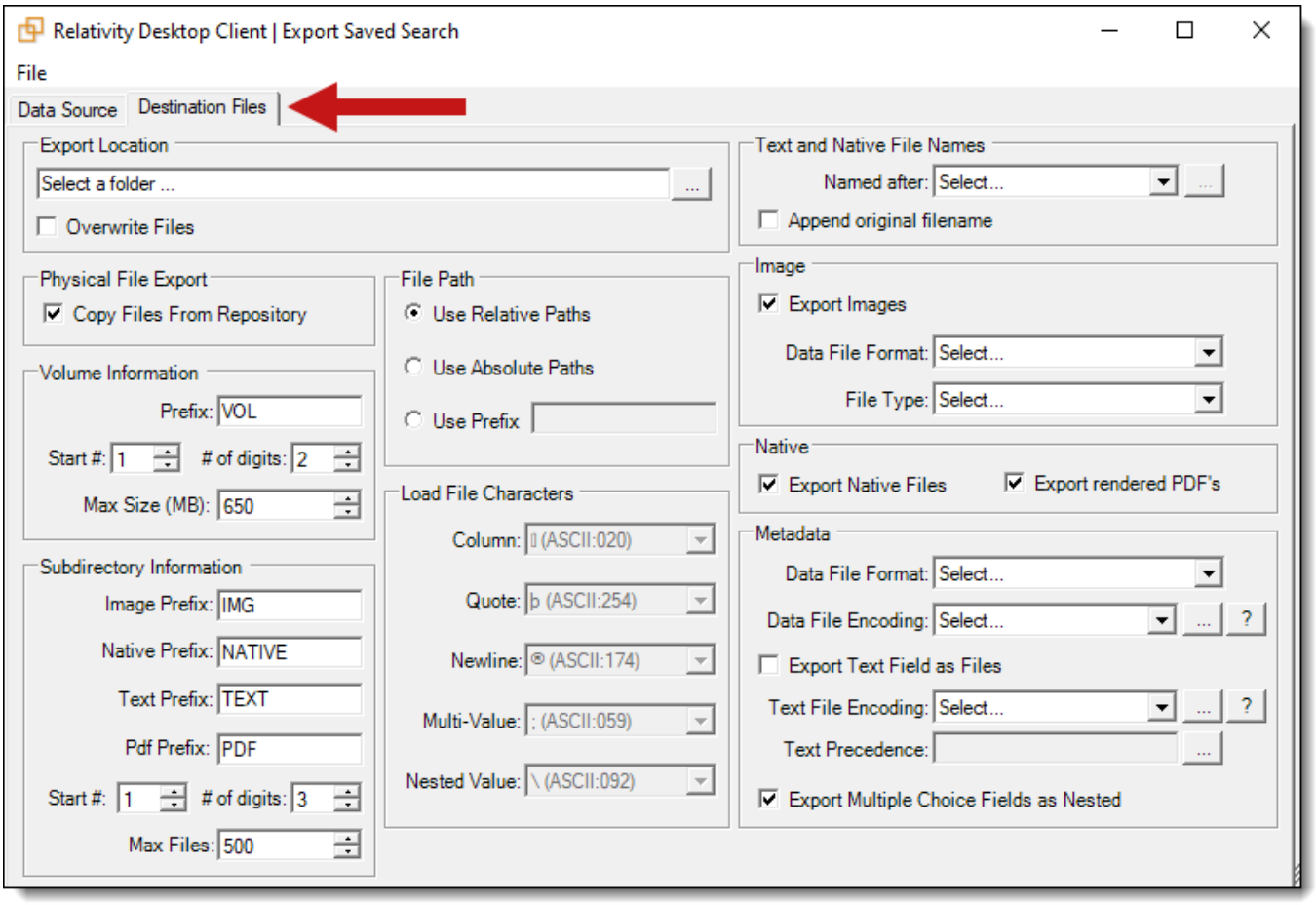
- **Start Export at Record #** - select a record number that identifies the initial document for export. The RDC exports the document with this record number and continues exporting documents with subsequent record numbers.
- (Available only for Saved Searches, Folders, and Subfolders) **Production Precedence** - click to display the Pick Production Precedence dialog where you can select a group of produced documents for export instead of the original images.



- Select the images that you want to export:
  - **Original Images** - export only the original, non-produced images.
  - **Produced Images** - export a produced version of the images.
  - **Include original images…** - export original images for the documents that are not in a specified production.
- Move the productions that you want to exported to the **Selected Productions** box. To move productions between columns, highlight the production and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the precedence of the fields.

  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 ...** is enabled, then the original document is produced.

5. Select the Destination Files tab.
   On the Destination tab, you can set options that control how the files in folders, searches, and production sets are exported. The Export dialog displays this tab when you select an **Export** option from the **Tools** menu, or when you right-click on a folder or workspace in the RDC. The Destination tab displays the same options when you export files in folders, searches, or production sets.



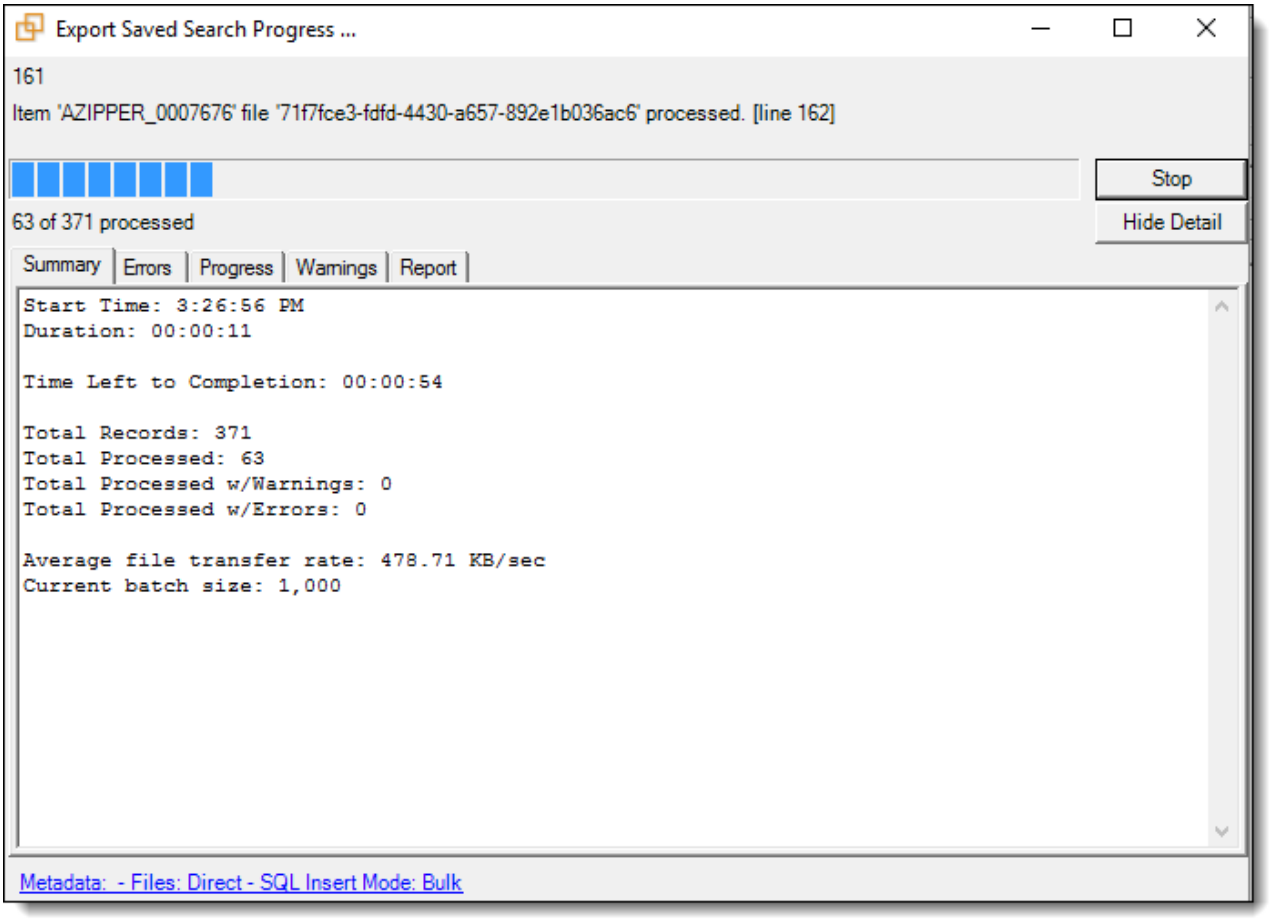
Note: In the Text and Native File Name section, the Named after option is available only for Production Sets.

6. Complete the fields on the Destination Files tab. See Fields on the Destination Files tab on the next page.
7. After you have selected your export settings, select **File** and click **Run**.

Note: A warning message is displayed if you are missing information required to run the export. Update the settings for the required options, and run the export again.

8. Review the progress of the export.
   You can view the progress of an export through the RDC. Select the following tabs to display specific information:

   - **Summary** - displays general information about the number of records, processing warnings, and errors. The following screen shot displays file progress for an export job.



- **Errors** - lists any errors encountered during the load. The Errors tab displays any errors that occur when you export content with the RDC.
- **Progress** - displays a detailed view of the load progress.
- **Warnings** - displays information about loading or connection issues.
- **Report** - includes the following files that you can export:
  - **Export Error Report** - exports a .csv file with a summary of errors.
  - **Export Error File** - exports a .dat file, which is a document-level load file containing only records with errors.
- **File Transfer Mode** - displays the following information:
  - **Web mode** - this mode uses the web server and it is the standard.
  - **Direct mode** - this mode provides faster performance, but requires a connection to the network hosting the data, as well as specific Windows group permissions. For more information, see Direct mode on page 10.

9. (Optional) To save your export settings for reuse, point to the **File** menu, and click **Save Export Settings**. Choose a location for the export settings file (.kwx).

4.4.3 Fields on the Destination Files tab

The Destination Files tab contains the following sections with their respective fields:

- **Export Location** - select a target directory for exporting folders, searches, and production sets. Click to browse for a location. Select **Overwrite Files** to overwrite any existing files of the same name in the target export directory.
- **Physical File Export** - select the **Copy Files From Repository** option. This is the default option and copies files from the file server to the specified export location. If you don't select **Copy Files From Repository**, Relativity doesn't copy the files to the export location. Instead, the exported load files reference the repository location of the files.
- **Volume Information** - 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 #** - select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
  - **# of Digits** - select the number of digits attached to the prefix. (For example, if you select 3, the output is VOL001, VOL002, and so on.)
  - **Max size** - select the maximum size allowed for each volume in MBs.
- **Subdirectory Information** - controls the naming and size of volume subfolders. Set the following options in this section:
  - **Image Prefix** - enter the alpha prefix for the subdirectory that stores exported images.
  - **Native Prefix** - enter the alpha prefix for the subdirectory that stores exported native files.
  - **Text Prefix** - enter the alpha prefix for the subdirectory that stores exported extracted text files.
  - **Pdf Prefix** - enter the alpha prefix for the subdirectory that stores exported extracted PDF files.
  - **Start #** - select the starting number for the subdirectories.
  - **# of Digits** - select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
  - **Max Files** - select the number of files to store in each subdirectory.
- **File Path** - controls how the export path for the files is referenced. Select one of the following options:
  - **Use absolute paths** - paths to exported files are represented as absolute paths. C:\ Desktop\VOL001\NATIVE001\AS000001.msg
  - **Use relative paths** - paths to exported files are represented as relative paths. .\VOL001\NATIVE001\AS000001.msg
  - **Use prefix** - a prefix is added to the relative path, such as a CD drive letter. D:\VOL001\NATIVE001\AS000001.msg
- **Load File Characters** - select the delimiters to use in a document-level load file when **Data File Format** in the **Metadata** section is set to **Custom**. Select the following options as necessary:
  - **Column** - this delimiter separates columns in the load file.
  - **Quote** - this delimiter qualifies the text in each field of the load file.
  - **Newline** - this delimiter signifies the end of any extracted text or long text field in the load file.
  - **Multi-Value** - this delimiter separates different choices within a choice field.
  - **Nested Value** - this delimiter indicates the hierarchy of choices within a choice field.

- **Text and Native File Names** - select the following options for naming exported native and extracted text files:

  Note: The following field types are supported by this feature: Date, Decimal, Fixed-Length Text, Single Choice, Whole Number, and Yes/No.

- (Available Only for Production Sets) **Named after** - select one of the following naming convention for exported files:
  - **Identifier** - select this option to name the files after the identifier for your workspace.
  - **Beginning production number** - select this option to name the files after the production number. (This number may be the Bates number for a production.)
  - **Custom** - select this option to name the native and text files in an export by appending them with either a control number or production begin bates and optionally, a field of your choice.
    To select custom naming options for your exported native and text files, do the following:
    1. Select **Custom** from the Named after drop-down menu.
    2. Click to the right of the Named after drop-down menu.
    3. Select either the control number or production begin bates naming option from the drop-down menu.
    4. Optionally, to append a field or custom text to the file name, click .
    5. Select the desired spacing option from the **_ (underscore)** drop-down menu.
    6. To either add custom text to the name or to add a field to the name, do the following:
       - To include custom text as part of the name, choose the **Custom Text...** option in the drop-down menu and enter the desired custom text in the textbox underneath the **Custom Text...** drop-down menu.
       - To include a field as part of the file names, select the desired field option from the **Custom Text...** drop-down menu. If a field is empty in a workspace it will not display as part of the file name even if selected from the **Custom Text...** drop-down menu.

         Note: If a boolean field is selected, the name of the field will be displayed and not the value. For example: JWOLFE_009_confidential-HAS IMAGES.

    7. Optionally, to add an additional field or custom text after the previously selected options, click .
    8. Select the desired spacing option from the **_ (underscore)** drop-down menu.
    9. To either add additional custom text to the name or to add an additional field to the name, do the following:
       - To include additional custom text as part of the name before a field, choose the **Custom Text...** option in the drop-down menu and enter the desired custom text in the textbox underneath the **Custom Text...** drop-down menu.
       - To include an additional field as part of the name, select the desired field option from the **Custom Text...** drop-down menu. If a field is empty in a workspace it will not display as part of the file name even if selected from the **Custom Text...** drop-down menu.

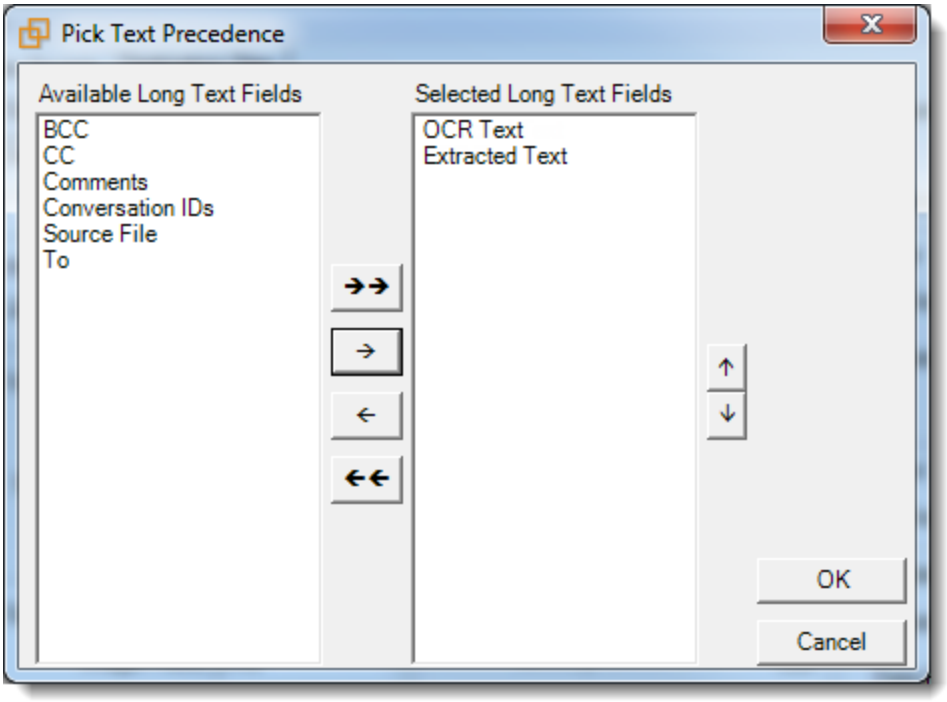
Note: If a boolean field is selected, the name of the field will be displayed and not the value. For example: JWOLFE_009_confidential-HAS IMAGES.

10. Click **Apply** to save the current naming options.

Note: If a file is not found in any of the production sets, the name will revert to the control number or production begin bates regardless of which naming options you have selected.

- **Append original file** - 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.
- **Image** - determines whether to include images in an export and sets the format of the load file. Set the following options:
  - **Check Export Images** - select this option to include images in the export. (You must set the **Data File Format** and the **File Type** when you export images.)
  - **Data File Format** - select one of these formats for image-level load file:
    - Opticon
    - IPRO
  - **File Type** - select one of these file types:
    - Single-page TIF/JPG
    - Multi-page TIF
    - PDF
- **Native** - controls which files are exported by Relativity Desktop Client.
  - **Export Native Files** - select to export native files.
  - **Export rendered PDF's** - select to export PDF files. This option is not available when exporting a Production set.
- **Metadata** - use the following options to control the export of the document-level load file and extracted text:
  - **Data File Format** - select a the format for the document-level load file you're exporting:
    - Comma separated (.csv)
    - Concordance (.dat) - load file exports with the standard Concordance delimiters.
    - Custom (.txt) - load file exports with the custom delimiters that you select in the **Load File Characters** section.
    - HTML (.html) - load file is in HTML and contains hyperlinks to launch any exported files.
  - **Data File Encoding** - select an encoding for the document-level load file from the drop-down box. Click ... for additional options.
  - **Export Text Field as Files** - determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. The RDC includes text as part of your load file if you deselect this option.
  - **Text File Encoding** - select the encoding for the document-level text files. Click ... for additional options.

- **Text Precedence** - select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click ... to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the precedence of the fields.



If you add any fields to the **Selected Long Text Fields** column, Relativity adds the Text Precedence column as the last column in the load file. During an export, Relativity checks the topmost field in the **Selected Long Text Fields** column for text, and if the field is null, it checks the next field in order of precedence for text. When it finds a field that contains text, Relativity adds the contents of that field to the Text Precedence column in the document load file, and then continues checking the fields for the next document.

For example, you want the Text Precedence column in the load file to contain the contents of the OCR Text field when it is available for a document and the contents of the Extracted Text field when the OCR Text for a document is null. In the Pick Text Precedence pop-up, you add the OCR Text as the first field in the **Selected Long Text Fields** column followed by the Extracted Text field.

Note: If you want to improve export performance, you don't need to add all of the long text fields you select in the Pick Text Precedence pop-up to the Selected Columns option on the Data Source tab. When you don't select these fields on the Data Source tab, but you add them to **Selected Long Text Fields** column, the RDC adds the content of these fields to the Text Precedence column as described above. When you add the long text fields on the Data Source tab, Relativity adds these columns to the document level load file.

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

- **Export Multiple-Choice Fields as Nested** - select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.

4.5 Exporting a folder

You can export the contents of a specific workspace folder through the RDC.

Note: To preserve the current folder structure of each document in a long text field, you have the option of running the Set Relativity folder path field script when you're exporting a folder through the RDC.

4.5.1 Exporting RDC Permissions

The following permissions are required to use the exporting feature in Relativity Desktop Client:

Object Security	Admin Operations
• Document: Local Access (Download, Copy Text) **Note:** This is required when exporting long-text cells greater than the value defined by the MaximumLongTextSizeForExportInCell instance setting, the default value of which is 1048576.	• Allow Export

4.5.2 Exporting a folder

Note: When you select the **Folder** option, only the contents of the current folder are exported. Use **Folder and Subfolders** option to export the contents of both the folder and its subfolders, or the contents of an entire workspace. See Exporting a folder and its subfolders on page 77.

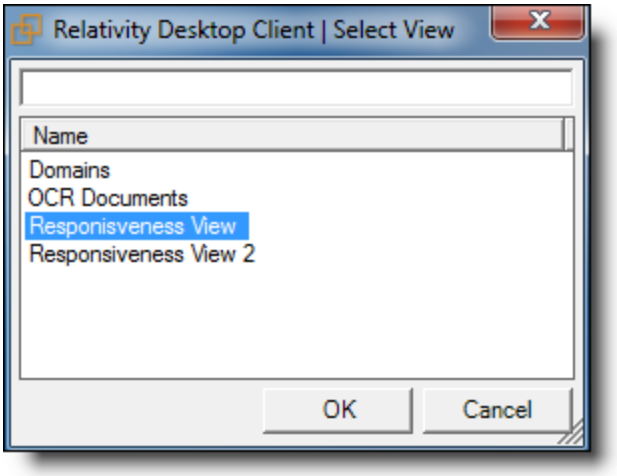
To export a folder:

1. Open the RDC and then select a workspace.
2. In the RDC browser, right-click on a specific folder, point to **Export** and then click **Folder**.

   You can also highlight a folder in the RDC browser. On the **Tools** menu, point to **Export** and click **Folder**.) The Data Source tab in the Export Production window appears.
3. (Optional) To use settings in an existing export file, complete these steps:
   a. Click the**File** menu, and select **Load Export Settings**.
   b. Browse for your export settings file (.kwx) in the Open dialog.
   c. Select a view, and click **OK**. Your view is listed on the Data Source tab, and determines the fields displayed in the **Selected Columns** box. Other settings from the file are used to populate the Destination Files tab. (You can also modify any settings on the Data Source and Destination Files tab as necessary.)

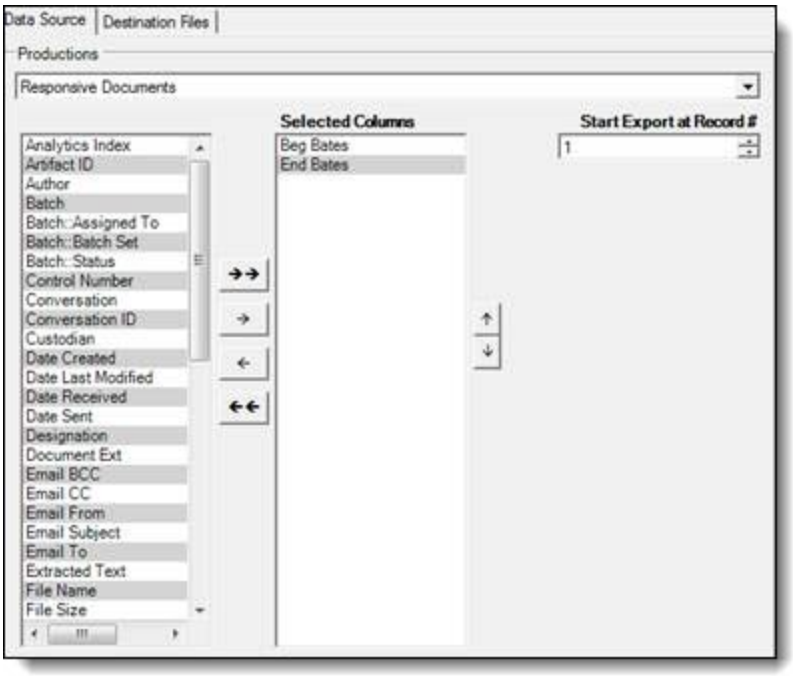
   Note: On the Destination Files tab, you may want to select **Overwrite Files** if you are re-exporting the

same group of files to the previously used location.



d. Continue with step 7.

1. On the Data Source tab, select a view in the Views box. Update the remaining options as necessary.
The Data Source tab appears when you select the option to export production sets, saved searches, folders, and subfolders. You will see similar options on the tab for each of these actions, but you may want to select different settings for them. The following screen shot uses a production set as an example, but the settings are the same when exporting production sets, saved searches, folders, and subfolders.



On the **Data Source** tab, you can set the following options for the data that you want to export. Depending on the type of data you want to export, the dropdown updates accordingly. Select from the following:

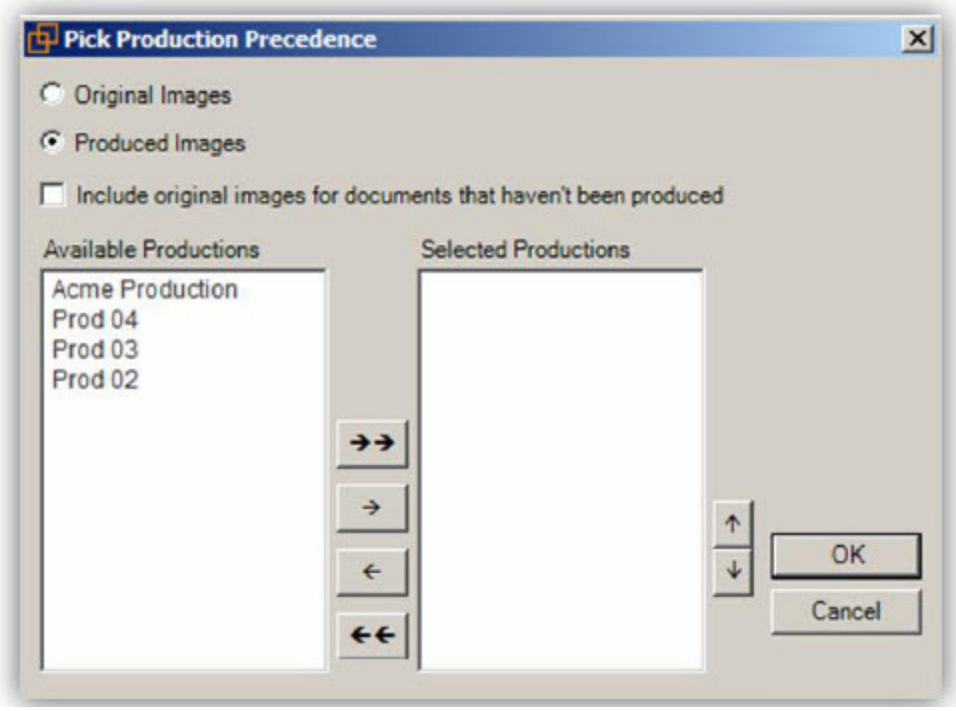
- **Views - Folders and subfolders** - select a view for the data that you want to export.
- **Searches - Saved Search** - select a saved search you want to export.
- **Productions - Production set** - select a production set you want to export

- **Selected Columns** - choose the fields that you want to export by moving them to the **Selected Columns** box. The box on the right displays all available fields. Only the fields in the **Selected Columns** box are exported.

  Note: If a reflected production field is selected for Selected Column, the RDC doesn't narrow down the field to a specific production. The reflected field for all productions is included.

- **Start Export at Record #** - select a record number that identifies the initial document for export. The RDC exports the document with this record number and continues exporting documents with subsequent record numbers.

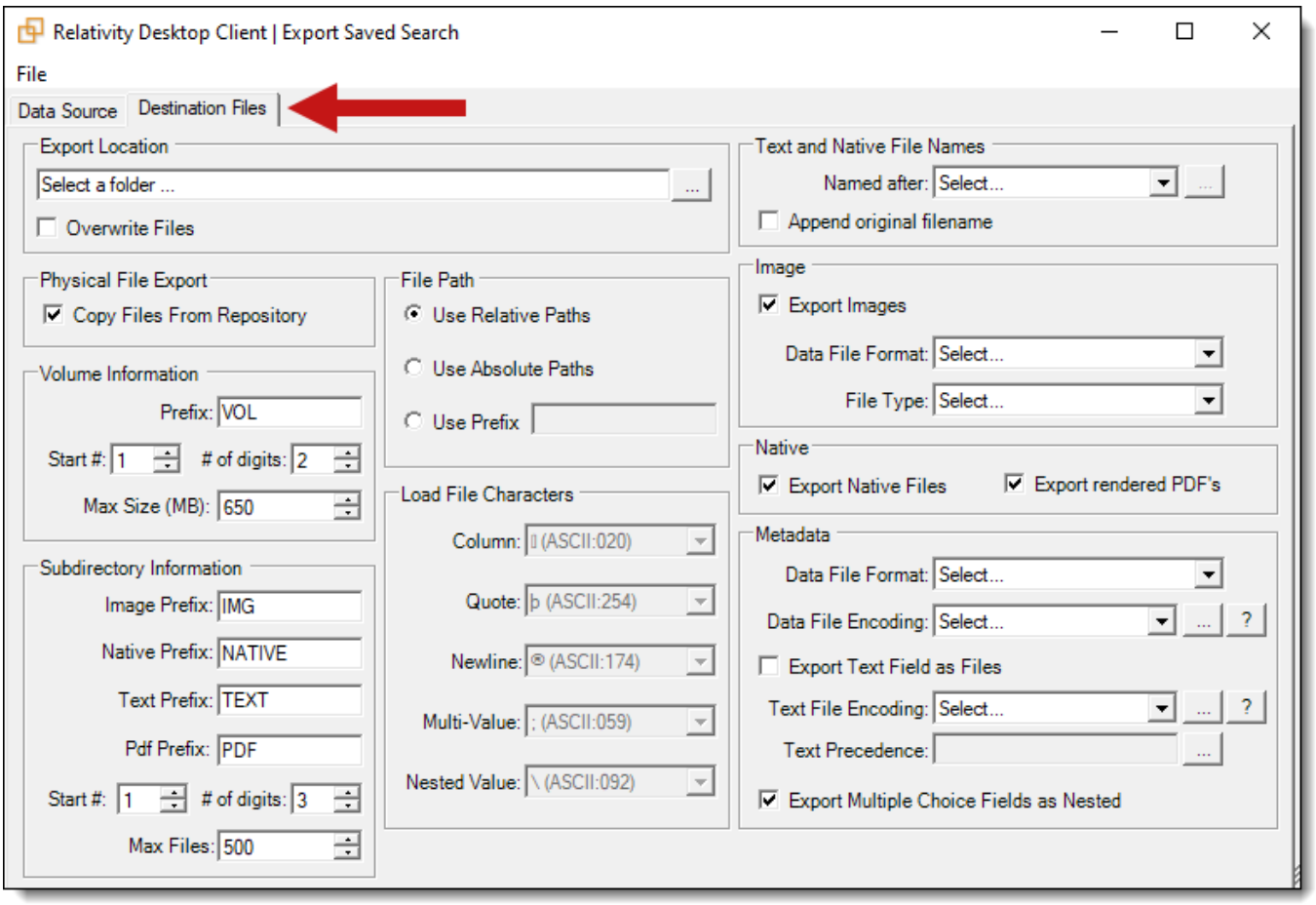
- (Available only for Saved Searches, Folders, and Subfolders) **Production Precedence** - click ... to display the Pick Production Precedence dialog where you can select a group of produced documents for export instead of the original images.



  - Select the images that you want to export:
    - **Original Images** - export only the original, non-produced images.
    - **Produced Images** - export a produced version of the images.
    - **Include original images…** - export original images for the documents that are not in a specified production.
  - Move the productions that you want to exported to the **Selected Productions** box. To move productions between columns, highlight the production and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the precedence of the fields.

    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 ...** is enabled, then the original document is produced.

4. Select the Destination Files tab.
   On the Destination tab, you can set options that control how the files in folders, searches, and production sets are exported. The Export dialog displays this tab when you select an **Export** option from the **Tools** menu, or when you right-click on a folder or workspace in the RDC. The Destination tab displays the same options when you export files in folders, searches, or production sets.



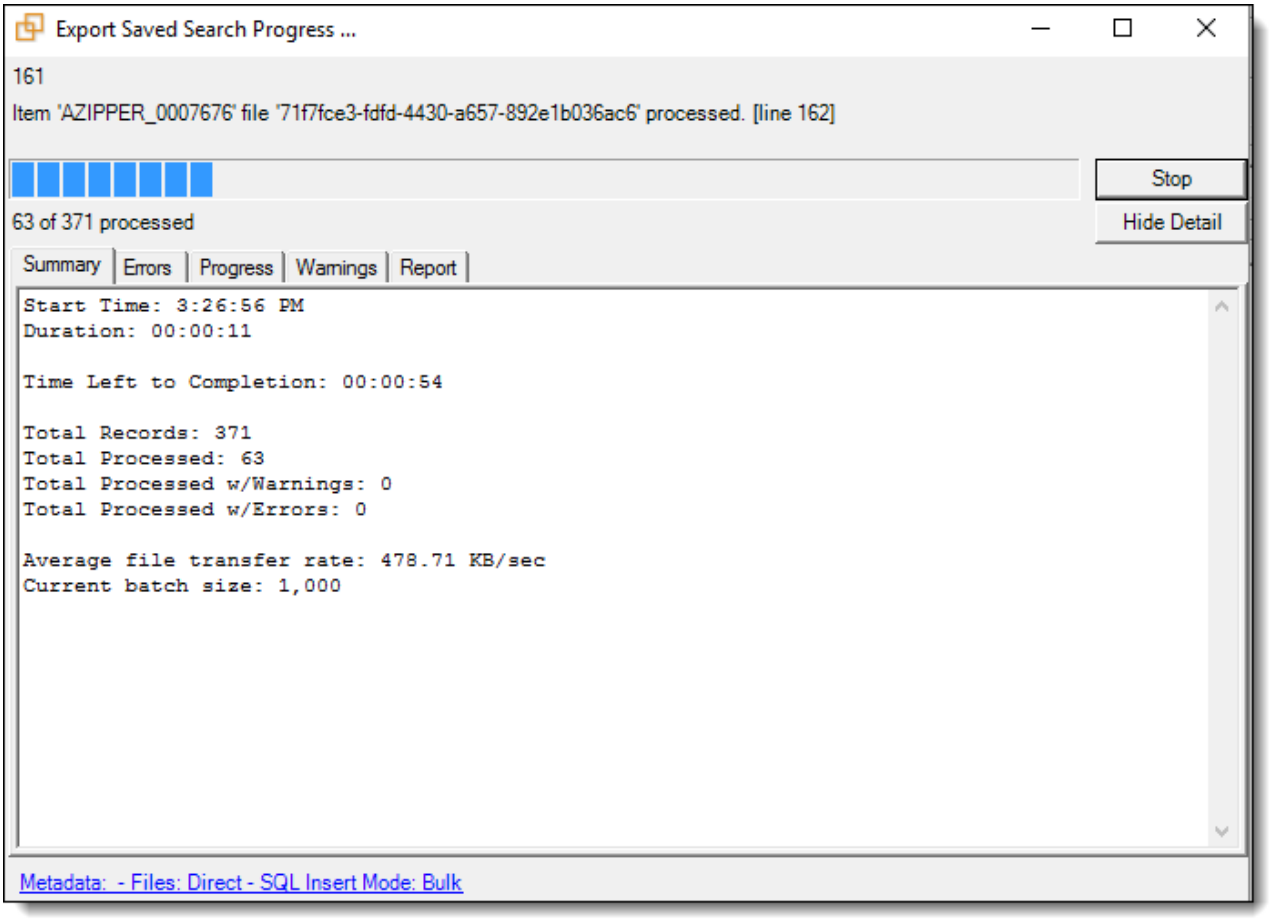
> **Note:** In the Text and Native File Name section, the Named after option is available only for Production Sets.

5. Complete the fields on the Destination Files tab. See Fields on the Destination Files tab on the next page.
6. After you have selected your export settings, select **File** and click **Run**.

> **Note:** A warning message appears if you are missing information required to run the export. Update the settings for the required options, and run the export again.

7. Review the progress of the export.
   You can view the progress of an export through the RDC. Select the following tabs to display specific information:

   - **Summary** - displays general information about the number of records, processing warnings, and errors. The following screen shot displays file progress for an export job.



- **Errors** - lists any errors encountered during the load. The Errors tab displays any errors that occur when you export content with the RDC.
- **Progress** - displays a detailed view of the load progress.
- **Warnings** - displays information about loading or connection issues.
- **Report** - includes the following files that you can export:
  - **Export Error Report** - exports a .csv file with a summary of errors.
  - **Export Error File** - exports a .dat file, which is a document-level load file containing only records with errors.
- **File Transfer Mode** - displays the following information:
  - **Web mode** - this mode uses the web server and it is the standard.
  - **Direct mode** - this mode provides faster performance, but requires a connection to the network hosting the data, as well as specific Windows group permissions. For more information, see Direct mode on page 10.

8. (Optional) To save your export settings, point to the **File** menu, and click **Save Export Settings**. Choose a location for the export settings file (.kwx).

4.5.3 Fields on the Destination Files tab

The Destination Files tab contains the following sections with their respective fields:

- **Export Location** - select a target directory for exporting folders, searches, and production sets. Click to browse for a location. Select **Overwrite Files** to overwrite any existing files of the same name in the target export directory.
- **Physical File Export** - select the **Copy Files From Repository** option. This is the default option and copies files from the file server to the specified export location. If you don't select **Copy Files From Repository**, Relativity doesn't copy the files to the export location. Instead, the exported load files reference the repository location of the files.
- **Volume Information** - 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 #** - select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
  - **# of Digits** - select the number of digits attached to the prefix. (For example, if you select 3, the output is VOL001, VOL002, and so on.)
  - **Max size** - select the maximum size allowed for each volume in MBs.
- **Subdirectory Information** - controls the naming and size of volume subfolders. Set the following options in this section:
  - **Image Prefix** - enter the alpha prefix for the subdirectory that stores exported images.
  - **Native Prefix** - enter the alpha prefix for the subdirectory that stores exported native files.
  - **Text Prefix** - enter the alpha prefix for the subdirectory that stores exported extracted text files.
  - **Pdf Prefix** - enter the alpha prefix for the subdirectory that stores exported extracted PDF files.
  - **Start #** - select the starting number for the subdirectories.
  - **# of Digits** - select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
  - **Max Files** - select the number of files to store in each subdirectory.
- **File Path** - controls how the export path for the files is referenced. Select one of the following options:
  - **Use absolute paths** - paths to exported files are represented as absolute paths. C:\ Desktop\VOL001\NATIVE001\AS000001.msg
  - **Use relative paths** - paths to exported files are represented as relative paths. .\VOL001\NATIVE001\AS000001.msg
  - **Use prefix** - a prefix is added to the relative path, such as a CD drive letter. D:\VOL001\NATIVE001\AS000001.msg
- **Load File Characters** - select the delimiters to use in a document-level load file when **Data File Format** in the **Metadata** section is set to **Custom**. Select the following options as necessary:
  - **Column** - this delimiter separates columns in the load file.
  - **Quote** - this delimiter qualifies the text in each field of the load file.
  - **Newline** - this delimiter signifies the end of any extracted text or long text field in the load file.
  - **Multi-Value** - this delimiter separates different choices within a choice field.
  - **Nested Value** - this delimiter indicates the hierarchy of choices within a choice field.

- **Text and Native File Names** - select the following options for naming exported native and extracted text files:

  Note: The following field types are supported by this feature: Date, Decimal, Fixed-Length Text, Single Choice, Whole Number, and Yes/No.

- (Available Only for Production Sets) **Named after** - select one of the following naming convention for exported files:
  - **Identifier** - select this option to name the files after the identifier for your workspace.
  - **Beginning production number** - select this option to name the files after the production number. (This number may be the Bates number for a production.)
  - **Custom** - select this option to name the native and text files in an export by appending them with either a control number or production begin bates and optionally, a field of your choice.
    To select custom naming options for your exported native and text files, do the following:
    1. Select **Custom** from the Named after drop-down menu.
    2. Click to the right of the Named after drop-down menu.
    3. Select either the control number or production begin bates naming option from the drop-down menu.
    4. Optionally, to append a field or custom text to the file name, click .
    5. Select the desired spacing option from the **_ (underscore)** drop-down menu.
    6. To either add custom text to the name or to add a field to the name, do the following:
       - To include custom text as part of the name, choose the **Custom Text...** option in the drop-down menu and enter the desired custom text in the textbox underneath the **Custom Text...** drop-down menu.
       - To include a field as part of the file names, select the desired field option from the **Custom Text...** drop-down menu. If a field is empty in a workspace it will not display as part of the file name even if selected from the **Custom Text...** drop-down menu.

         Note: If a boolean field is selected, the name of the field will be displayed and not the value. For example: JWOLFE_009_confidential-HAS IMAGES.

    7. Optionally, to add an additional field or custom text after the previously selected options, click .
    8. Select the desired spacing option from the **_ (underscore)** drop-down menu.
    9. To either add additional custom text to the name or to add an additional field to the name, do the following:
       - To include additional custom text as part of the name before a field, choose the **Custom Text...** option in the drop-down menu and enter the desired custom text in the textbox underneath the **Custom Text...** drop-down menu.
       - To include an additional field as part of the name, select the desired field option from the **Custom Text...** drop-down menu. If a field is empty in a workspace it will not display as part of the file name even if selected from the **Custom Text...** drop-down menu.

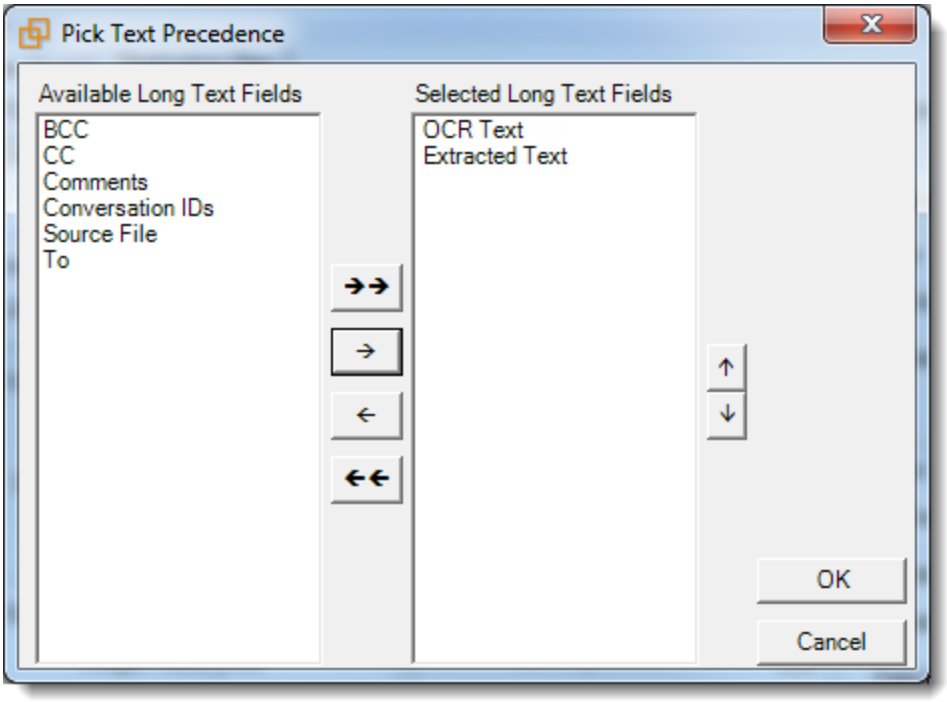
Note: If a boolean field is selected, the name of the field will be displayed and not the value. For example: JWOLFE_009_confidential-HAS IMAGES.

10. Click **Apply** to save the current naming options.

Note: If a file is not found in any of the production sets, the name will revert to the control number or production begin bates regardless of which naming options you have selected.

- **Append original file** - 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.
- **Image** - determines whether to include images in an export and sets the format of the load file. Set the following options:
  - **Check Export Images** - select this option to include images in the export. (You must set the **Data File Format** and the **File Type** when you export images.)
  - **Data File Format** - select one of these formats for image-level load file:
    - Opticon
    - IPRO
  - **File Type** - select one of these file types:
    - Single-page TIF/JPG
    - Multi-page TIF
    - PDF
- **Native** - controls which files are exported by Relativity Desktop Client.
  - **Export Native Files** - select to export native files.
  - **Export rendered PDF's** - select to export PDF files. This option is not available when exporting a Production set.
- **Metadata** - use the following options to control the export of the document-level load file and extracted text:
  - **Data File Format** - select a the format for the document-level load file you're exporting:
    - Comma separated (.csv)
    - Concordance (.dat) - load file exports with the standard Concordance delimiters.
    - Custom (.txt) - load file exports with the custom delimiters that you select in the **Load File Characters** section.
    - HTML (.html) - load file is in HTML and contains hyperlinks to launch any exported files.
  - **Data File Encoding** - select an encoding for the document-level load file from the drop-down box. Click ... for additional options.
  - **Export Text Field as Files** - determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. The RDC includes text as part of your load file if you deselect this option.
  - **Text File Encoding** - select the encoding for the document-level text files. Click ... for additional options.

- **Text Precedence** - select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click ... to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the precedence of the fields.



If you add any fields to the **Selected Long Text Fields** column, Relativity adds the Text Precedence column as the last column in the load file. During an export, Relativity checks the topmost field in the **Selected Long Text Fields** column for text, and if the field is null, it checks the next field in order of precedence for text. When it finds a field that contains text, Relativity adds the contents of that field to the Text Precedence column in the document load file, and then continues checking the fields for the next document.

For example, you want the Text Precedence column in the load file to contain the contents of the OCR Text field when it is available for a document and the contents of the Extracted Text field when the OCR Text for a document is null. In the Pick Text Precedence pop-up, you add the OCR Text as the first field in the **Selected Long Text Fields** column followed by the Extracted Text field.

Note: If you want to improve export performance, you don't need to add all of the long text fields you select in the Pick Text Precedence pop-up to the Selected Columns option on the Data Source tab. When you don't select these fields on the Data Source tab, but you add them to **Selected Long Text Fields** column, the RDC adds the content of these fields to the Text Precedence column as described above. When you add the long text fields on the Data Source tab, Relativity adds these columns to the document level load file.

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

- **Export Multiple-Choice Fields as Nested** - select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.

4.6 Exporting a folder and its subfolders

You can export the contents of a folder and its subfolders, as well as an entire workspace, through the RDC.

Note: To preserve the current folder structure of each document in a long text field, you have the option of running the Set Relativity folder path field script when you're exporting a folder through the RDC.

4.6.1 Exporting RDC Permissions

The following permissions are required to use the exporting feature in Relativity Desktop Client:

Object Security	Admin Operations
• Document: Local Access (Download, Copy Text) **Note:** This is required when exporting long-text cells greater than the value defined by the MaximumLongTextSizeForExportInCell instance setting, the default value of which is 1048576.	• Allow Export

4.6.2 Exporting a folder and its subfolders

Note: You can also export only the content of the current folder using the **Folder** option. See Exporting a folder on page 68.

To export a folder and its subfolders:

1. Open the RDC and select a workspace.
2. In the RDC browser, right-click on a specific folder, point to **Export** and then click **Folder and Subfolders**.

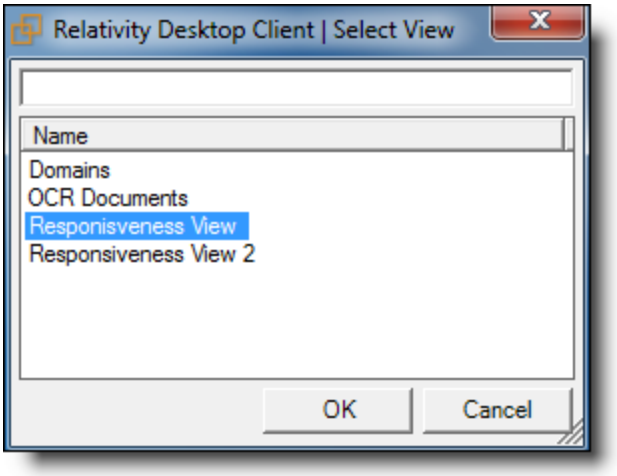
   You can also highlight a folder in the RDC browser. On the **Tools** menu, point to **Export** and click **Folder and Subfolders**.

   The Data Source tab in the Export Production window appears.

   Note: To export an entire workspace, highlight the root folder.
3. (Optional) To use settings in an existing export file, complete these steps:
   a. Click **File** and select **Load Export Settings**.
   b. Browse for your export settings file (.kwx) in the Open dialog.
   c. Select a view, and then click **OK**. Your view is lists on the Data Source tab. This determines the fields listed in the **Selected Columns** box. Other settings from the file are used to populate the Destination Files tab. You can also modify any settings on the Data Source and Destination Files tab as necessary.

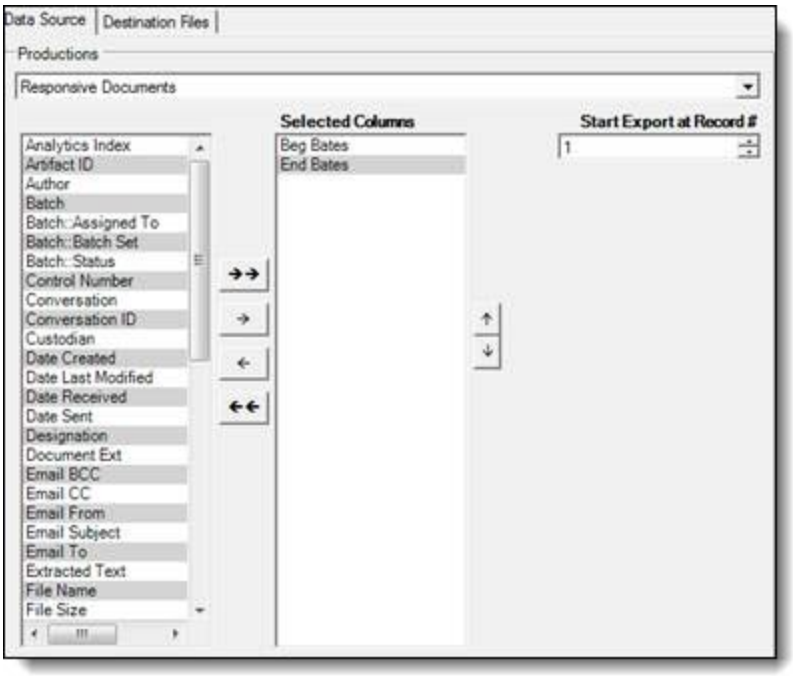
      Note: On the Destination Files tab, you may want to select **Overwrite Files** if you are re-exporting the

same group of files to the previously used location.



d. Continue with step 7.

4. On the Data Source, select a view in the **Views** box. Update the remaining options as necessary.
The Data Source tab appears when you select the option to export production sets, saved searches, folders, and subfolders. You will see similar options on the tab for each of these actions, but you may want to select different settings for them. The following screen shot uses a production set as an example, but the settings are the same when exporting production sets, saved searches, folders, and subfolders.



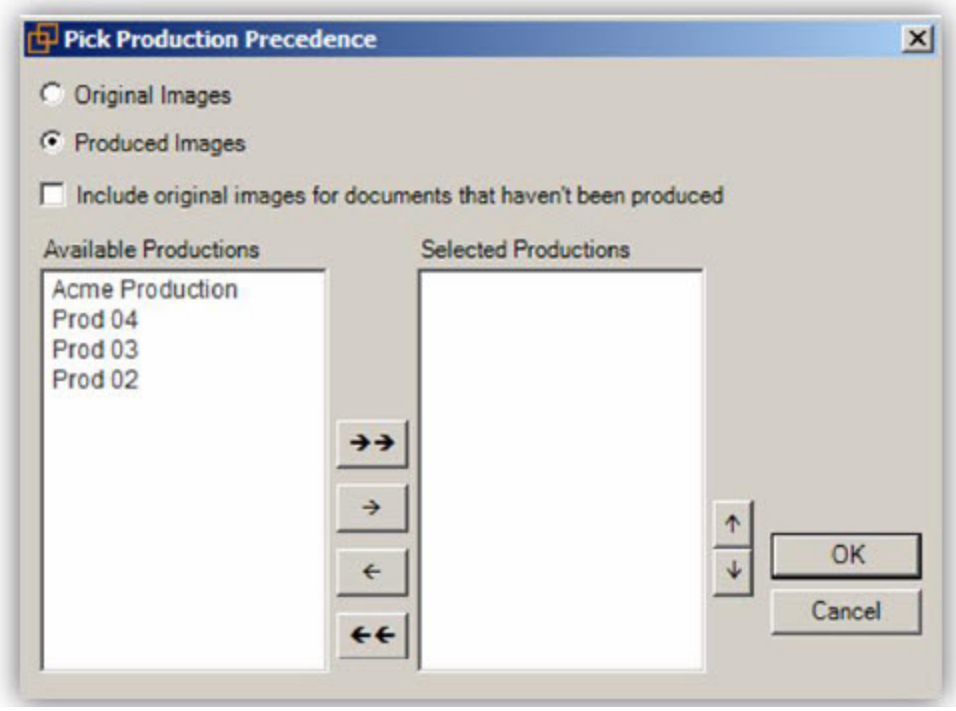
On the **Data Source** tab, you can set the following options for the data that you want to export. Depending on the type of data you want to export, the dropdown updates accordingly. Select from the following:

- **Views - Folders and subfolders** - select a view for the data that you want to export.
- **Searches - Saved Search** - select a saved search you want to export.

- **Productions - Production set** - select a production set you want to export
- **Selected Columns** - choose the fields that you want to export by moving them to the **Selected Columns** box. The box on the right displays all available fields. Only the fields in the **Selected Columns** box are exported.

  Note: If a reflected production field is selected for Selected Column, the RDC doesn't narrow down the field to a specific production. The reflected field for all productions is included.

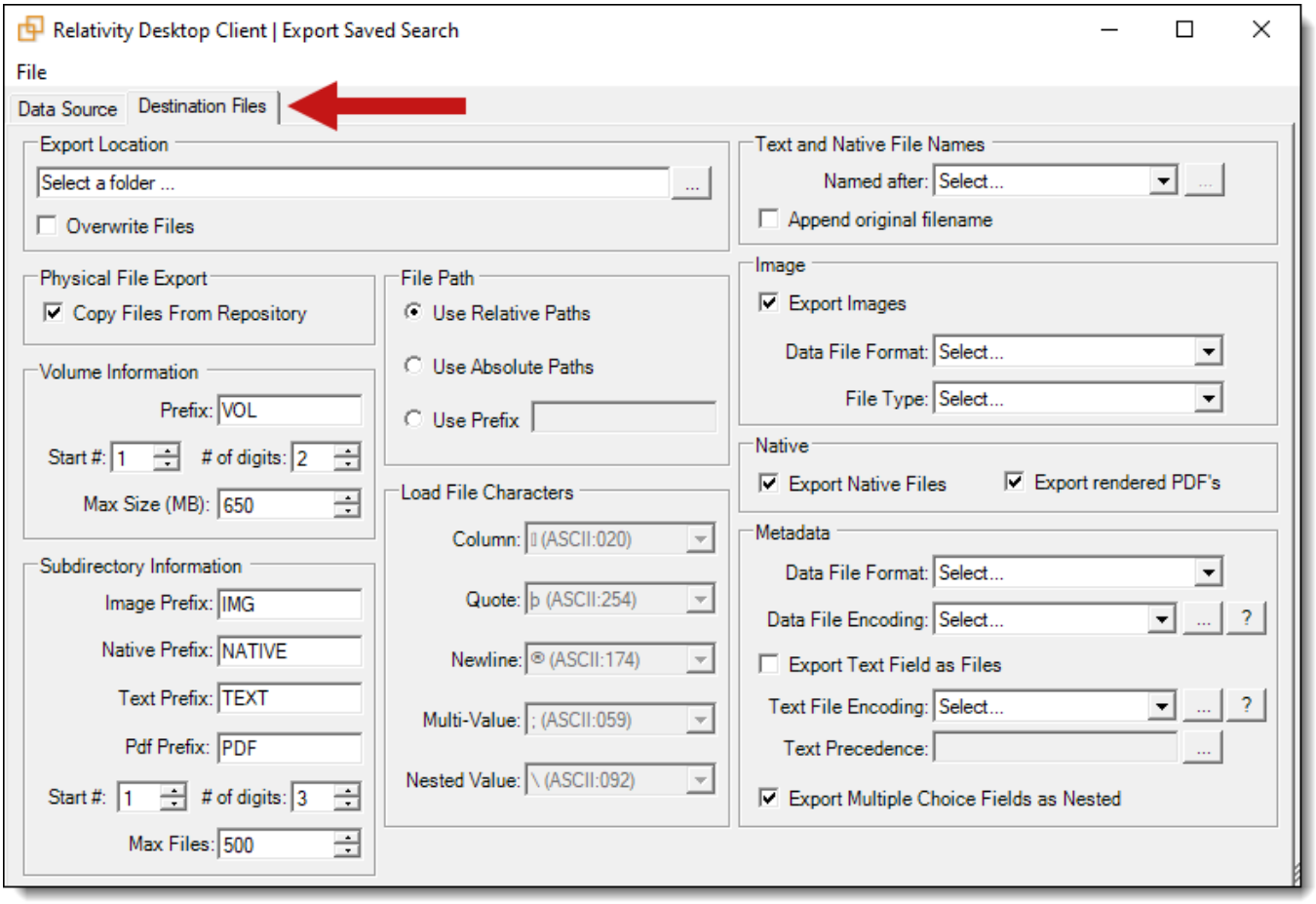
- **Start Export at Record #** - select a record number that identifies the initial document for export. The RDC exports the document with this record number and continues exporting documents with subsequent record numbers.
- (Available only for Saved Searches, Folders, and Subfolders) **Production Precedence** - click ... to display the Pick Production Precedence dialog where you can select a group of produced documents for export instead of the original images.



  - Select the images that you want to export:
    - **Original Images** - export only the original, non-produced images.
    - **Produced Images** - export a produced version of the images.
    - **Include original images…** - export original images for the documents that are not in a specified production.
  - Move the productions that you want to exported to the **Selected Productions** box. To move productions between columns, highlight the production and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the precedence of the fields.

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 ...** is enabled, then the original document is produced.

5. Select the **Destination Files** tab.
   On the Destination tab, you can set options that control how the files in folders, searches, and production sets are exported. The Export dialog displays this tab when you select an **Export** option from the **Tools** menu, or when you right-click on a folder or workspace in the RDC. The Destination tab displays the same options when you export files in folders, searches, or production sets.



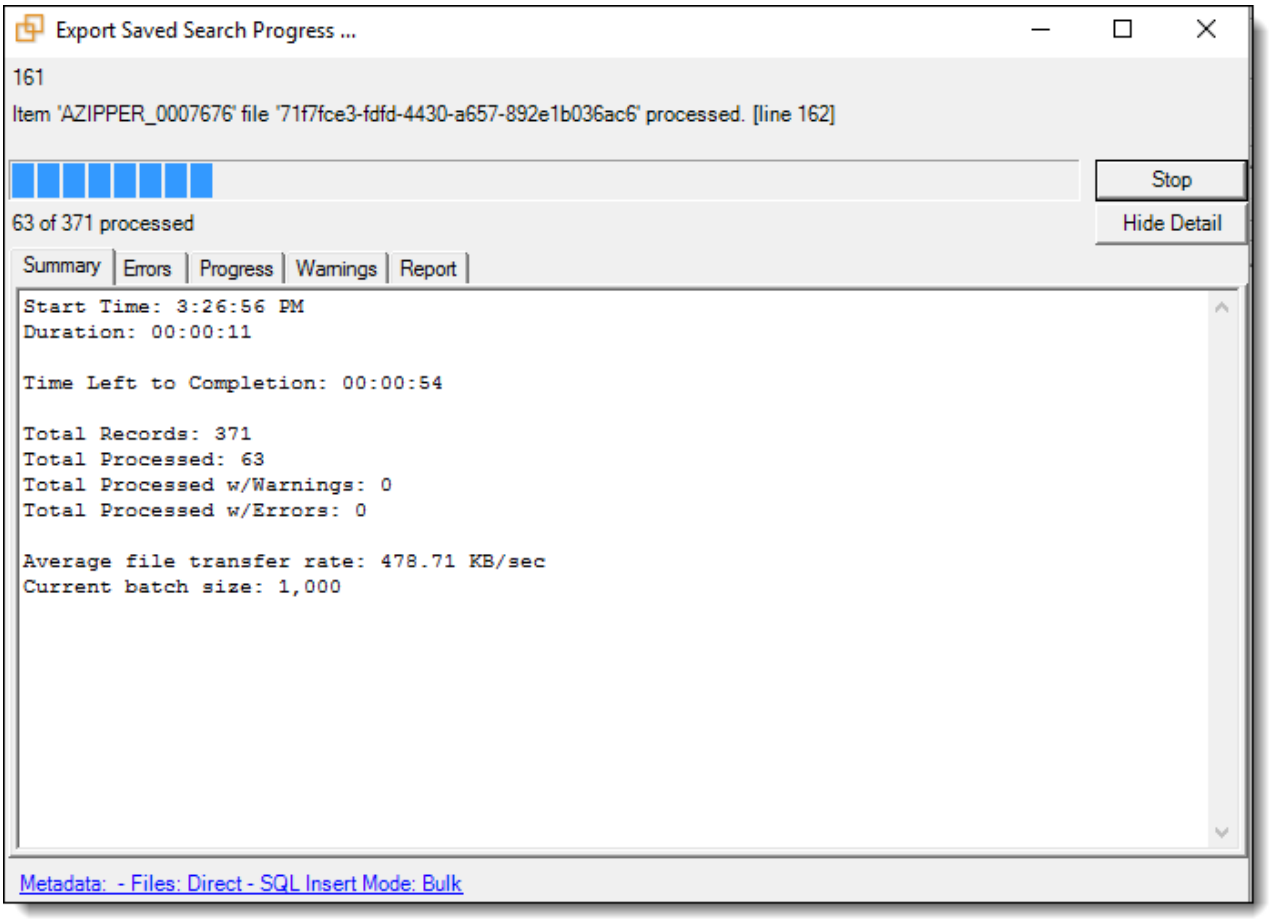
Note: In the Text and Native File Name section, the Named after option is available only for Production Sets.

6. Complete the fields on the Destination Files tab. See Fields on the Destination Files tab on the next page.
7. After you have selected your export settings, select **File** and then click **Run**.

Note: A warning message displays if you are missing information required to run the export. Update the settings for the required options, and run the export again.

8. Review the progress of the export.
   You can view the progress of an export through the RDC. Select the following tabs to display specific information:

- **Summary** - displays general information about the number of records, processing warnings, and errors. The following screen shot displays file progress for an export job.



- **Errors** - lists any errors encountered during the load. The Errors tab displays any errors that occur when you export content with the RDC.
- **Progress** - displays a detailed view of the load progress.
- **Warnings** - displays information about loading or connection issues.
- **Report** - includes the following files that you can export:
  - **Export Error Report** - exports a .csv file with a summary of errors.
  - **Export Error File** - exports a .dat file, which is a document-level load file containing only records with errors.
- **File Transfer Mode** - displays the following information:
  - **Web mode** - this mode uses the web server and it is the standard.
  - **Direct mode** - this mode provides faster performance, but requires a connection to the network hosting the data, as well as specific Windows group permissions. For more information, see Direct mode on page 10.

9. (Optional) To save your export settings, click **File** > **Save Export Settings**. Choose a location for the export settings file (.kwx).

4.6.3 Fields on the Destination Files tab

The Destination Files tab contains the following sections with their respective fields:

- **Export Location** - select a target directory for exporting folders, searches, and production sets. Click to browse for a location. Select **Overwrite Files** to overwrite any existing files of the same name in the target export directory.
- **Physical File Export** - select the **Copy Files From Repository** option. This is the default option and copies files from the file server to the specified export location. If you don't select **Copy Files From Repository**, Relativity doesn't copy the files to the export location. Instead, the exported load files reference the repository location of the files.
- **Volume Information** - 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 #** - select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
  - **# of Digits** - select the number of digits attached to the prefix. (For example, if you select 3, the output is VOL001, VOL002, and so on.)
  - **Max size** - select the maximum size allowed for each volume in MBs.
- **Subdirectory Information** - controls the naming and size of volume subfolders. Set the following options in this section:
  - **Image Prefix** - enter the alpha prefix for the subdirectory that stores exported images.
  - **Native Prefix** - enter the alpha prefix for the subdirectory that stores exported native files.
  - **Text Prefix** - enter the alpha prefix for the subdirectory that stores exported extracted text files.
  - **Pdf Prefix** - enter the alpha prefix for the subdirectory that stores exported extracted PDF files.
  - **Start #** - select the starting number for the subdirectories.
  - **# of Digits** - select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
  - **Max Files** - select the number of files to store in each subdirectory.
- **File Path** - controls how the export path for the files is referenced. Select one of the following options:
  - **Use absolute paths** - paths to exported files are represented as absolute paths. C:\ Desktop\VOL001\NATIVE001\AS000001.msg
  - **Use relative paths** - paths to exported files are represented as relative paths. .\VOL001\NATIVE001\AS000001.msg
  - **Use prefix** - a prefix is added to the relative path, such as a CD drive letter. D:\VOL001\NATIVE001\AS000001.msg
- **Load File Characters** - select the delimiters to use in a document-level load file when **Data File Format** in the **Metadata** section is set to **Custom**. Select the following options as necessary:
  - **Column** - this delimiter separates columns in the load file.
  - **Quote** - this delimiter qualifies the text in each field of the load file.
  - **Newline** - this delimiter signifies the end of any extracted text or long text field in the load file.
  - **Multi-Value** - this delimiter separates different choices within a choice field.
  - **Nested Value** - this delimiter indicates the hierarchy of choices within a choice field.

- **Text and Native File Names** - select the following options for naming exported native and extracted text files:

  Note: The following field types are supported by this feature: Date, Decimal, Fixed-Length Text, Single Choice, Whole Number, and Yes/No.

- (Available Only for Production Sets) **Named after** - select one of the following naming convention for exported files:
  - **Identifier** - select this option to name the files after the identifier for your workspace.
  - **Beginning production number** - select this option to name the files after the production number. (This number may be the Bates number for a production.)
  - **Custom** - select this option to name the native and text files in an export by appending them with either a control number or production begin bates and optionally, a field of your choice.
    To select custom naming options for your exported native and text files, do the following:
    1. Select **Custom** from the Named after drop-down menu.
    2. Click to the right of the Named after drop-down menu.
    3. Select either the control number or production begin bates naming option from the drop-down menu.
    4. Optionally, to append a field or custom text to the file name, click .
    5. Select the desired spacing option from the **_ (underscore)** drop-down menu.
    6. To either add custom text to the name or to add a field to the name, do the following:
       - To include custom text as part of the name, choose the **Custom Text...** option in the drop-down menu and enter the desired custom text in the textbox underneath the **Custom Text...** drop-down menu.
       - To include a field as part of the file names, select the desired field option from the **Custom Text...** drop-down menu. If a field is empty in a workspace it will not display as part of the file name even if selected from the **Custom Text...** drop-down menu.

       Note: If a boolean field is selected, the name of the field will be displayed and not the value. For example: JWOLFE_009_confidential-HAS IMAGES.

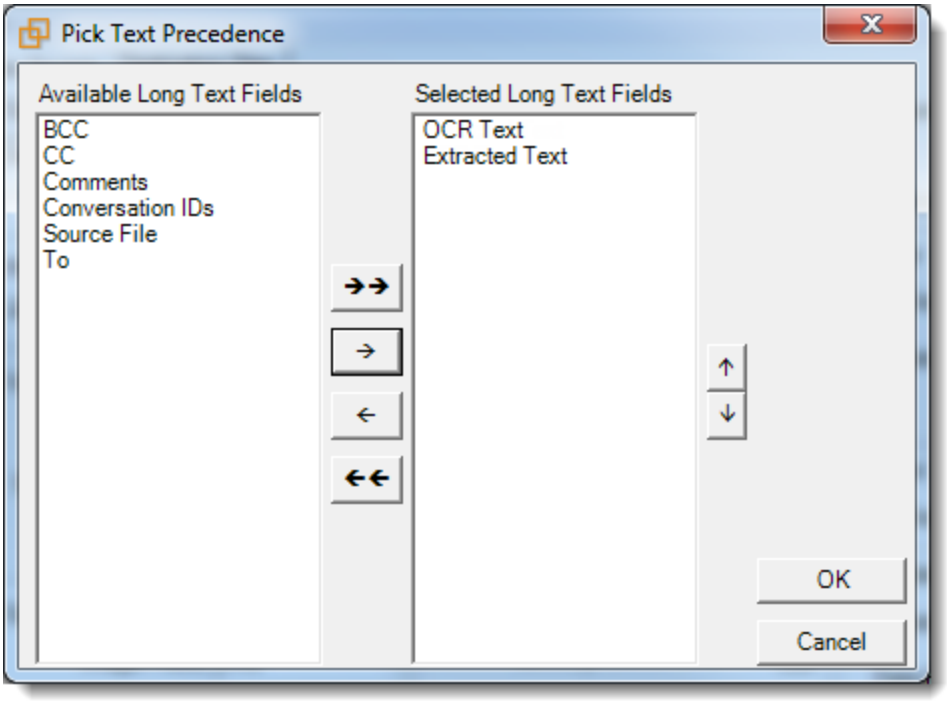
    7. Optionally, to add an additional field or custom text after the previously selected options, click .
    8. Select the desired spacing option from the **_ (underscore)** drop-down menu.
    9. To either add additional custom text to the name or to add an additional field to the name, do the following:
       - To include additional custom text as part of the name before a field, choose the **Custom Text...** option in the drop-down menu and enter the desired custom text in the textbox underneath the **Custom Text...** drop-down menu.
       - To include an additional field as part of the name, select the desired field option from the **Custom Text...** drop-down menu. If a field is empty in a workspace it will not display as part of the file name even if selected from the **Custom Text...** drop-down menu.

       Note: If a boolean field is selected, the name of the field will be displayed and not the value. For example: JWOLFE_009_confidential-HAS IMAGES.

10. Click **Apply** to save the current naming options.

> **Note:** If a file is not found in any of the production sets, the name will revert to the control number or production begin bates regardless of which naming options you have selected.

- **Append original file** - 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.
- **Image** - determines whether to include images in an export and sets the format of the load file. Set the following options:
  - **Check Export Images** - select this option to include images in the export. (You must set the **Data File Format** and the **File Type** when you export images.)
  - **Data File Format** - select one of these formats for image-level load file:
    - Opticon
    - IPRO
  - **File Type** - select one of these file types:
    - Single-page TIF/JPG
    - Multi-page TIF
    - PDF
- **Native** - controls which files are exported by Relativity Desktop Client.
  - **Export Native Files** - select to export native files.
  - **Export rendered PDF's** - select to export PDF files. This option is not available when exporting a Production set.
- **Metadata** - use the following options to control the export of the document-level load file and extracted text:
  - **Data File Format** - select a the format for the document-level load file you're exporting:
    - Comma separated (.csv)
    - Concordance (.dat) - load file exports with the standard Concordance delimiters.
    - Custom (.txt) - load file exports with the custom delimiters that you select in the **Load File Characters** section.
    - HTML (.html) - load file is in HTML and contains hyperlinks to launch any exported files.
  - **Data File Encoding** - select an encoding for the document-level load file from the drop-down box. Click for additional options.
  - **Export Text Field as Files** - determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. The RDC includes text as part of your load file if you deselect this option.
  - **Text File Encoding** - select the encoding for the document-level text files. Click for additional options.
  - **Text Precedence** - select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the precedence of the fields.



If you add any fields to the **Selected Long Text Fields** column, Relativity adds the Text Precedence column as the last column in the load file. During an export, Relativity checks the topmost field in the **Selected Long Text Fields** column for text, and if the field is null, it checks the next field in order of precedence for text. When it finds a field that contains text, Relativity adds the contents of that field to the Text Precedence column in the document load file, and then continues checking the fields for the next document.

For example, you want the Text Precedence column in the load file to contain the contents of the OCR Text field when it is available for a document and the contents of the Extracted Text field when the OCR Text for a document is null. In the Pick Text Precedence pop-up, you add the OCR Text as the first field in the **Selected Long Text Fields** column followed by the Extracted Text field.

Note: If you want to improve export performance, you don't need to add all of the long text fields you select in the Pick Text Precedence pop-up to the Selected Columns option on the Data Source tab. When you don't select these fields on the Data Source tab, but you add them to **Selected Long Text Fields** column, the RDC adds the content of these fields to the Text Precedence column as described above. When you add the long text fields on the Data Source tab, Relativity adds these columns to the document level load file.

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

- **Export Multiple-Choice Fields as Nested** - select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.

5 Configuring the RDC

You can fine-tune the performance of the RDC in your environment by adjusting its configuration settings, for example, for batching, data validation, and retries.

5.1 RDC configuration file

You can use the information in this section to update the configuration settings used by the RDC. The Import API also uses these same settings located in the app.config file.

Use the following instructions to locate the config file on your machine, and set custom configuration properties for the RDC:

1. Exit the RDC if it is currently open.
2. Navigate to the **Relativity.Desktop.Client.exe.config** file on the machine where the RDC is installed. By default, this configuration file is located in the following directory: [Installation_Directory]\kCura Corporation\Relativity Desktop Client

   Note: Make a backup copy of this file in case you need to rollback any configuration changes made to it.
3. Open the **Relativity.Desktop.Client.exe.config** file in a text or XML editor and modify it as necessary.

5.1.1 Configuration settings

The Relativity.DataExchange section of the **Relativity.Desktop.Client.exe.config** contains the configuration properties in the following table.

5.1.1.1 General settings

Name	Description	Default Value
CreateErrorForInvalidDate	When this value is set to True, a zeroed date, such as 0/0/0000, causes an Invalid Date error. When False, the date is treated as a NULL value.	True
FileTypeIdentifyTimeoutSeconds	Defines the maximum number of seconds to identify a file type before reaching the timeout.	10
HttpExtractedTextTimeoutSeconds	Defines the timeout, in seconds, for HTTP/REST-based API web services specifically used for extracted text. **Note:** This value doesn't impact WebAPI-based web services, which means that WebAPIOperationTimeout setting is still honored.	900
HttpTimeoutSeconds	Defines the timeout, in seconds, for HTTP/REST-based API web services. **Note:** This value doesn't impact WebAPI-based web services, which means the WebAPIOperationTimeout setting is still honored.	300
IOErrorNumberOfRetries	Defines the number of times the RDC retries an operation within an import or export process after an IO failure occurs.	20
IOErrorWaitTimeInSeconds	Defines the number of seconds the RDC waits before	30

Name	Description	Default Value
	retrying an operation within an import or export process after an IO failure occurs.	
LogAllEvents	Enables an option to Save Progress Log when job completes.	False
LogConfigFile	Defines the Relativity Logging configuration file name.	LogConfig.xml
SuppressCertificateCheckOnClient	When this value is set to True, SSL certificate validation errors are suppressed. When False, SSL certificate validation errors cause job failures.	False
TempDirectory	Defines a temp directory override where short lived import files are stored. When not defined, the user profile %TEMP% directory is used.	
WebAPIOperationTimeout	Defines the time in milliseconds, which an XML Web service client waits for the reply to a synchronous XML Web service request to arrive.	600000

5.1.1.2 Transfer settings

Name	Description	Default Value
BadPathErrorsRetry	When this value is set to True, bad path errors are retried during a transfer. When False, permission errors aren't retried and cause job failures.	True
PermissionErrorsRetry	When this value is set to True, permission errors are retried before and during a transfer. When False, permission errors aren't retried and cause job failures.	True
TapiAsperaBcpRootFolder	Defines the root folder where the BCP files are uploaded when using the Aspera transfer client.	
TapiFileNotFoundErrorsDisabled	When this value is set to True, missing files aren't treated as errors. When False, missing files are treated as errors.	False
TapiFileNotFoundErrorsRetry	When this value is set to True, missing files are retried. When False, missing files aren't retried.	True
TapiForceAsperaClient	When this value is set to True, the Aspera transfer client is forced. When False, the best fit transfer client is chosen at runtime.	False
TapiForceBcpHttpClient	When this value is set to True, the HTTP transfer client is forced only for BCP operations. When false, the best fit transfer client is chosen at runtime.	False
TapiForceClientCandidates	Forces an ordered list of transfer clients when probing a workspace and choosing the best client. This value represents a semi-colon delimited list. Native transfer client identifiers must be used, such as FileShare, Aspera, or Http.	
TapiForceFileShareClient	When this value is set to True, the file share transfer client is forced. When False, the best fit transfer client is chosen at runtime.	False

Name	Description	Default Value
TapiForceHttpClient	When this value is set to True, the HTTP transfer client is forced. When false, the best fit transfer client is chosen at runtime. **Note:** This setting is the same as web mode.	False
TapiLargeFileProgressEnabled	When this value is set to True, large-file progress is used by transfer clients to display "Trip x of y" chunk info within the status area. When False, no chunk info is displayed .	False
TapiMaxInactivitySeconds	The maximum number of seconds that elapse with no data movement occurring before the transfer is treated as inactive. When this occurs, the import or export job continues but performance may be degraded.	180
TapiMaxJobParallelism	Defines the maximum degree of parallelism for a transfer client job. This value isn't guaranteed to be honored by all clients.	10
TapiMinDataRateMbps	Defines the minimum data rate in Mbps units. If set to zero, the best value is chosen. This value isn't guaranteed to be honored by all clients.	0
TapiPreserveFileTimestamps	When this value is set to True, the RDC preserves the import and export file timestamps. Only direct modes support this functionality. **Note:** By default, this value is set to False, because preserving file timestamps may degrade performance between 10-20%.	False
TapiTargetDataRateMbps	Defines the target data rate in Mbps units. This value isn't guaranteed to be honored by all clients.	100
TapiTransferLogDirectory	Defines the directory where Relativity Logging and transfer client logs are stored.	%temp%\RDC_log\

5.1.1.3 Import settings

Name	Description	Default Value
AuditLevel	Controls the details collected in an audit: • **FullAudit** - includes create, update, and delete messages. Snapshot is also enabled so all current field values (Audit Details) are captured for updates. This is the default setting. • **NoSnapshot** - Includes create, update, and delete messages. Snapshot is disabled so current field values (Audit Details) aren't captured for updates. • **NoAudit** - Auditing is disabled.	FullAudit
CreateErrorForInvalidDate	When this value is set to True, a zeroed date, such as 0/0/0000,	True

Name	Description	Default Value
	causes an Invalid Date error. When False, the date is treated as a NULL value.	
DisableImageLocationValidation	Disables the validation of the image file locations for all jobs when set to True. See Additional guidelines for disabling file validation below.	False
DisableImageTypeValidation	Disables the validation of image file types for all jobs when set to True. Image type validation is dependent upon image location validation. See Additional guidelines for disabling file validation below.	False
DisableNativeLocationValidation	Disables the validation of the native file locations for all jobs when set to True. See Additional guidelines for disabling file validation below. **Note:** Don't use the DisableNativeLocationValidation flag when copying files to a repository. File locations are validated regardless of the flag before they are copied.	False
DisableNativeValidation	Disable the validation of native file types for all jobs. Native type validation is dependent upon native location validation. See Additional guidelines for disabling file validation below.	False
DynamicBatchResizingOn	When this value is set to True, the batch size is automatically decreased by 100 when a large import job is in progress, and it causes a timeout.	True
ImportBatchMaxVolume	Defines the maximum number of bytes before the metadata is imported.	10485760
ImportBatchSize	Defines the maximum number of documents or objects before the metadata is imported.	1000
JobCompleteBatchSize	Defines the file count threshold at which the RDC completes and recreates the transfer job used to transfer files.	50000
MinimumBatchSize	When AutoBatch is set to True, this value represents the lower bound on the batch size. Batch sizes can't be smaller than this value.	100

Additional guidelines for disabling file validation

You can disable file validation by setting these configuration settings to true:

- DisableImageLocationValidation
- DisableImageTypeValidation
- DisableNativeLocationValidation
- DisableNativeValidation

Review the following guidelines before disabling file validation:

- When you disable file type validation, you do not receive any warnings regarding unsupported file types. It's therefore possible for files to be imaged and result in errors.

- Disabling the file type validation also causes the application to set the Relativity Native Types field to Unknown Format.
    - Setting a native type to unknown has no effect on productions or OCR.
    - Setting a native type to unknown has no effect on how the viewer or imaging engine handles the file. This means that a native type of unknown can't be the sole cause of an error in the viewer or the imaging engine. If a file is designated unknown and it actually has an unsupported file type, the Viewer or imaging engine throws an error based on the fact that it has an unsupported file type.

5.1.1.4 Export settings

Name	Description	Default Value
ExportBatchSize	Defines the maximum number of export documents per batch.	1000
ExportErrorNumberOfRetries	Defines the number of times the RDC retries an operation within an export process after a non-IO failure. This value should be greater than or equal to the IOErrorNumberOfRetries value.	20
ExportErrorWaitTimeInSeconds	Defines the number of seconds the RDC waits before retrying an operation within an export process after a non-IO failure. This value should be greater than or equal to the IOErrorWaitTimeInSeconds value.	30
ExportThreadCount	Defines the number of threads that get created during export. **Note:** This configuration setting is only used when the UseOldExport setting is true.	2
UseOldExport	When this value is set to True, the legacy export method is used. When False, the new export method is used. The old export should only be used when encountering compatibility issues.	False

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