

UC Export Work
Version 10.0
for iManage Work 10 Client

- Exports folders and subfolders directly from workspaces, tabs and folders
- Filter documents and email messages
- Works with on premises and cloud server systems
- Exports files even if path length exceeds Windows limit of 254 characters

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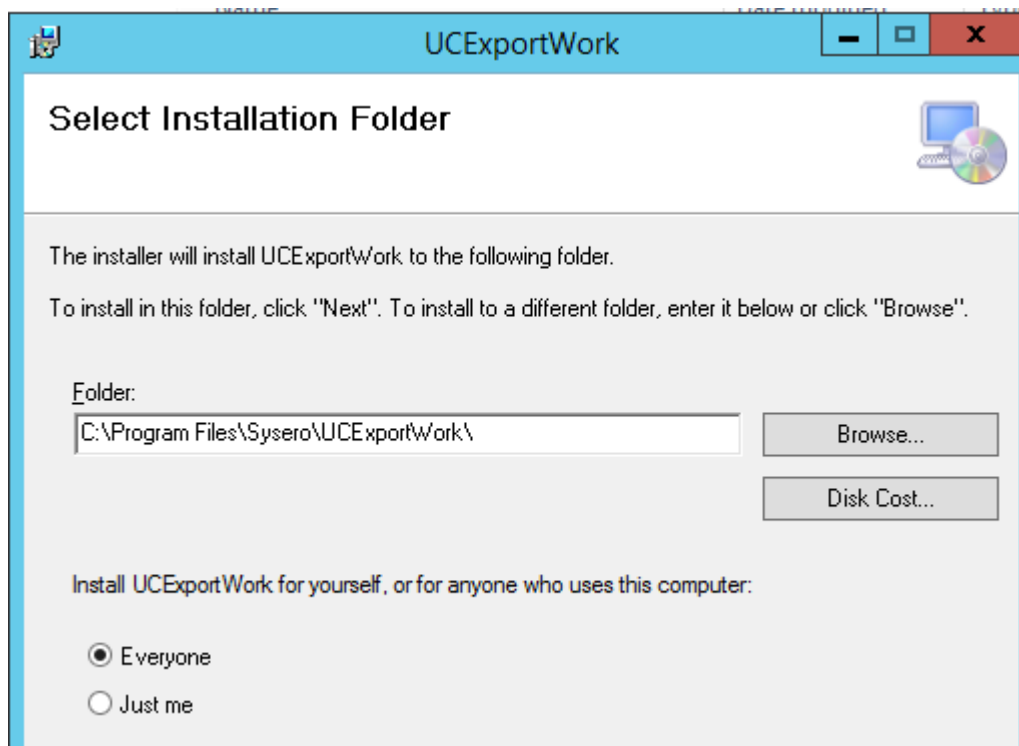
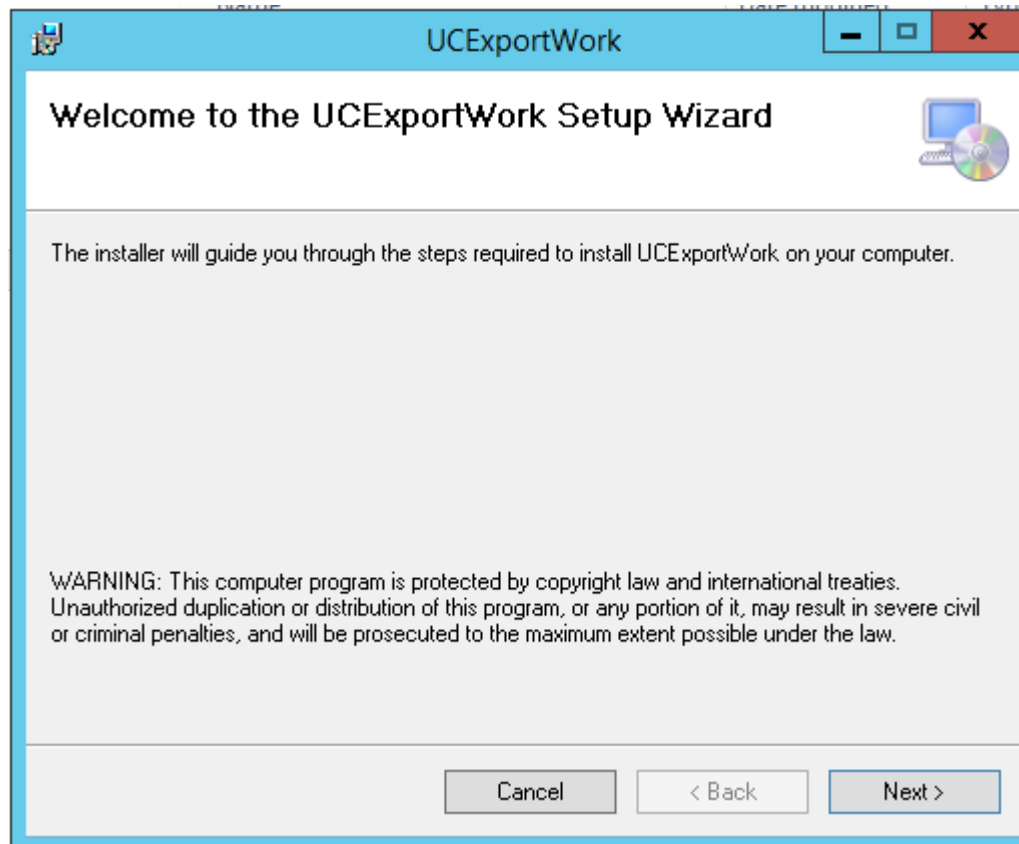
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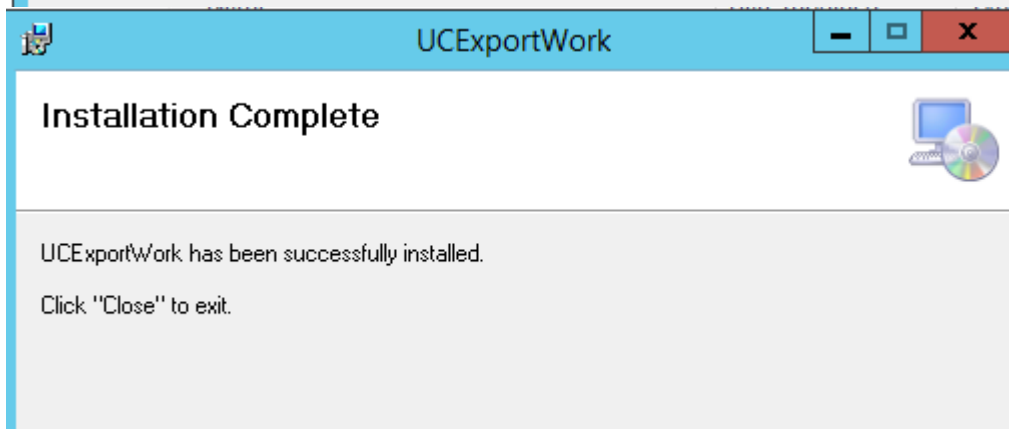
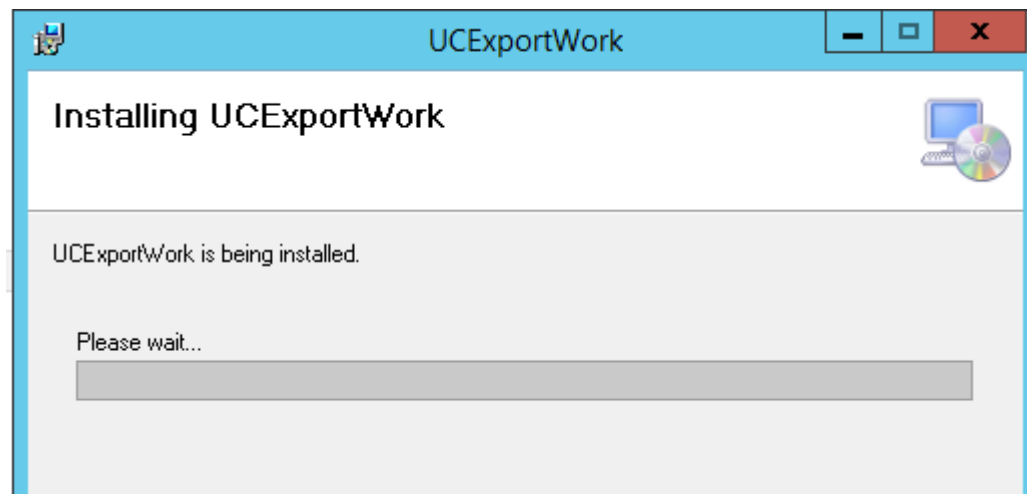
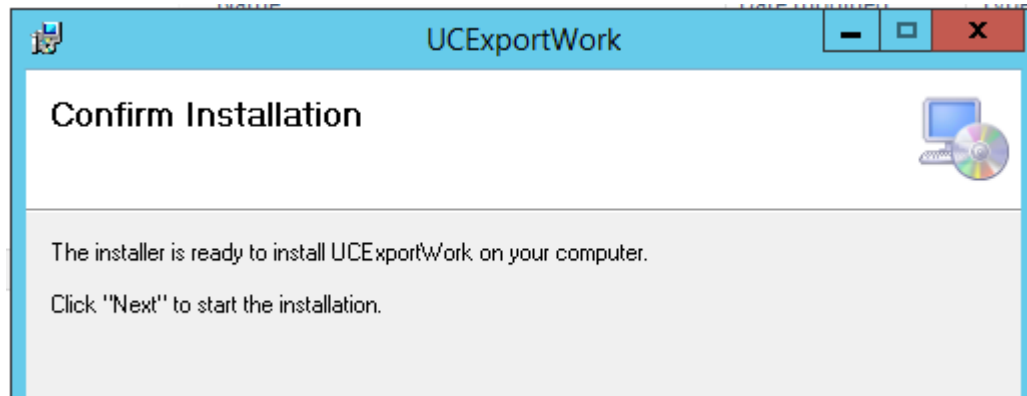
1 Support

For support, please contact support@uclogic.com

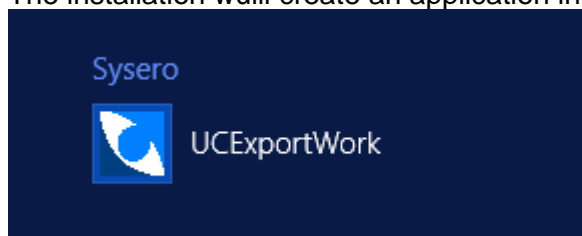
2 Installation

Run the setup.exe and follow instructions





The installation will create an application in the Apps menu under Sysero



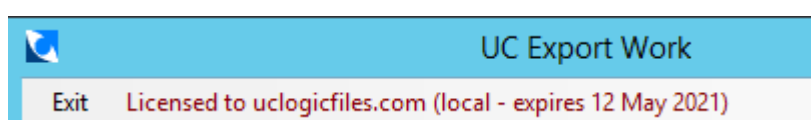
3 Usage

3.1 Licensing

When you first launch the application, it will check to see if you have a license. This requires access to the internet to validate the license. If a valid license is found, the menu bar will display the license details



Initially the license will show as online, once it is validated a local copy of the license will be created in the %appdata%\ucexportWork directory. The next time the app is loaded it will show as local



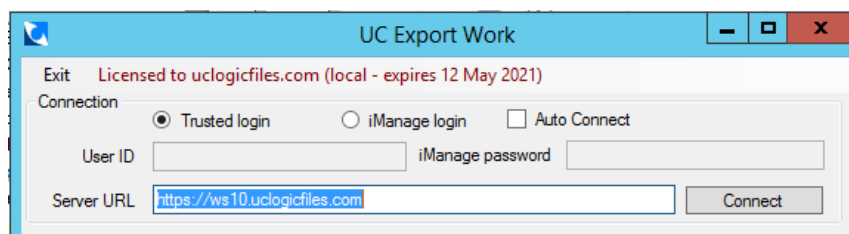
The expiry date will show when the license will stop unless it is renewed. If the expiry date is reached the app will check online to see if there is an updated license and download this if once is found.

3.2 Using the application

Enter the server url to connect to the iManage system, use the following format:

https://{imanager server name}

for example:



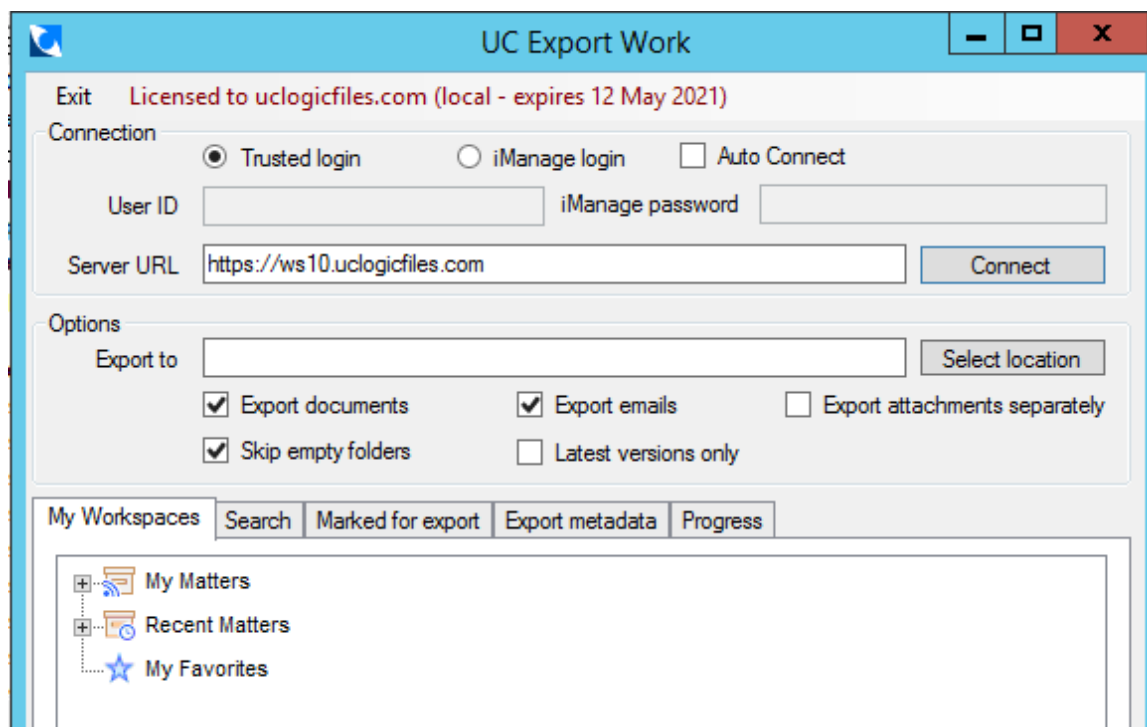
There are two methods to connect to the iManage system

- Trusted Login
- iManage Login

If you use the trusted login method, you will automatically be logged into iManage as the user you are currently logged into on Windows.

If you choose the iManage login you will need to provide the iManage user id and iManage password and your system administrators will have to create a control centre application (see section 3.4)

Click Connect, if you are successfully connected the application will display your My Matters, Recent Matters and Favourites:



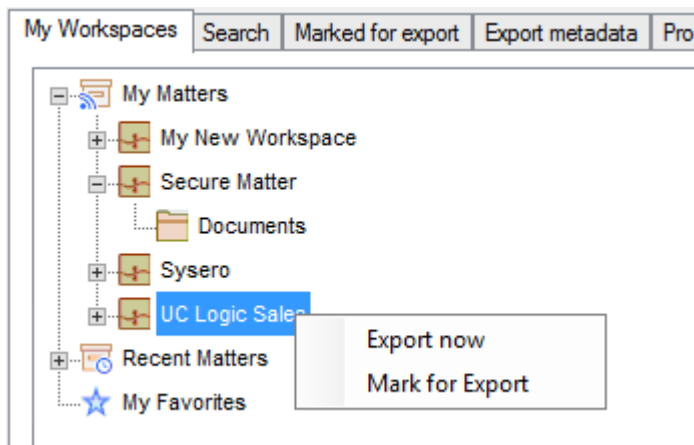
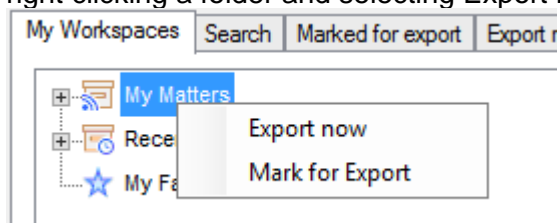
Select the location for the export and check the options to export documents, emails, attachments and versions.

Select the option to export attachments if you want to get an individual file copy of each email attachment. Even if you don't select to export the attachments, the exported email will still contain the attachments embedded in the email file.

The following applies when exporting folders:

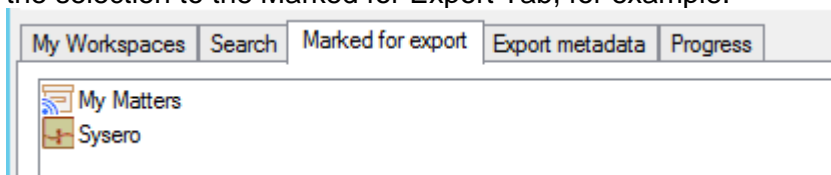
- Files will be exported in the same structure as appears in the folders.
- Filenames will use the document description from the document profile.
- If you are exporting a large number of nested folders, as there may be an operating system limit to length of the path and filename that can be created. If this limit is reached the file will be exported to a special folder called Extra beneath the root export folder.
- All documents will be exported from a folder, regardless of how many documents are displayed in the folder by the client.

You can export directly from the My Matters, Recent Matters or Favourites folders by right clicking a folder and selecting Export Now



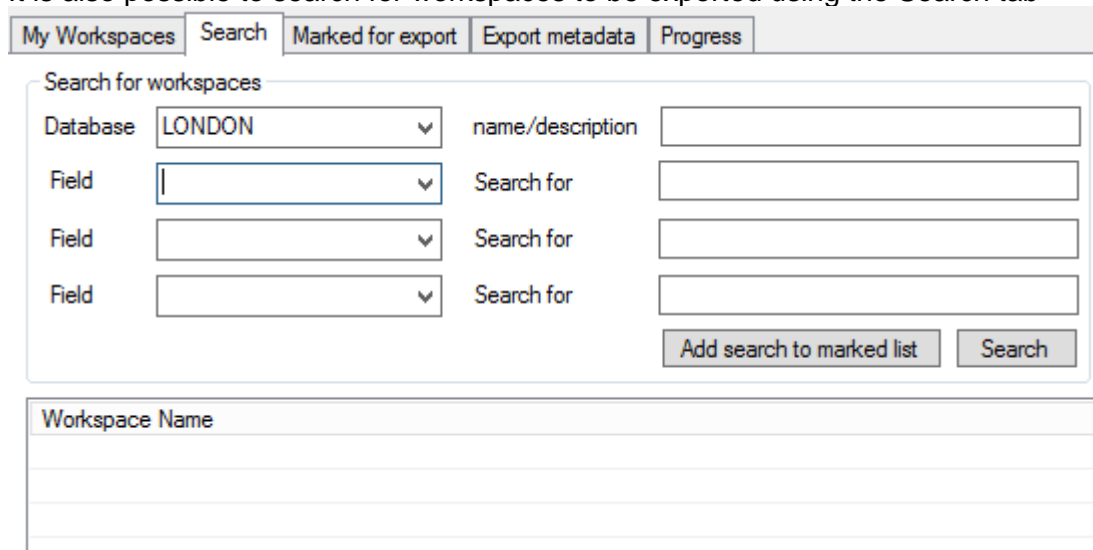
This can be done from any sub folder to export either a specific workspace or folder

To mark workspaces/folders for export, select the option to Mark for Export, this will add the selection to the Marked for Export Tab, for example:



The whole of My Matters plus the Sysero workspace will be exported. If a workspace is selected multiple times it will only be exported once.

It is also possible to search for workspaces to be exported using the Search tab



To search, select the database (note, it is not possible to search all database in one search, but you can perform multiple searches and add these to the Marked for Export List)

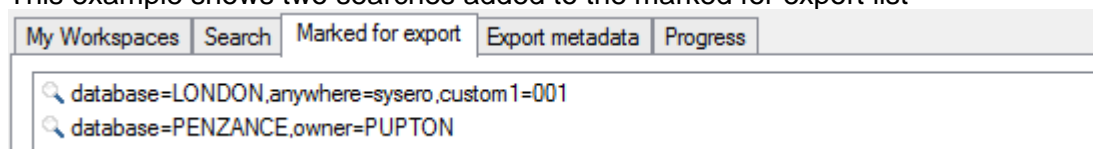
These searches can be performed on the following fields:

- Name/description – enter the text to search for which appears in either the workspace name or description fields.
- Custom field metadata - select the custom field to search and enter the data. This has to be exact and does not support searching for partial custom field values or wild cards

Click the search button to perform the search.

From the search results you can export immediately by right clicking on the workspaces or mark them for exporting later. You can also just add the search criteria to the marked list By adding a search criteria and clicking the 'Add search to marked list button'.

This example shows two searches added to the marked for export list

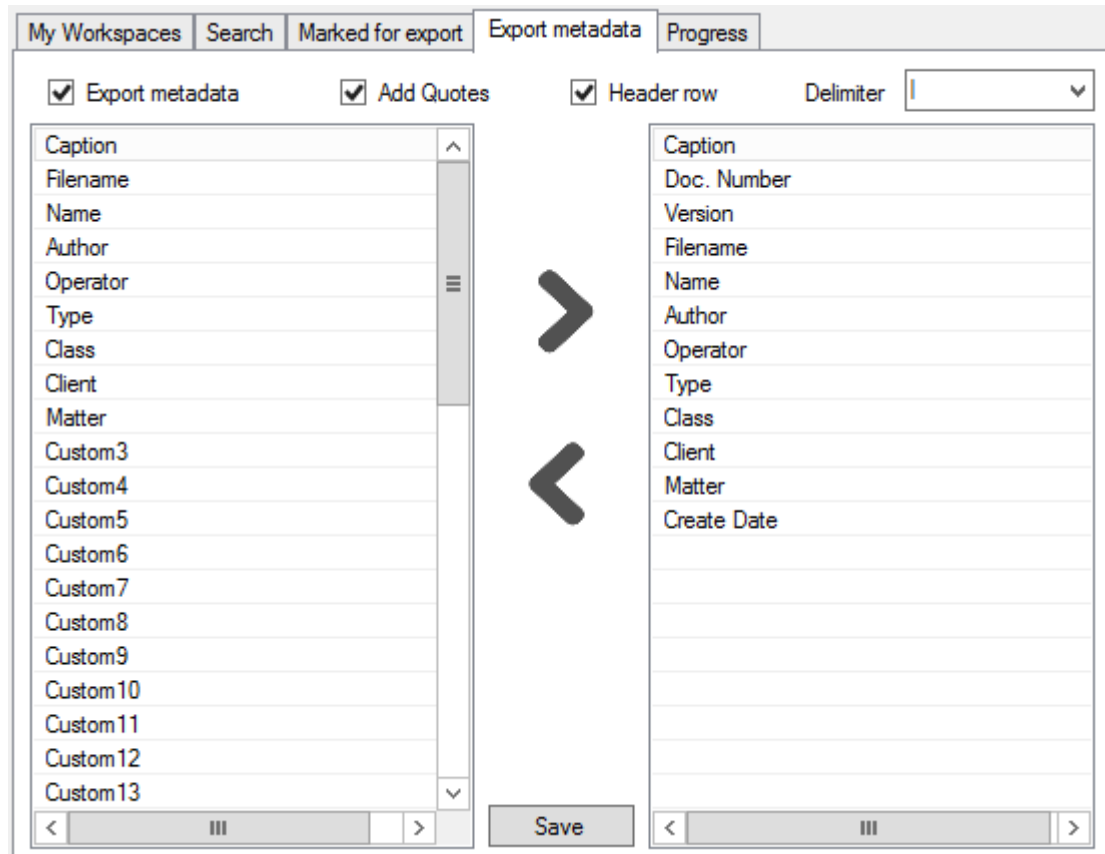


The first exports all workspaces with custom1=001 in the LONDON database where the word sysero appears in either the workspace name or description

The second exports all workspaces from the PENZANCE database where the owner is PUPTON

If multiple searches select the same workspace multiple times, the workspace will only be exported once.

3.3 Exporting Metadata



To export a file listing each document exported, select the Export Metadata tab.

Select the fields and options required.

If the Export Metadata is enabled a file called metadata.txt will be exported into the export location. Each time an export occurs it will append to the existing metadata file, so if you need separate metadata files for each export it is advised to export to new directories each time so a new metadata.txt file will be created.

3.4 Creating the Control Centre Application to support iManage logins

The application is supplied with a manifest.zip file that will be installed in the program files directory. You can upload this with the control centre to create the necessary application or you can manually create the application as described below.

NOTE: Make sure that Allow Refresh Token is set to Yes

Load the iManage Control Centre, and select the System Setup, Application page. Add a new application with the details as follows:

Application Edit	
Name	UCExportWork
Description	
Publisher	Sysero
Website	
Client ID	6ee56700-9e1e-c019-2ef8-1faf57173997
Contact	
Authentication Edit	
Does this application require authentication with iManage Work?	Yes
Application Type	Web
Client Type ⓘ	Public
Redirect URL ⓘ	http://localhost/
Client Secret ⓘ	3ef9ff1a-d78e-d680-930c-3b06fe9b456e
Client Secret Expires On	Never Expires
Allow Refresh Token	Yes
Refresh Token Expiry	365 days
Access Token Expiry	30 mins
Security Edit	
All Users	

Client ID: 6ee56700-9e1e-c019-2ef8-1faf57173997
 Client Secret: 3ef9ff1a-d78e-d680-930c-3b06fe9b456e