

UC Import Export Work
Version 10.1
for iManage Work 10

- Separate licenses required for Import/Export functionality
- Works with on premises and cloud server systems
- Exports folders and subfolders directly from workspaces, tabs and folders
 - Export documents and/or email messages
 - Export files even if path length exceeds Windows limit of 254 characters
 - Export metadata along with the files
- Import folders, subfolder or selected documents

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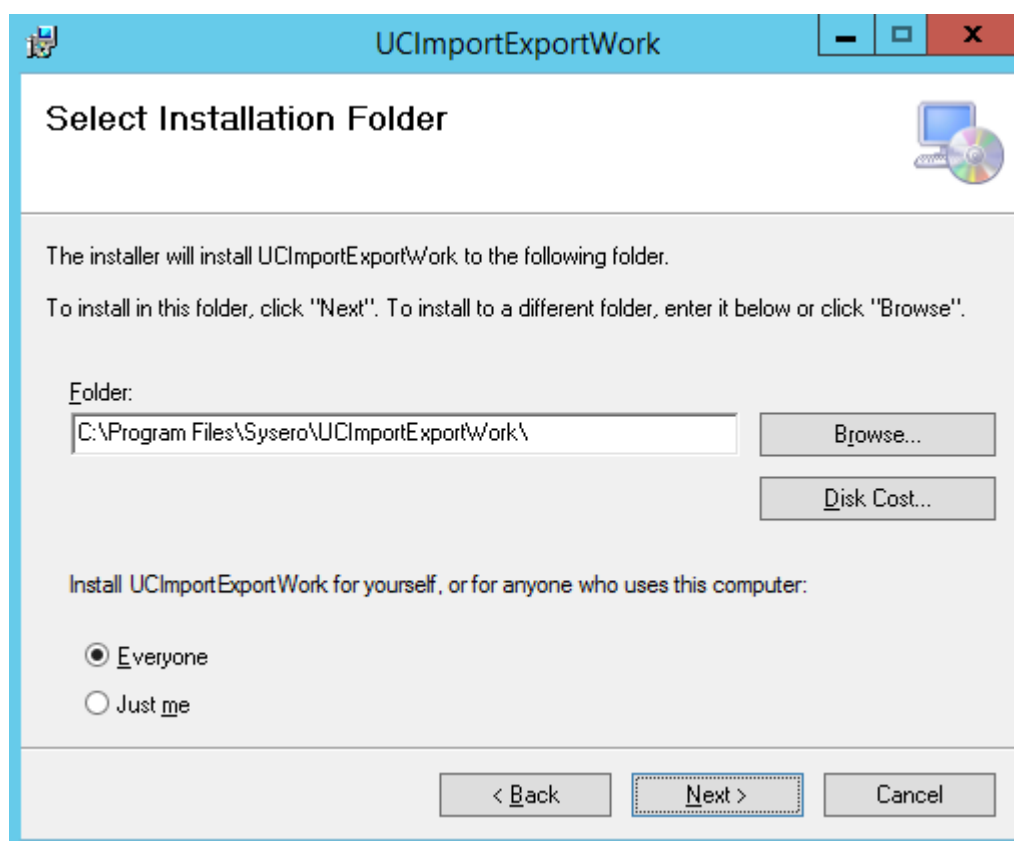
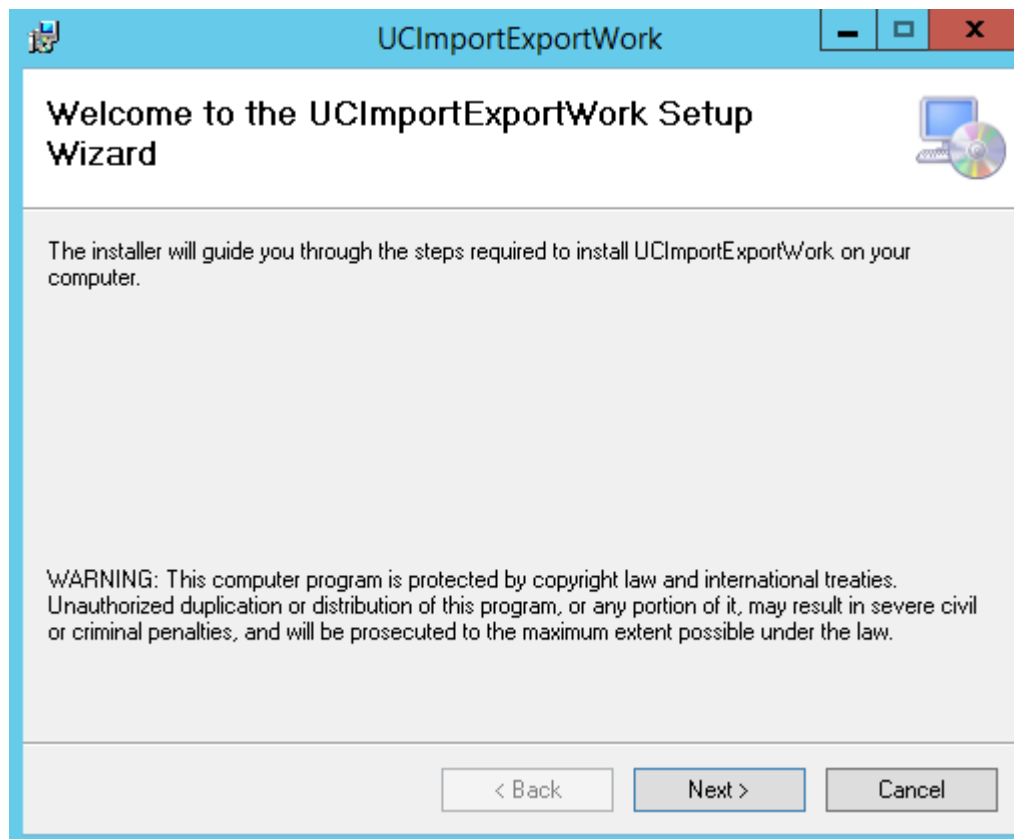
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1 Support

For support, please contact support@uclogic.com

2 Installation

Run the setup.exe and follow instructions



The installation will create an application under Sysero

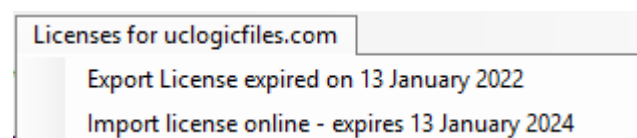


3 Usage

3.1 Licensing

When you first launch the application, it will check to see if you have any valid licenses. This requires access to the internet to validate the license. If a valid license is found, the menu bar will display the license details. The Import and Export functionality are covered by two separate licenses. Depending on what you have purchased the licenses will be displayed.

If you do not have a valid license or your previous license has expired the functionality of exporting will be limited to 10 docs per folder and importing will be limited to 10 docs per folder. This allows you to test the functionality before committing to a purchase of either or both licenses.



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

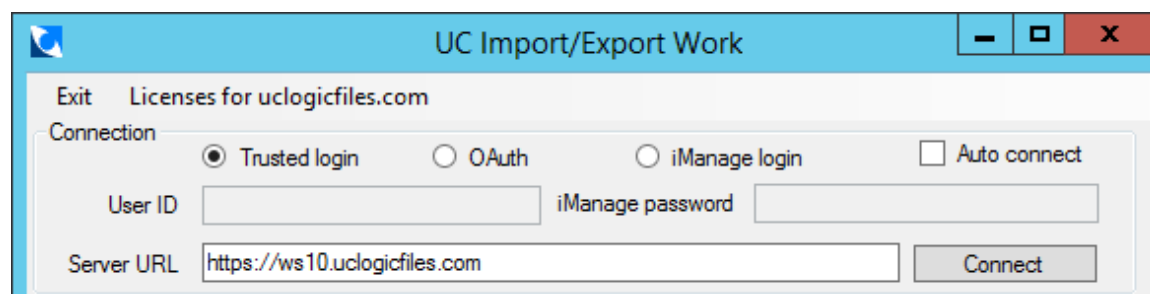
The expiry date will show when the license will stop unless it is renewed. If the expiry date is reached the app will check online to see if there is an updated license and download this if once is found.

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:



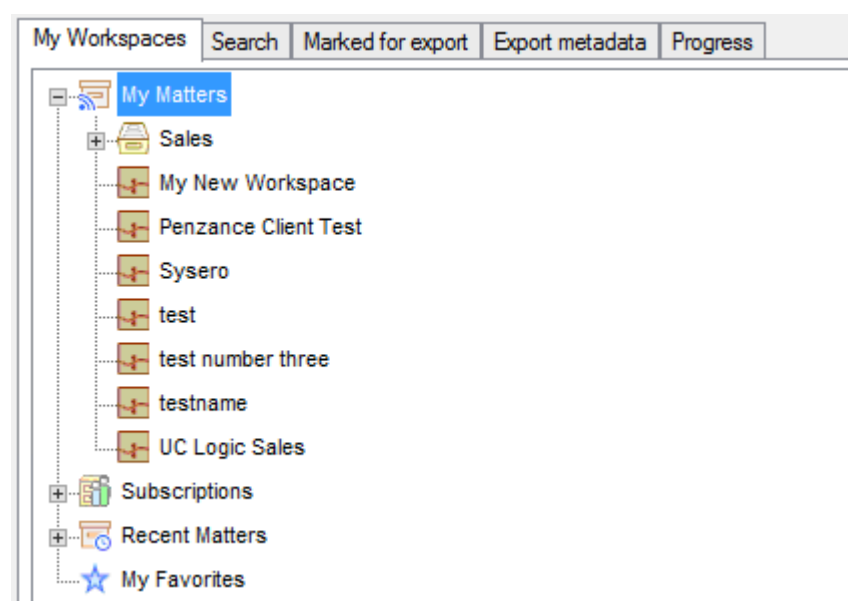
There are three methods to connect to the iManage system

- Trusted Login
- OAuth Login (this should be the one to use if you are connecting to the iManage cloud (https://cloudimanager.com))
- 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:



3.3 Exporting

Complete the export options: select the location for the export and check the options to export documents, emails, attachments and versions.

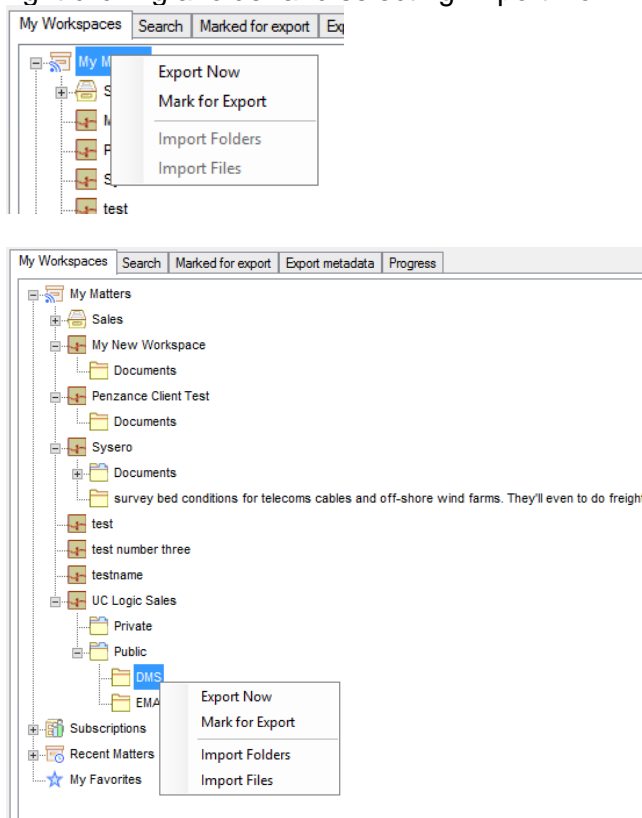
Select the option to export attachments if you want to get an individual file copy of each email attachment. Even if you don't select to export the attachments, the exported email will still contain the attachments embedded in the email file.

You can choose to export orphaned documents, which are documents that match the client/matter fields of the workspace but are not in any of the workspace folders.

The following applies when exporting folders:

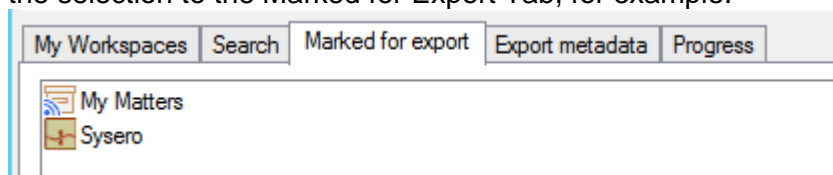
- Files will be exported in the same structure as appears in the folders.
- Filenames will use the document description from the document profile.
- If you are exporting a large number of nested folders, as there may be an operating system limit to length of the path and filename that can be created. 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



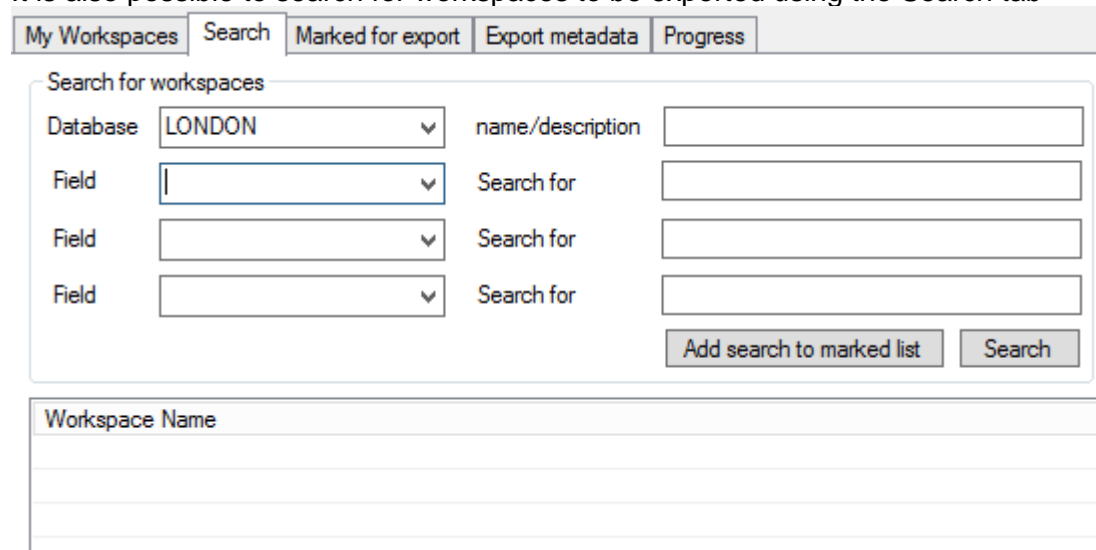
This can be done from any sub folder to export either a specific workspace or folder. Double click a folder to expand the sub folders beneath it.

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)

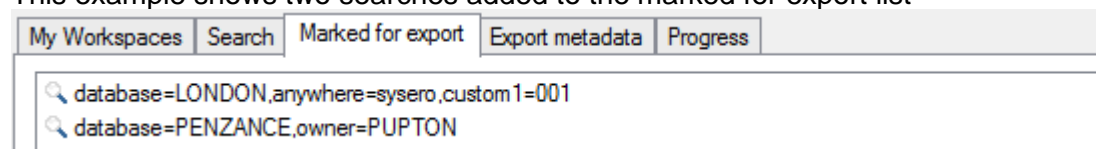
These searches can be performed on the following fields:

- 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

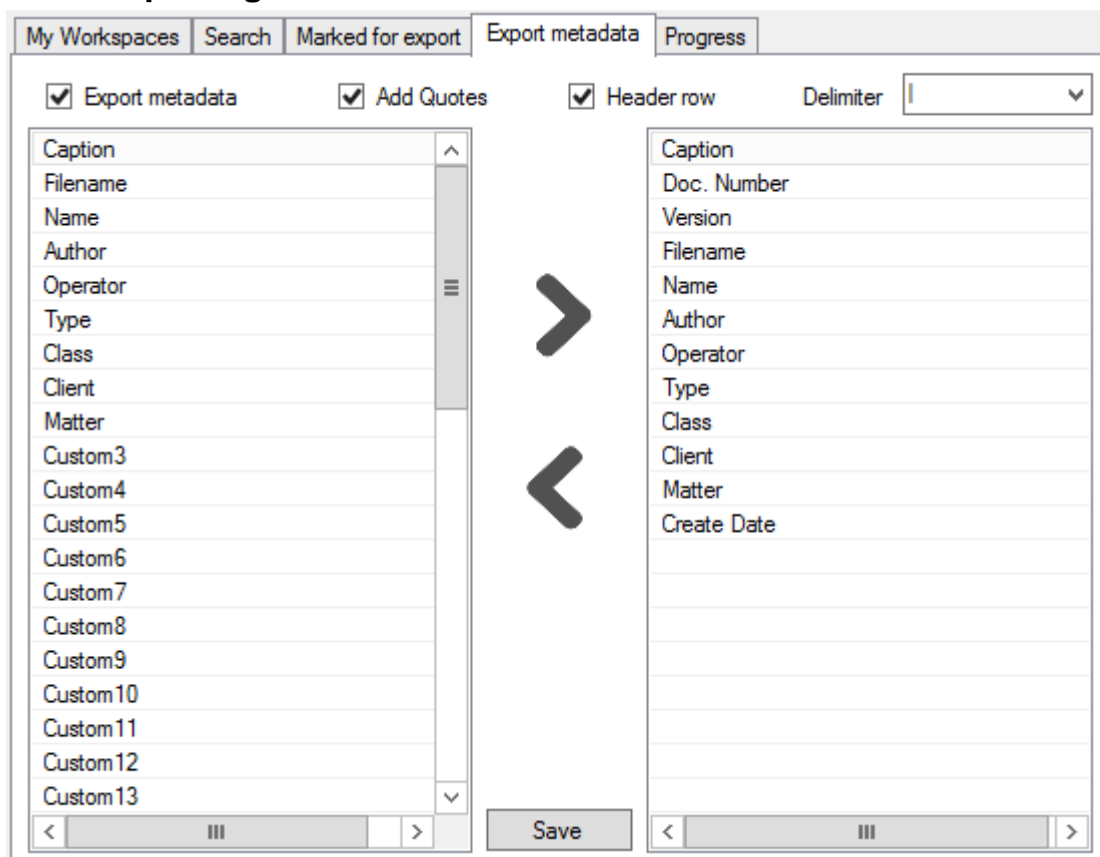


The first exports all workspaces with custom1=001 in the LONDON database where the word sysero appears in either the workspace name or description

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.

3.3.1 Exporting Metadata



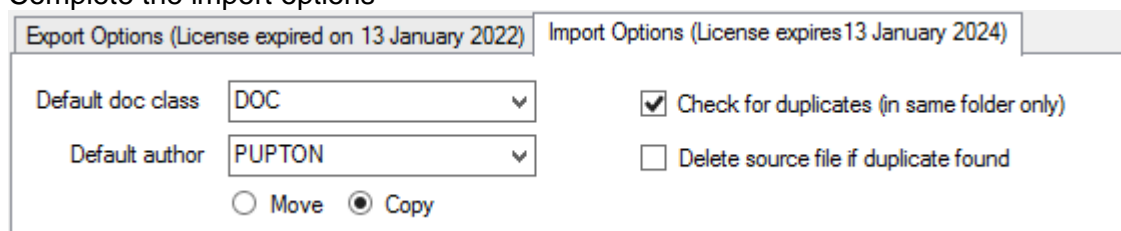
To export a file listing each document exported, select the Export Metadata tab.

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 Importing

Complete the import options



The option to check for duplicates will see if an import has already happened for the document being imported. A duplicate is found if the following criteria is met:

- Filename and extension match
- Document size is identical
- File create dates match
- File edit dates match

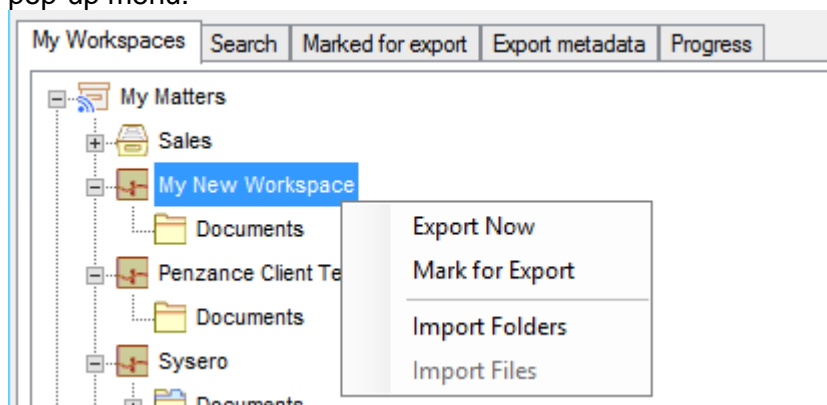
If any of these criteria is not met then the document will be deemed to be not a duplicate and will be imported as a new document.

If the option to delete source file if a duplicate is found can be used to delete already imported documents from the source directory whilst performing a new import

Imports can either be selected files or whole folders and subfolders. The ability to do these imports is subject to having the necessary rights at the specified folder.

- Workspace – Can only import folders if you have full access rights to the workspace
- Tab – Can only import folders if you have read/write access to the tab
- Folder – Can import documents or folders providing you have read/write access to the folder

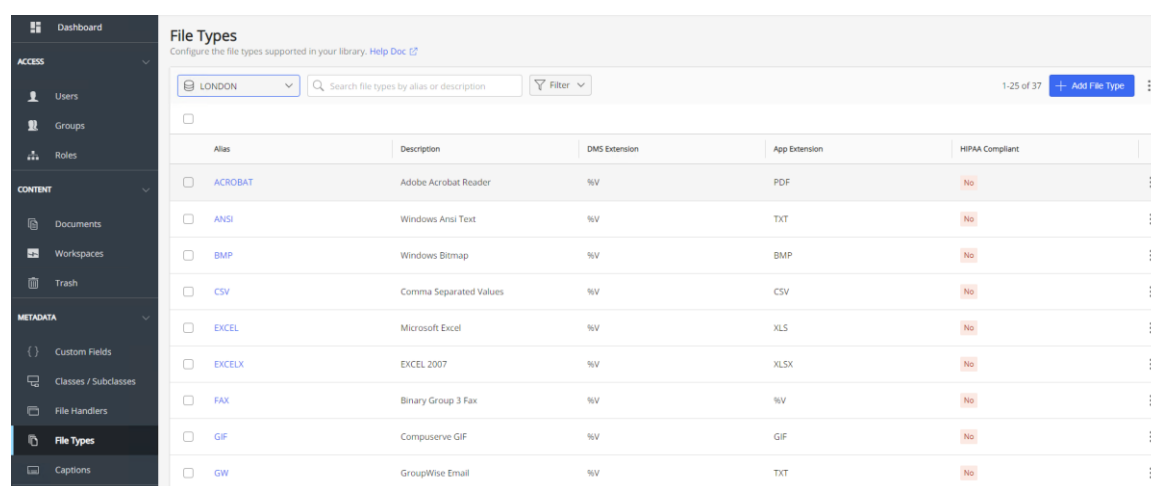
If you do not have the necessary rights to import, the option will be greyed out from the pop-up menu.



3.4.1 Filter docs for importing

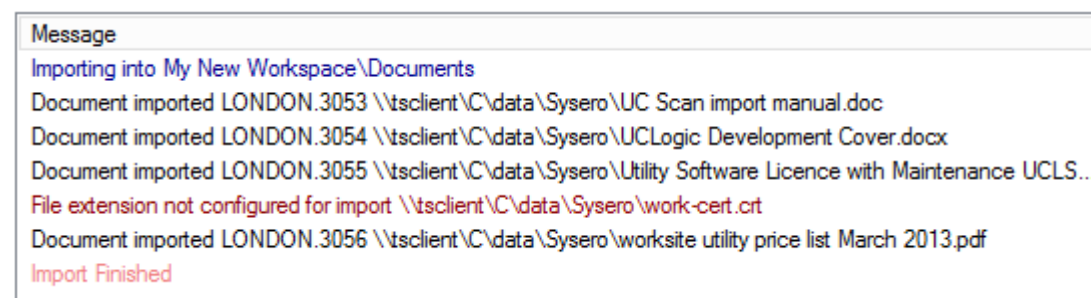
Files are only imported if the extension matches one that is defined in the iManage databases. The Type table in the database administrator or control centre application defines the extensions and the corresponding Type alias to use on the profile.

Description	Auto	Alias	DMS Extension	App Extension	HIPAA Compliant
Adobe Acrobat Reader	Y	ACROBAT	%V	PDF	N
Windows Ansi Text	Y	ANSI	%V	TXT	N
Windows Bitmap	Y	BMP	%V	BMP	N
Comma Separated Values	N	CSV	%V	CSV	N
Microsoft Excel	Y	EXCEL	%V	XLS	N
EXCEL 2007	Y	EXCELX	%V	XLSX	N
Binary Group 3 Fax	Y	FAX	%V	%V	N
Compuserve GIF	Y	GIF	%V	GIF	N
GroupWise Email	N	GW	%V	TXT	N
HTML	N	HTML	%V	HTML	N
Adobe Illustrator (AI)	Y	ILLUSTRATOR-AI	%V	AI	N
Joint Photographic Experts Group	N	JPEG	%V	JPEG	N



Alias	Description	DMS Extension	App Extension	HIPAA Compliant
ACROBAT	Adobe Acrobat Reader	%V	PDF	No
ANSI	Windows Ansi Text	%V	TXT	No
BMP	Windows Bitmap	%V	BMP	No
CSV	Comma Separated Values	%V	CSV	No
EXCEL	Microsoft Excel	%V	XLS	No
EXCELX	EXCEL 2007	%V	XLSX	No
FAX	Binary Group 3 Fax	%V	%V	No
GIF	Compuserve GIF	%V	GIF	No
GW	GroupWise Email	%V	TXT	No

If the import finds a file that has an extension that is not defined in this table, then it will not be imported and a message will be displayed during the import:



```

Message
Importing into My New Workspace\Documents
Document imported LONDON.3053 \\tsclient\C\data\Sysero\UC Scan import manual.doc
Document imported LONDON.3054 \\tsclient\C\data\Sysero\UCLogic Development Cover.docx
Document imported LONDON.3055 \\tsclient\C\data\Sysero\Utility Software Licence with Maintenance UCLS...
File extension not configured for import \\tsclient\C\data\Sysero\work-cert.crt
Document imported LONDON.3056 \\tsclient\C\data\Sysero\worksite utility price list March 2013.pdf
Import Finished
  
```

If you want to import a file with an extension that is not recognised, then you will need to add the necessary record using the database administrator or the control centre application.

3.5 Logging

Log files will be created in the %appdata%\UCImportExportWork directory.

3.6 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 (don't forget to add a trailing / to the redirect URL - **http://localhost/**) :

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