

UC Export Folders

Version 3.6

for Worksite 8.x, 9.x x86



- Exports folders and subfolders directly from workspaces, tabs and folders
- Filter documents and email messages
- Integrated into Filesite and Desksite clients
- Overcomes the 9999 limit folder size of 9.x clients
- Exports files even if path length exceeds Windows limit of 254 characters
- Export multiple workspaces listed in a delimited text file

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1. Support

For support, please contact support@uclogic.com



2. Installation

First ensure all Worksite clients are closed. This includes Outlook, Desksite and any integrated applications (e.g. Word, Excel, Powerpoint, Acrobat)

The installation process updates registry keys in HKEY_LOCAL_MACHINE, so you need to install the application as a user that has rights to update this part of the registry.

Run the setup.exe and follow instructions

When prompted for the licence key, enter the supplied code. If you enter any other code, you will install a trial version only. The trial version can be changed to a full version at a later date by adding the full licence code. Instructions on how to do this will be supplied with the licence code.



3. Configuration

The Import tool uses the following registry keys:

e Edit View Favorites Help				
uC Logic	*	Name	Туре	Data
		(Default)	REG SZ	(value not set)
UCImportFolder		ab LicenseKey	REG_SZ	1111111-111
			1120_02	
UCSupportSite				
⊳ - 퉲 VideoLAN				
Vision Objects				
VMware, Inc.				
k 📜 Volatilo	*	•		

Registry Key	Description
LicenseKey	License key, any number other than the proper code will
(string)	result in the application running in trial mode
AddDocCountPrefix	Y or N (default)
(string)	(optional)
	Set to Y to add a document count prefix to every exported
	file
DocCountFormat	(optional)
(string)	e.g. 00000
	Specifies the document count prefix number format
	Example: 00000
	Would export files with a prefix of 00001, 00002, 00003 etc
	If AddDocCountPrefix is Y and DocCountFormat is empty,
	then the prefix is added but without leading 0's

The following registry keys are editable via the application and are used to define the metadata export fields. Do not edit these keys directly in the registry.

😰 Registry Editor				
File Edit View Favorites Help				
Policies UCExportFolders UCExportFolder UCExportFolde		Name (Coefault) ab) Delimiter ab) Metadata ab) Quotes	Type REG_5Z REG_5Z REG_5Z REG_5Z	Data (value not set) 0,1,2,3,24,5,6,25,60,26,61,8,7,82,11,10,81,37,38,39,40,45,46,FN N
Computer\HKEY_CURRENT_USER\Software\UC Logic\UCExportFolders				li.



4. Usage

Restart Outlook/Desksite and the menu should now be available when right clicking on a Workspace, tab or document folder

Checked-out Documents Recent Documents Case Worklist Case Worklist My Cases My Cases Client A Client B Client I Client R Client R Client S Client T Client T	
•••••••••••••••••••••••••••••	Import Folders and Docs Add Shortcuts Search Documents Send URL Link Show Web View Show All Hidden Tabs Refresh Re-file
Bo Berndtsson Pers Fredo Enterprises/A Fr	Move "2005-BMM-1 My New Case" Create Shortcut Delete "2005-BMM-1 My New Case" Rename "2005-BMM-1 My New Case" New Add to My Cases
	Add to My Cases Add to My Favorites Add to Shortcut bar Properties Export Workspace



🖶 Export Worksite Folder and Doc	uments 🛛 🗙			
End of Year Accounts 2015				
Export Options Location				
Export Documents				
🔽 Export Emails				
Export Attachments separately				
🔽 Skip Empty Folders				
Create Report				
🔲 Export Metadata	Select Metadata Fields			
L	OK Cancel			

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

Select the option to export attachments if you want to get an individual file copy of each emails attachments. 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.
- Be careful 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 not be exported.
- All documents will be exported from a folder, regardless of how many documents are in the folder. This overcomes the maximum of 9,999 document limit imposed by 9.x clients when viewing folders
- If the path for a document to be exported exceeds the Windows limit of 254 characters, a folder called 'extra' will be created beneath a directory named after the workspace and these documents exported to this location.



4.1. Export Metadata

To create a metadata file, check the Export Metadata checkbox, which will enable you to press the Select Metadata Fields button.

🗟. Select Metadata Fields		×
[
Available Fields Filename Workspace Name Server Database Doc Num Version Description Name Author Operator Type Class Subclass Edit Date Create date Full Text Size Image: Size Image: State Image: Size <	Selected Fields Filename Workspace Name Database Doc Num Version Author Operator Type Class	
	ок	Cancel

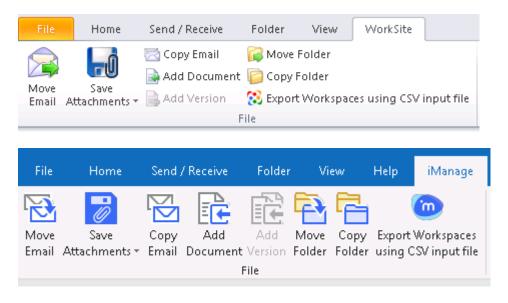
Use this dialog to specify which fields to export, the delimiter to use, if double quotes should be used to wrap around the exported fields and if you require a field header row. You may select the same field multiple times if you wish. The metadata file will be created in the root of the export directory selected and will be called metadata.txt. If there is already an existing metadata.txt file in the export directory, the metadata will be appended to the file.



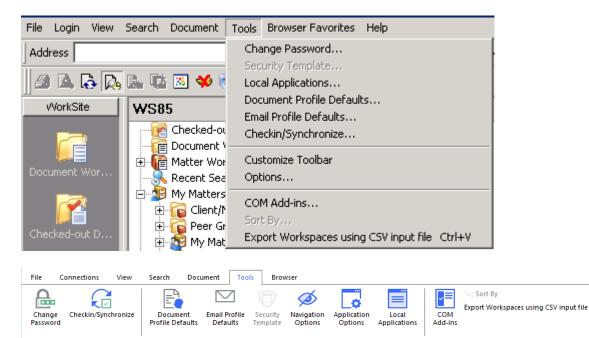
4.2. Export from a delimited text file

Multiple workspaces can be exported using a delimited text file that identifies workspaces based on custom field values.

In Filesite the command is on the Worksite, File ribbon	
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In Desksite the command is on the Tools menu





You will need a delimited file with a list of the custom values used to select the workspaces. The delimiter in the text file can be defined in the following dialog

🔜 Select input file	
Input file definition	
	Select file
First row has field names	
Field delimiter	
Field order - Use delimiter used in input file to separate fields (e.g. custom1,custom	2)
Next	Cancel

For example, to select workspace based on client/matter (custom1/custom2) values, create a text file in the following format (assuming a comma is used as the delimiter)

13456,002 13456,089 14321,001 76543,002

Save this file and then use the dialog to select this file and set the other fields as shown below

🔜 Select input file	_ 🗆 🗙
Input file definition	
C:\Users\Administrator\Desktop\matterstoexport.txt	Select file
First row has field names	
Field delimiter	
Field order - Use delimiter used in input file to separate fields (e.g. custom1,custor	m2)
custom1,custom2	
Next	Cancel



Valid field names in the field order file are

custom1 custom2 custom3 custom4 custom5 custom6 custom7 custom8 custom9 custom10 custom11 custom12 custom29 custom30



Click Next to display the standard export dialog and set your options according to how you want to perform the export.

🖷 Export Worksite Folder and Documents 🛛 🗙		
C:\Users\Administrator\Des	ktop\matterstoexport.txt	
Export Options Location C:\exporttest		
 Export Documents Export Emails Export Attachments separately Skip Empty Folders Create Report 		
🗖 Export Metadata	Select Metadata Fields	
	OK Cancel	