# 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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# Contents

## 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:
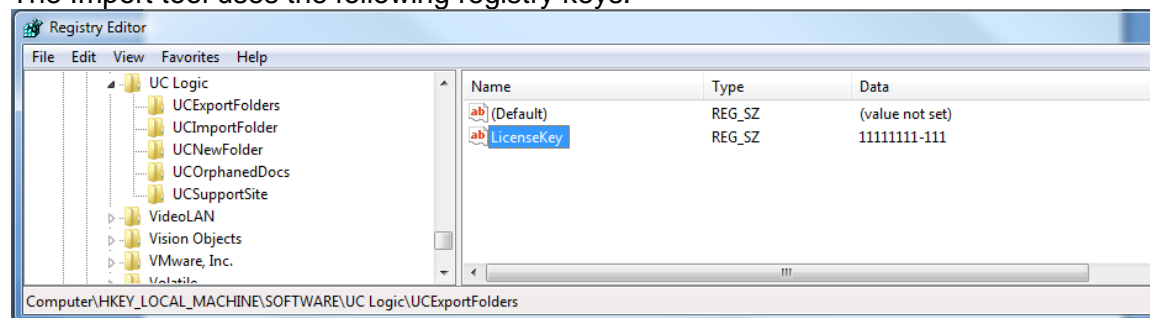


| Registry Key | Description |
|---|---|
| LicenseKey (string) | License key, any number other than the proper code will result in the application running in trial mode |
| AddDocCountPrefix (string) | Y or N (default) (optional) Set to Y to add a document count prefix to every exported file |
| DocCountFormat (string) | (optional) e.g. 00000 Specifies the document count prefix number format Example: 00000 Would export files with a prefix of 00001, 00002, 00003 etc<br><br>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.
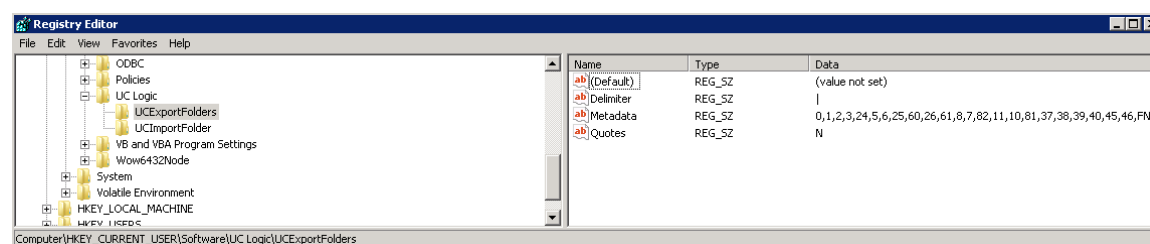
## 4. Usage

Restart Outlook/Desksite and the menu should now be available when right clicking on a Workspace, tab or document folder
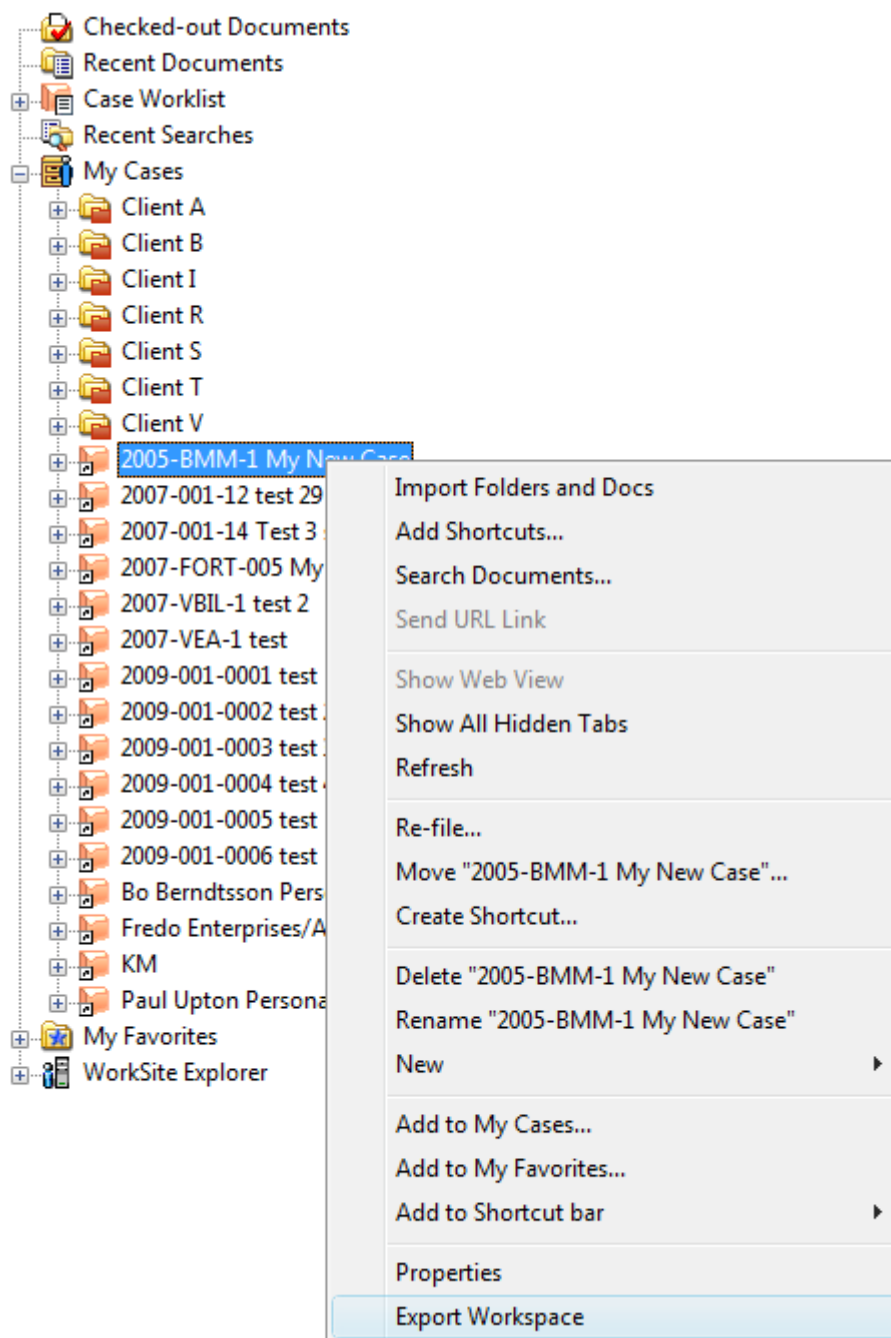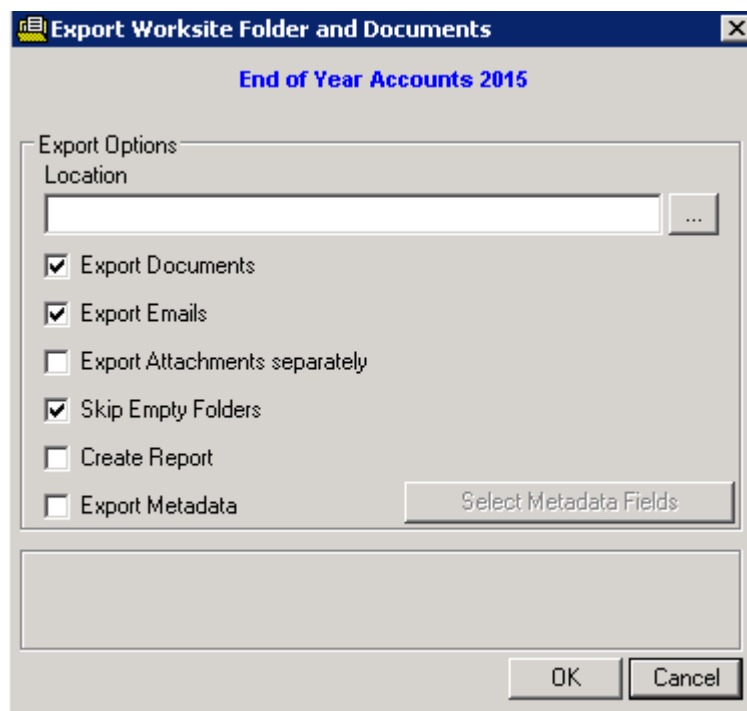
Select the location for the export and check the options to export documents, emails and attachments.

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.
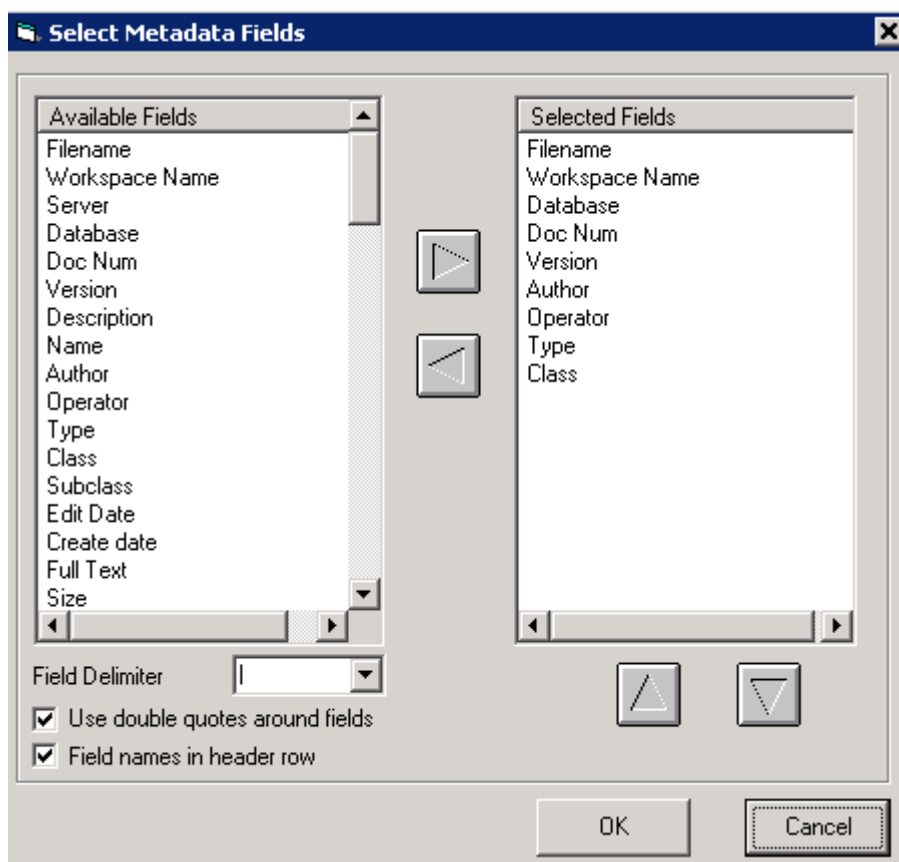


Use this dialog to specify which fields to export, the delimiter to use, if double quotes should be used to wrap around the exported fields and if you require a field header row. You may select the same field multiple times if you wish. The metadata file will be created in the root of the export directory 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.
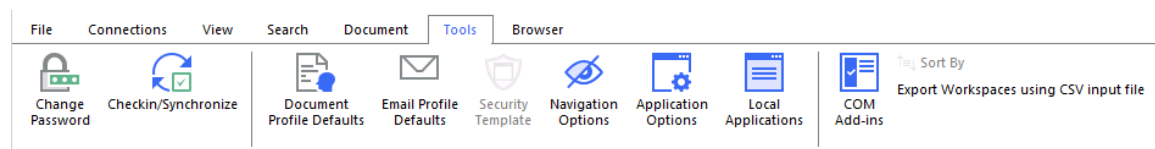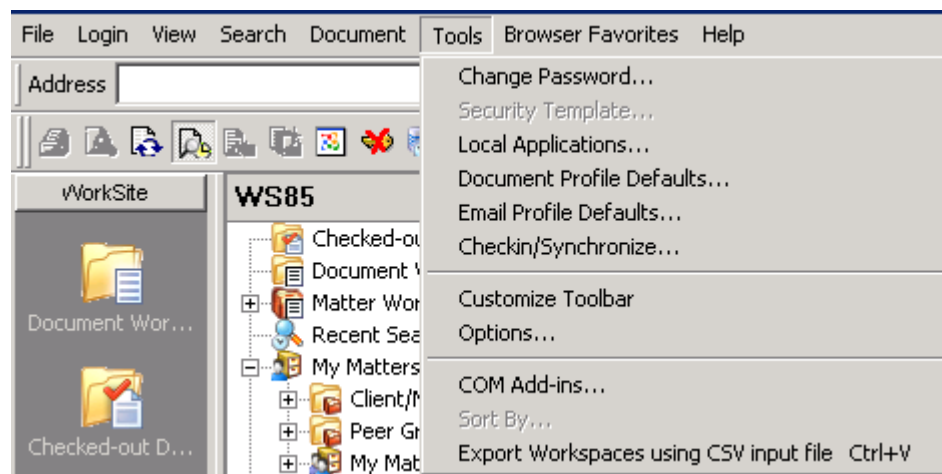
## 4.2. Export from a delimited text file

Multiple workspaces can be exported using a delimited text file that identifies workspaces based on custom field values.
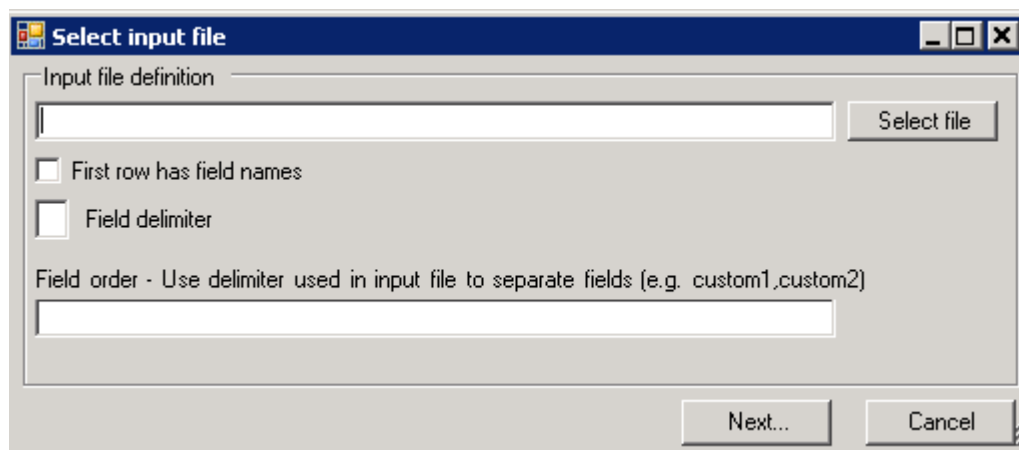
In Filesite the command is on the Worksite, File ribbon
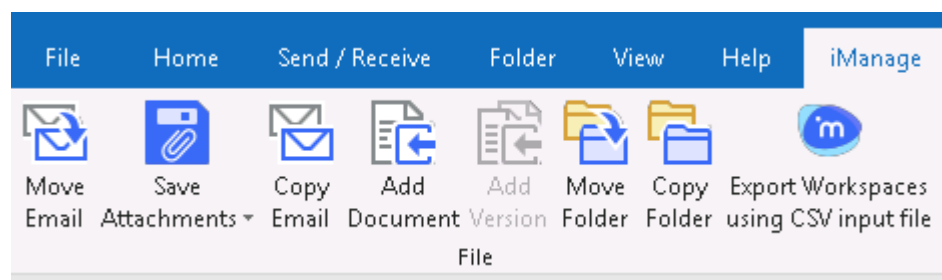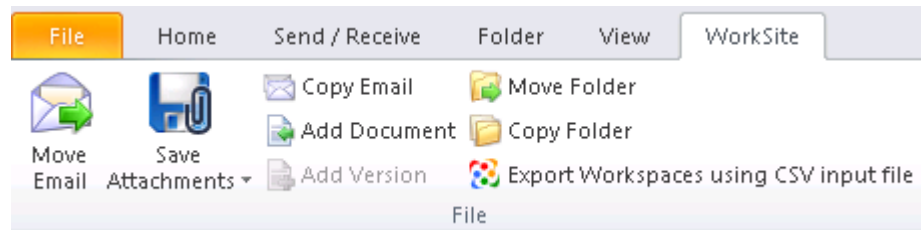




In Desksite the command is on the Tools menu

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



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
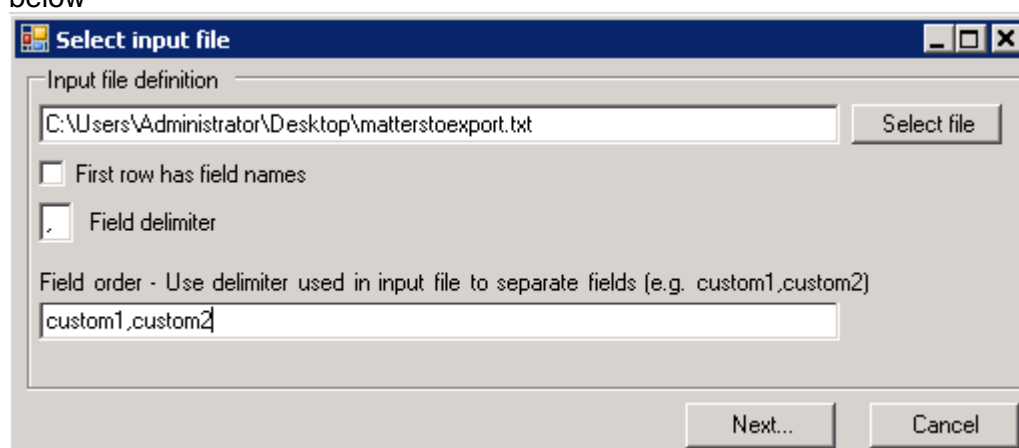
Valid field names in the field order file are

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

Valid field names in the field order file are

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