

# **UC Import Export Work**

## **Version 10.4.2**

### **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 260 characters
  - Export metadata along with the files
- Import folders, subfolder or selected documents
  - Can keep the imported files creation and edit dates
  - Import from CSV files
  - Import from ZIP files
  - Import from PST files
  - Import multiple versions

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## 1 Release Notes

### Version 10.4.2 10 March 2025

- (Import - CSV) Added the ability to have custom field variables as part of the folder names when performing a CSV import
- (Import - CSV) Fixed issue with delimiter not reading correctly for CSV import files leading to csv fields not being recognised
- (Import - ZIP) Added icons to zip file list
- (Import - ZIP) Supports nested zip files within zip files (does not support nested zip files with passwords)
- (Import - ZIP) Supports extracting from a zip file when one is found in a directory import (not password protected zip files)
- (Import - ZIP) Supports duplicate checking when importing from a zip file
- (Import - ZIP) Fixed issue when importing from sub folders in zip files
- (Import - ZIP) Fixed issue when trying to import from root zip folder
- (Export) - Fixed issue where export pro licenses reported no export license and only exported 10 docs per folder

### Version 10.4.1 18 February 2025

- (Import - CSV) Added message to show how to identify which csv fields are to be used for workspace search
- (Import - ZIP) Fixed issue with import from ZIP where the filename was too long for Windows file path limit
- (Import - ZIP) Added option to view the files in the zip when importing from a zip file
- (Import) Now truncates the docname if it is longer than 254 characters for any type of import

### Version 10.4.0 27 November 2024

- (Import - CSV) Support for importing multiple versions for a document for CSV file imports where there is a unique ID field and a numeric version number field in the CSV data
- (Import - PST) Added the ability to import from PST email files - Outlook x64 client required
- (Import - CSV) Fixed issue with importing from CSV file when there are Unicode characters
- (Import) Stopped multiple import retries when file extension is unknown
- (All) Standard and Pro versions created
- (All) Added optional message check for WebView2 installed on PC - see manual for reg key
- (All) app is now signed

### Version 10.3.1 29 August 2024

- (Export) Checks for 403 error (insufficient rights) when exporting and does not attempt to retry the export if a 403 error encountered
- (Export) Fixed a bug when adding a search to the Marked for Export tab

### Version 10.3.0 23 July 2024

- (Import - ZIP) Added option to import directly from ZIP files (zip, 7z, tar)
- (Import) If the imported filename has the document number and version number at the end of the filename, this is now removed from the document name
- (Import) Stopped failed count from registering retry failures. Only logs a failed import if the import fails 10 times
- (Import) Clicking on a Workspace/tab/folder from My Workspaces or Workspace search tabs will add the required import location details automatically to CSV Import tab and Import from ZIP tab
- (All) Updated to iManage Work Desktop SDK version 10.9.3

### Version 10.2.27 5 July 2024

- (All) Improved logging to Exception Log

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(Export) A document export is now retried up to 10 times if a problem is encountered such as server connection timeouts

Version 10.2.26 13 June 2024

(Export) Fixed issue where a folder with a large number of docs didn't export correctly  
(Export) Fixed issue when trying to exporting search containing multiple values in one field separated by commas  
(Export) Added button to export all found workspaces from the search tab  
{Import} Fixed issue when importing using a csv file and not finding workspaces based on csv data  
(Import) Added alternative delimiters for csv import file  
(Import) Fixed issue where duplicate detection enabled for csv import wasn't identifying duplicates correctly  
(Import) Improved logging of missing metadata

Version 10.2.25 24 May 2024

(All) Checks online to see if there is a newer version of the app available. Displays message if a newer one exists  
(Export) Added additional summary information for each workspace exported  
(Export) Added more logging/debug logging around sub folder exports  
(Export) Added an option to Add to My Matters from Search tab  
(Export) Saves search fields selected

Version 10.2.24 5 April 2024

(Export) Added function to calculate size of export  
(Export) Fixed saved search folder export  
(All) Removed trusted login option - use OAuth login instead

Version 10.2.23 26 March 2024

(Export) Added additional error checking on exporting  
(Export) Replaced illegal characters in filenames with more meaningful characters  
(Export) Removed carriage returns from comments metadata export

Version 10.2.22 26 February 2024

(Export) Added Export Type option for Standard, flat file or workspace flat file

Version 10.2.21 23 February 2024

(Export) Fixed issue exporting My Matters, Recent Matters, Subscriptions and My Favorites

Version 10.2.20 20 February 2024

(Export) Retries exports on receiving a 429 timeout error from iManage cloud  
(Import/Export) Added timings for imports and exports  
(Export) Folder ID Export option now exports all docs in folder, even if greater than 9999, normal export has always done this.  
(Export) Comments added to list of available fields for metadata export

Version 10.2.19 6 February 2024

(Import) Retries imports on receiving a 429 timeout error from iManage cloud  
(Export) Added the ability to do a flat file export - iManage folders are not recreated  
(Export) Added iManage Path to metadata options to export the imanage folder path, multiple rows are created if the doc is located in multiple folders

Version 10.2.18 17 January 2024

(All) Supports comma separated multiple domains in license xml

Version 10.2.17 19 December 2023

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(Import) Fixed CSV import where filenames have extended Unicode characters, e.g. Scandinavian characters  
(All) Added license request menu option

Version 10.2.16 30 November 2023

Fixed iManage login issue with urlencoded characters in password

Version 10.2.15 24 November 2023

Fixed export metadata error - The given key was not present in the dictionary

Version 10.2.14 20 November 2023

Allowed more than 25 doc classes to be listed in import drop down field  
Fixed import duplicate detection issue

Version 10.2.13 31 August 2023

Fixed duplicate export issue  
Fixed saved export lists not exporting

Version 10.2.12 22 August 2023

Added unicode support for importing

Version 10.2.11 21 August 2023

Refreshed iManage interops

Version 10.2.10 11 August 2023

Added support for Doc Sub Class default values  
Fixed issue with date format for importing documents  
Fixed issue with importing documents when doc class has required fields

Version 10.2.8 8 August 2023

Fixed issue with internal domain not being picked up correctly for license checks

Version 10.2.7.0 22 July 2023

Added additional debug logging during document import

Version 10.2.6.0 21 July 2023

Implemented alternative way to determine licensed domain name

Version 10.2.5.0 18 July 2023

Fixed object not found issue - needed HKEY\_LOCAL\_MACHINE\SOFTWARE\UC Logic\UCImportExportWork reg key created on install  
Added debug reporting of traffic optimisation statistics for cloudmanage connections

Version 10.2.4.0 6 June 2023

Enabled token refresh when required  
Added advanced option tab to control batch size, debug logs, Folder ID endpoint exports, timeout value, pause time between exports  
Fixed search folder exports

Version 10.2.3.0 11 May 2023

Updated to .NET 4.8  
Fixed issue with object not found on startup if HKEY\_LOCAL\_MACHINE\SOFTWARE\UC Logic\UCImportExportWork reg key is not present

Version 10.2.2.0 4 May 2023

Added option to export docs using FolderID (max 9999 docs) - Only to be used on advice from Sysero/UC Logic  
Removed Auto Connect option

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Version 10.2.0.1 2 May 2023

- Fixed error log output of failing endpoint
- Fixed imanage cloud endpoint for workspace operations check
- Fixed import default author selection issue
- Added Debug option

Version 10.2.0.0 11 April 2023

- Added the ability to import from a CSV file
- Search limit default set to 500, but can be changed using BatchSize registry key
- The search limit is the cursor batch size, so unlimited docs can be returned from a search, this just limits each batch size returned from a search

Version 10.1.0.14 24 March 2023

- Changed the search limit to 500 to prevent maxjsonlength being reached from REST calls

Version 10.1.0.13 1 December 2022

- Added the ability to select the database from csv file for workspace searches (database has to be one of the first 4 fields in csv file)
- Searches can be edited from the marked for export tab to populate the workspace search fields

Version 10.1.0.11 10 November 2022

- Added an option to skip search folders during an export
- Added an option to ignore duplicate exports to same export location unless the doc has been updated in iManage
- Added an option to search for workspaces to export using csv text file
- Export lists can be saved and recalled

Version 10.1.0.10 7 October 2022

- History of server urls and user ids changed to being saved in HKCU registry instead of user.config file
- Allows a temporary domain name to be used for workgroup PCs

Version 10.1.0.9 6 October 2022

- Supports supervised imports to retain create and edit dates of imported files
- Saves a list of user ids and server urls entered, for quick selection

Version 10.1.0.8 9 September 2022

- Supports fully offline mode using registry key and an offline license file that can be sent on request

Version 10.1.0.7 25 August 2022

- Added Downloaded history record for each document exported
- Fixed issue when exported file length was exactly 260 characters

Version 10.1.0.6 18 May 2022

- Fixed issue where documents don't get exported if the document name is blank

Version 10.1.0.5 17 May 2022

- Allowed large files to be exported

Version 10.1.0.4 27 April 2022

- Allowed large files to be imported - up to the max as set in the server reg setting Max Filesize
- Tidied up the progress messages
- Added tool tip text to docs that don't get imported due to extension not recognised
- Fixed issue when double clicking on top level folders in the Workspace view

Version 10.1.0.3 29 March 2022

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Updated to 10.6 Desktop API  
Added prerequisite build event to add WebView2 runtime for Azure AD with conditional access enabled

Version 10.1.0.2 24 March 2022

Fixed issues with exporting searches where 0 docs were returned  
Changed location of where offline license file is saved

Version 10.1.0.1 9 March 2022

Fixed issues with exporting searches  
Fixed workspace views to show search folders  
Workspaces can now be expanded to show sub folders in search tab

Version 10.1.0.0 7 March 2022

Added UC Import Work (requires separate license)

Version 10.0.0.20 11 February 2022

Now exports search folders

Version 10.0.0.19 22 January 2022

Added an option to export orphaned docs  
Saves checkbox options to registry  
Fixed issue with 10.2 server REST bug with finding folders beneath tabs

Version 10.0.0.17 18 November 2021

Fixed problem with exporting category folders

Version 10.0.0.16 10 November 2021

Fixed problem when exporting just folders that caused the sub folders to not get exported

Version 10.0.0.15 7 June 2021

Excluded dlls from installation package

Version 10.0.0.14 12 May 2021

Fixed issue with exporting just emails  
Fixed issue exporting email attachments

Version 10.0.0.13 4 May 2021

Fixed an issue with the last user field being used for metadata export causing an empty metadata file

Version 10.0.0.12 23 April 2021

Fixed an issue with non uk dates and license checking

Version 10.0.0.11 23 March 2021

Fixed some licensing issues

Version 10.0.0.10 9 February 2021

Documents exported with date/time stamps matching profile dates/times

Version 10.0.0.9 2 February 2021

Fixed issue with accented characters not exporting correctly  
Added additional logging  
Converted the metadata dates to correct time zone  
Fixed metadata header creation when exporting from the marked for export tab

Version 10.0.0.8 1 February 2021

Fixed login issue when the imanager explicit login password contained non alpha-numeric characters

Version 10.0.0.6 23 November 2020



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Added subscription lists to views

Version 10.0.0.5 30 October 2020

Added OAuth login option

Tested against iManage Cloud

Version 10.0.0.4 19 October 2020

Searching for workspace limited to 500 (default) as cursor feature not reliable enough

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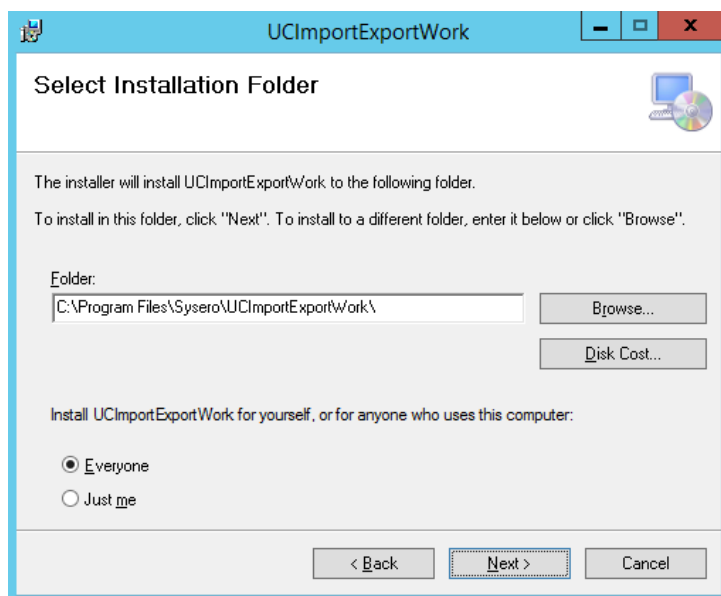
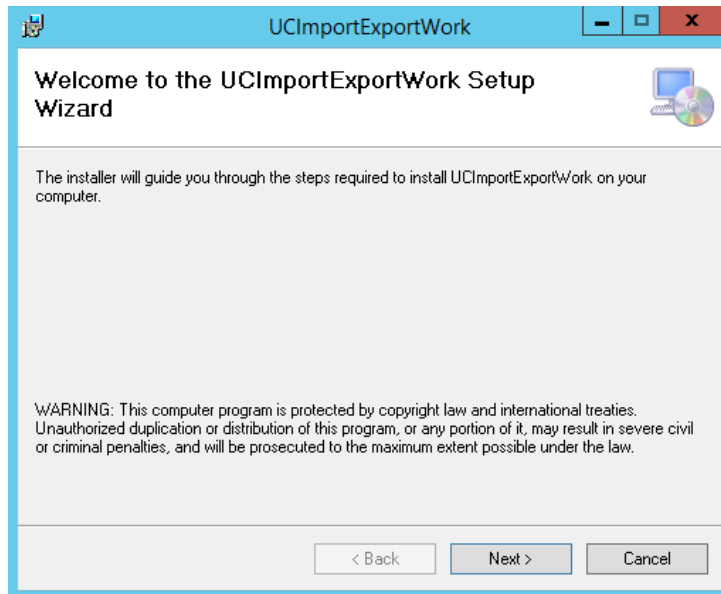
## **2 Support**

For support, please contact [support@uclogic.com](mailto:support@uclogic.com)

### 3 Installation

Microsoft Edge WebView2 is required to run this application. It is usually installed as part of Microsoft Edge, so you will more than likely have this installed, if not, it can be downloaded and installed from Microsoft's web site.

Run the setup.exe and follow instructions



The installation will create an application under Sysero



## 4 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 (**Note: For Offline licensing, see the next section**). 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.

There are licenses available for the following products:

- UC Import Work Standard
- UC Import Work Pro
- UC Export Work Standard
- UC Export Work Pro

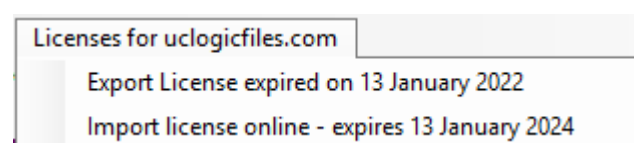
In general, the standard versions of the applications allow basic import/export functionality. The Pro versions will enable additional functionality.

Import Pro has these extra features:

- Import from CSV files
- Import from ZIP files
- Import from PST files
- Version Importing

Export Pro has these extra features:

- Exporting orphaned documents (documents not in folders)
- Exporting email attachments separately



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.

### 4.1 Offline licensing

Fully offline licensing is supported by adding the REG\_SZ registry key **OfflineMode** to the following location:

HKEY\_LOCAL\_MACHINE\SOFTWARE\UC Logic\UCImportExportWork

**Y** = Works offline, the app will not check the UC Logic license server for a valid license. A license file will be required from UC Logic, please contact [support@uclogic.com](mailto:support@uclogic.com) for a license file.

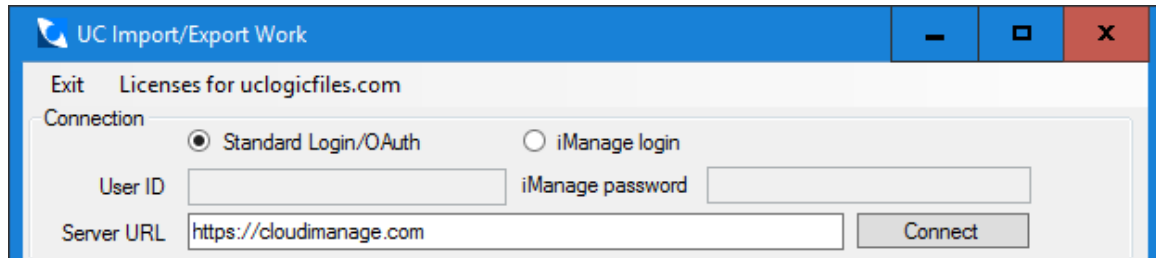
**N** = Works online (default). The app will check the UC Logic license server for a valid license. This is a read only access to an encrypted file., No information is saved on the UC Logic servers during this process.

## 5 Starting the application

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

`https://{imanager server name}`

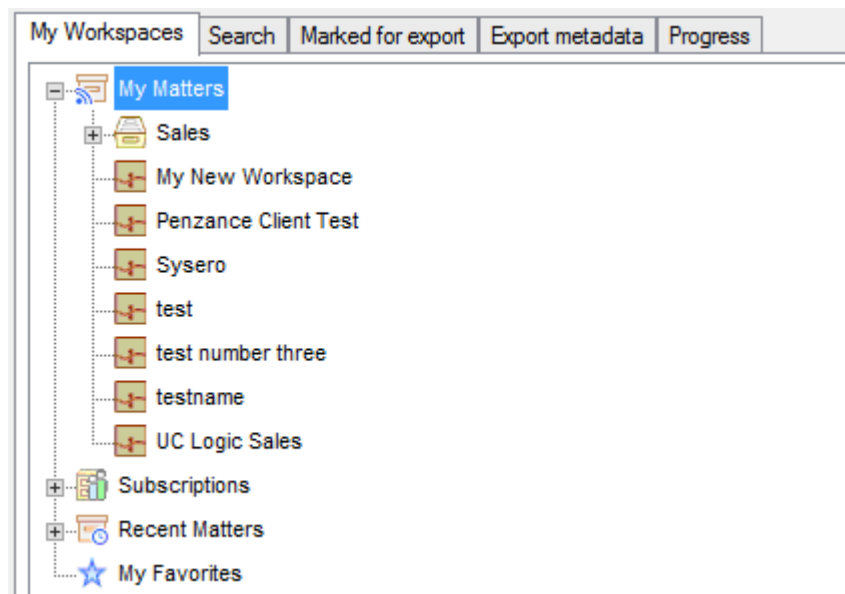
for example:



There are two methods to connect to the iManage system

- Standard/Login/OAuth - This is the usual way to login to the application, it may prompt for your normal network login id and password or it may automatically login as the currently signed in user - this is dependent on how your iManage system has been set up for authentication. This should be the one to use if you are connecting to the iManage cloud (<https://cloudimanager.com>)
- iManage Login – This login method will allow you to enter an iManage User ID and their iManage password. Please note – the user's iManage password is not the same as the user's network login password. This option also enables the supervisor import mode, if your iManage role allows this.

Click Connect, if you are successfully connected the application will display your My Matters, Subscriptions to other people's My Matters, Recent Matters and Favourites:



## 6 Exporting

### 6.1 Export Options

Complete the export options:

- **Export To:** Select the location for the export. Workspaces, folders and documents will be created beneath the folder selected.
- **Export Type:**
  - All Folders (Default) – This is the normal export type, all folders from iManage are recreated in the file system during the export.
  - Flat File (no folders) – Exports the docs to the selected export location but does not recreate any iManage folders.
  - Workspace Flat File (Folder for each workspace) – Exports the docs to the selected location and creates a separate folder for each workspace being exported, but does not create the workspace folder structure.
- **Export documents:** Select this option to export any documents from the selected export source.
- **Export emails:** Select this option to export any emails from the selected export source.
- **Export attachments separately:** Only select this option if you want to export each email attachment as a separate file. The email itself will already have the attachments within it, so this option is not always necessary.
- **Skip empty folder:** Select this option if you don't want the app to create an export folder if there are no documents or sub folders within it in the iManage system.
- **Latest versions only:** If you only want the latest version of each document, select this option, otherwise all versions of each document will be exported.
- **Export orphaned document:** 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.
- **Skip Search folder:** Check this option if you do not want to export any search folders found
- **Ignore duplicate exports:** You can choose to prevent the export of a document if it has already been exported to the same location. However, if the doc has since been edited in iManage it will not be classified as a duplicate and will get exported again.

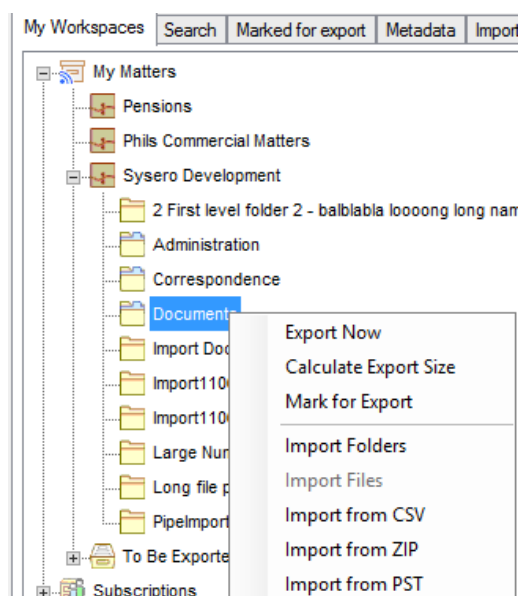
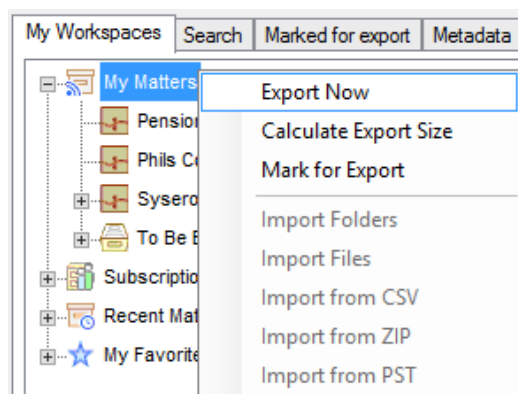
The following applies when exporting folders:

- Files will be exported in the same structure as appears in the folders, unless one of the Flat File export types is selected.
- Filenames will use the document description from the document profile.
- If you are exporting a large number of nested folders, there's a Windows 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.

## 6.2 Exporting from My Workspaces tab

You can export directly from the My Matters, Recent Matters, Subscriptions 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.

## 6.3 Calculate Export Size

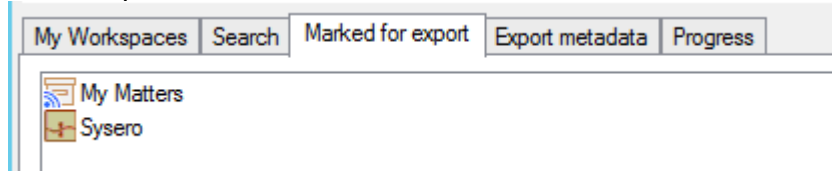
Before you perform the export, you can check the expected size of the export using the Calculate Export Size command from the pop up menu. This process will scan through all folders selected and report the number of files and expected size for the export. It will not perform any exports.



## 6.4 Marking multiple workspaces or folders for export

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

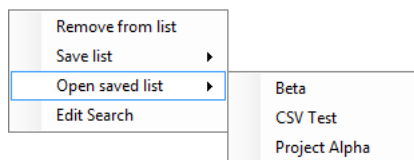
for example:



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.

You can also add workspace searches to the Marked for Export list.

A list can be saved by right clicking the list and selecting **Save List**. Multiple lists can be saved.

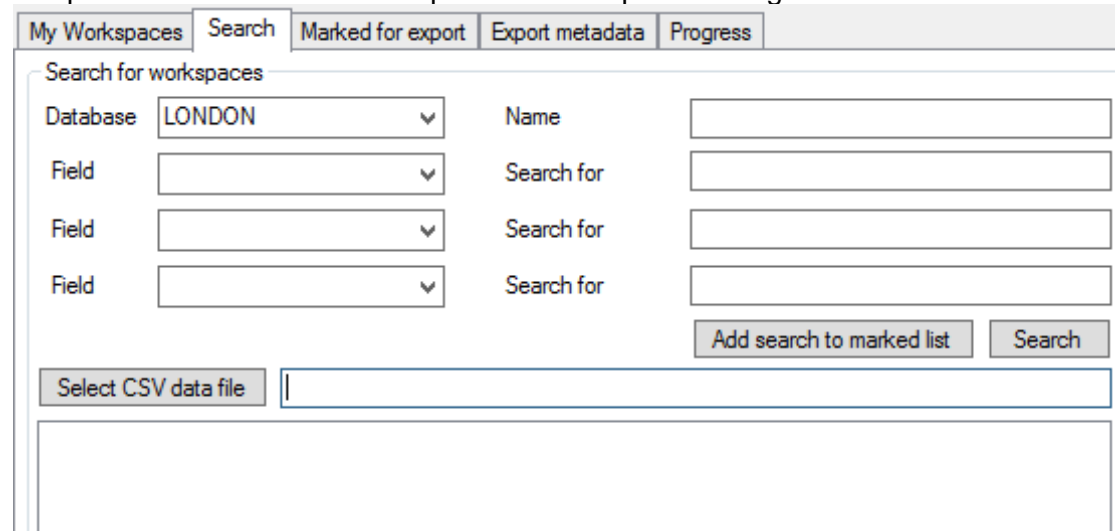


If a list has previously been saved, it can be recalled using the **Open saved list** command from the right click pop up menu.

An individual search can also be edited to repopulate the Search fields.

## 6.5 Searching for Workspaces to export

It is 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).

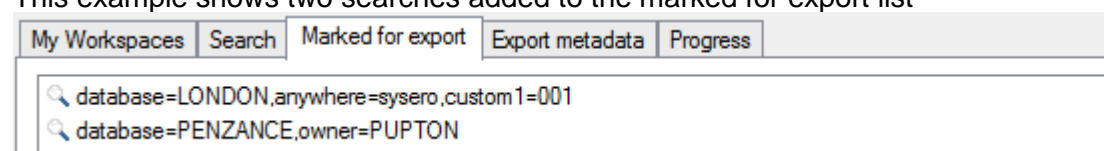
These searches can be performed on the following fields:

- 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
- Search using the contents of a CSV text file

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. To export the complete list of searched workspaces, click the **Export Search Results** button. This will export all workspaces that are listed in the search results view. If you are prompted to load more workspaces when running the search, please note that this button will export only those listed in the results window, so if you have stopped loading the additional workspace, these will not be in the results list and will not get exported when using the **Export Search Results** button. If you want to export all workspaces that the search criteria find, then you can either load all workspaces before clicking the **Export Search Results** button or you can add the search criteria to the marked list by clicking the **Add search to marked list button**. Then export from the Marked for Export tab.

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

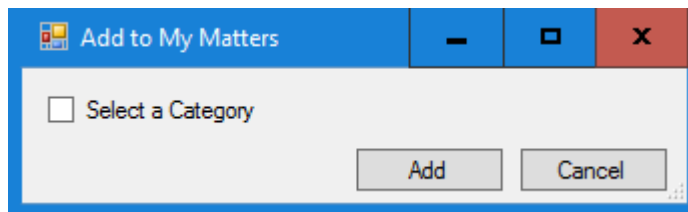


The first exports all workspaces with custom1=001 in the LONDON database where the word sysero appears in either the workspace name or description

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

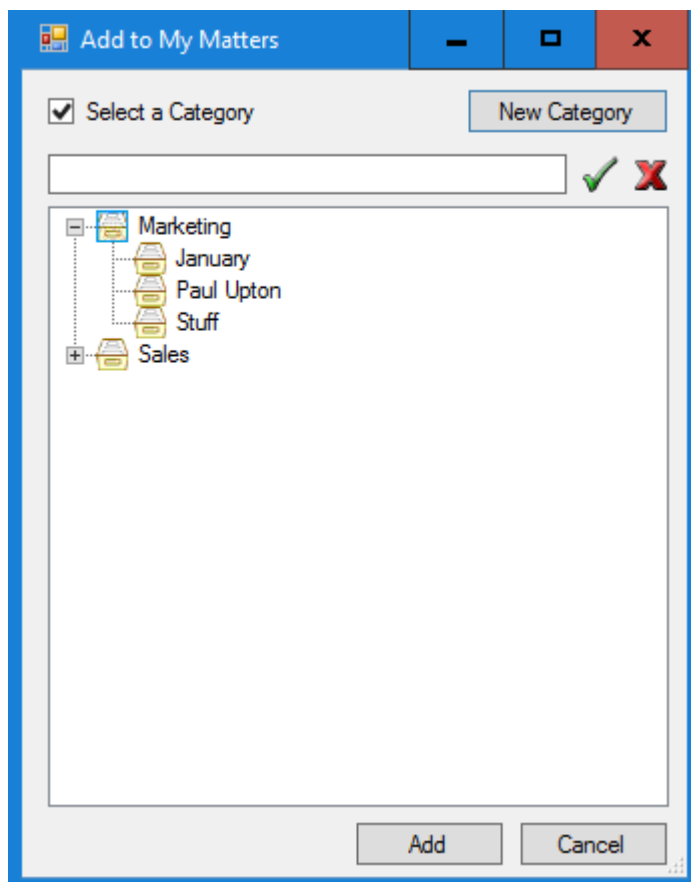
If multiple searches select the same workspace multiple times, the workspace will only be exported once.

It is possible to add workspaces listed in the search results to the My Matters list, by right clicking on a workspace and selecting **Add to My Matters**



To place the workspace in the root of the My Matters folders, just click the Add button.

To add the workspace to a category, click the **Select a Category** option. New categories can be created here as well.



The workspace will be added to the selected category by using the Add button

## 6.6 Searching for Workspaces using an external CSV text file

It is possible to search for workspaces based on the contents of an csv text file. The CSV file must be comma separated and must not have a header row. Double quotes can be used to enclose each field.

The following are a suitable example of a CSV file that can be used:

```
"003","01"
"001","01"
"001","02"
```

There are 2 fields in this csv file, comma separated and double quotes used.

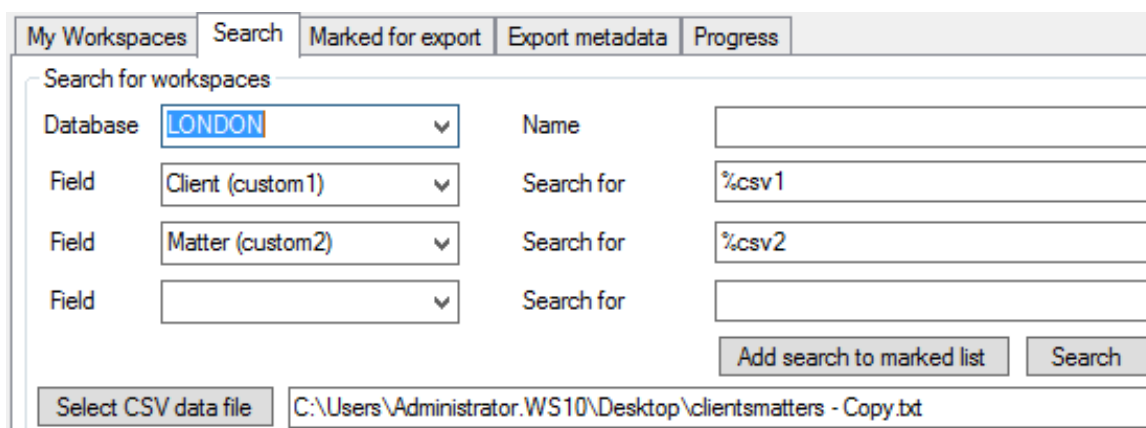
```
003,01,HSMITH
001,01,FJINES
001,02,DHARRY
003,01,BGLADWORTH
005,98,LPOTTER
```

There are 3 fields in this CSV file

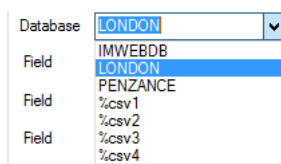
Use the **Select CSV data file** button to choose the file you want to use.

To match the field in the CSV to the iManage profile field, select the field to search and add %csv1 to match this with the first field, %csv2 for the second and so on.

The following is an example of searching on client and matter fields using the 1<sup>st</sup> and 2<sup>nd</sup> fields in the csv file selected:



The database can also be selected from the csv file. The database has to be one of the first four fields in the csv file. Select one of the four %csv options from the database drop down field.



Click **Search** to test the search is valid.

Click **Add search to marked list** to add this to the Marked for export list.

## 6.7 Exporting Metadata

My Workspaces
Search
Marked for export
Export metadata
Progress

☒ Export metadata
☒ Add Quotes
☒ Header row
Delimiter

Caption
Filename
Name
Author
Operator
Type
Class
Client
Matter
Custom3
Custom4
Custom5
Custom6
Custom7
Custom8
Custom9
Custom10
Custom11
Custom12
Custom13

>
<

Caption
Doc. Number
Version
Filename
Name
Author
Operator
Type
Class
Client
Matter
Create Date

Save

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.

## 7 Importing

### 7.1 Import Options

Complete the import options

Export Options (Pro License expires 24 Feb 2026)	Import Options (Pro License expires 28 Nov 2026)	Advanced Options
Default doc class <input type="text" value="DOC"/>	<input type="radio"/> Move <input checked="" type="radio"/> Copy	
Default sub class <input type="text"/>	<input checked="" type="checkbox"/> Check for duplicates (in same folder only)	
Default Email class <input type="text" value="E-MAIL"/>	<input type="checkbox"/> Delete source file if duplicate found	
Default author <input type="text" value="PAUL.UPTON"/>	<input checked="" type="checkbox"/> *Extract files from ZIP files when importing from directories	
	<input type="checkbox"/> Supervised Import Mode <a href="#">Details</a>	

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 for normal imports. Emails and zip files duplicate import detection works differently.

- Imported document name and extension match
- Document size is identical
- Document is being imported into the same folder as the existing document
- File create dates match
- File edit dates match

For files imported from Zip files, the duplicate detection will check for the following:

- Imported document name and extension match
- Document size is identical
- Document is being imported into the same folder as the existing document

**Note: Email duplicate detection is carried out by the iManage server duplicate detection settings, regardless of how you set the duplicate checking in this application. If the iManage server detects a duplicate email is already saved, then the import process will NOT import the email again.**

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.

If you have licensed the professional version, you have the option to extract files from any zip files that are discovered during the import process. Password protected zip files are not supported. If you choose to not extract the files from a zip file, then the application will attempt to import the zip file as a single iManage document. If your iManage system is not configured to support zip files, then the zip file import will fail.

### 7.2 Supervised Import Mode

Supervised import mode provides some additional features and is only available under certain circumstances, see note below.

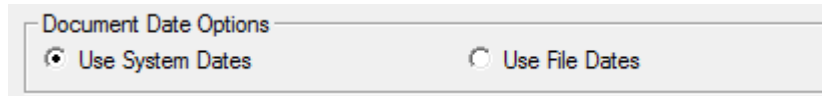
The features enabled when using supervised import mode are:

- Match create/edit dates to file stamp dates for System dates

- Import multiple versions when using a compatible CSV file

Supervised import mode can be used to update the profile create and edit dates to match the imported file dates. This only affects iManage systems that are set to **Use System Dates** on the iManage Work Server as File dates are always updated to reflect the imported file dates.

The iManage Work Server can be configured to either show System dates or File dates. Please read the iManage Server Administration guide for details on this feature and to check which option your system is configured for,



If you have this set to System dates and you want to ensure the create and edit dates for documents being imported are set to the actual dates on the files, then you should perform the import with the Supervised Import Mode option checked, otherwise the create and edit dates will be the date and time you perform the import.

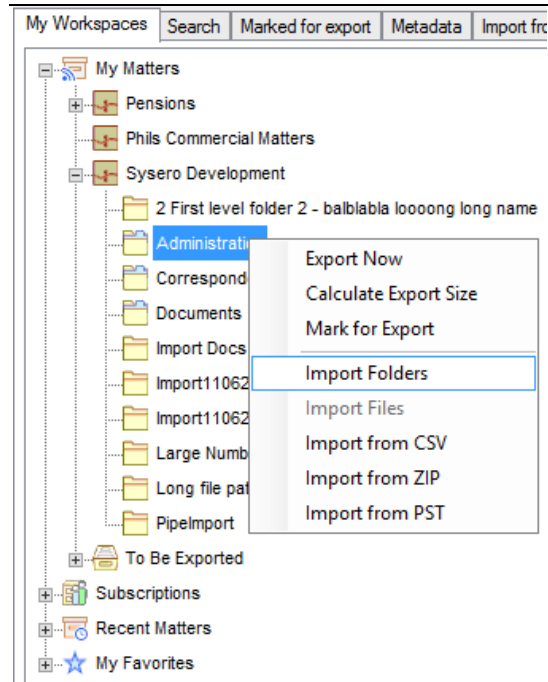
***NOTE: The Supervised Import Mode is only available if the application is logged in using the iManage login option and the user logging in is a member of the NRTADMIN group in all connected databases. It will be greyed out if OAuth login is used to connect to the iManage system or if the user is not a member of the NRTADMIN group in ALL databases.***

### 7.3 Importing Files or Folders

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.





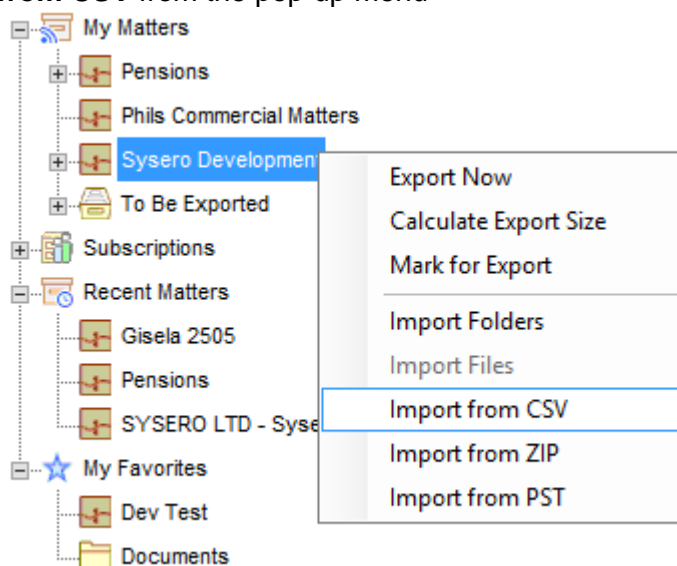
## 7.4 Import documents from a CSV file

A CSV (Comma Separated File) can be used to select files and metadata for the import. There are two main ways to perform the CSV import:

- Import into a specific workspace
- Import into multiple workspaces based on CSV metadata values

### 7.4.1 Import from CSV into one Workspace

To import into a specific workspace, select the workspace or folder where you want to start the import, then click on the **Import from CSV** tab or right click and select **Import from CSV** from the pop-up menu



This will select the workspace as the import location

My Workspaces Search Marked for export Metadata **Import from CSV** Import from ZIP Import from PST Progress Exceptions

Select CSV File

☐ First row contains field names Delimiter

Field Mappings Folder Filing

☒ Import into Workspace: **ACTIVE!12**  
Sysero Development

☐ Import into Workspaces located using metadata fields

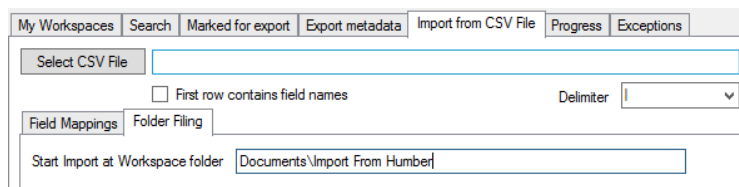
CSV Field	iManage Field	Default

If you selected a folder beneath the workspace, this will be added to the folder location for the import. In the example below, the Import Docs folder was selected

Field Mappings Folder Filing

Start Import at Workspace folder

You can change the starting folder location or add sub folders by separating with a back slash, For example:



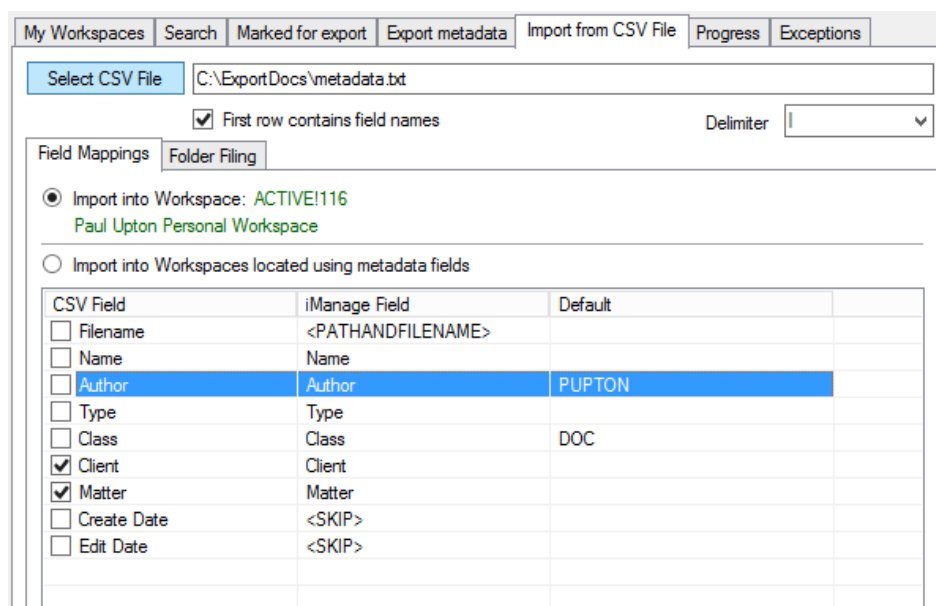
You can now select the CSV file and set up the field mappings – see section [7.4.3](#)

## 7.4.2 Import into multiple workspaces

If your CSV file has fields that can be matched to existing workspace metadata, then it is possible to import directly into multiple workspaces based on locating the destination workspace from the metadata in the CSV field. For example, if the CSV file had fields for client and matter number and these matched to the client/matter number for existing workspaces, then the documents can be imported directly to the workspace.

To do this, the CSV file must contain the exact data that can be matched against workspace metadata. If you need to map the client/matter numbers in the CSV file to different ones as used in your iManage system, you will need to manipulate the CSV file to contain the new client/matter numbers. This can be done in Excel or SQL, but the exact process falls outside of the scope of this manual.

To select the option to import into workspaces based on the CSV metadata, first select the CSV file then select the option to **Import into Workspaces located using metadata fields**



CSV Field	iManage Field	Default
<input type="checkbox"/> Filename	<PATHANDFILENAME>	
<input type="checkbox"/> Name	Name	
<input type="checkbox"/> Author	Author	PUPTON
<input type="checkbox"/> Type	Type	
<input type="checkbox"/> Class	Class	DOC
<input checked="" type="checkbox"/> Client	Client	
<input checked="" type="checkbox"/> Matter	Matter	
<input type="checkbox"/> Create Date	<SKIP>	
<input type="checkbox"/> Edit Date	<SKIP>	

Map the fields in the CSV file to the iManage fields (see section [7.4.3](#))

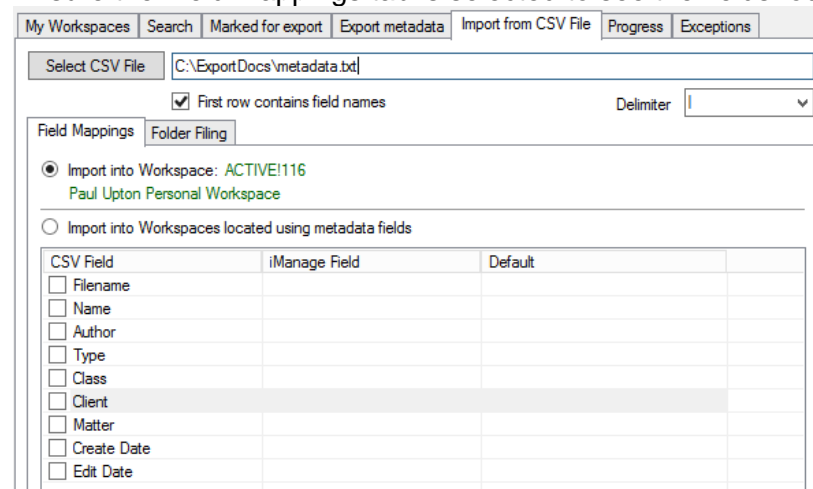
You must have fields that can be used to search for a single workspace, in the example above the client and matter fields are used to search for the workspace. The search fields are identified by the checkboxes against the fields.

You can go to the folder filing tab. This is used to specify where in the workspace the documents should be imported (see section [7.4.4](#))

### 7.4.3 CSV Field mappings

Once you have selected the workspace and the import folder location, you can select the CSV file. Use the **Select CSV File** to browse for the CSV file and check the box if the first row as field names.

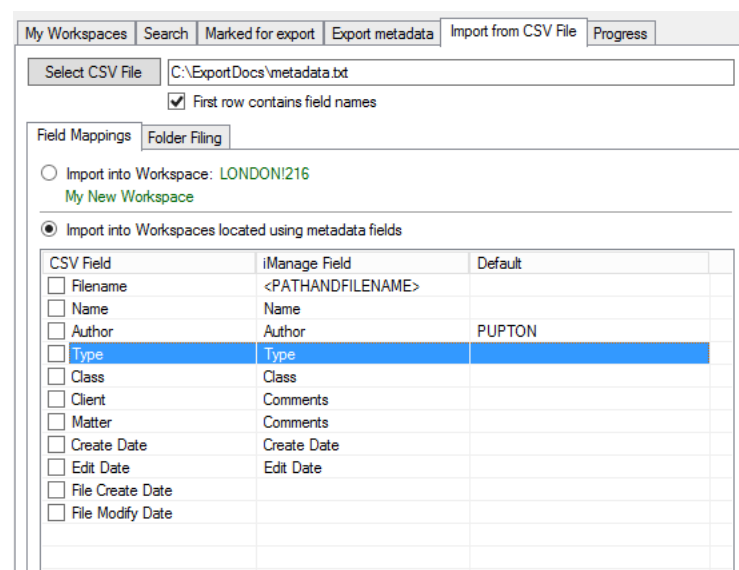
Ensure the Field Mappings tab is selected to see the fields found in the selected file.



CSV Field	iManage Field	Default
<input type="checkbox"/> Filename		
<input type="checkbox"/> Name		
<input type="checkbox"/> Author		
<input type="checkbox"/> Type		
<input type="checkbox"/> Class		
<input type="checkbox"/> Client		
<input type="checkbox"/> Matter		
<input type="checkbox"/> Create Date		
<input type="checkbox"/> Edit Date		

You now need to map the fields in the CSV file to the iManage fields. Right click on each field you wish to import and select the relevant iManage field. You must always have one field that point to the document to be imported, this must be mapped to the field <PATHANDFILENAME>

You should only use each iManage field once, except for the comments field. When the comments field is used multiple times, all the CSV data selected is added to the comments field.



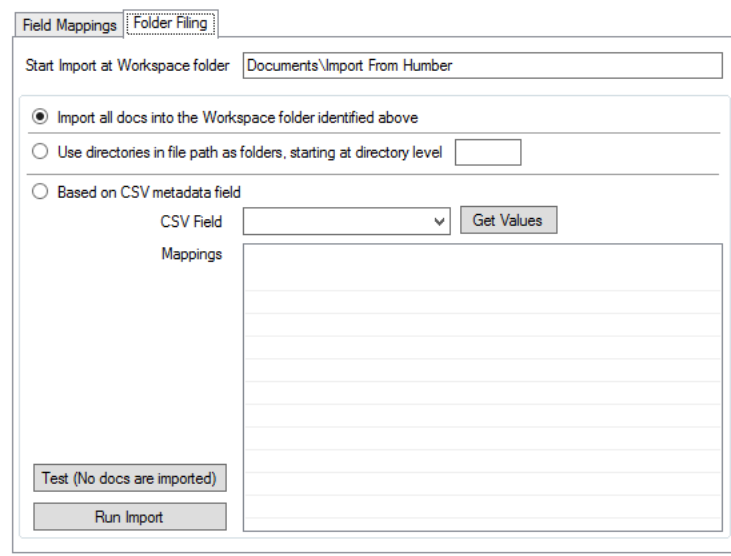
CSV Field	iManage Field	Default
<input type="checkbox"/> Filename	<PATHANDFILENAME>	
<input type="checkbox"/> Name	Name	
<input type="checkbox"/> Author	Author	PUPTON
<input type="checkbox"/> Type	Type	
<input type="checkbox"/> Class	Class	
<input type="checkbox"/> Client	Comments	
<input type="checkbox"/> Matter	Comments	
<input type="checkbox"/> Create Date	Create Date	
<input type="checkbox"/> Edit Date	Edit Date	
<input type="checkbox"/> File Create Date		
<input type="checkbox"/> File Modify Date		

The example above, uses the filename, name, author, type, class, client, matter, create date and edit date fields from the CSV file. The other fields are ignored. You can set a default value, if the CSV value does not match an existing value in the custom table by right clicking the relevant row and choosing **Set Default Value** from the popup menu.

## 7.4.4 Selecting which folder to use for CSV imports

There are three options to choose to determine where the docs should be imported:

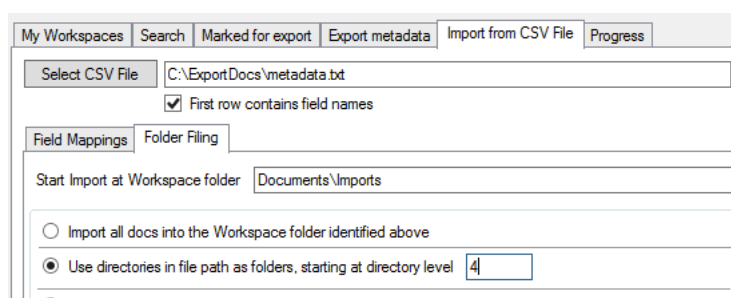
- Directly to the folder specified
- A folder based on the directory path of the document being imported
- A folder based on one of the CSV fields



In all imports the imports will start at the folder as specified in the **Start Import at Workspace folder**. If this folder does not exist in the workspace, it will be created.

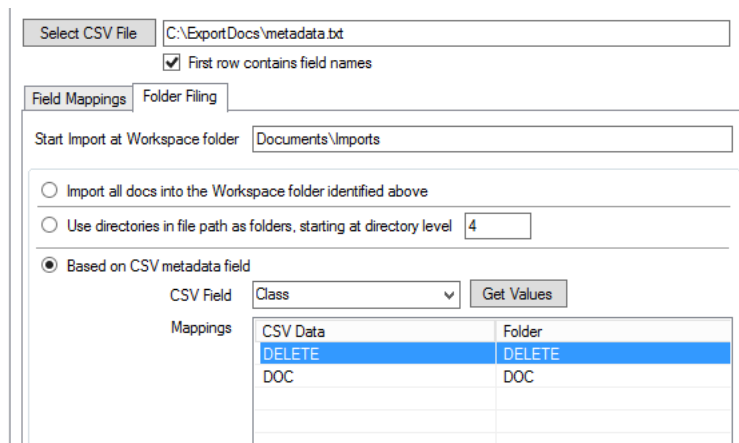
When **Import all docs into the workspace folder identified above** is used, the document will all be imported into the folder as shown at the top of the options. If the folder does not exist a new one will be created in the Workspace

When **Use directories in the file path as folders** is used, the folders will be created according to the Start Import at Workspace folder value, plus the directories of the actual files being imported. For example, using the values as shown below.



If the file being imported is C:\Paul\docstoimport\Project ABC\Letters\letter to Frank.docx and the starting level for folder fling was set to 4, then the file would be imported to the folder <Workspace Name>\Documents\Import\Project ABC\Letters. Folders that do not exist will be created.

When **Based on CSV Metadata** option is used then the folder selected will depend on the value in one of the metadata fields. Commonly the doc class would be used here.



CSV Data	Folder
DELETE	DELETE
DOC	DOC

The example above would import into either  
 <Workspace Name>\Documents\Imports\Delete  
 Or  
 <Workspace Name>\Documents\Imports\Doc

The folder name can be amended by right clicking the CSV Data/Folder row and assigning to a new folder. If the folder does not exist, it will be created during the import.

#### 7.4.5 Using Metadata Variables in Folder Names

Folders can be identified using profile metadata fields, for example, if your workspace folder names contain client/matter numbers, then you can reference these using the following variables

%01	Custom1
%02	Custom2
%03	Custom3
%04	Custom4
%05	Custom5
%06	Custom6
%07	Custom7
%08	Custom8
%09	Custom9
%10	Custom10
%11	Custom11
%12	Custom12
%29	Custom29
%30	Custom30

For example: To select/create a folder using custom1 and custom2, you might enter:

Documents (%01.%02)

If the workspace being imported into has custom1=12345 and custom2=997, then this would map to a folder called Documents (12345.997)





My Workspaces	Search	Marked for export	Metadata	*Import from CSV	*Import from ZIP	*Import from PST	Progress	Exceptions
<div>CSV Data</div> <div> Checking version import data, ID:4294, Version:1  Checking version import data, ID:4295, Version:5  Checking version import data, ID:4295, Version:4  Checking version import data, ID:4295, Version:3  Checking version import data, ID:4295, Version:2  Checking version import data, ID:4295, Version:1  Checking version import data, ID:4296, Version:3  Checking version import data, ID:4296, Version:2  Checking version import data, ID:4296, Version:1  Checking version import data, ID:4297, Version:2  Checking version import data, ID:4297, Version:1  Checking version import data, ID:4298, Version:3  Checking version import data, ID:4298, Version:2  Checking version import data, ID:4298, Version:1  Checking version import data, ID:4299, Version:1  Checking version import data, ID:4300, Version:1  Checking version import data, ID:4301, Version:3  Checking version import data, ID:4301, Version:2  Checking version import data, ID:4301, Version:1  Checking version import data, ID:4302, Version:2  Checking version import data, ID:4302, Version:1 </div>								

These checks are also carried out if you start an import run. If any issues are discovered, the import will not begin.

Versions can only be created during a single import run. It is not possible to add versions to documents previously imported.



### 7.4.7 Testing the CSV Import

A test can be used to check you have set up the correct folder allocations by clicking the **Test (no docs are imported)** button

This will show the folder that will be bused for the import for each row in the CSV file.

My Workspaces	Search	Marked for export	Export metadata	Import from CSV File	Progress
CSV Data		Import Location			
C:\ExportDocs\Penzance Client Test\Documents\PZ...		Penzance Client Test\Documents\Imports\DOC			
C:\ExportDocs\Penzance Client Test\Documents\PZ...		Penzance Client Test\Documents\Imports\DOC			
C:\ExportDocs\Penzance Client Test\Documents\46...		Penzance Client Test\Documents\Imports\DOC			
C:\ExportDocs\Penzance Client Test\Documents\PZ...		Penzance Client Test\Documents\Imports\DELETE			
C:\ExportDocs\Penzance Client Test\Documents\20...		Penzance Client Test\Documents\Imports\DELETE			
C:\ExportDocs\Penzance Client Test\Documents\to ...		Penzance Client Test\Documents\Imports\DOC			
C:\ExportDocs\Penzance Client Test\Documents\to ...		Multiple Workspaces found			
C:\ExportDocs\Penzance Client Test\Documents\to ...		Penzance Client Test\Documents\Imports\DOC			
C:\ExportDocs\Penzance Client Test\Documents\to ...		Penzance Client Test\Documents\Imports\DOC			
C:\ExportDocs\Penzance Client Test\Documents\to ...		Penzance Client Test\Documents\Imports\DOC			
C:\ExportDocs\Penzance Client Test\Documents\to ...		Penzance Client Test\Documents\Imports\DOC			
C:\ExportDocs\Penzance Client Test\Documents\to ...		Penzance Client Test\Documents\Imports\DOC			
C:\ExportDocs\Penzance Client Test\Documents\to ...		Multiple Workspaces found			
C:\ExportDocs\Penzance Client Test\Z eAudit\com...		Penzance Client Test\Documents\Imports\DOC			
C:\ExportDocs\Penzance Client Test\Z eAudit\drivi...		Penzance Client Test\Documents\Imports\DOC			
C:\ExportDocs\Penzance Client Test\Z eAudit\elect...		Penzance Client Test\Documents\Imports\DOC			
C:\ExportDocs\Penzance Client Test\Z eAudit\com...		Penzance Client Test\Documents\Imports\DOC			
C:\ExportDocs\Penzance Client Test\Z eAudit\drivi...		Penzance Client Test\Documents\Imports\DOC			

### 7.4.8 Run the CSV Import

Use the **Run Import** button to do an actual import

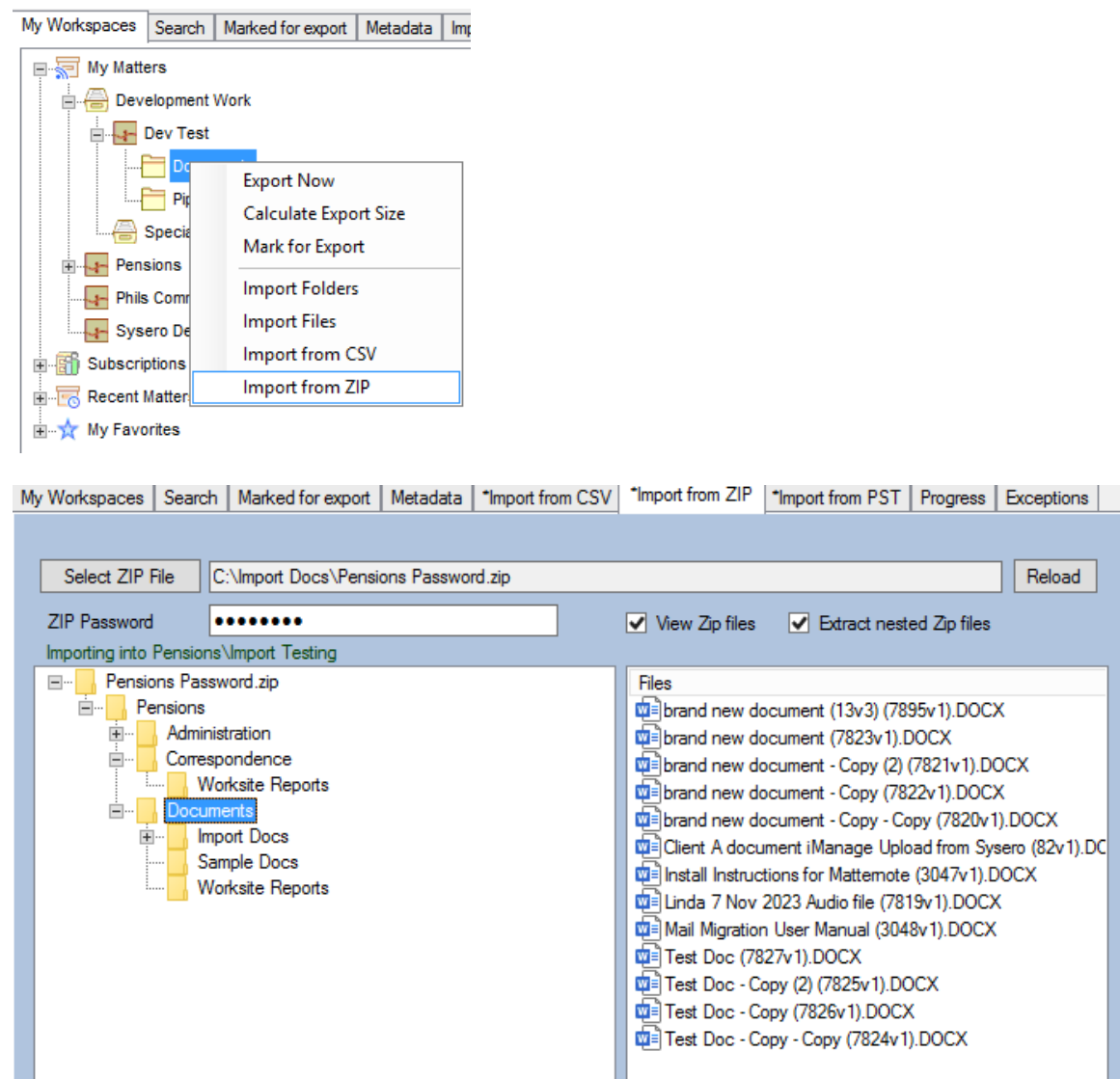
## 7.5 Import from ZIP files

The contents of a ZIP file can be imported directly into iManage, this can be especially useful if the ZIP file contains very long filenames that cannot be extracted to a Windows PC due to the 260-character limit for filenames.

The following ZIP formats are supported:

- Zip, Zip encrypted
- 7z, 7z encrypted
- Tar

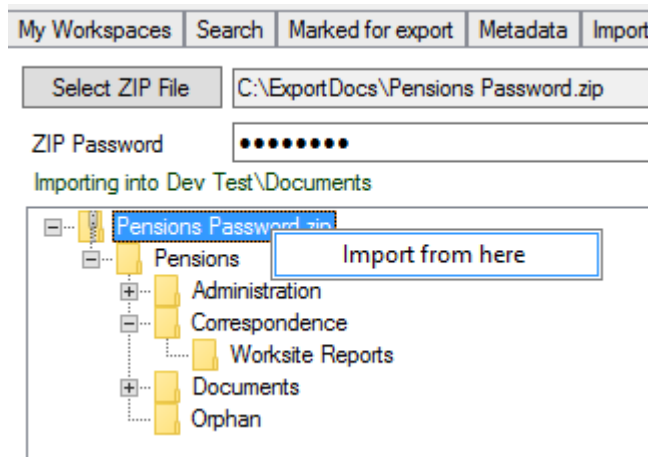
To import into a specific workspace, select the workspace or folder where you want to start the import, then click on the **Import from ZIP** tab or right click and select **Import from ZIP** from the pop-up menu.



Select the zip file to import, and if necessary, enter a password to display the contents of the ZIP file.

To view the files within the zip file, choose the option to **View Zip Files**. You can also choose if you want to extract the files from any nested zip files found within the zip file selected. However, if the nested zip file has a password, this is not supported. If you choose not to extract nested zip files, then the application will attempt to import the actual zip file as a single iManage document, depending if you have zip file support configured in your iManage system.

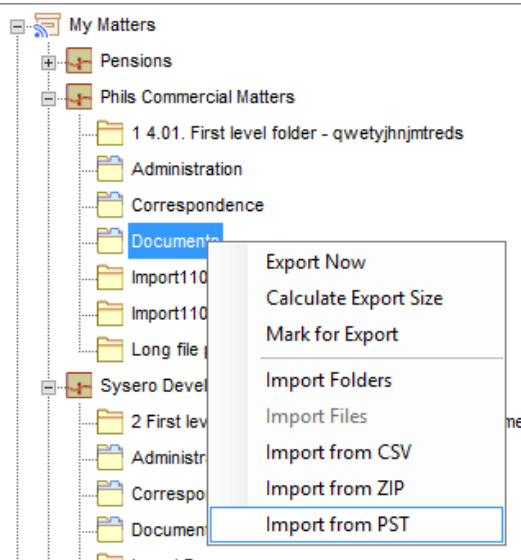
To begin the import, choose the folder in the ZIP file where you want to start importing. To import the whole ZIP file right click the zip name at the top of the tree and select **Import from here** from the pop-up menu.



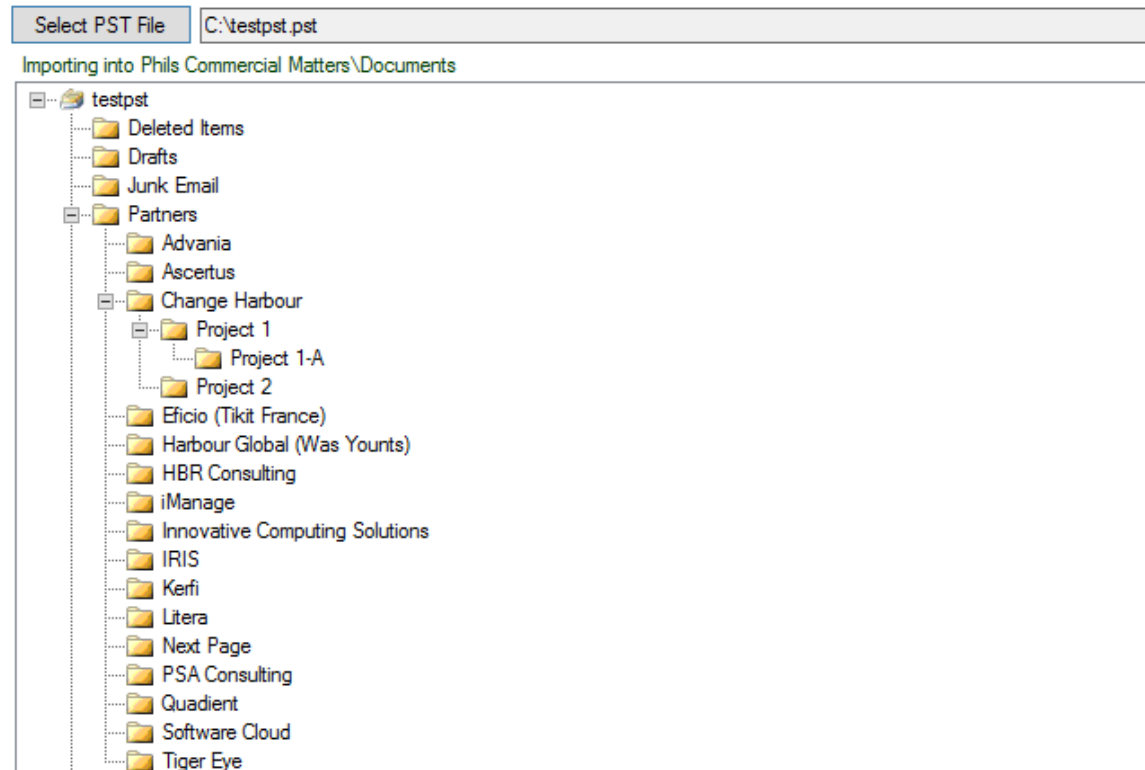
## 7.6 Import from PST files

PST files are files created from Outlook containing archived or backed up emails. The contents of a PST file can be imported directly into iManage.

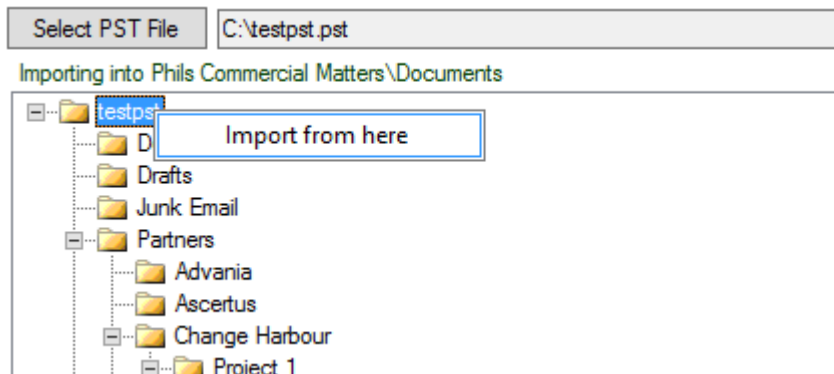
To import into a specific workspace, select the workspace or folder where you want to start the import, then click on the **Import from PST** tab or right click and select **Import from PST** from the pop-up menu.



Select the pst file to import, and the contents should be displayed.



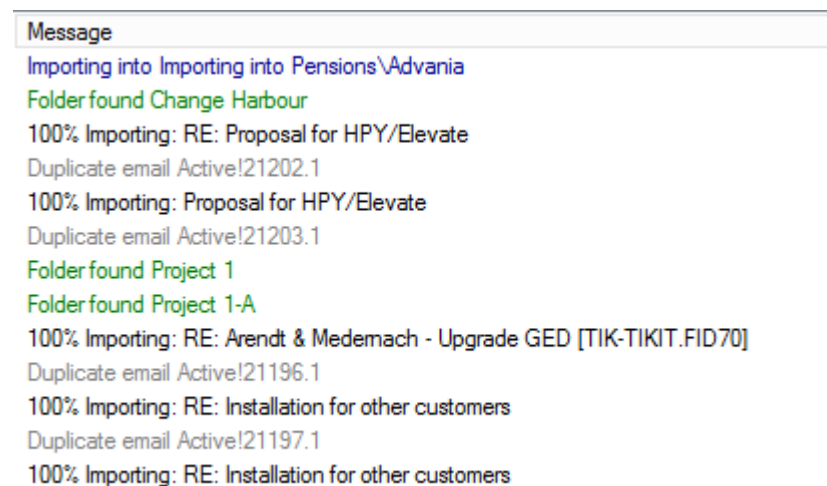
To begin the import, choose the folder in the PST file where you want to start importing. To import the whole PST file right click the name at the top of the tree and select **Import from here** from the pop-up menu.



## 7.7 Duplicate Emails

The import of emails will use the configuration of your iManage system with regard to email duplicate detection. If you have duplicate detection enabled, then emails can not be imported multiple times, even to different iManage folders. The iManage system will reject the import if the email already exists in the iManage system. If you are importing to a different folder, then shortcuts to the original email will be placed in the folder.

The import will show when duplicate emails have been detected.



The import summary will show how many emails were duplicates

```

***** Import Summary *****
Number of emails imported from PST: 0
Number of duplicate emails not imported from PST: 8
Total number of emails not imported from PST: 8
  
```

## 7.8 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.

WorkSite Databases	Description	Auto	Alias	DMS Extension	App Extension	HIPAA Compliant
IMWEBDB	Adobe Acrobat Reader	Y	ACROBAT	%V	PDF	N
LONDON	Windows Ansi Text	Y	ANSI	%V	TXT	N
User	Windows Bitmap	Y	BMP	%V	BMP	N
Group	Comma Separated Values	N	CSV	%V	CSV	N
Roles	Microsoft Excel	Y	EXCEL	%V	XLS	N
Type	EXCEL 2007	Y	EXCELX	%V	XLSX	N
Class	Binary Group 3 Fax	Y	FAX	%V	%V	N
App Setup	Compuserve GIF	Y	GIF	%V	GIF	N
PC Locations	GroupWise Email	N	GW	%V	TXT	N
Client	HTML	N	HTML	%V	HTML	N
Custom3	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
<input type="checkbox"/> ACROBAT	Adobe Acrobat Reader	%V	PDF	No
<input type="checkbox"/> ANSI	Windows Ansi Text	%V	TXT	No
<input type="checkbox"/> BMP	Windows Bitmap	%V	BMP	No
<input type="checkbox"/> CSV	Comma Separated Values	%V	CSV	No
<input type="checkbox"/> EXCEL	Microsoft Excel	%V	XLS	No
<input type="checkbox"/> EXCELX	EXCEL 2007	%V	XLSX	No
<input type="checkbox"/> FAX	Binary Group 3 Fax	%V	%V	No
<input type="checkbox"/> GIF	Compuserve GIF	%V	GIF	No
<input type="checkbox"/> 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.

## 8 Advanced Options

Export Options (License expires 9 Sep 2024)		Import Options (License expires 9 Sep 2023)		Advanced Options
<input type="checkbox"/> Debug Logging		Batch Size	<input type="text" value="500"/>	
<input type="checkbox"/> Export using Folder ID endpoint		Timeout (seconds)	<input type="text" value="100"/>	
		Pause time (seconds)	<input type="text" value="0"/>	

The advanced options tab should only be used if requested by the Sysero support team. For the most part these values will not need changing, but in certain circumstances our support team may request that you change some of these values.

For example, if you are having trouble exporting more than the batch size of documents from a single folder, it may be requested that you switch to using the Folder ID endpoint setting. More information regarding these settings can be provided on request.

## 9 Logging

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

## 10 Creating the Control Centre Application

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 <a href="#">Edit</a>	
Name	UCExportWork
Description	
Publisher	Sysero
Website	
Client ID	6ee56700-9e1e-c019-2ef8-1faf57173997
Contact	
Authentication <a href="#">Edit</a>	
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 <a href="#">Edit</a>	
All Users	

Client ID: 6ee56700-9e1e-c019-2ef8-1faf57173997

Client Secret: 3ef9ff1a-d78e-d680-930c-3b06fe9b456e





---

## 11 Special Registry Keys

To check for WebView2 installation, set the following registry key string value

HKEY\_CURRENT\_USER\SOFTWARE\UC Logic\UCImportExportWork\SkipWebView2Checks=N

If this registry key is not present it will default to Y and not show any warning messages,  
But the log files will always show if webview2 was found or not.