

UC Import Export Work

Version 10.2.24

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
 - Can keep the imported files creation and edit dates
 - Import from CSV files

© Sysero Limited 2024

Contents

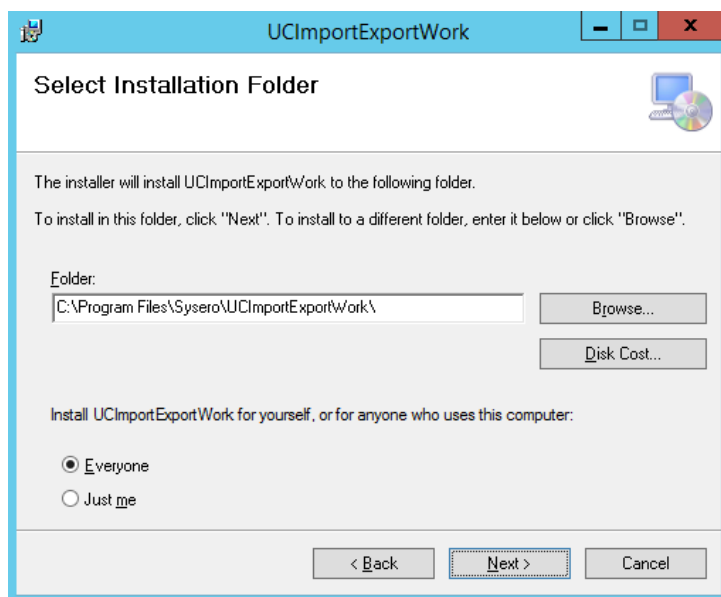
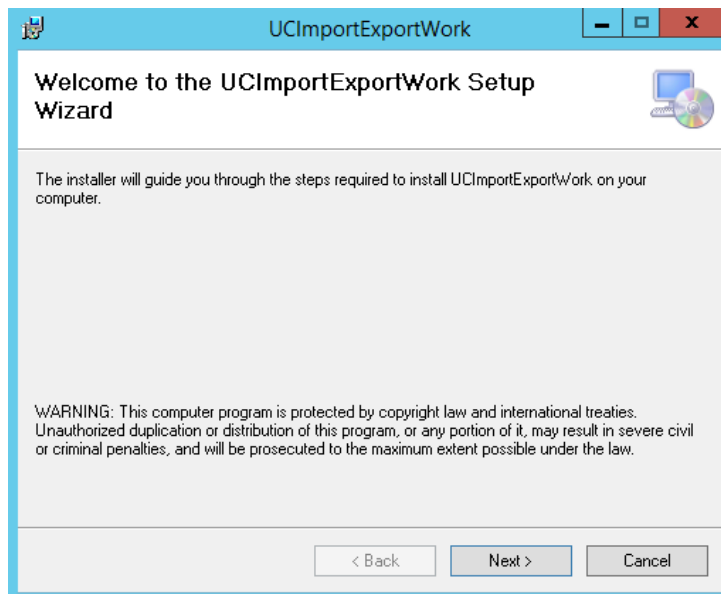
1	Support.....	3
2	Installation	4
3	Licensing	5
3.1	Offline licensing.....	5
4	Starting the application	6
5	Exporting	7
5.1	Export Options	7
5.2	Exporting from My Workspaces tab.....	8
5.3	Calculate Export Size	8
5.4	Marking multiple workspaces or folders for export.....	9
5.5	Searching for Workspaces to export.....	10
5.6	Searching for Workspaces using an external CSV text file	12
5.7	Exporting Metadata	13
6	Importing	14
6.1	Import Options	14
6.2	Supervised Import Mode (Retaining imported file dates)	14
6.3	Importing Files or Folders.....	15
6.4	Import documents from a CSV file.....	16
6.4.1	Import from CSV into one Workspace	16
6.4.2	Import into multiple workspaces	17
6.4.3	CSV Field mappings	18
6.4.4	Selecting which folder to use for CSV imports.....	19
6.4.5	Testing the CSV Import.....	20
6.4.6	Run the CSV Import	20
6.5	Filter docs for importing.....	21
7	Advanced Options	22
8	Logging	22
9	Creating the Control Centre Application.....	23

1 Support

For support, please contact support@uclogic.com

2 Installation

Run the setup.exe and follow instructions



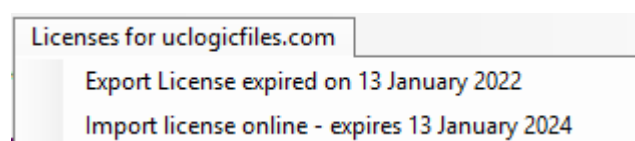
The installation will create an application under Sysero



3 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.



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.

3.1 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 for a license file.

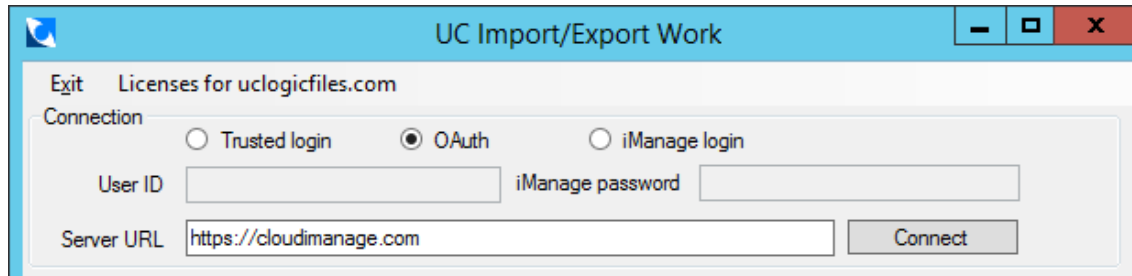
N = Works online (default). The app will check the UC Logic license server for a valid license. This is a read only access to an encrypted file., No information is saved on the UC Logic servers during this process.

4 Starting the application

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

`https://{imanager server name}`

for example:



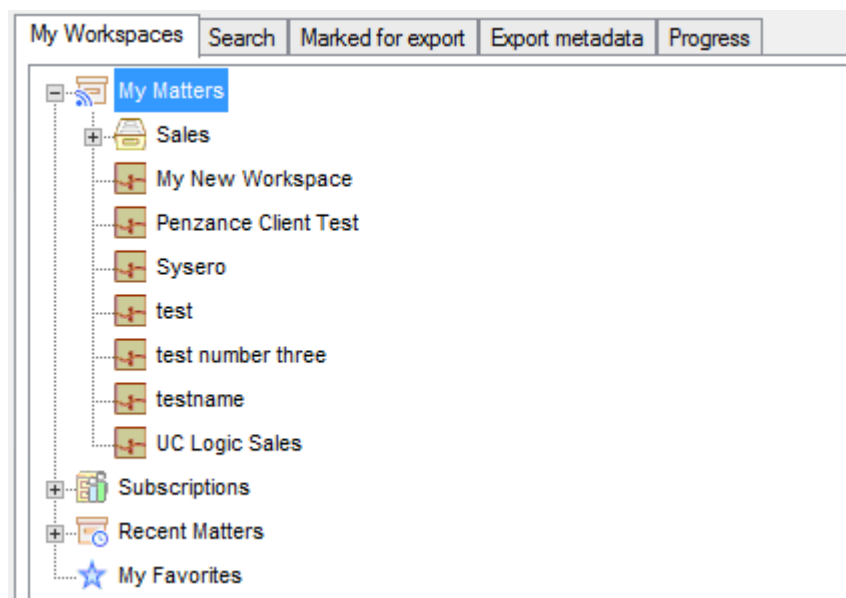
There are three methods to connect to the iManage system

- 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.

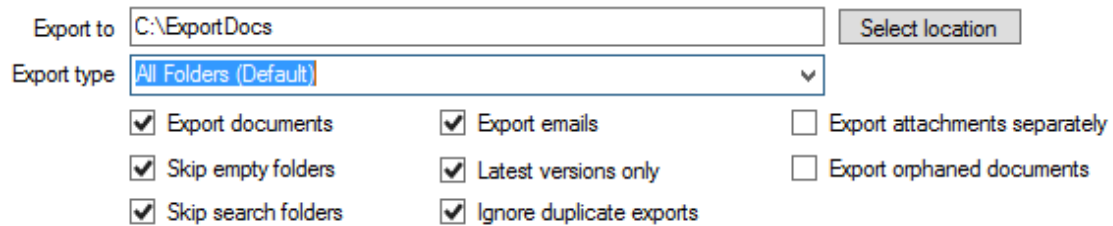
If you choose the iManage login you will need to provide the iManage user id and iManage password and your system administrators will have to create a control centre application (see section 6)

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:



5 Exporting

5.1 Export Options



Export to: C:\ExportDocs Select location

Export type: All Folders (Default) ▼

☒ Export documents ☒ Export emails ☐ Export attachments separately

☒ Skip empty folders ☒ Latest versions only ☐ Export orphaned documents

☒ Skip search folders ☒ Ignore duplicate exports

Complete the export options:

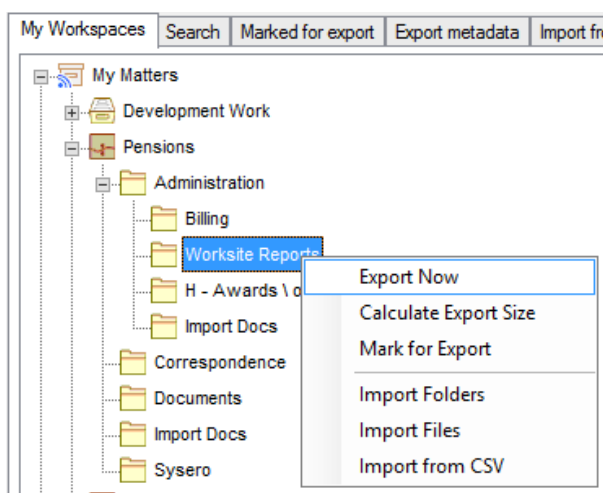
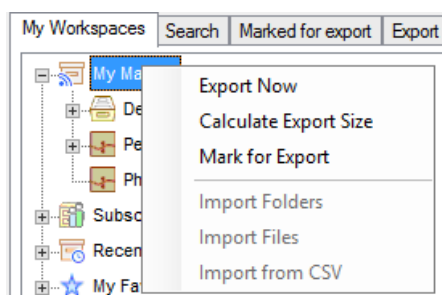
- Export To: Select the location for the export. Workspaces, folders and documents will be created beneath the folder selected.
- Export Type:
 - All Folders (Default) – This is the normal export type, all folders from iManage are recreated in the file system during the export.
 - Flat File (no folders) – 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.

5.2 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.

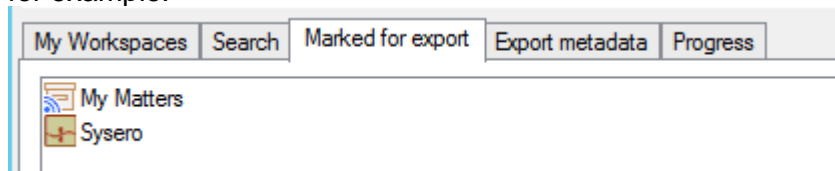
5.3 Calculate Export Size

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.

5.4 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.

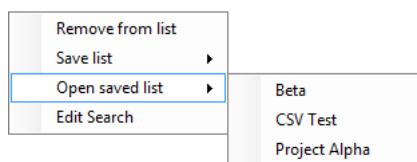
for example:



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.

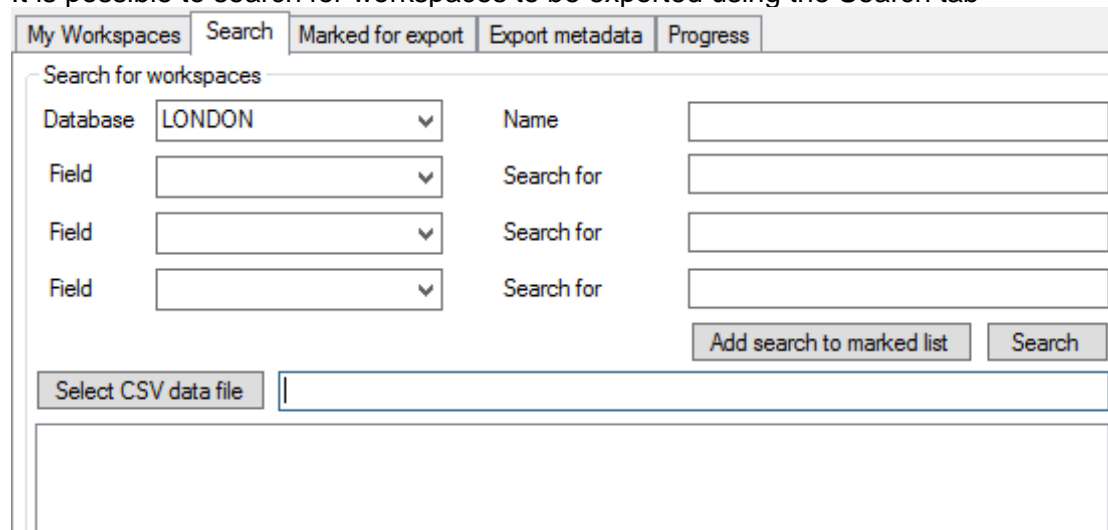


If a list has previously been saved, it can be recalled using the **Open saved list** command from the right click pop up menu.

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

5.5 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).

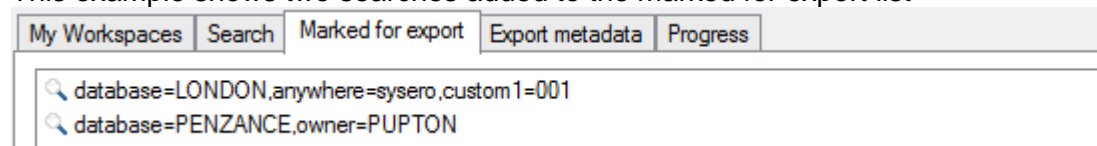
These searches can be performed on the following fields:

- 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. 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.

5.6 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.

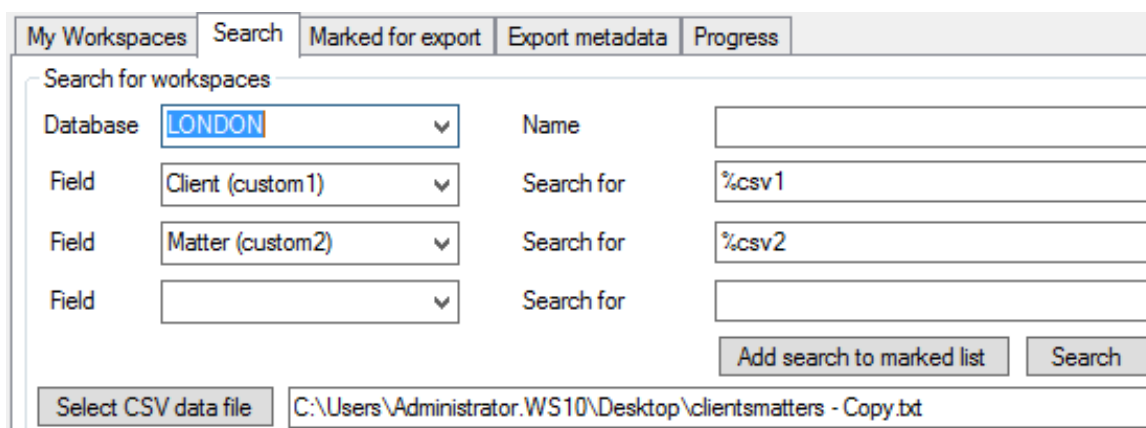
```
003,01,HSMITH
001,01,FJINES
001,02,DHARRY
003,01,BGLADWORTH
005,98,LPOTTER
```

There are 3 fields in this CSV file

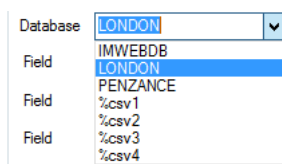
Use the **Select CSV data file** button to choose the file you want to use.

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 1st and 2nd 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.

5.7 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.

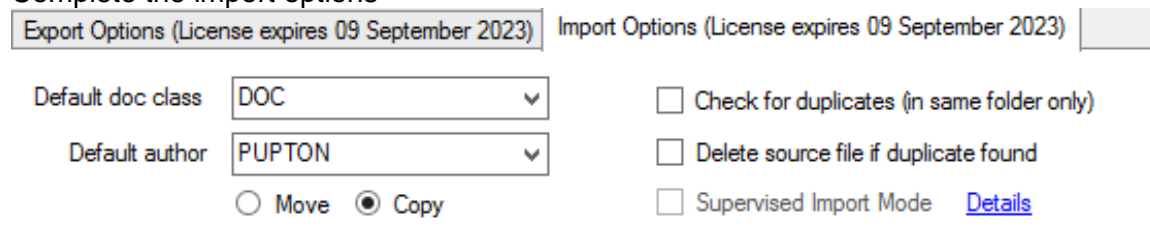
Select the fields and options required.

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.

6 Importing

6.1 Import Options

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

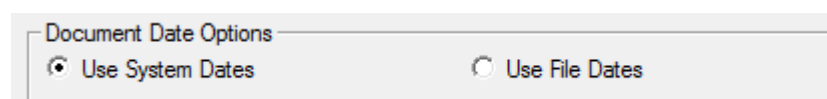
If any of these criteria is not met then the document will be deemed to be not a duplicate and will be imported as a new document.

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

6.2 Supervised Import Mode (Retaining imported file dates)

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.

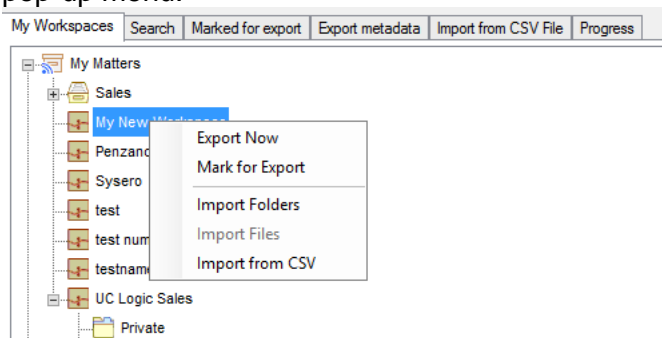
NOTE: The Supervised Import Mode is only available if the application is logged in using the iManage login option and the user logging in is a member of the NRTADMIN group in all connected databases. It will be greyed out if Trusted Login or OAuth logins are used to connect to the iManage system or if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

6.3 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.



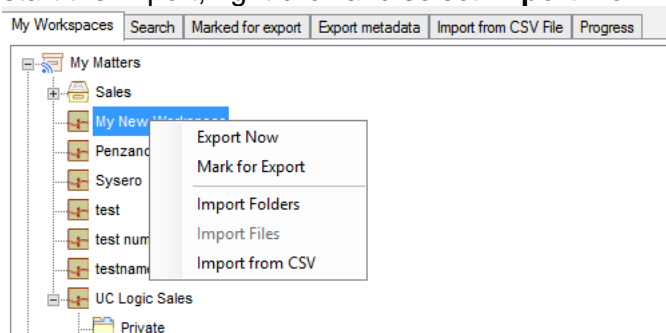
6.4 Import documents from a CSV file

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:

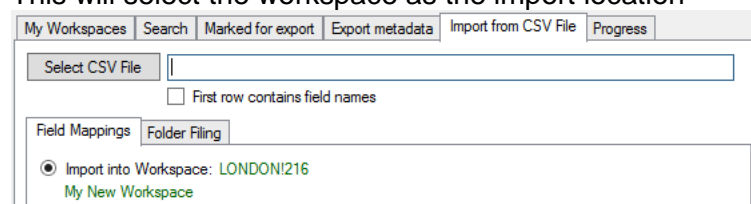
- Import into a specific workspace
- Import into multiple workspaces based on CSV metadata values

6.4.1 Import from CSV into one Workspace

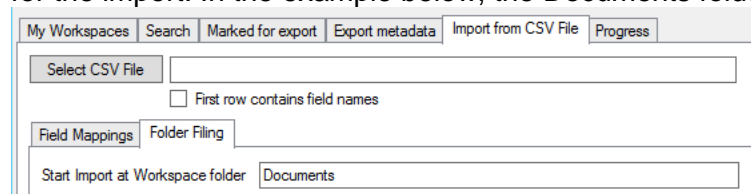
To import into a specific workspace, select the workspace or folder where you want to start the import, right click and select **Import from CSV**



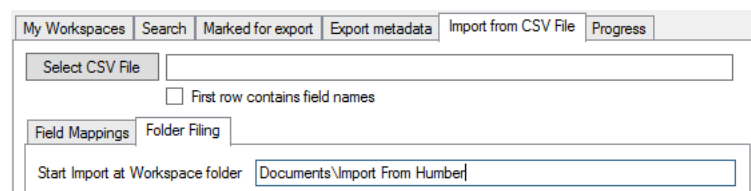
This will select the workspace as the import location



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



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



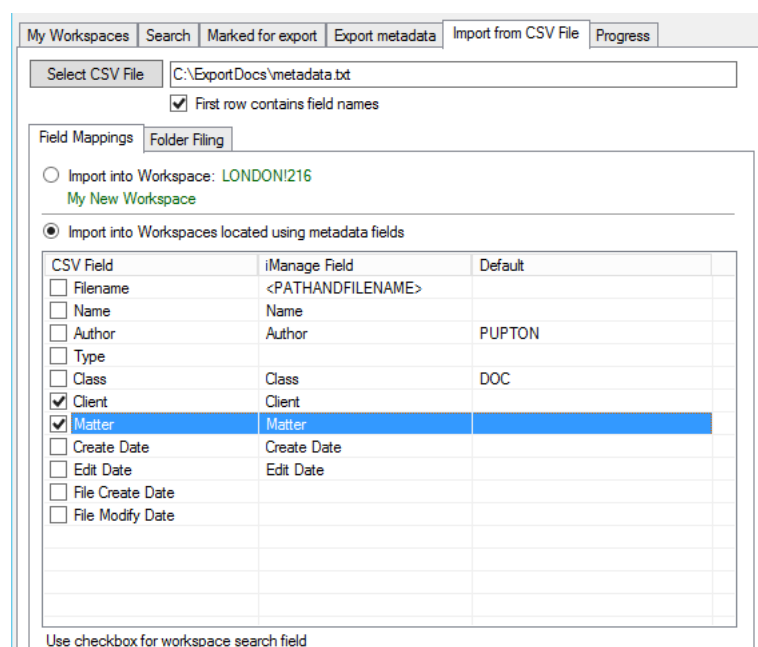
You can now select the CSV file and set up the field mappings – see section [6.4.3](#)

6.4.2 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		
<input type="checkbox"/> Class	Class	DOC
<input checked="" type="checkbox"/> Client	Client	
<input checked="" type="checkbox"/> Matter	Matter	
<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		

Use checkbox for workspace search field

Map the fields in the CSV file to the iManage fields (see section [6.4.3](#))

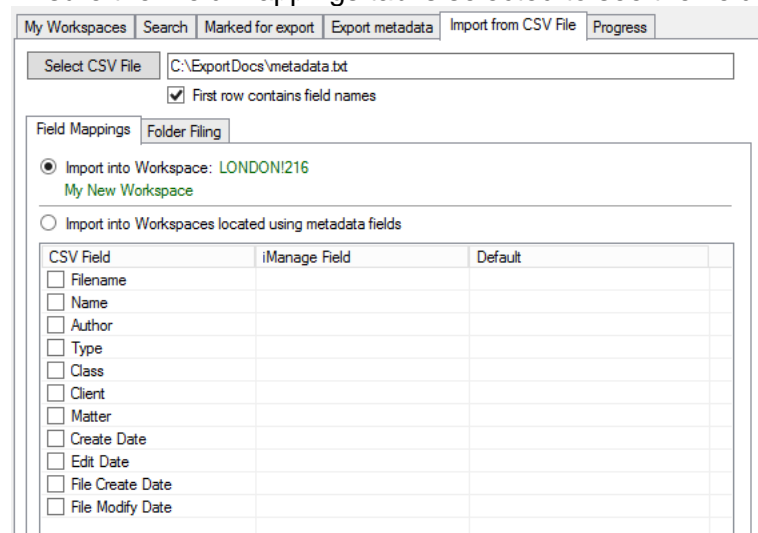
You must have fields that can be used to search for a single workspace, in the example above the client and matter fields are used to search for the workspace. The search fields are identified by the checkboxes against the fields.

You can go to the folder filing tab. This is used to specify where in the workspace the documents should be imported (see section [6.4.4](#))

6.4.3 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.

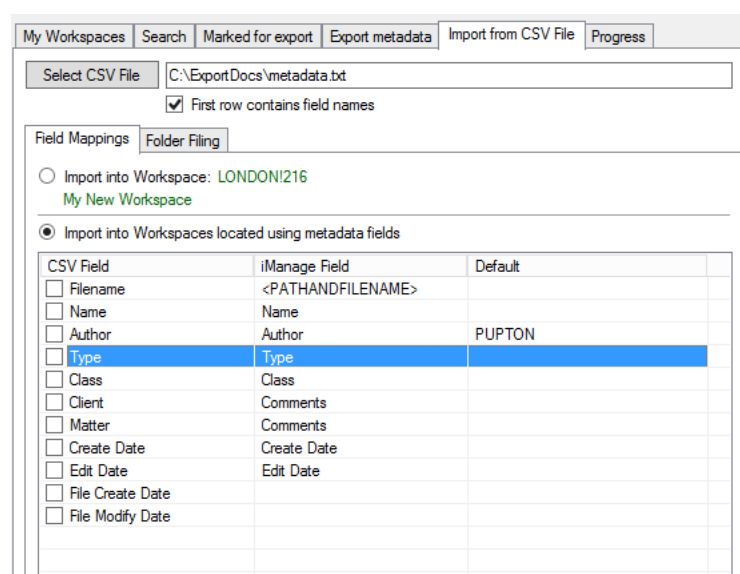
Ensure the Field Mappings tab is selected to see the fields found in the selected file.



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		
<input type="checkbox"/> File Create Date		
<input type="checkbox"/> File Modify 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>

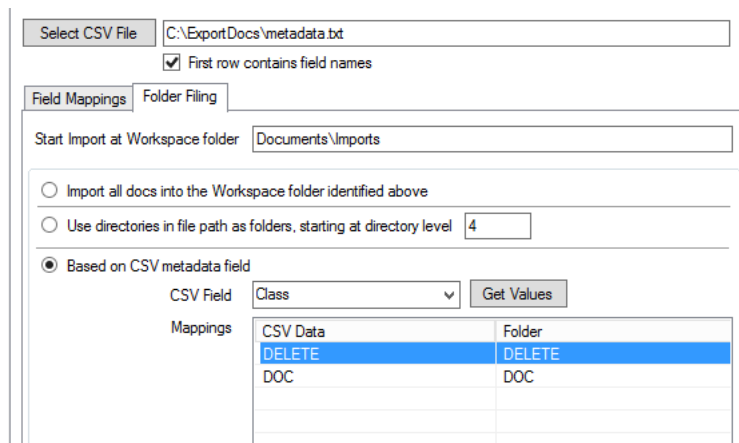
You should only use each iManage field once, except for the comments field. When the comments field is used multiple times, all the CSV data selected is added to the comments field.



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.

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.



Select CSV File: C:\ExportDocs\metadata.txt

☒ First row contains field names

Field Mappings | Folder Filing

Start Import at Workspace folder: Documents\Imports

☐ Import all docs into the Workspace folder identified above

☐ Use directories in file path as folders, starting at directory level: 4

☒ Based on CSV metadata field

CSV Field: Class [v] [Get Values]

CSV Data	Folder
DELETE	DELETE
DOC	DOC

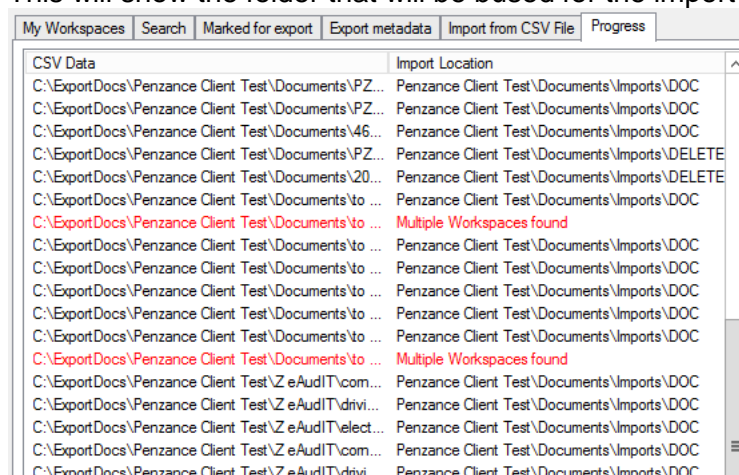
The example above would import into either
 <Workspace Name>\Documents\Imports\Delete
 Or
 <Workspace Name>\Documents\Imports\Doc

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.

6.4.5 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 used for the import for each row in the CSV file.



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

6.4.6 Run the CSV Import

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

6.5 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.

7 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.

8 Logging

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

9 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
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