



Desktop Client Manual

v7.5

October 19, 2012

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[Documentation Help Site](#).



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1 Relativity Desktop Client overview

The Relativity Desktop Client (RDC) provides the functionality for importing document load, image, and production files, as well as for exporting production sets, saved searches, and folders. You can also use this utility to import and export custom Relativity applications and object information.

2 RDC installation

The Relativity Desktop Client (RDC) provides the functionality for importing document load, image, and production files, as well as for exporting production sets, saved searches, and folders. You can also use this utility to import and export custom Relativity applications and object information.

For information about importing applications into Relativity, see Applications on the Relativity Developer Network.

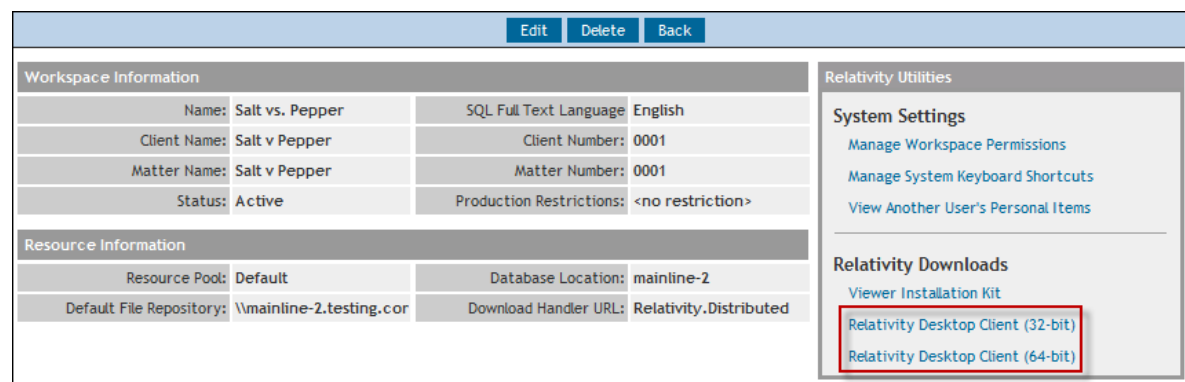
2.1 RDC software requirements

The RDC 7.1 or higher requires that Microsoft .NET 4.0 and Microsoft Visual C++ 2010 Redistributable is installed on the workstation. Your operating system determines whether you need to download the 64-bit or 32-bit version of these applications:

- If you are running a 32-bit machine, you must install the RDC 32-bit and the Visual C++ 2010 x86 Redistributable.
- If you are running a 64-bit machine, you will want to install the RDC 64-bit and the Visual C++ 2010 x64 Redistributable. You may notice a significant improvement in the speed of the RDC with the 64-bit version. However, a 64-bit machine can have both the x86 and x64 redistributables installed at the same time, and it can run the 32-bit or 64-bit version of the RDC.

2.2 Installing the RDC

You will need to download a copy of the installer for the RDC. To obtain a copy of this application, open a workspace in Relativity. Select the **Administration** tab, and click **Workspace Details** to display the Relativity Utilities Console. Depending on the configuration of your machine, click the **Download Relativity Desktop Client** button for a 32-bit or 64-bit operating system (OS).

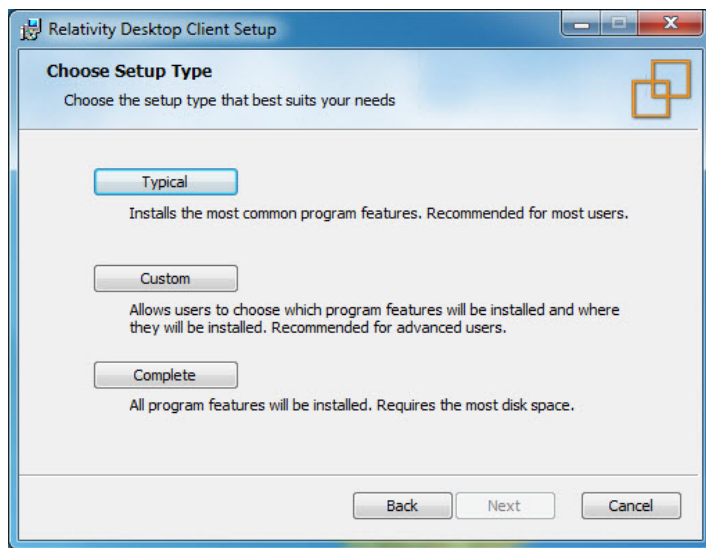


To install the RDC, click **Run** on the File Download dialog box, and on any security messages. You will see the setup wizard for the RDC displayed. Click **Next** to start the installation.



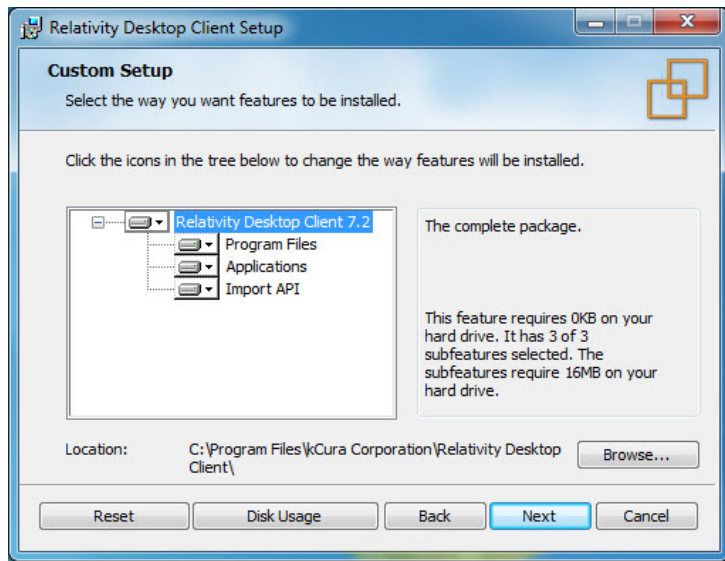
On the Choose Setup Type dialog box, click on one of the following options:

- **Typical** installs the most common programs features.
- **Custom** provides options to choose application features and location where they will be installed.
- **Complete** installs all application features.

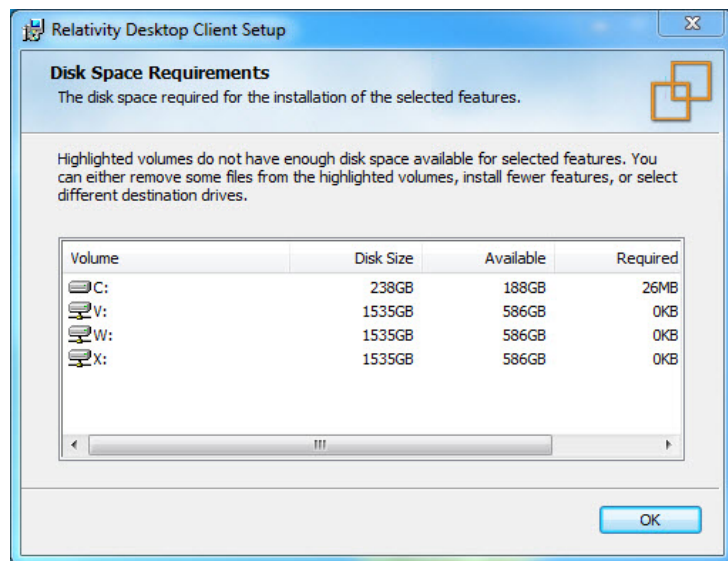


If you selected **Custom**, you can click on the icons in the tree to select the features that you want to

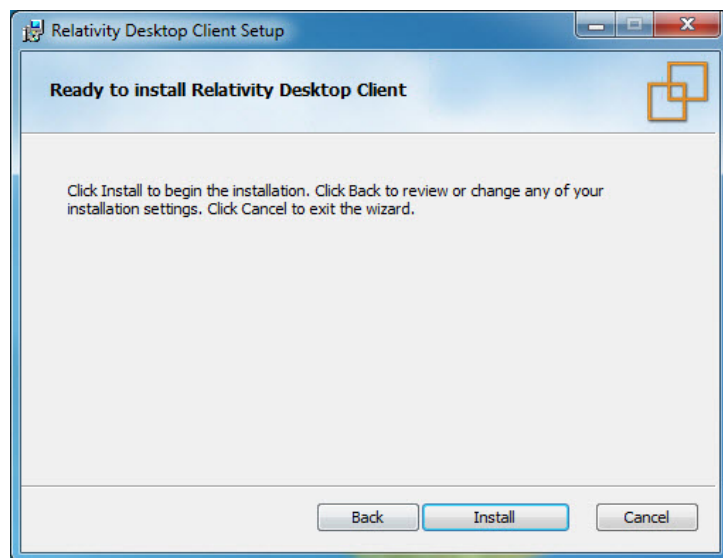
install. Click **Reset** if you want to redisplay the default settings.



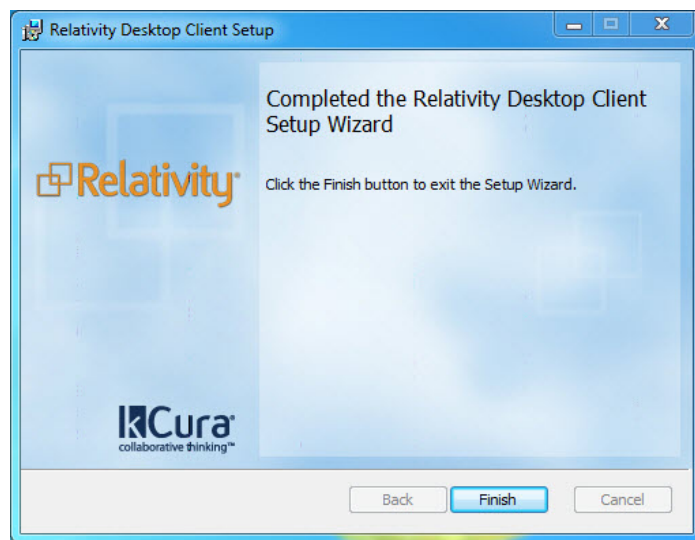
You can also use the **Disk Usage** button to display the amount disk space available and required for the installation. After you have selected your custom settings, click **Next** to display the Ready to Install dialog box.



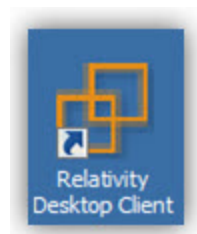
If you selected the **Typical** or **Complete** option, you will immediately see the Ready to Install dialog box. Click **Install** to run the installation wizard.



Click **Finish** when the setup is complete.



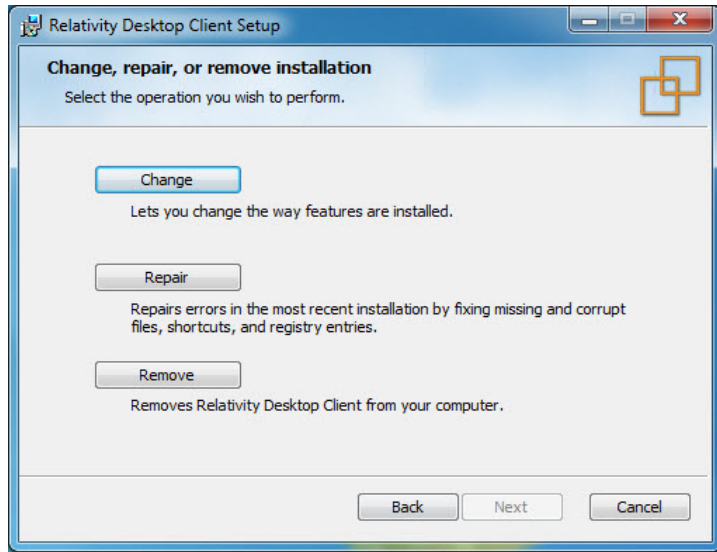
Your desktop will display a shortcut icon for the RDC.



2.3 Changing, repairing, or removing RDC installation

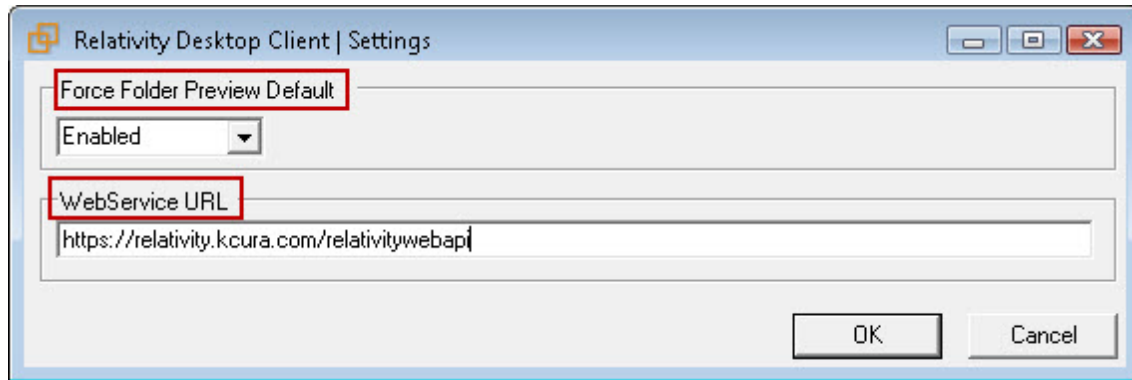
You can also run the installer to modify, repair, or remove an existing installation of the RDC. Run the installer on a machine where the application is installed. Select one of the following options:

- **Change** allows you to modify the features that are installed.
- **Repair** attempts to fix errors in the most recent installation.
- **Remove** uninstalls the RDC from your machine.



3 Starting the RDC

To open the RDC, double-click on the shortcut installed on your desktop. When you open the application for first time, the Settings dialog box is displayed.



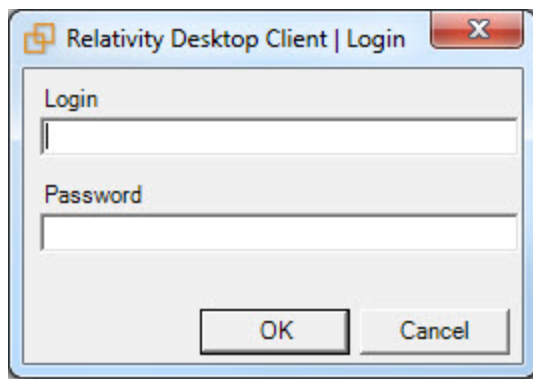
Select or enter settings for the following options:

- **Force Folder Preview Default** includes options to enable or disable this feature. When it is enabled, the RDC will check the first 1000 records of the load file after you click **Import**. It then displays the number of folders that will be created. You can use this information to ensure that the load process is behaving as expected. If a large number of folders are listed, you can stop the load file, and verify that the **Folder Info** field is set correctly. By default, this feature is **Enabled**. See Importing on page 14.
- **WebService URL** allows you to enter the URL provided by your Relativity Administrator. This URL is used to establish a connection between the RDC and your server. If the URL path is entered incorrectly, you will be unable to connect the RDC to your database.

Click **OK**. These settings are stored in your machine registry and they are retained when you upgrade the RDC.

3.1 Logging on to the RDC

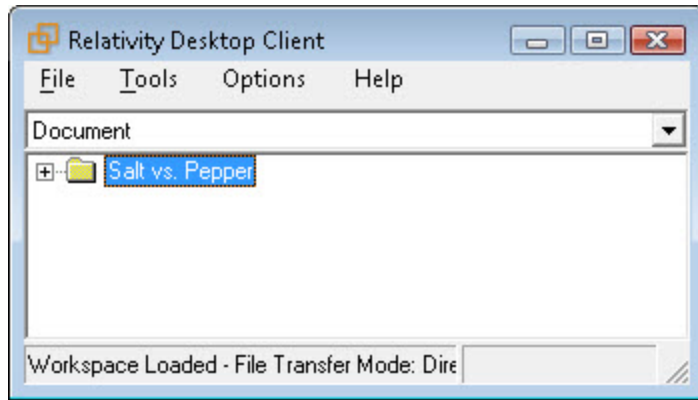
To log in, enter your **Login** name and **Password**. These are the same credentials you use to log in to Relativity.



After you log in, the RDC displays a list of workspaces where you have access rights. Use the filter bar to narrow the list.

Note: By default, a wildcard is used to filter workspaces in the RDC. For example, enter ELA to find workspaces named ELAN and RELATIVITY.

Highlight your workspace and click **OK** to open it in the RDC. The folder structure of your workspace displays. A new workspace will contain only a root folder, while an existing workspace may contain subfolders that you can display by clicking the plus sign.



3.2 RDC menu bar

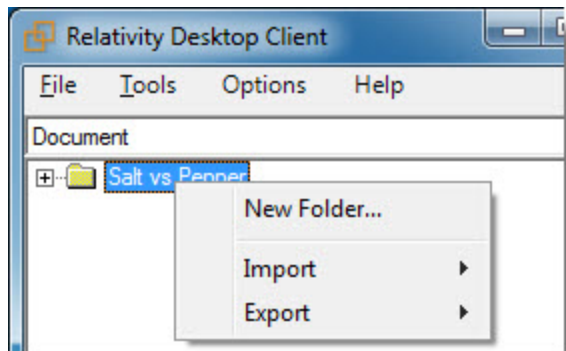
The RDC menu bar is displayed above the workspace folder structure. It includes the following menu options:

Menus	Options	Descriptions
File	Open	Switch between different workspaces.
	Exit	Close the RDC.
	Refresh	Update the folder browser.
Tools - Import	Image File	Import images from a page-level load file.
	Document Load File	Import native files, document metadata, and extracted text from a document-level load file.
	Production File	Import production data and images from a page-level load file.
Tools - Export	Application	Import Relativity applications from a load file. Some applications are available on the Relativity Customer Portal. Contact support@kcura.com.
	Production Set	Export production sets.
	Saved Search	Export from saved searches.
	Folder	Export from a specific folders.
Options	Folder and Subfolders	Export from a specific folder and its subfolders.
	Settings	Change the default value for Force Folder Preview and enter a WebService URL.

Menus	Options	Descriptions
	Check Connectivity	Assist with troubleshooting network and system configuration errors that occurred while importing and exporting.
Help	About	Display the version of the RDC.

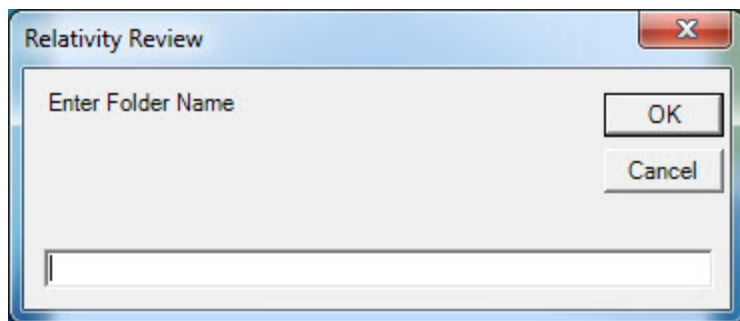
3.3 Right-click options for workspace folders

The RDC also provides **right-click options** on folders, which you can use to build the workspace folder structure, or to import and/or export directly to and from a folder.



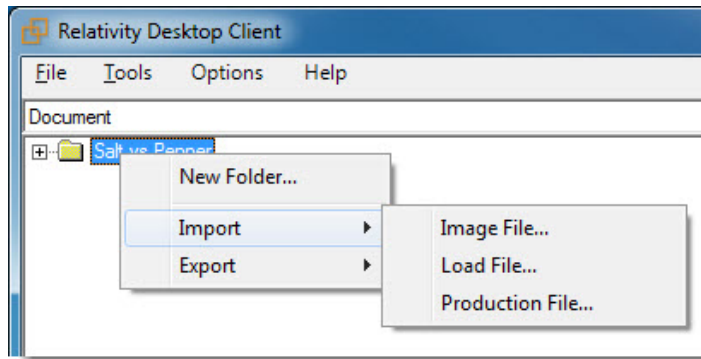
When you right-click on a workspace or folder, the following menu options are displayed:

- **New Folder:** Use this option to create subfolders. In the Add New Folder pop-up, enter a folder name and click **OK**. The new folder will be added to the workspace through the RDC.

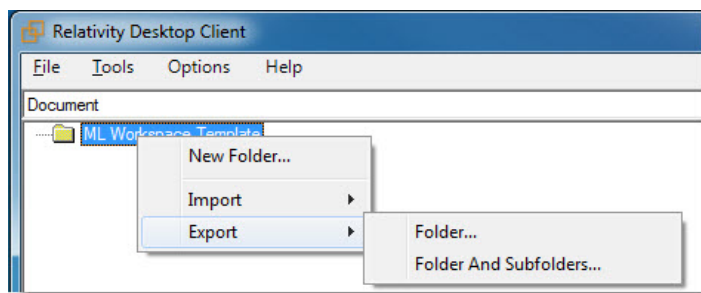


- **Import:** Use this option to import an image file, document load file, or production file into a specific folder. Highlight the folder, point to **Import**, and select a file type. If you have metadata, natives and

images to load, run the load file import first, then the image file import. See [Importing](#).



- **Export:** Use this option to export a specific folder, or a folder and its subfolders. See Exporting on page 40.



4 Importing

You can import document load files as well as image and production files through the Relativity Desktop Client (RDC). You need to [install the RDC](#) on your computer before you can perform an export.

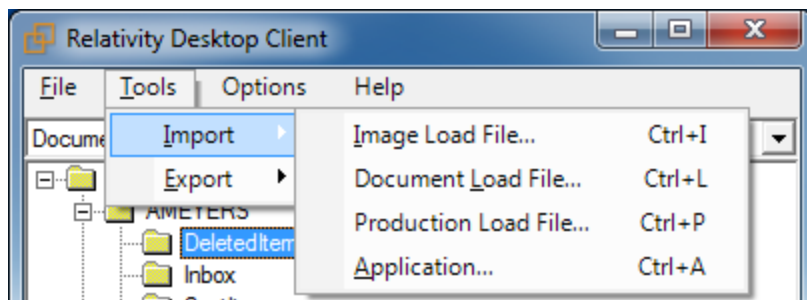
4.1 Importing document metadata, files, and extracted text

You can use a document-level load file to import document metadata, native files, and extracted text. For large data sets, consider breaking the load file into smaller document counts and using multiple computers and instances to load the individual load files. It may be helpful to break up the types of information into distinct subgroups, such as load metadata, natives, text, and images. Loading data in smaller amounts can assist with quality assurance.

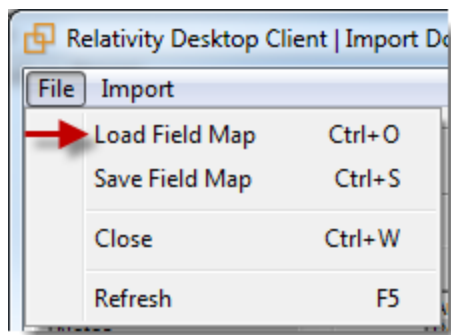
Note: The RDC imports only metadata for native files with the size of 0 KB. In the RDC, the Warnings tab displays a message indicating that the file is empty and only metadata has been loaded for the record. In the viewer, users will see extracted text when it exists for the file. If the file has no extracted text, users will see a blank placeholder, and no image or viewer options will be available. See Configuring the RDC on page 71.


Use the following steps to import documents:

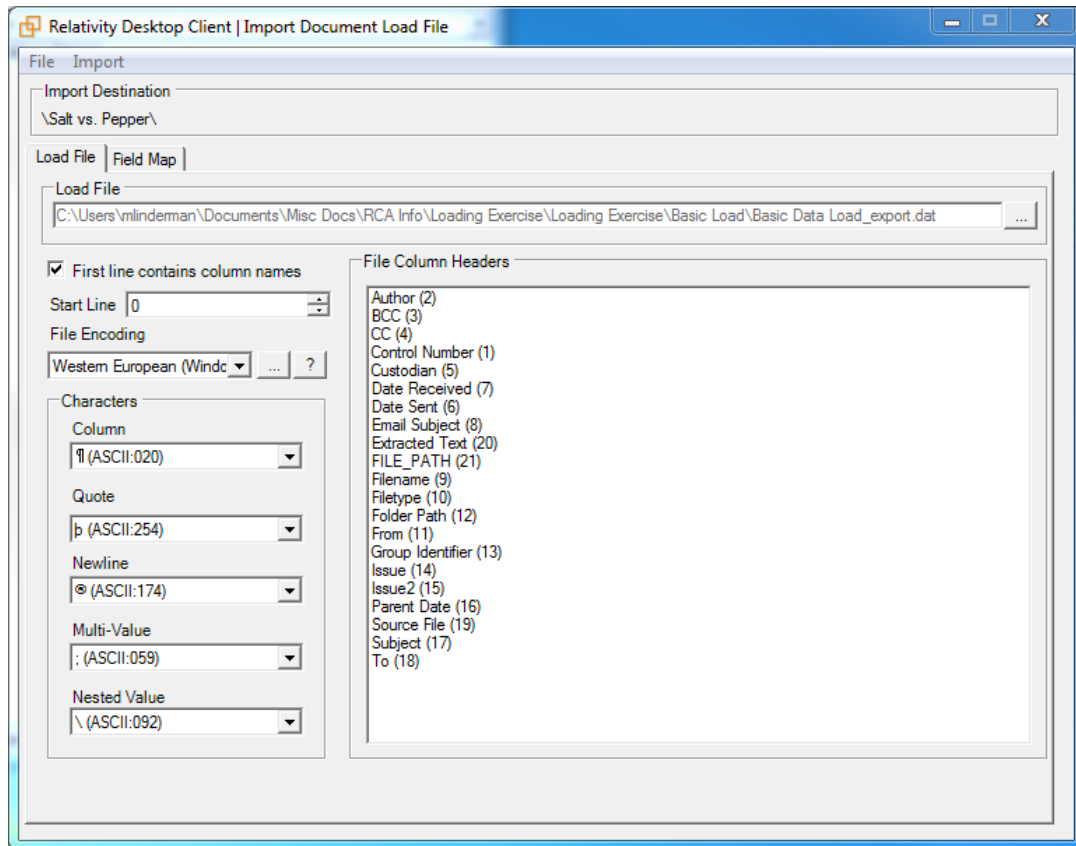
1. Open the RDC and select a workspace.
2. On the **Tools** menu, point to **Import** and click **Document Load File**. (In the RDC browser, you can right-click on a specific folder, point to **Import** and click **Load File**.) The Load File tab in the Import Document Load File window is displayed.



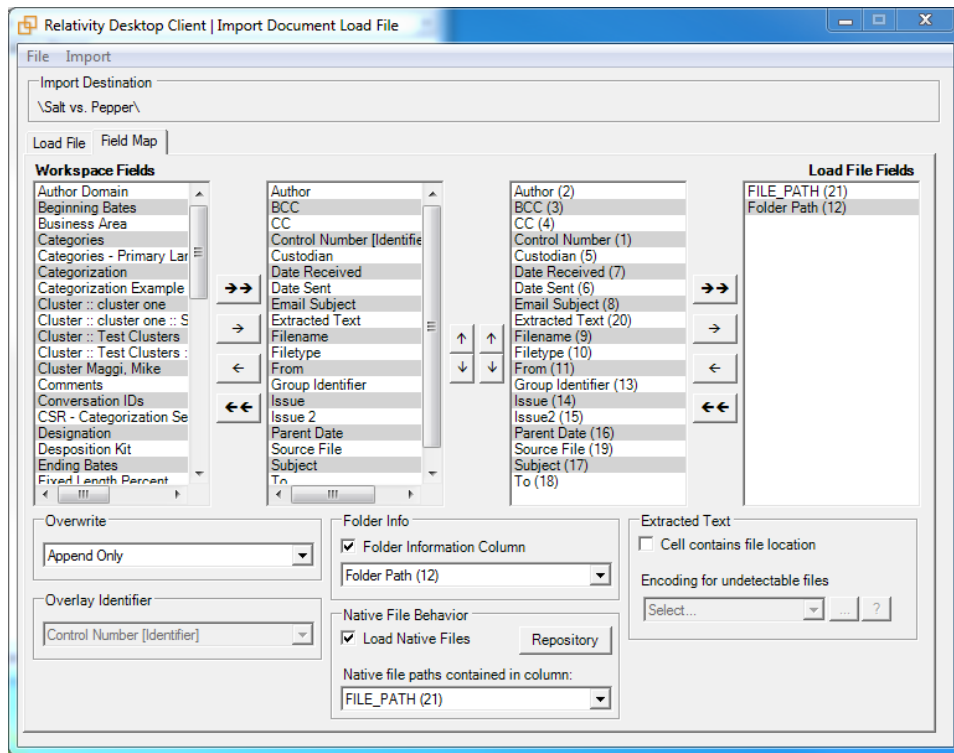
3. (Optional) To use settings in from an existing import file, use these steps:
 - On the Import Document Load File dialog, click the **File** menu, and select **Load Field Map**.



- Browse for your load field map file (.kwe) in the **Open Saved Field Map** dialog, and click **Open**.
 - Click **OK** on the kCura.EDDS.WinForm dialog. Click **Open** on **Choose Load File** dialog. Settings from the file are used to populate fields in the Load File and Field Map tabs. (You can also modify any settings on these tabs as necessary.)
 - Continue with step 7.
4. On the Load File tab, click  to browse for a document load file. Next, set the other options as necessary. See Setting options on the Load File tab on page 18.



5. Select the Field Map tab.



6. Use the information in these topics to set the options available on this tab:

- Setting options on the Field Map tab on page 21
- Overwrite and Overlay Identifiers on page 22
- Folder Info on page 23
- Native File Behavior on page 24
- Extracted Text on page 26

Note: A warning message is displayed if you are missing information required to run the import. Update the settings for the required options, and click **Import File** again.

7. (Optional) To preview information about the content that will be imported to the workspace, select **Import**, and click one of these options:

- **Preview File** — displays the first 1000 documents in the load file. Only mapped fields are shown. Make sure that matched fields displayed in the preview are correct.

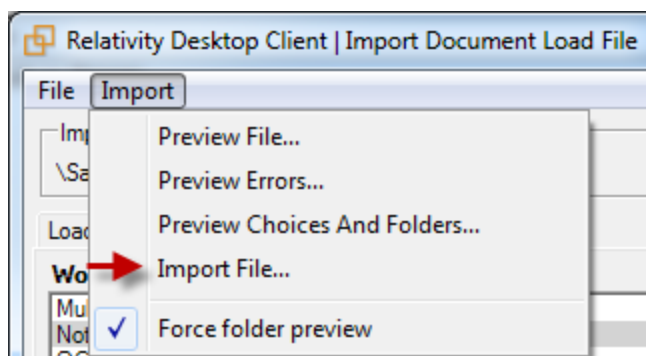
Relativity Desktop Client Preview Load File							
	Record Num	1:Control Number	1:Date	Author	BCC	Extracted Text	Custodian
▶	1	alewis_0013010	20010601 17:56:00.000			from: puthigai savita	[new code]
	2	azippper_0000050	20010529 19:06:00.000			from: johnson adam	[new code]
	3	azippper_0000051		enron		broker deal summary	[new code]
	4	azippper_0000053	20010530 18:44:00.000			from: johnson adam	[new code]
	5	azippper_0000054		enron		broker deal summary	[new code]
	6	azippper_0000055	20010531 18:43:00.000			from: johnson adam	[new code]
	7	azippper_0000056		enron		broker deal summary	[new code]
	8	azippper_0000058	20010601 18:23:00.000			from: johnson adam	[new code]
	9	azippper_0000059		enron		broker deal summary	[new code]
	10	azippper_0000060	20010606 18:50:00.000			from: johnson adam	[new code]
	11	azippper_0000061		enron		broker deal summary	[new code]
	12	azippper_0000086	20010418 11:28:00.000			from: forster david	[new code]
	13	azippper_0000087	20010418 16:23:00.000			from: forster david	[new code]
	14	azippper_0000088	20010418 16:35:00.000			from: forster david	[new code]
	15	azippper_0000089		mmotsin		totals yr 2000	[new code]
	16	azippper_0000312	20010430 20:05:00.000			from: rostant justin	[new code]
	17	azippper_0000497	20010530 20:13:00.000			from: shults bob	[new code]
	18	azippper_0000498	20010531 09:57:00.000			from: forster david	[new code]
	19	azippper_0000499	20010531 10:00:00.000			from: forster david	[new code]
	20	azippper_0000501	20010531 10:31:00.000			from: cummings john	[new code]
	21	azippper_0000502		icummin		sheet1	[new code]
	22	azippper_0000504	20010531 18:42:00.000			from: haney mike	[new code]
	23	azippper_0000505		mike haney		&a &a &a &a metals &	[new code]
	24	azippper_0000677	20010413 16:29:00.000			from: rostant justin	[new code]
	25	azippper_0000679	20010417 19:50:00.000			from: rostant justin	[new code]

- **Preview Errors** — checks all documents for potential loading errors, but displays only the first 1000 errors. If your file does not contain errors, you will see the following message:



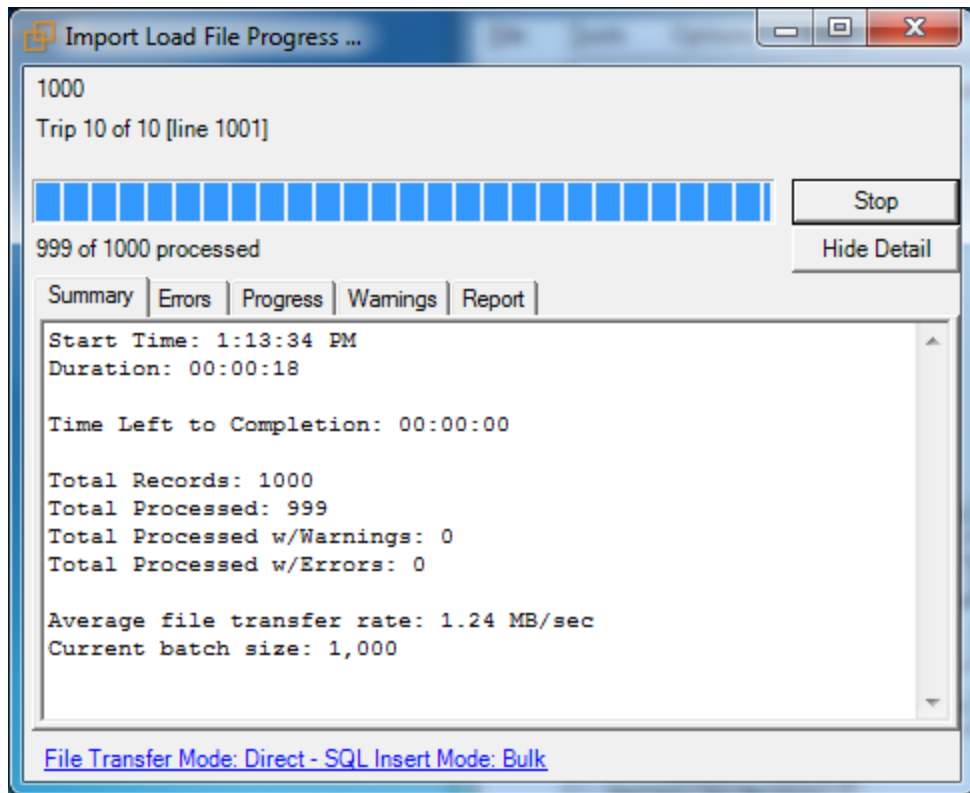
Note: You can use the error report to correct any errors, and then you can re-add the file to the RDC. Relativity will load only valid records. Records with errors will be skipped and can be exported for correction and reload. See Handling Errors on page 36.

- **Preview Choices and Folders** — displays the number of choices created in the browser and the number of choices created by importing the records.
8. On the Import menu, click **Import File**.

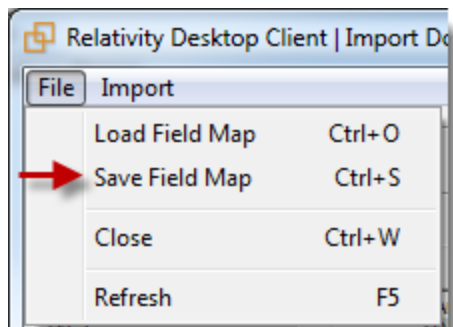


Note: If **Force folder preview** is selected, a confirmation message is displayed, which contains information about the number of folders that will be create. Click **OK** to continue with the import.

9. Review the progress of the import. See Viewing import or export progress in the RDC on page 38.



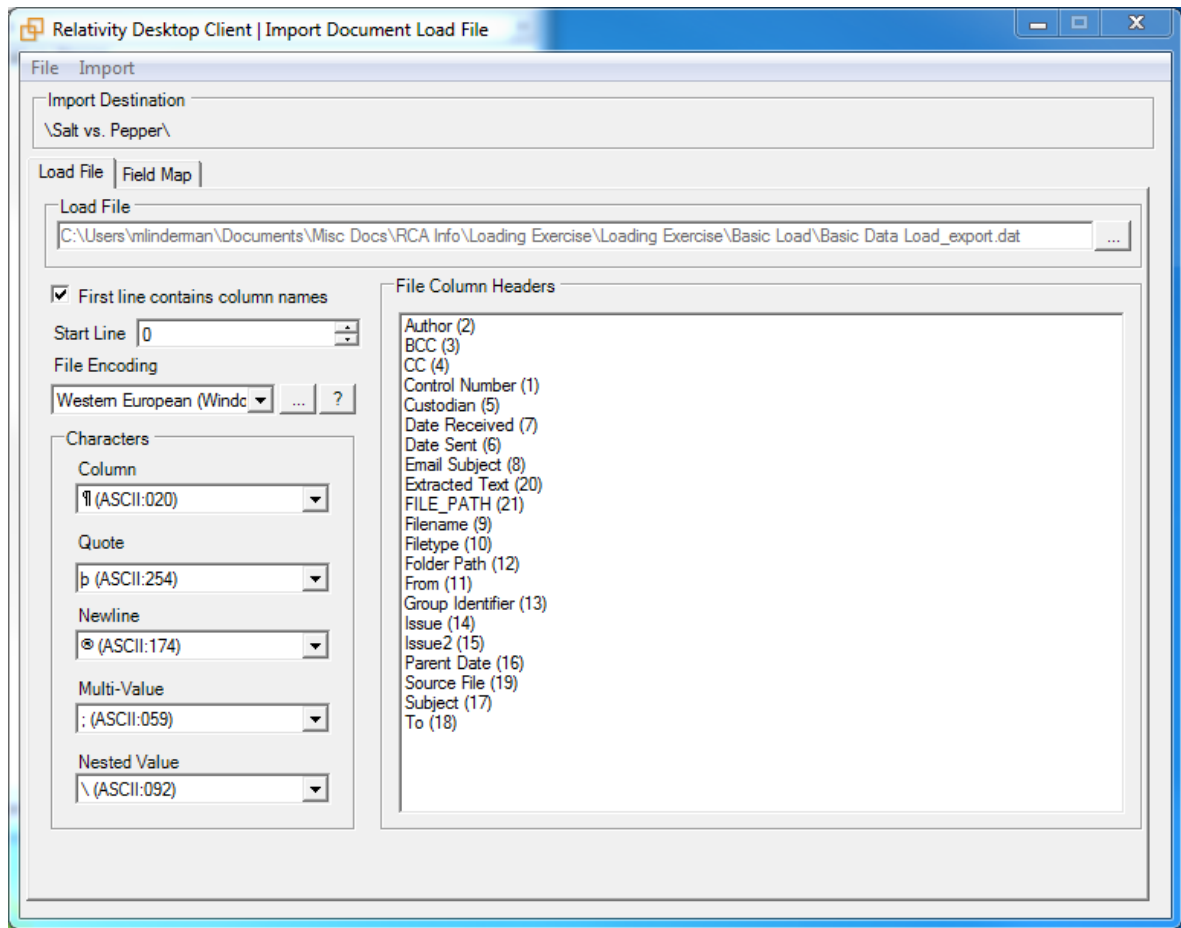
10. (Optional) To save your import settings, point to the **File** menu, and click **Save Field Map**. Choose a location for the document load file (.kwe). See Saving import settings on page 27.





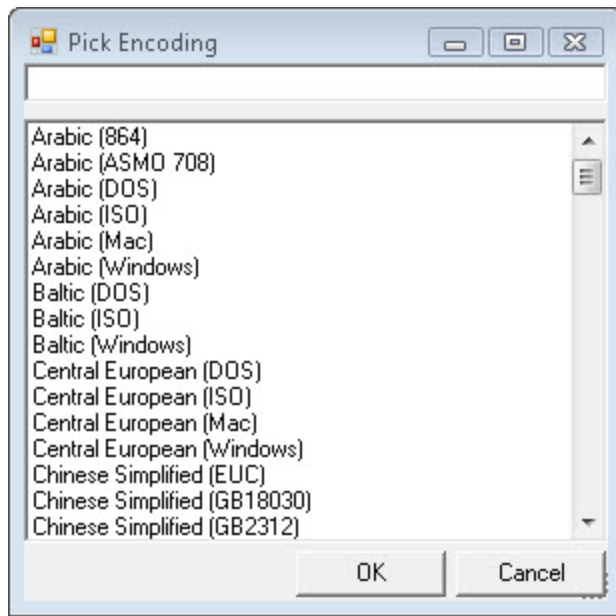
4.1.1 Setting options on the Load File tab

On the Load File tab, set the following options to indicate how your load file is configured:

- **First line contains column names** — select this option if your load file has a header.

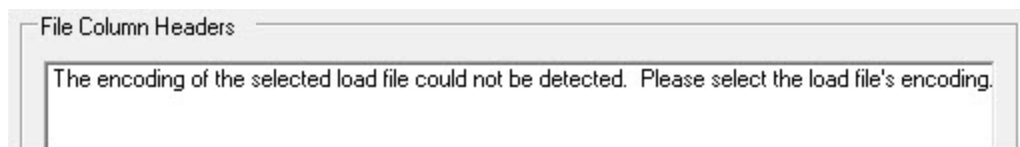


- **Start Line** — select the line number in the load file where you want the import process to begin. The default value is 0, which results in loading the entire file.
- **Source Encoding** — select an encoding for the document load file. (Consult your processing vendor or department to determine the correct encoding option, if necessary.) If your file contains a language other than English, choose a Unicode option. Click  for additional options or click  for additional information about encoding.

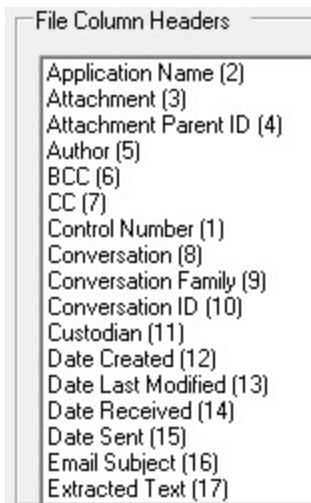


Review the following information about how the encoding of load files is handled:

- Relativity uses auto-detection to determine the encoding of your text files. If it finds a different file type in your text files, it will change to the appropriate method.
 - Relativity immediately applies any changes that you make to the encoding of a load file, and displays these changes in the column header preview.
 - Relativity provides you with the ability to audit the encoding of a load file.
 - Relativity includes the functionality for previewing the import file as well as the encoding of the extracted text files.
- **File Column Headers** — Relativity automatically updates this section of the Load File tab when you select the file encoding. This section may display the following message before you select an encoding for the load file:



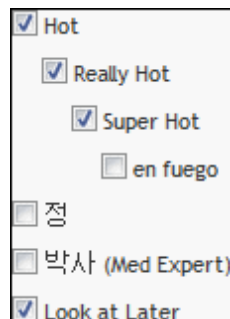
After you select the encoding, this section displays the fields in the load file. The column headers in the file should display as vertical list. The fields are displayed in alphanumeric order. The numeric value in parentheses indicates the position of the field within the file. For example, the control number is the first column in this illustration, while the Application Name is second.



Since the load file is parsed based on the delimiter set, you may need to check delimiters used in the load file if the column headers are not lined up correctly. Determine the delimiters used in the file, and then select them in the Character section of this tab.

- **Characters** — select the delimiters used by your load file:
 - **Column delimiter** — select the character used to separate columns.
 - **Quote** — select the character used as the text qualifier:
 - **Newline** — select the character used to indicate the end of a line in any extracted text or long text field.
 - **Multi-value delimiter** — select the character used to separate choices within a field.
 - **Nested value** — select the character used to separate the different levels of a multi-choice hierarchy.

For example, you might import a field with following values: “Hot\Really Hot\Super Hot; Look at Later”. Using a semi-colon (;) as a multi-value delimiter, and a backslash (\) as a nested value delimiter, Relativity will display the choices as illustrated below:



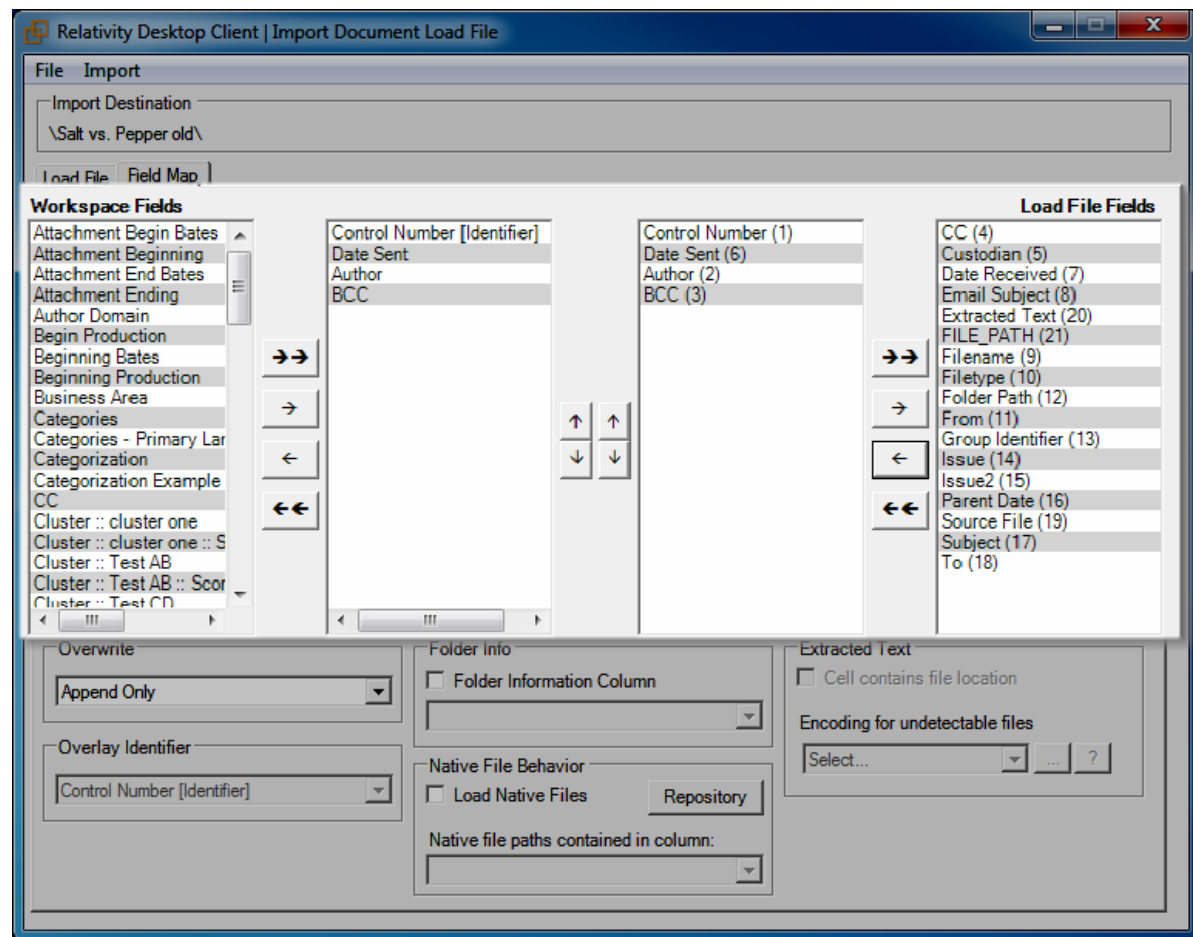
4.1.2 Setting options on the Field Map tab

On the Field Map tab, you select the fields in your load file that will be added to the database, and you map them to specific workspace fields. The columns displayed on this tab include:

- **Workspace Fields** — this column displays all fields available in your workspace.
- **Load File Fields** — this column displays all fields available in the load file.

You must match fields from the Workspace Fields and Load File Fields columns by moving them into the center columns. To move fields between columns, highlight them and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the fields. Only fields matched in the center columns are loaded into the workspace. Other fields in the Workspace and Load File Fields columns are ignored. You must always match the Control Number or identifier field for each load file.

In the following example, the center columns display the Control Number (Identifier) in the workspace mapped to the Control Number in the load file. The Date field in the workspace is mapped to the Date Sent field in the load file. During import, the data in the fields from the file will be loaded to their mapped fields in the workspace.



Review these additional guidelines when you map fields for a workspace and load file:

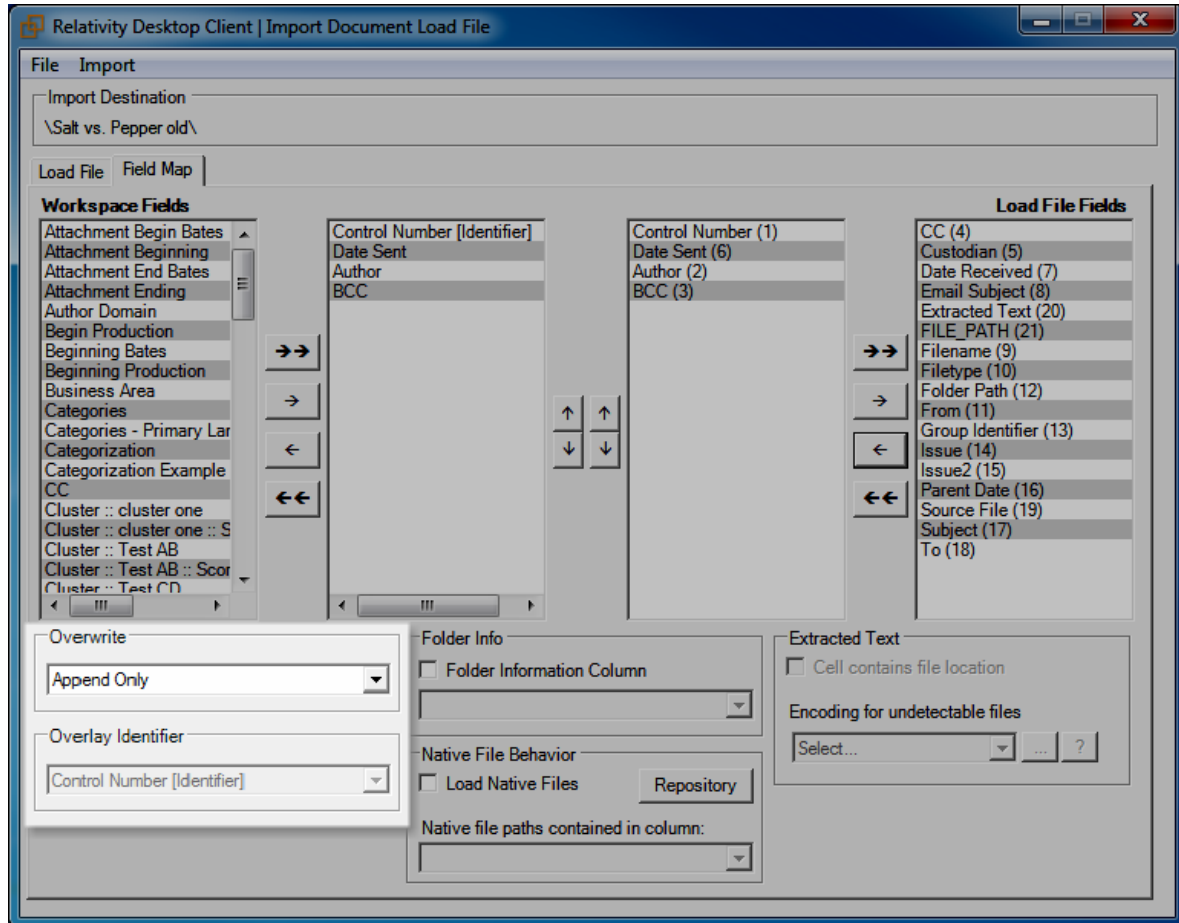
- Before importing relational fields, review the **Import Behavior** option on the New or Edit Field form. You can use this option to determine how blank values are handled in relational fields.
- If you are importing a field that contains more than 200 choices, you will see these choices automatically displayed in a Popup Picker. You will see an error if duplicate choices exist for the field.
- You do not need to be concerned about the row colors displayed in the columns or the order in which the fields are mapped such as mapping the control number before the date. Neither of these issues effect how the fields are displayed in Relativity, or how users interact with them.

4.1.2.1 Overwrite and Overlay Identifiers

In the Overwrite section, select one of these options to indicate the type of load:

- **Append Only** — load only new records.
- **Overlay Only** — update existing records only. You must include a workspace identifier in an overlay load. This field acts as a link indicating to Relativity where to import the data.
- **Append/Overlay** — adds new records and overlays data on existing records.

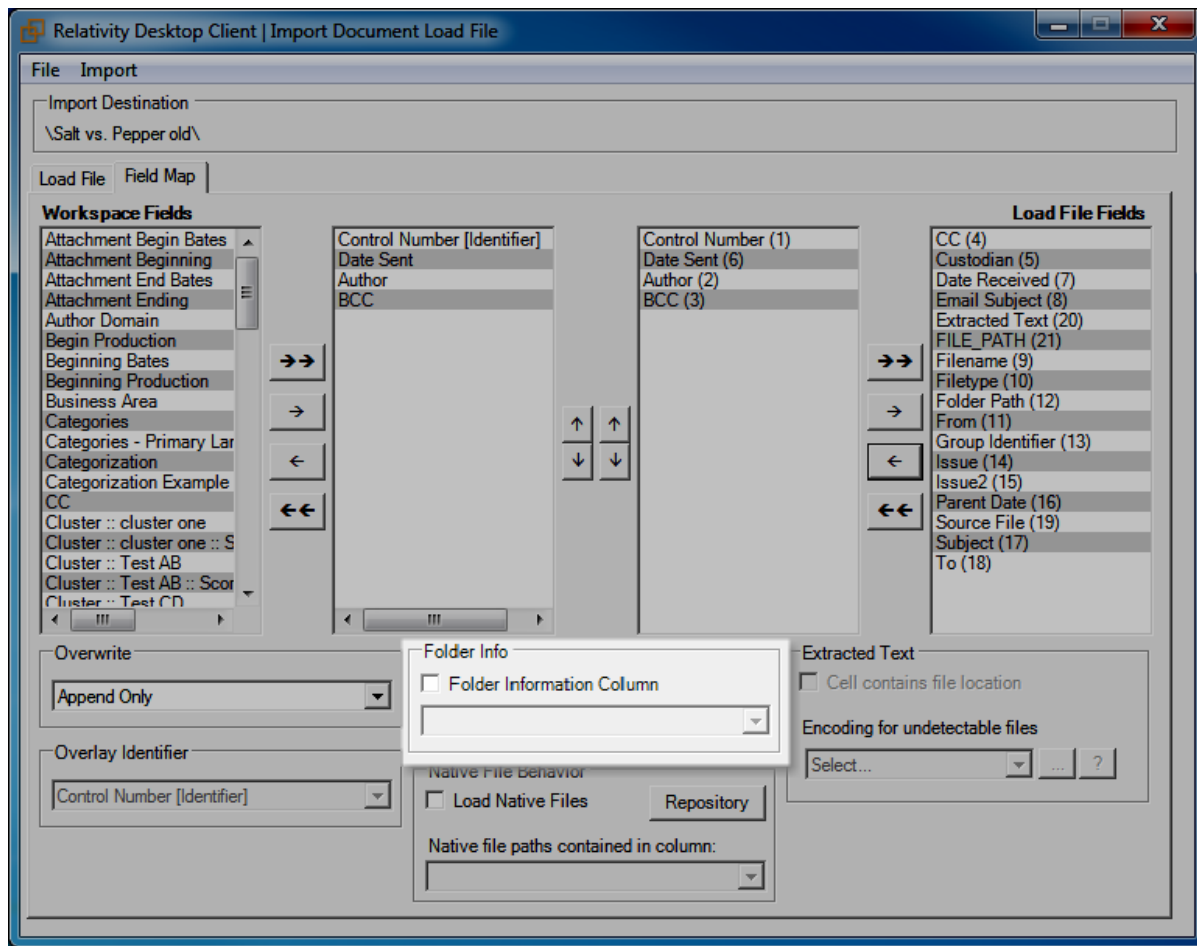
If you are performing an overlay or append/overlay, select an **Overlay Identifier** to specify the field that links your overlay load file to the workspace.



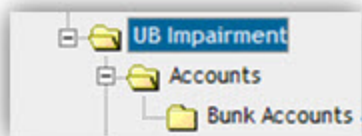
Note: The fields in the drop-down are fixed-length fields with a manually-applied SQL index. This is NOT the same as adding the field to the full-text index. Contact your SQL database administrator to apply an index to a field.

4.1.2.2 Folder Info

In the **Folder Info** section, select **Folder Information Column** if you want to use a metadata field to build the folder structure for the workspace. In the drop-down box, choose the field that you want Relativity to use for building the folder structure. This field is commonly a source or folder path field. All folders are built under the Import Destination folder.



When building the folder structure, Relativity looks for backslashes to indicate a new sub-folder. The following folder structure would result from a field containing field with the value UB Impairment\Accounts\Bunk Accounts:

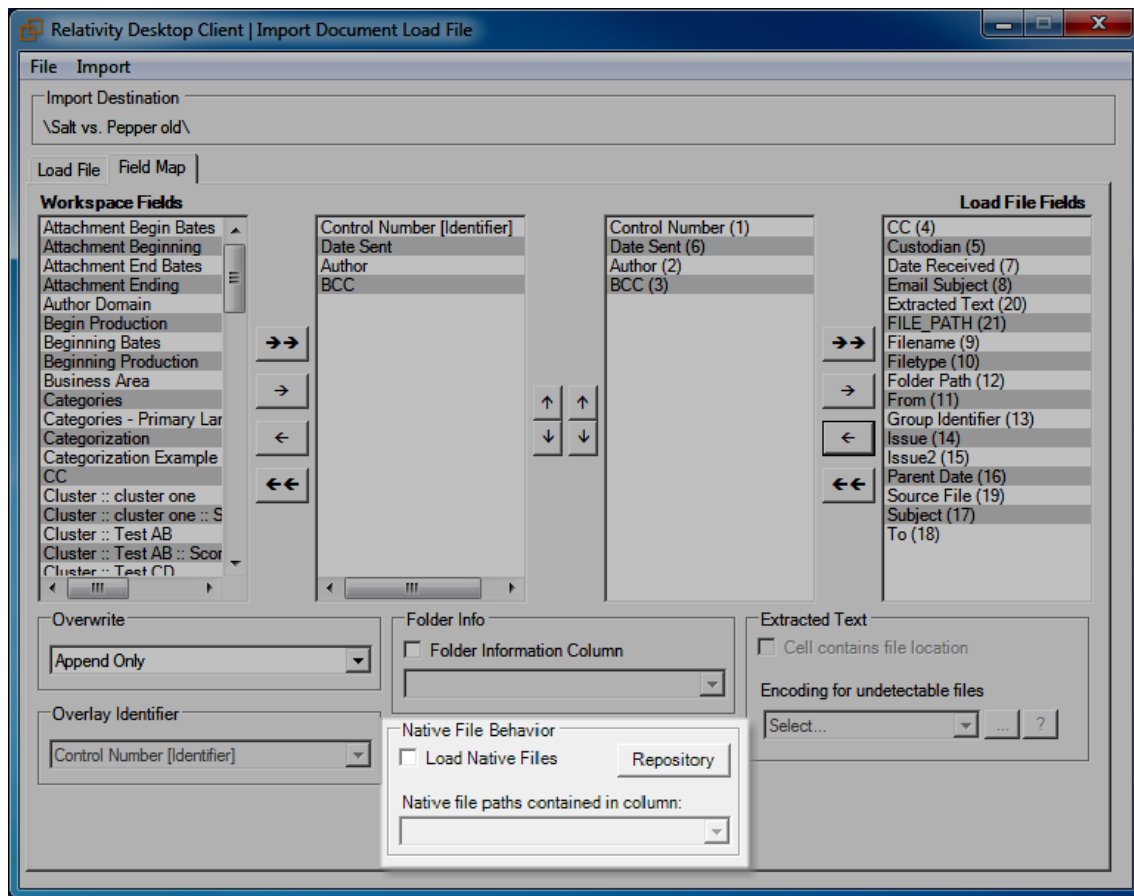


Before importing, you can use the **Preview Choices and Folders** option to check the number of folders that will be created in the workspace.

Note: Do not select **Folder Information Column** if you do not want to build a folder structure based on metadata. When this option is not selected, Relativity loads all documents directly into the folder indicated by the import destination.

4.1.2.3 Native File Behavior

In the Native File Behavior section, select **Load Native Files** if you want to load native files along with database records. (Do not select this option if you do not have any native files to load.)

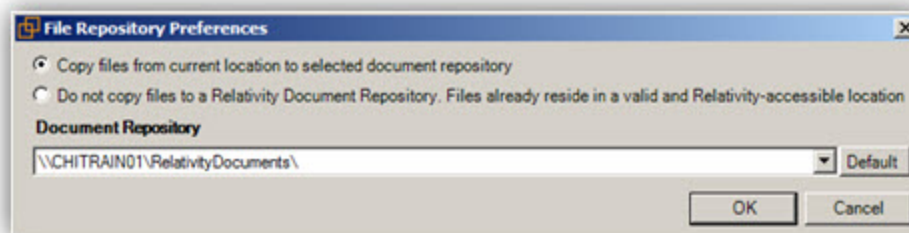


Note: You can ignore the **Repository** option if your files are on your desktop or laptop, or if you are a consulting partner loading data into kCura's hosting environment.

In the **Native file paths contained in column** drop-down box, select a field from your load file that contains a relative or absolute path to the native files. If the native files reside in a Relativity-accessible location, click **Repository**, and select one of these options:

- **Copy files from current location to selected document repository** — select this option to copy files from the location in the selected load file field to the selected document repository.

Note: You can use the **Default** option to configure an environment level. See the Relativity Configuration Table document.

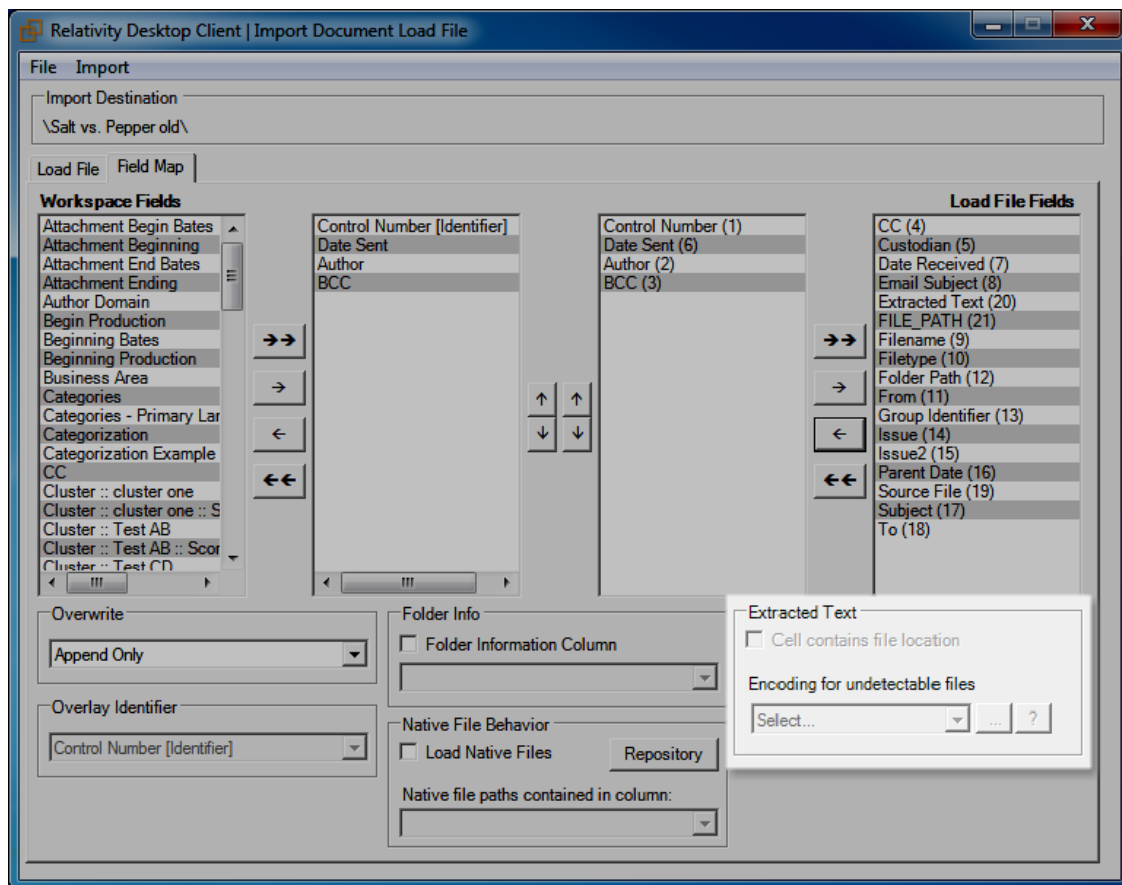




- **Do not copy files to a Relativity document repository** — select this option if the native files have already been copied to their final location, which is accessible by Relativity.

4.1.2.4 Extracted Text

In the **Extracted Text** section, set the following options to control how the Full Text or OCR is loaded into the database:

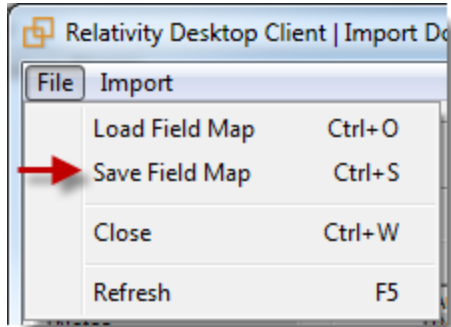
- **Cell contains file location**—select this option if your extracted text is in document-level text files, and your load file contains a path to those text files. You don't need to select this option if a field in your load file contains extracted text.



- **Encoding for undetectable files**—select an encoding for the text file. Click  for additional language options or click  for additional information about encoding.
 - **Western European (Windows)**—indicates the Windows standard encoding for English.
 - **Unicode** —utilizes more than 107,000 characters covering 90 scripts.
 - **Unicode (Big-Endian)**—is the same as Unicode, except that the byte order is reversed.
 - **Unicode (UTF-7)**—represents Unicode text using a stream of ASCII characters to guarantee that the high bit will always be zero.
 - **Unicode (UTF-8)**—represents all characters in the Unicode character set using 8-bit bytes.

4.1.3 Saving import settings

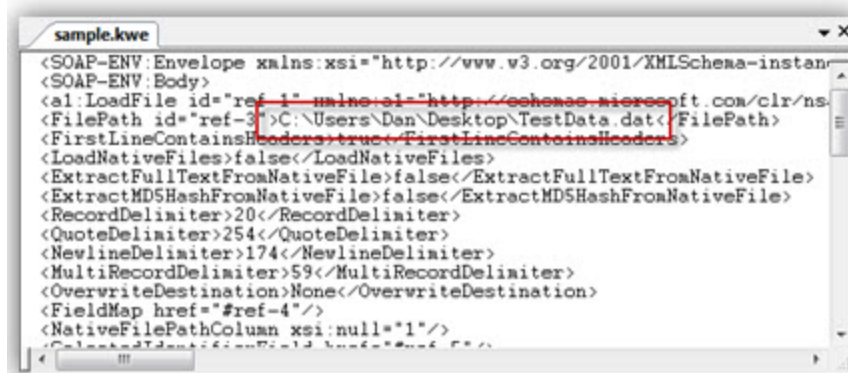
You can save the settings used to import a load file. This option is helpful if you frequently work with your own internal processing tools or with the same processing vendor. To save your import settings, point to the **File** menu, and click **Save Field Map**. Choose a location for the document load file (.kwe).



Note: The settings for the selected destination path and for copying files to a repository aren't saved in the .kwe file.

When you have an identically formatted load file, you can use your saved .kwe. In the RDC, open the .kwe file, and select the file being loaded.

You can also update the path in the .kwe file. The following illustration displays the text of a .kwe file. The fourth line contains an absolute path to the document-level load file to be loaded. Update this section to point to your new load file. After you have updated your .kwe file, select **File** and **Load Field Map**. Test for any errors, and then load the file.

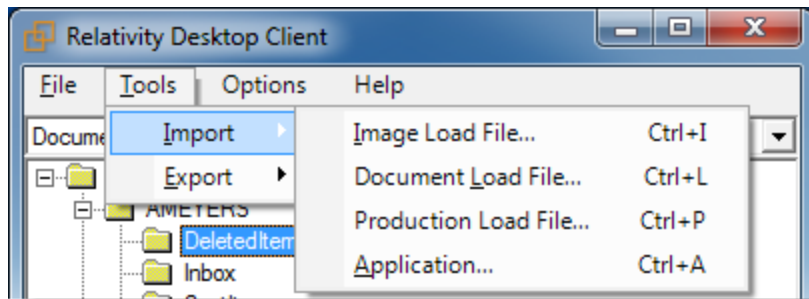


4.2 Importing an image file

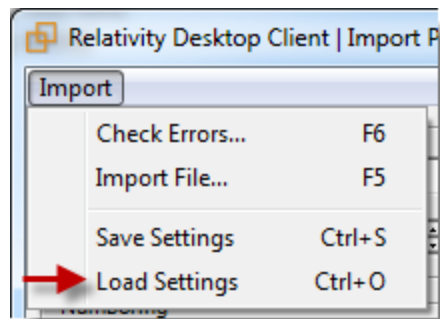
You can import image load files that are Opticon-formatted page-level files. Relativity only accepts single page, Group IV TIFs, or JPGs.

To import an image load file, use these steps:

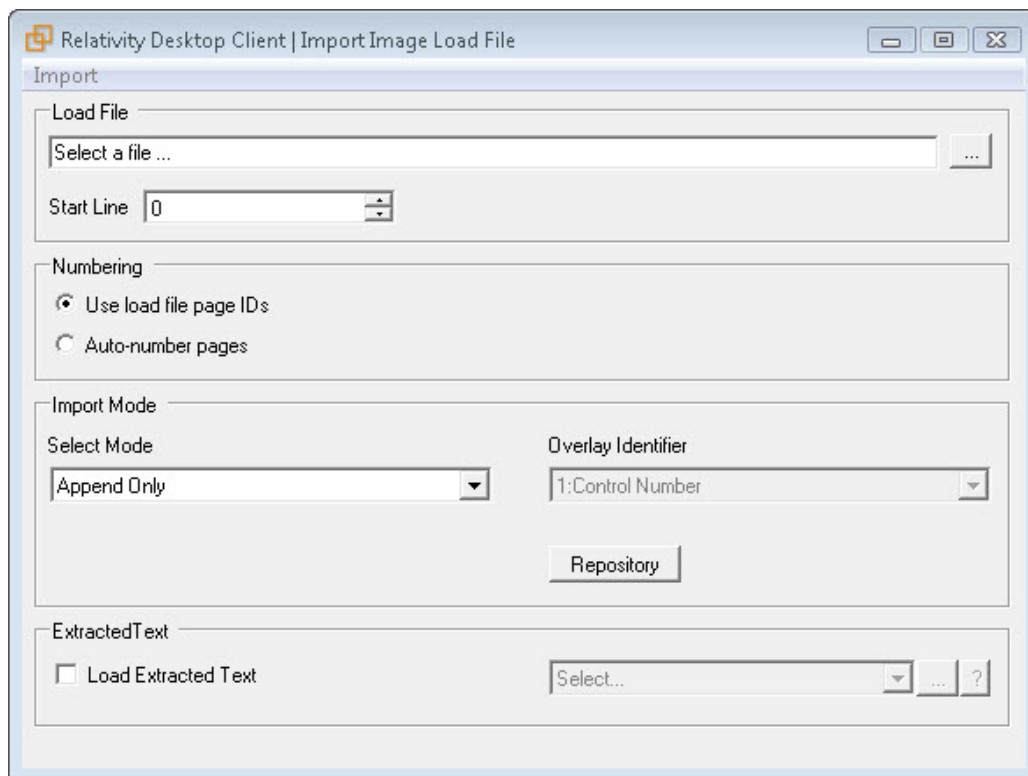
1. Open the RDC and select a workspace.
2. On the **Tools** menu, point to **Import** and click **Image Load File**. (In the RDC browser, you can right-click on a specific folder, point to **Import** and click **Image File**.) The Import Production Load File dialog is displayed.



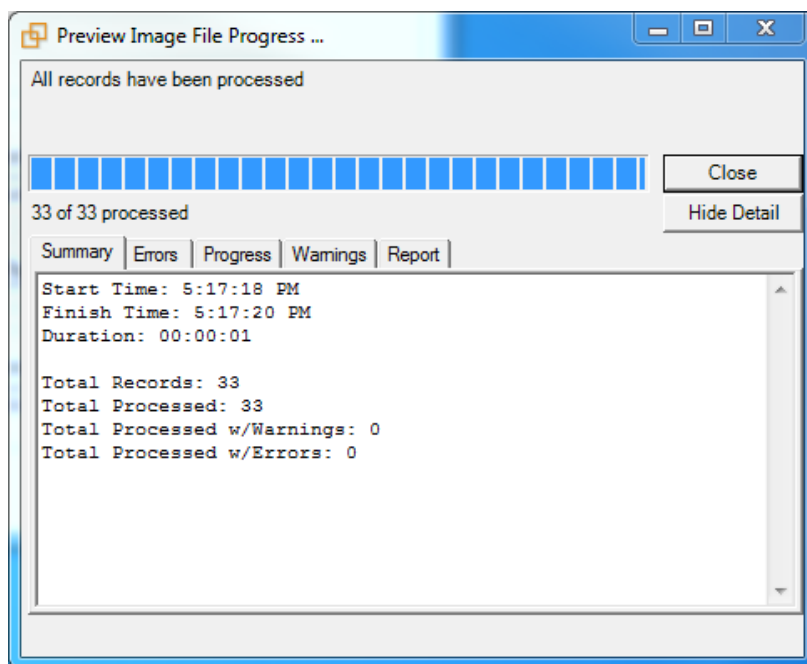
3. (Optional) To use settings in an existing import file, complete these steps:
 - On the Import Image Load File dialog, click the **Import** menu, and select **Load Settings**.



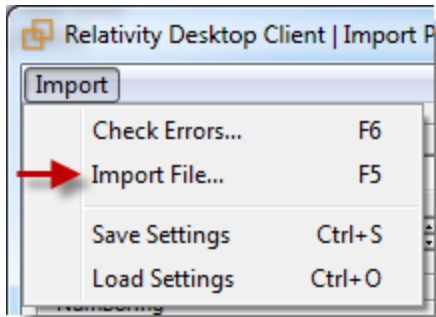
- Browse for your load settings file (.kwx) in the **Open** dialog, and click **Open**.
 - Click **OK** on the kCura.EDDS.WinForm dialog. Click **Open** on **Choose Load File** dialog. Settings from the file are used to populate fields in the Import Image Load File dialog. (You can also modify the settings on this dialog as necessary.)
 - Continue with step 5.
4. On the Import Image Load File dialog, set the options as necessary. See Import options for production and image files on page 31.



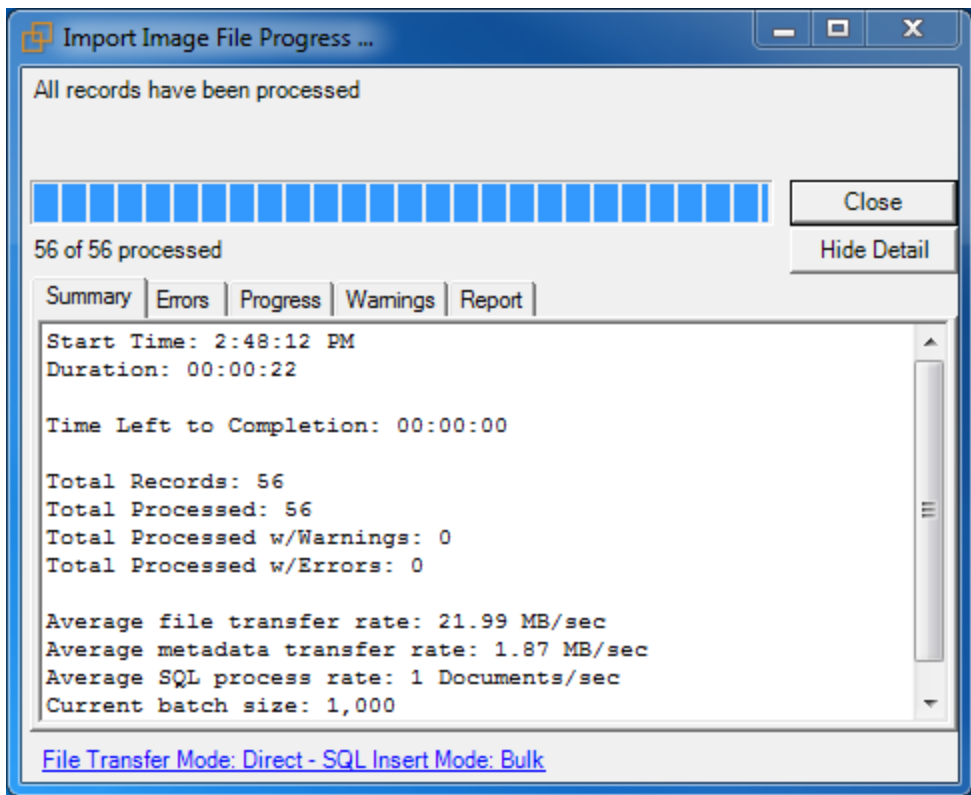
5. (Optional) To view any errors, click **Import**, and then **Check Errors**. The preview dialog lists several tabs that may contain information about any errors in your import. See Handling Errors on page 36.



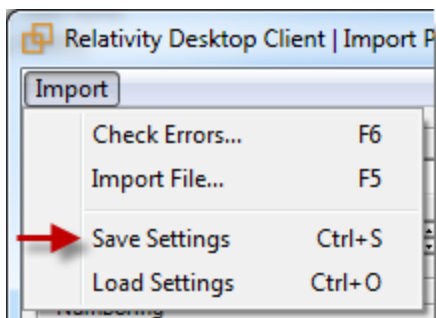
6. On the **Import** menu, click **Import File**.



7. Review the progress of the import. See Viewing import or export progress in the RDC on page 38.




8. (Optional) To save your import settings, point to the **File** menu, and click **Save Field Map**. Choose a location for the production load file (.kwi). See Saving import settings on page 27.



4.2.1 Import options for production and image files

In the RDC, the similar options are available for importing production and image files. Select the following options:

- **Load File** - click  to browse for your page-level load file. Relativity accepts Opticon format image load files.
- **Start Line** - select the line number in the load file where you want the import process to begin. The default value is 0, which results in loading the entire file.
- **Numbering** - select one of the following options:
 - **Use load file page IDs** - default setting.
 - **Auto-number pages** - select this option if page IDs in the production are not unique. For example, you might import a set of TIFFs that share a page identifier for each record. The page identifiers are shared per document and are not unique. The **Auto-number pages** option appends the 01, .02, and so on to the page-level identifier, creating a unique number per page.

```
100001,,D:\IMAGES\001\100001_001.TIF,Y,,,3
100001,,D:\IMAGES\001\100001_002.TIF,,,,
100001,,D:\IMAGES\001\100001_003.TIF,,,,
100002,,D:\IMAGES\001\100002_001.TIF,Y,,,2
100002,,D:\IMAGES\001\100002_002.TIF,,,,
```

Note: Enable **Auto-number pages** if you are importing productions that use document level numbering without page numbers, and include documents that contain multiple pages.

- **Select Mode** - select one of the following options:
 - **Append Only** - load only new records.
 - **Overlay Only** - update existing records only. You must include a workspace identifier in an overlay load. This field acts as a link indicating to Relativity where to import the data.

Note: Select Overlay when you are overlaying production images on existing documents.

- **Append/Overlay** - adds new records and overlays data on existing records.
- (Available Only for Production Load Files) **Production** - select a Relativity production that you want to upload images to. Only new, empty production sets appear in this list.
- (Available Only for Production Load Files) **Overlay Identifier** - select a field that stores overlaid document-level Bates information on the document.

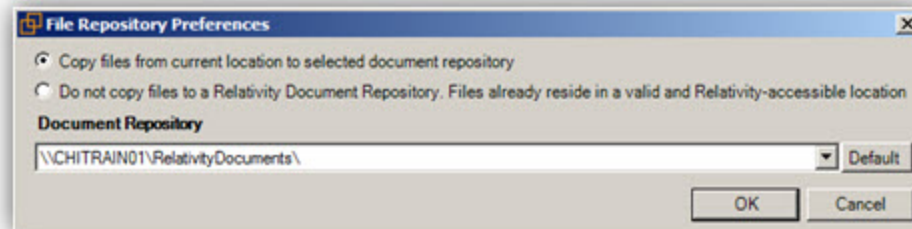
Note: The fields in the drop-down are fixed-length fields with a manually-applied SQL index. Note that this is NOT the same as adding the field to the full-text index. Contact your SQL database administrator to apply an index to a field.



- **Repository** - if the native files reside in a Relativity-accessible location, click **Repository**, and select one of the following options. (You can ignore this option if your files are on your desktop or laptop, or if you

are a consulting partner loading data into kCura's hosting environment.)

- **Copy files from current location to selected document repository** - select this option to copy files from the location in the selected load file field to the selected document repository.

Note: You can use the **Default** option to configure an environment level. See the [Relativity Configuration Table Guide](#).



- **Do not copy files to a Relativity document repository** - select this option if the native files have already been copied to their final location, which is accessible by Relativity.
- (Available Only for Image Load Files) **Load Extracted Text** - select this option to load new text for Production documents that may be revised based on redactions. The text files must meet these requirements:
 - Have .txt extensions
 - Stored in the same directory as TIFF files,
 - Named in the same way as the TIFF files
- (Available Only for Image Load Files) **Encoding for undetectable files** - select an encoding for the text file. Click  for additional language options or click  for additional information about encoding.
 - **Western European (Windows)** - indicates the Windows standard encoding for English.
 - **Unicode** - utilizes more than 107,000 characters covering 90 scripts.
 - **Unicode (Big-Endian)** - is the same as Unicode, except that the byte order is reversed.
 - **Unicode (UTF-7)** - represents Unicode text using a stream of ASCII characters to guarantee that the high bit will always be zero.
 - **Unicode (UTF-8)** - represents all characters in the Unicode character set using 8-bit bytes.

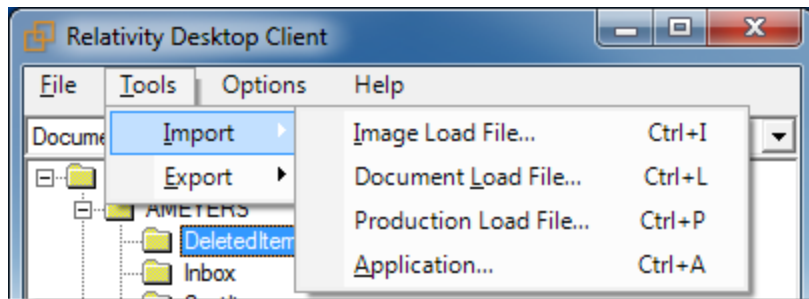
4.3 Importing a production file

You can import productions executed in an external tool to a Relativity workspace. Follow these guidelines when you want to work with externally executed production:

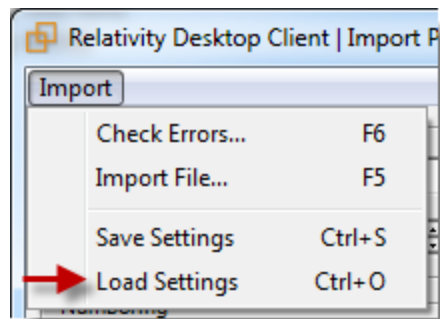
- Create a production set in Relativity. The numbering imported with the Opticon file functions as Bates numbering. (The Bates label setting in the imported production is not used.)
- Run the production with the external tool to generate the following files:
 - **Document level control file** - it should minimally contain an identifier field that is also present in the workspace, and a new production or Bates number.
 - **Page level Opticon file** - it should use the production or Bates numbering scheme.
- Overlay document level load file in Relativity.

To import a production, use these steps:

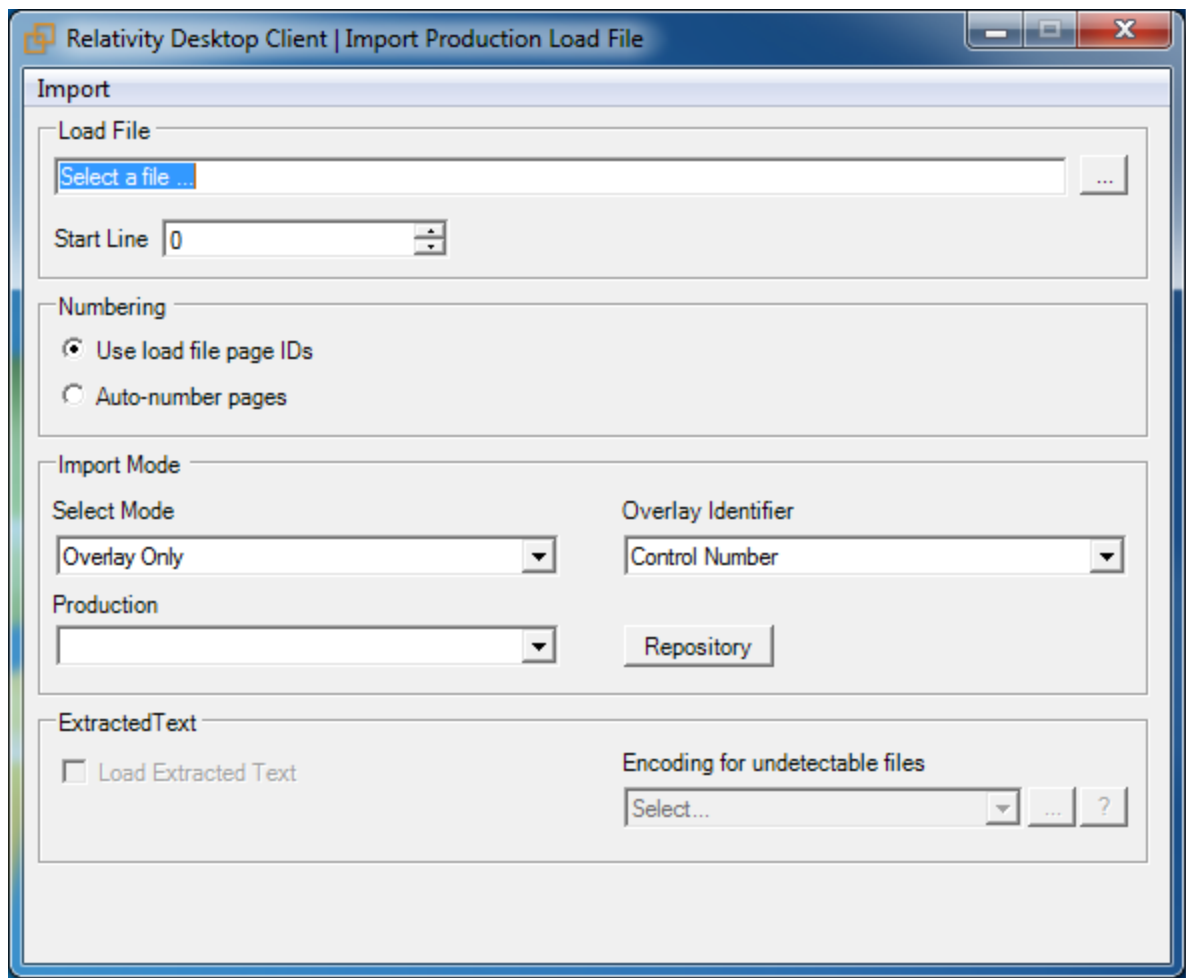
1. Open the RDC and select a workspace.
2. On the **Tools** menu, point to **Import** and click **Production Load File**. (In the RDC browser, you can right-click on a specific folder, point to **Import** and click **Production File**.) The Import Production Load File dialog is displayed.



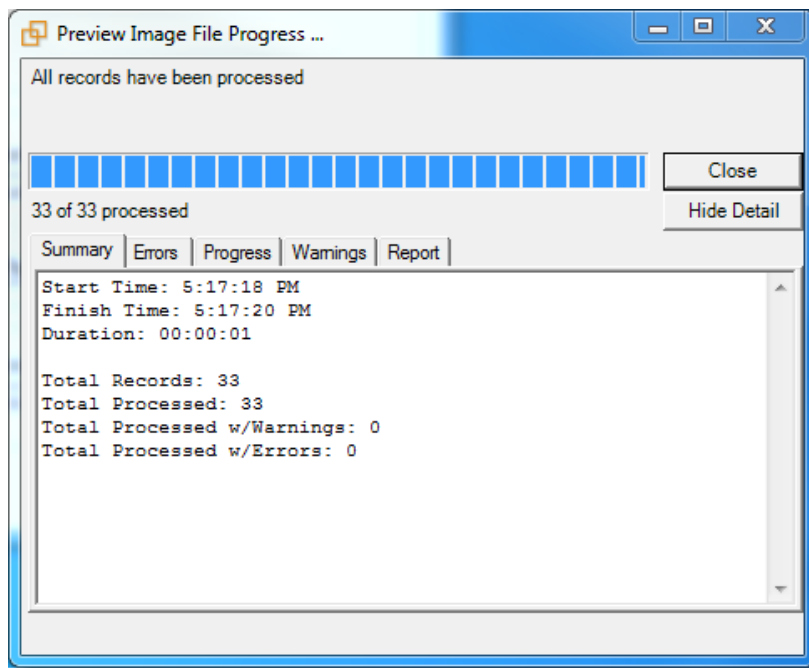
3. (Optional) To use settings in an existing import file, complete these steps:
 - On the Import Production Load File dialog, click the **Import** menu, and select **Load Settings**.



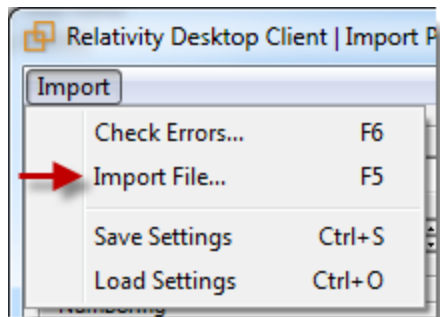
- Browse for your load settings file (.kwx) in the **Open** dialog, and click **Open**.
 - Click **OK** on the kCura.EDDS.WinForm dialog. Click **Open** on **Choose Load File** dialog. Settings from the file are used to populate fields in the Import Production Load File dialog. (You can also modify the settings on this dialog as necessary.)
 - Continue with step 5.
4. On the Import Production Load File dialog, set the options as necessary. See Import options for production and image files on page 31.



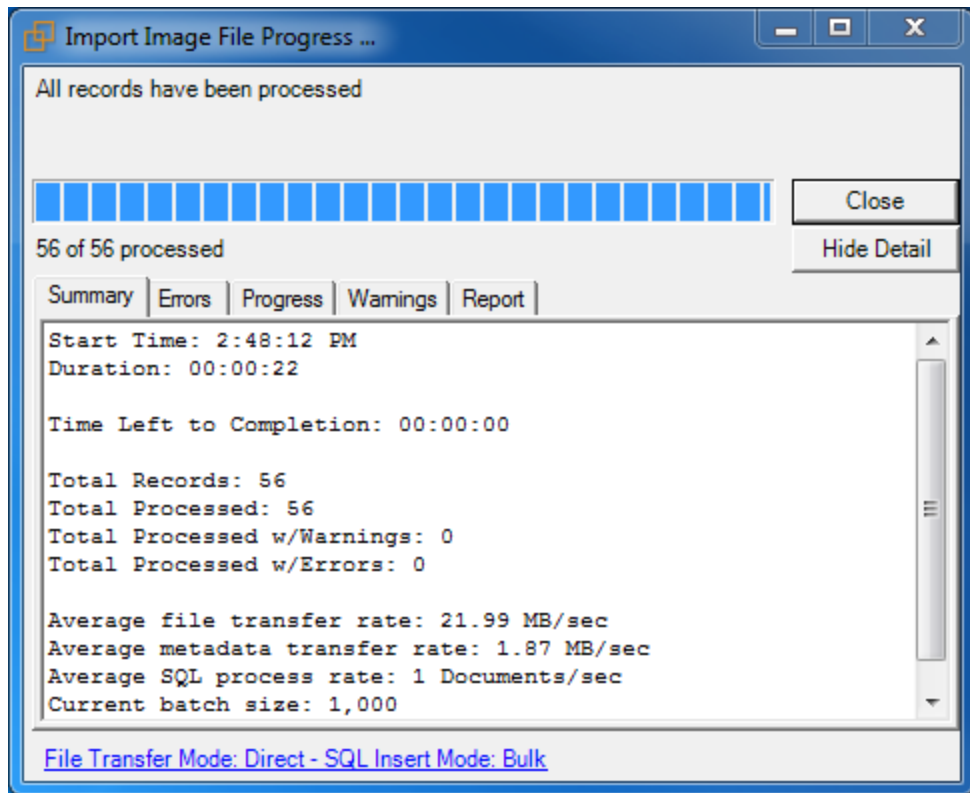
5. (Optional) To view any errors, click **Import**, and then **Check Errors**. The preview dialog lists several tabs that may contain information about any errors in your import. See Handling Errors on page 36.



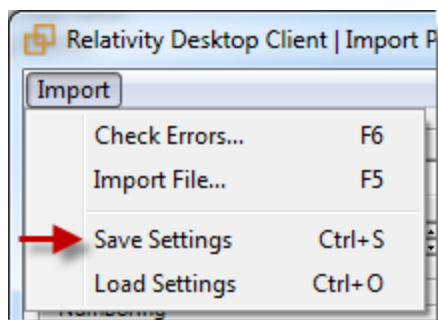
6. On the **Import** menu, click **Import File**.



7. Review the progress of the import. See Viewing import or export progress in the RDC on page 38.

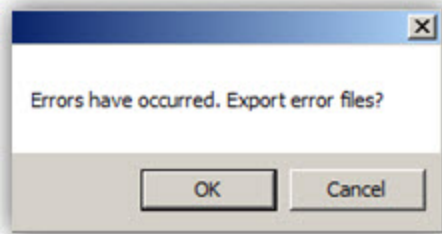


8. (Optional) To save your import settings, point to the **File** menu, and click **Save Field Map**. Choose a location for the production load file (.kwi). See Saving import settings on page 27.

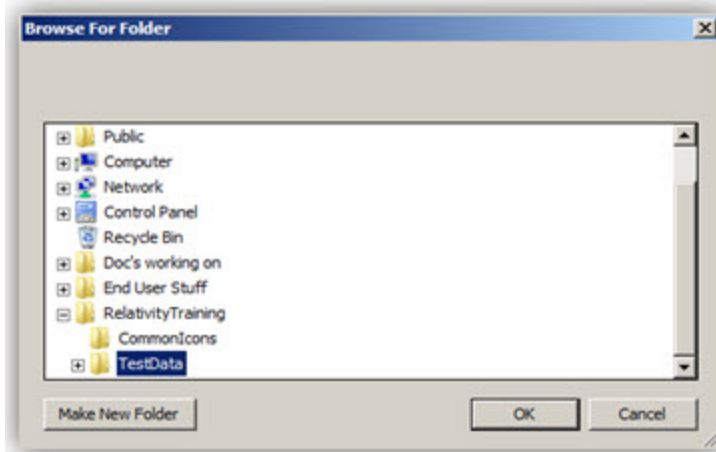


4.4 Handling Errors

Relativity skips any records with errors that it encounters during the load process. It warns you about any errors that were encountered after all the correct records have been loaded.



When you click **OK** in the error warning box, Relativity creates a new document-level load file with only the erroneous records. If more than 1,000 errors are encountered during the load process, only the first 1,000 errors are recorded. You will be prompted to save these records to prevent any loss of data. Choose a path to save your error file and click **OK**.



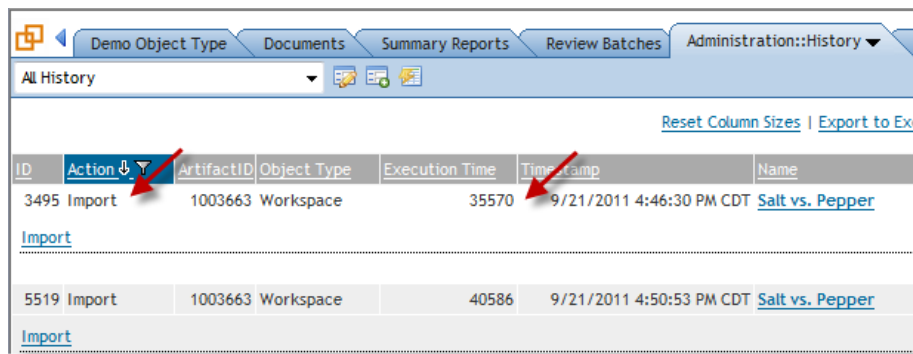
After you have saved your error file, you can make any necessary corrections to those records, and then perform an **Append Load**. A record of these errors is also available in the Errors tab, referencing the workspace name and Artifact ID.

4.5 Using command line import

You can use the Windows Command Line to import documents into Relativity. This allows you to automate document importing along with other parts of your processing and integration process. See the [Relativity Command Line Import Guide](#).

4.6 Viewing audit information for an import

After you have imported your file, the RDC records and audits this instance in the History tab. Click **Import** to display the settings used for the import. To view the transfer rate of the load file, add the **Execution Time** field to the view, if necessary.

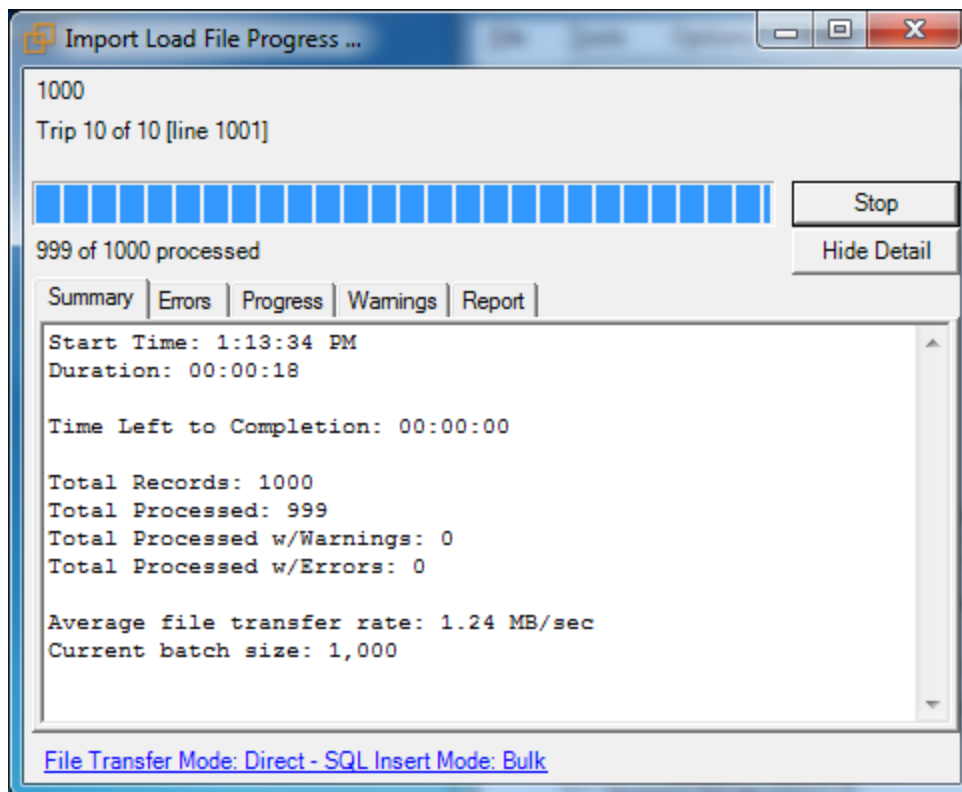


ID	Action	ArtifactID	Object Type	Execution Time	Timestamp	Name
3495	Import	1003663	Workspace	35570	9/21/2011 4:46:30 PM CDT	Salt vs. Pepper
Import						
5519	Import	1003663	Workspace	40586	9/21/2011 4:50:53 PM CDT	Salt vs. Pepper
Import						

4.7 Viewing import or export progress in the RDC

You can view the progress of an import or export through the RDC. Select the following tabs to display specific information:

- **Summary** - displays general information about the number of records processing, warnings, and errors.



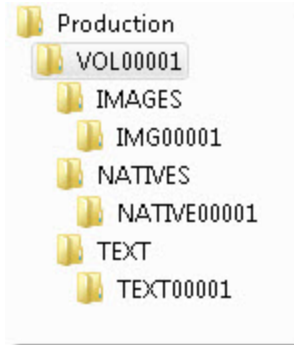
- **Errors** - lists any errors encountered during the load. Only records with no errors will be imported into the workspace.
- **Progress** - displays a detailed view of the load progress.
- **Warnings** - displays information about loading or connection issues.

- **Report** - includes the following files that you can export:
 - **Export Error Report** - click this button to export a .csv file with a summary of errors.
 - **Export Error File** - click this button to export a .dat file, which is a document-level load file containing only records with errors.
- **File Transfer Mode** - displays the following information:
 - **Web mode** - this mode uses the web server and it is the standard.
 - **Direct mode** - this mode provides faster performance, but requires a connection to the network hosting the data, as well as specific Windows group permissions to be used. Contact your Relativity administrator for more information.

Note: SQL Insert Mode always shows Bulk.

5 Exporting

You can use the Relativity Desktop Client (RDC) to export production sets, search results, and folders. When you perform an export, the RDC will automatically create top level folders for images, text, and natives as illustrated below. It exports all documents included in the production set, search result, or folder.

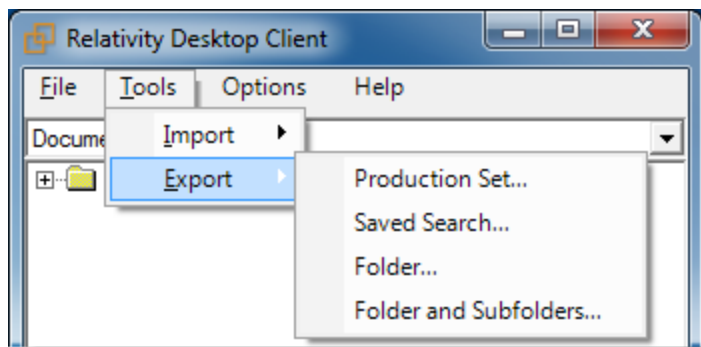


Note: You need to install the RDC on your computer before you can perform an export.

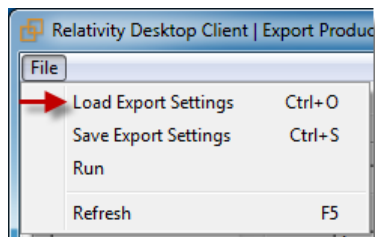
5.1 Exporting a production set

You can export the contents of a production set created in Relativity through the RDC.

1. Open the RDC and select a workspace.
2. On the **Tools** menu, point to **Export** and click **Production Set**. The Data Source tab in the Export Production window is displayed.

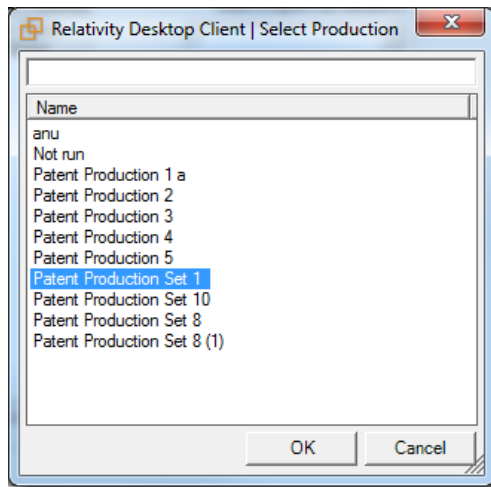


3. (Optional) To use settings in an existing export file, use these steps:
 - Click the **File** menu, and select **Load Export Settings**.

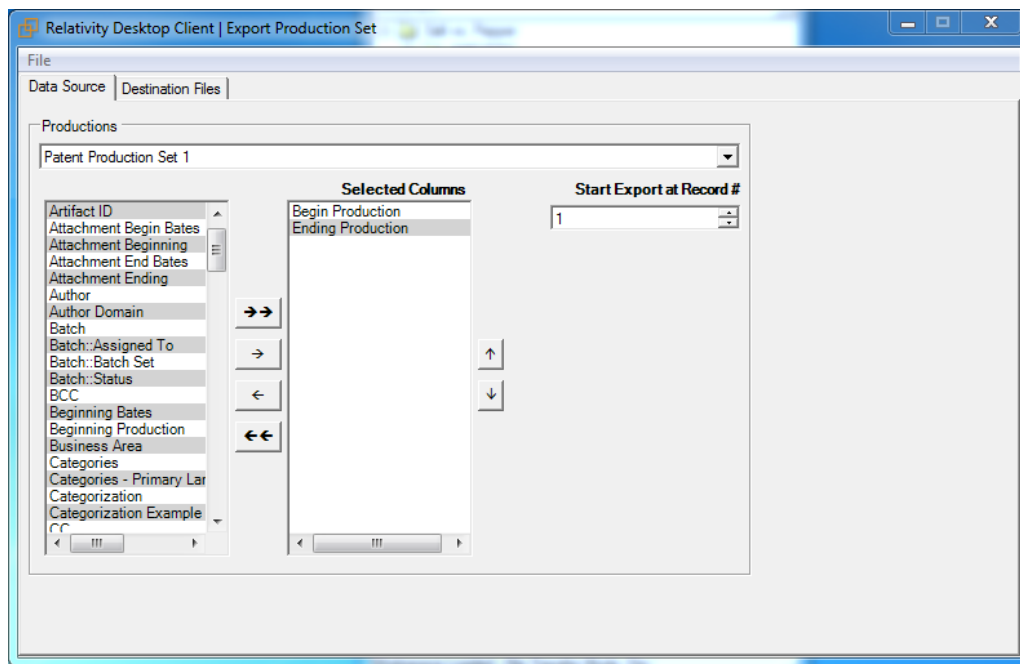


- Browse for your export settings file (.kwx) in the Open dialog.
- Select a production set, and click **OK**. Your production set is listed on the Data Source tab, and the settings from the file are used to populate the Destination Files tab. (You can also modify any settings on the Data Source and Destination Files tab as necessary.)

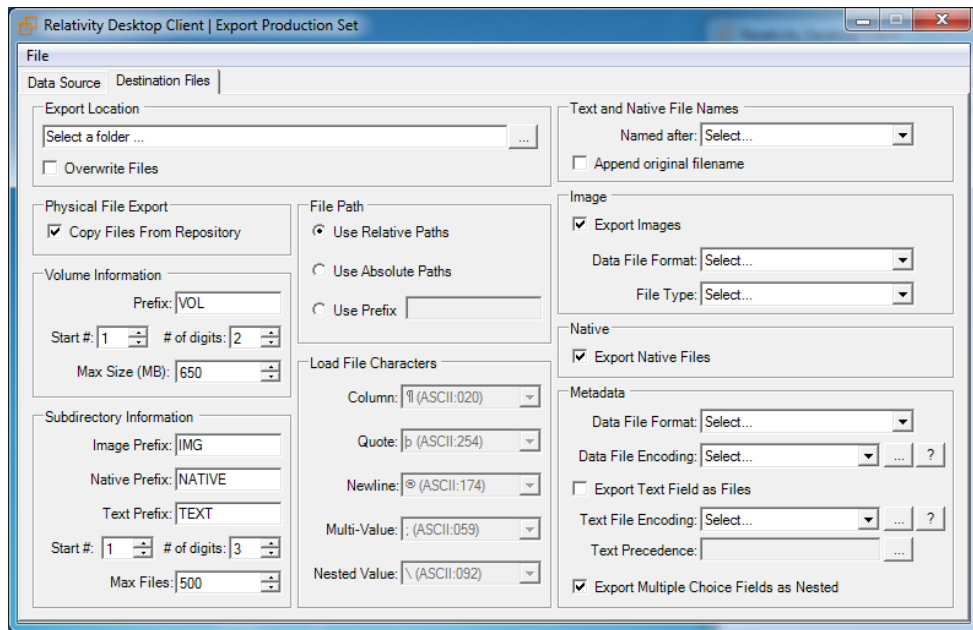
Note: On the Destination Files tab, you may want to select **Overwrite Files** if you are re-exporting the same group of files to the previously used location. See Export Location on page 59.



- Continue with step 7.
4. On the Data Source, select a production set in the **Productions** box. Update the remaining options as necessary. See Setting options on the Data Source tab on page 56.



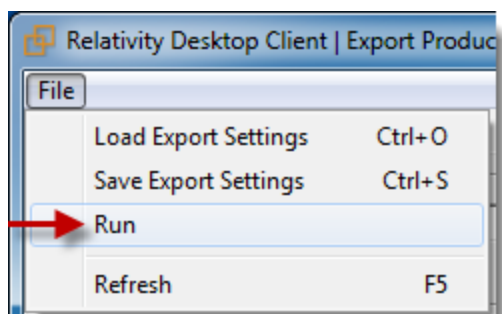
5. Select the Destination Files tab.



6. Use the information in these topics to set the options available on the tab:

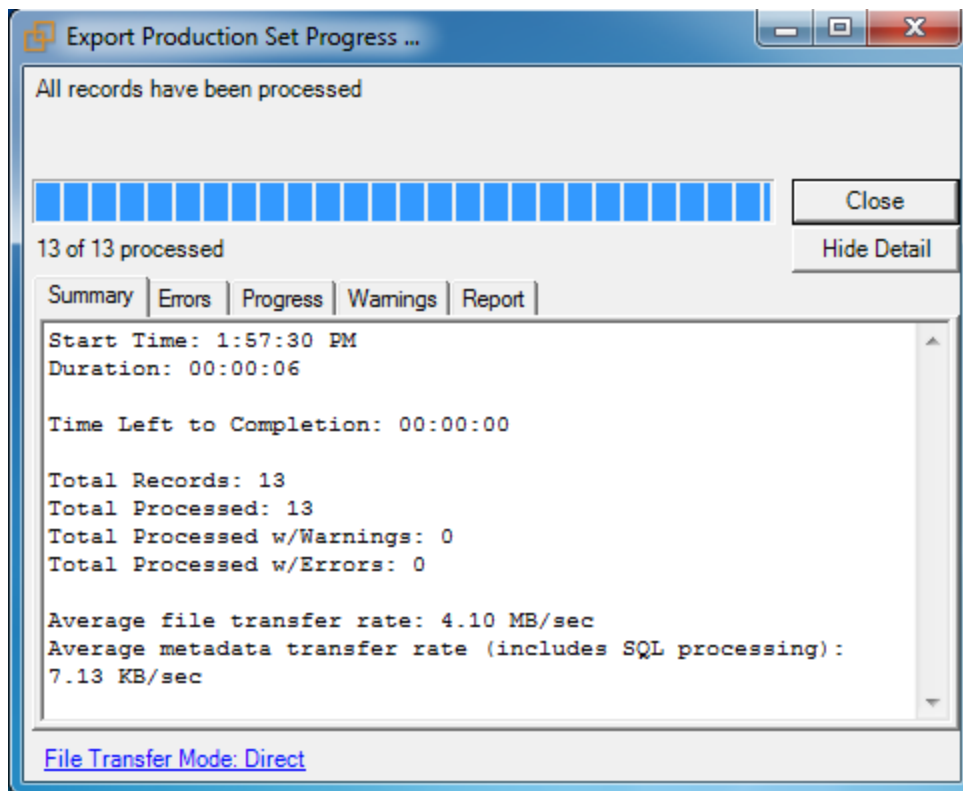
- Export Location on page 59
- Physical File Export on page 59
- Volume Information on page 60
- Subdirectory Information on page 61
- File Path on page 62
- Load File Characters on page 63
- Text and Native File Names on page 64
- Image on page 65
- Native on page 66
- Metadata on page 67

7. After you have selected your export settings, select **File** and click **Run**.

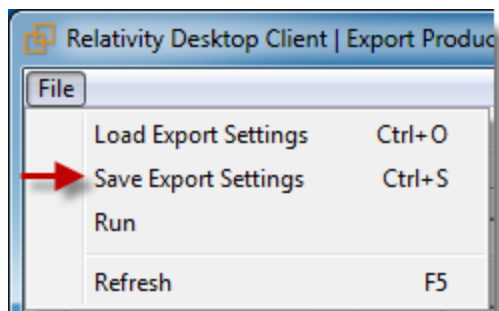


Note: A warning message is displayed if you are missing information required to run the export. Update the settings for the required options, and click **Run** again.

- Review the progress of the export. See Viewing import or export progress in the RDC on page 38.



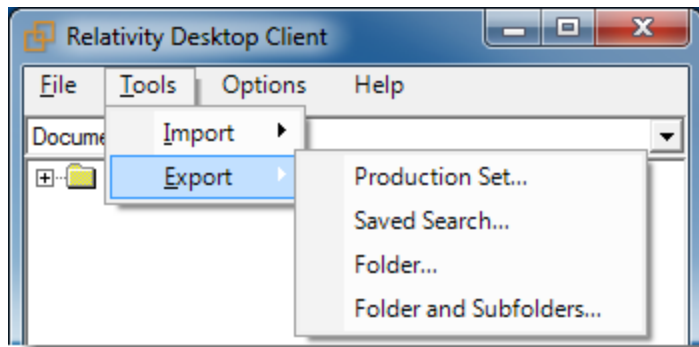
- (Optional) To save your export settings, point to the **File** menu, and click **Save Export Settings**. Choose a location for the export settings file (.kwx).



5.2 Exporting a saved search

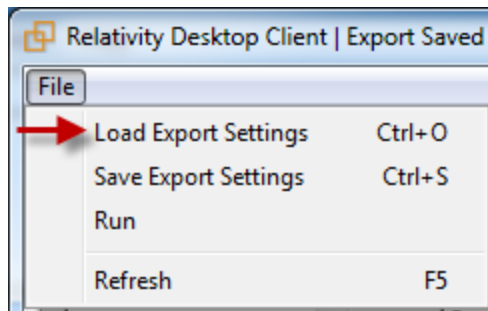
You can export the current results of a saved search through the RDC.

- Open the RDC and select a workspace.
- On the **Tools** menu, point to **Export** and click **Saved Search**. The Data Source tab in the Export Production window is displayed.



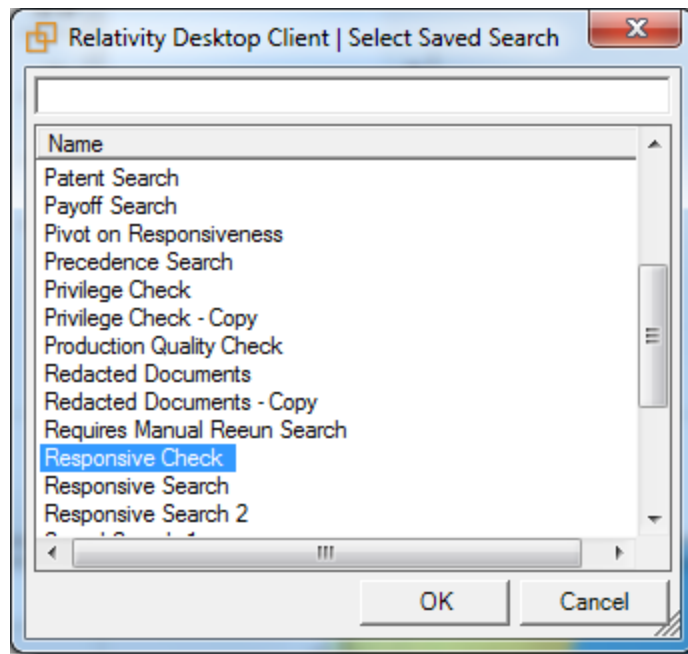
3. (Optional) To use settings in an existing export file complete these steps:

- Click the **File** menu, and select **Load Export Settings**.

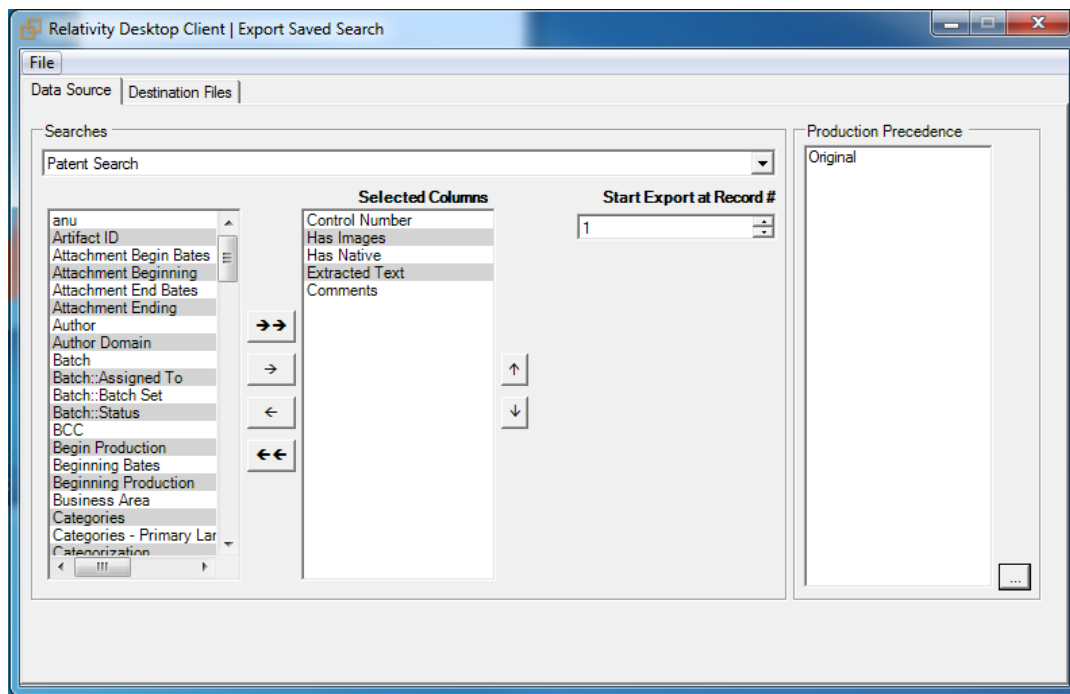


- Browse for your export settings file (.kwx) in the Open dialog.
- Select a saved search, and click **OK**. Your saved is listed on the Data Source tab, and the settings from the file are used to populate the Destination Files tab. (You can also modify any settings on the Data Source and Destination Files tab as necessary.)

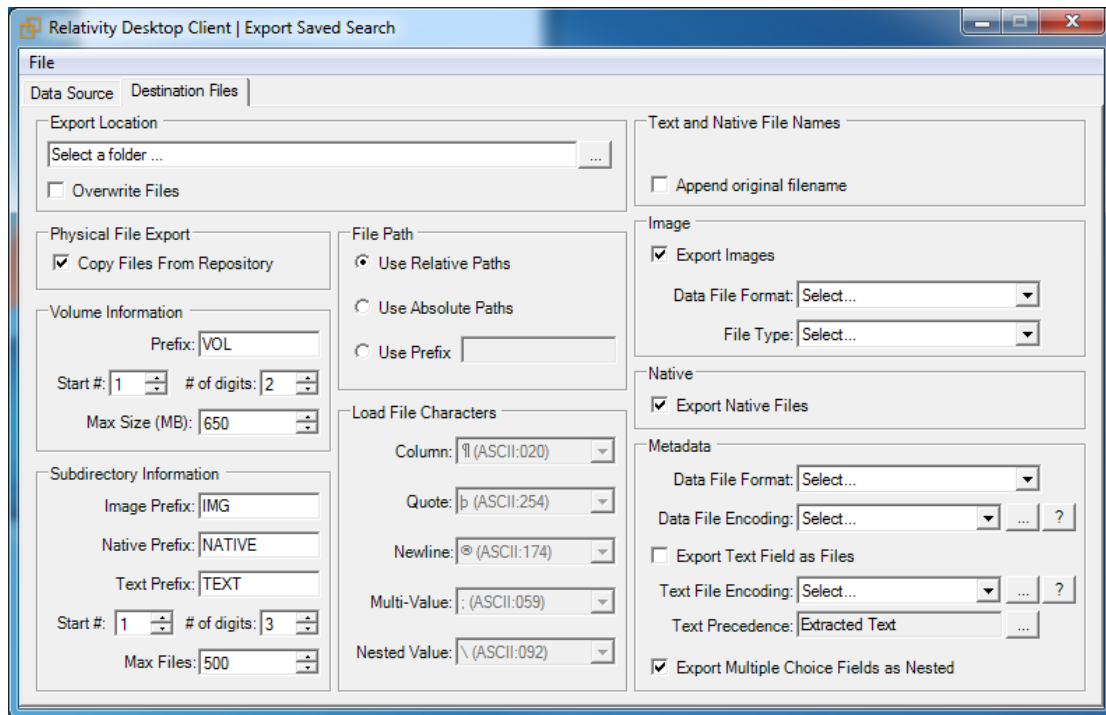
Note: On the Destination Files tab, you may want to select **Overwrite Files** if you are re-exporting the same group of files to the previously used location. See Export Location on page 59.



- Continue with step 7.
4. On the Data Source, select a saved search in the **Searches** box. Update the remaining options as necessary. See Setting options on the Data Source tab on page 56.



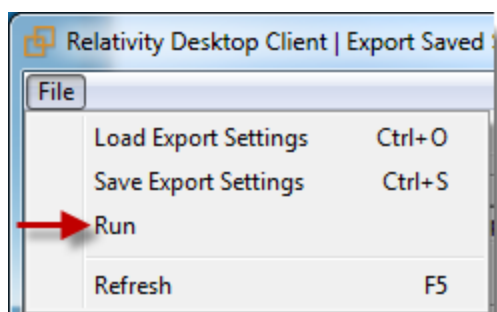
5. Select the Destination Files tab.



6. Use the information in these topics to set the options available on the tab:

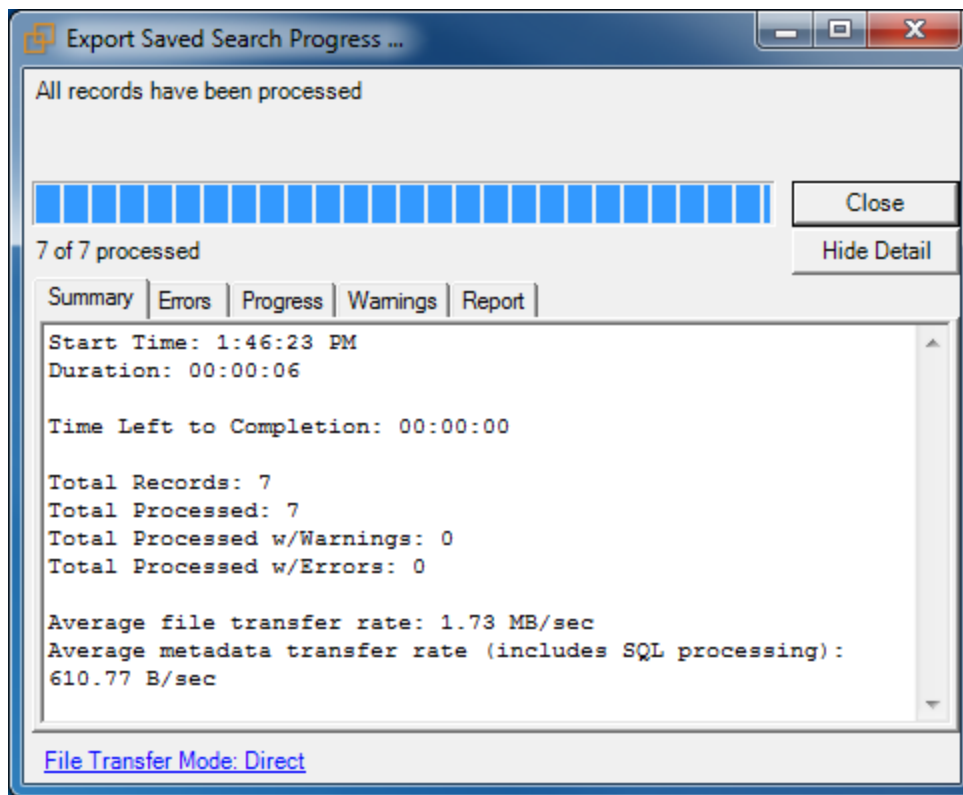
- Export Location on page 59
- Physical File Export on page 59
- Volume Information on page 60
- Subdirectory Information on page 61
- File Path on page 62
- Load File Characters on page 63
- Text and Native File Names on page 64
- Image on page 65
- Native on page 66
- Metadata on page 67

7. After you have selected your export settings, select **File** and click **Run**.

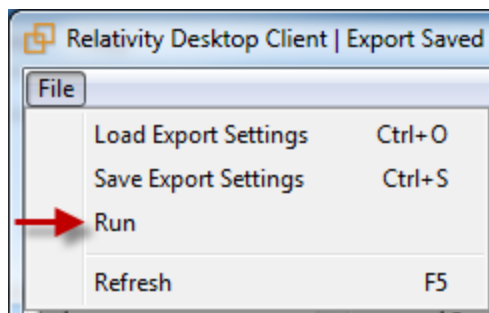


Note: A warning message is displayed if you are missing information required to run the export. Update the settings for the required options, and run the export again.

- Review the progress of the export. See [Viewing import or export progress in the RDC](#).



- (Optional) To save your export settings for reuse, point to the **File** menu, and click **Save Export Settings**. Choose a location for the export settings file (.kwx).



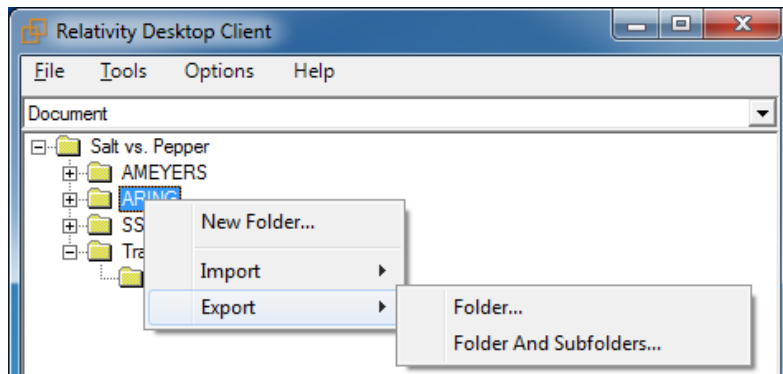
5.3 Exporting a folder

You can export the contents of a specific workspace folder through the RDC.

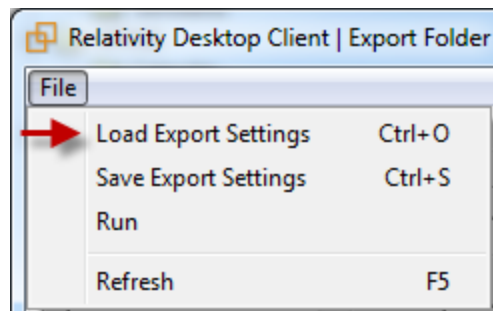
Note: When you select the **Folder** option, only the contents of the current folder are exported. Use **Folder and Subfolders** option to export the contents of both the folder and its subfolders, or the contents of an entire workspace. See [Exporting a folder and its subfolders](#) on page 52.

Use the following steps to export a folder:

1. Open the RDC and select a workspace.
2. In the RDC browser, right-click on a specific folder, point to **Export** and click **Folder**. (You can also highlight a folder in the RDC browser. On the **Tools** menu, point to **Export** and click **Folder**.) The Data Source tab in the Export Production window is displayed.

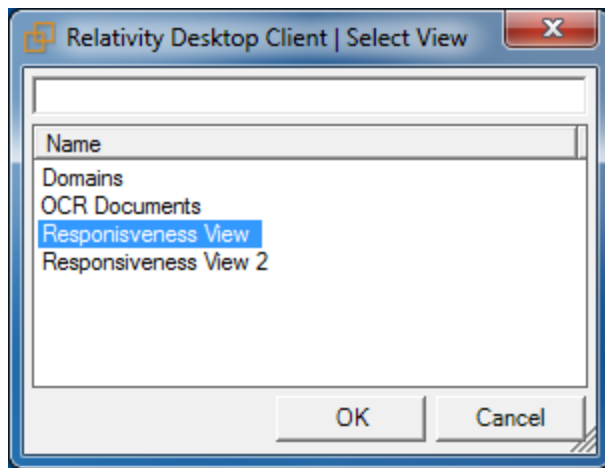


3. (Optional) To use settings in an existing export file, complete these steps:
 - Click the **File** menu, and select **Load Export Settings**.

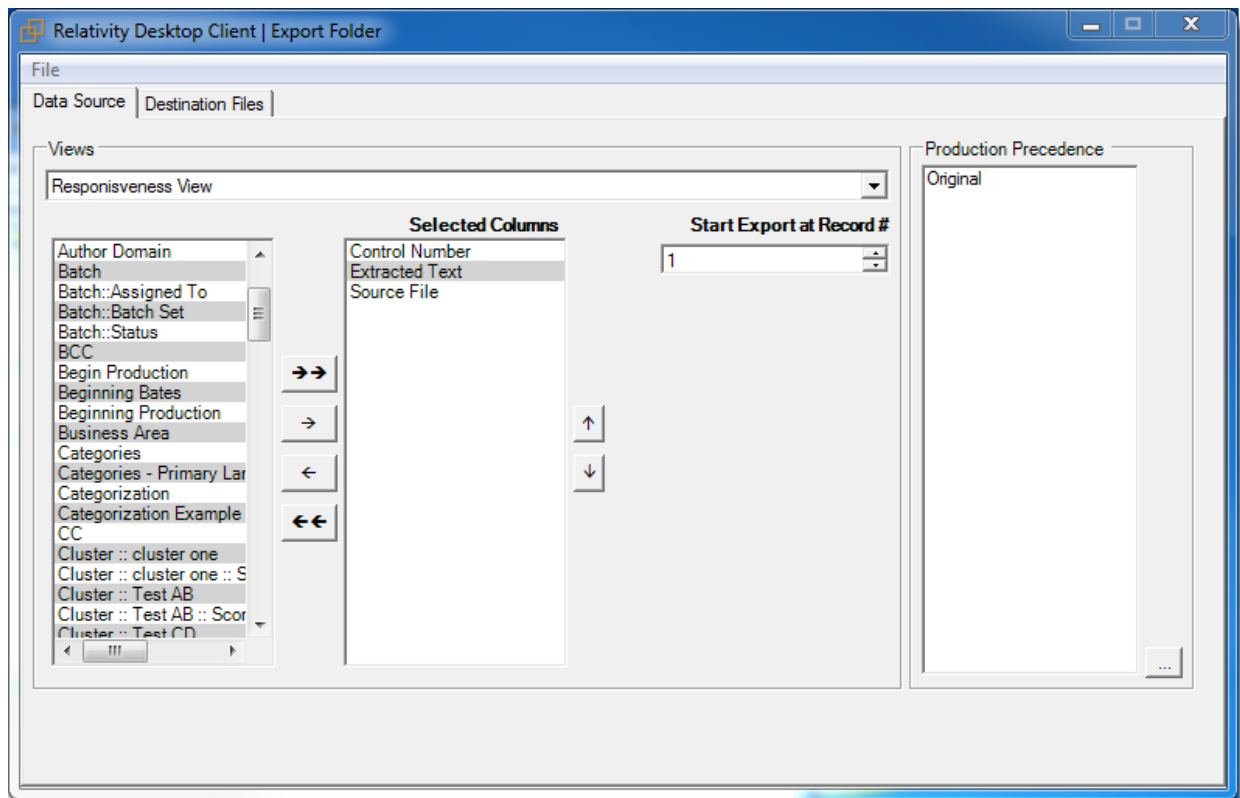


- Browse for your export settings file (.kwx) in the Open dialog.
- Select a view, and click **OK**. Your view is listed on the Data Source tab, and determines the fields displayed in the **Selected Columns** box. Other settings from the file are used to populate the Destination Files tab. (You can also modify any settings on the Data Source and Destination Files tab as necessary.)

Note: On the Destination Files tab, you may want to select **Overwrite Files** if you are re-exporting the same group of files to the previously used location. See [Export Location](#).



- Continue with step 7.
4. On the Data Source, select a view in the Views box. Update the remaining options as necessary. See [Setting options on the Data Source tab](#).



5. Select the Destination Files tab.

Relativity Desktop Client | Export Folder

File

Data Source | Destination Files

Export Location

C:\Users\mlindeman\Documents\RDC Temp\export folder 2

☒ Overwrite Files

Physical File Export

☒ Copy Files From Repository

Volume Information

Prefix: VOL

Start #: 1 # of digits: 2

Max Size (MB): 650

Subdirectory Information

Image Prefix: IMG

Native Prefix: NATIVE

Text Prefix: TEXT

Start #: 1 # of digits: 3

Max Files: 500

File Path

☒ Use Relative Paths

☐ Use Absolute Paths

☐ Use Prefix

Load File Characters

Column: . (ASCII:044)

Quote: " (ASCII:034)

Newline: (ASCII:010)

Multi-Value: ; (ASCII:059)

Nested Value: \ (ASCII:092)

Text and Native File Names

☐ Append original filename

Image

☐ Export Images

Data File Format: Select...

File Type: Select...

Native

☒ Export Native Files

Metadata

Data File Format: Comma-separated (.csv)

Data File Encoding: Unicode

☐ Export Text Field as Files

Text File Encoding: Select...

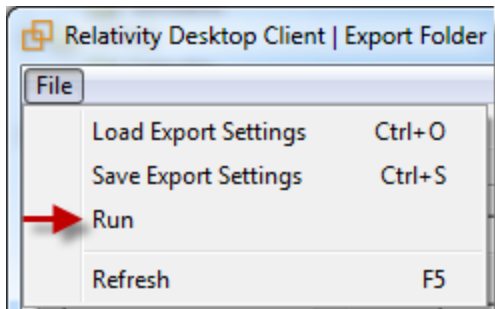
Text Precedence: Extracted Text

☒ Export Multiple Choice Fields as Nested

6. Use the information in these topics to set the options available on the tab:

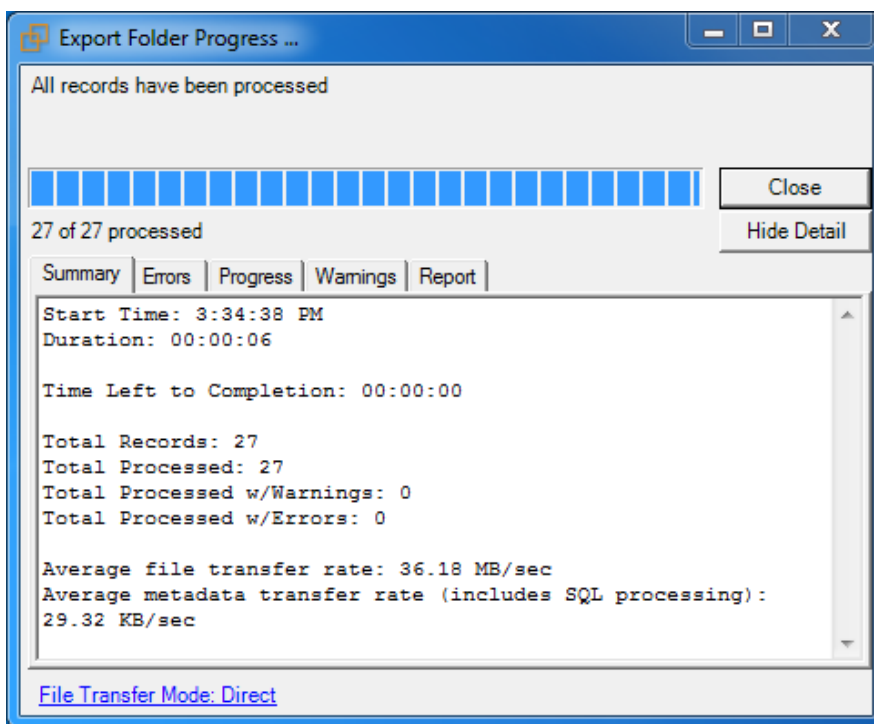
- Export Location on page 59
- Physical File Export on page 59
- Volume Information on page 60
- Subdirectory Information on page 61
- File Path on page 62
- Load File Characters on page 63
- Text and Native File Names on page 64
- Image on page 65
- Native on page 66
- Metadata on page 67

7. After you have selected your export settings, select **File** and click **Run**.

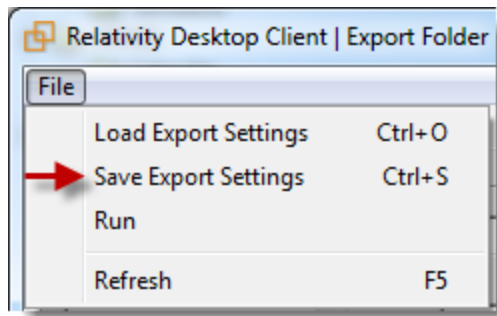


Note: A warning message is displayed if you are missing information required to run the export. Update the settings for the required options, and run the export again.

8. Review the progress of the export. See [Viewing import or export progress in the RDC](#).



9. (Optional) To save your export settings, point to the **File** menu, and click **Save Export Settings**. Choose a location for the export settings file (.kwx).



5.4 Exporting a folder and its subfolders

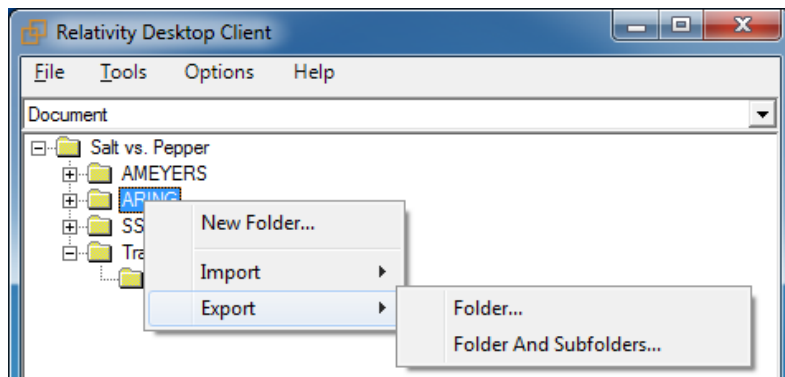
You can export the contents of a folder and its subfolders as well as an entire workspace through the RDC.

Note: You can also export only the content of the current folder using the **Folder** option. See Exporting a folder on page 47.

Use the following steps to export a folder and its subfolders:

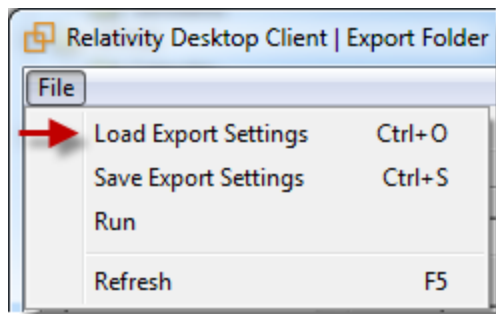
1. Open the RDC and select a workspace.
2. In the RDC browser, right-click on a specific folder, point to **Export** and click **Folder and Subfolders**. (You can also highlight a folder in the RDC browser. On the **Tools** menu, point to **Export** and click **Folder and Subfolders**.) The Data Source tab in the Export Production window is displayed.

Note: To export an entire workspace, highlight the root folder.



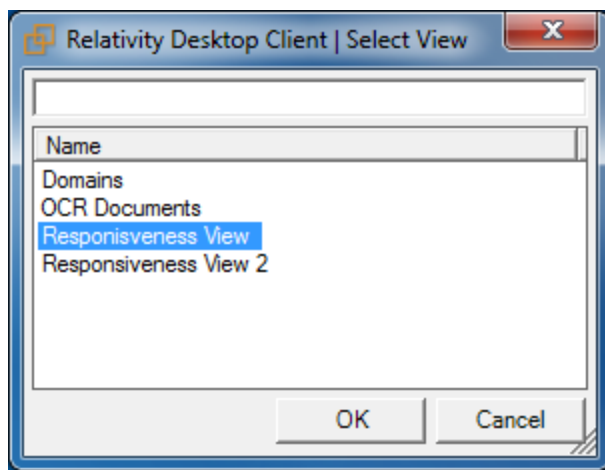
3. (Optional) To use settings in an existing export file, complete these steps:

- Click the **File** menu, and select **Load Export Settings**.

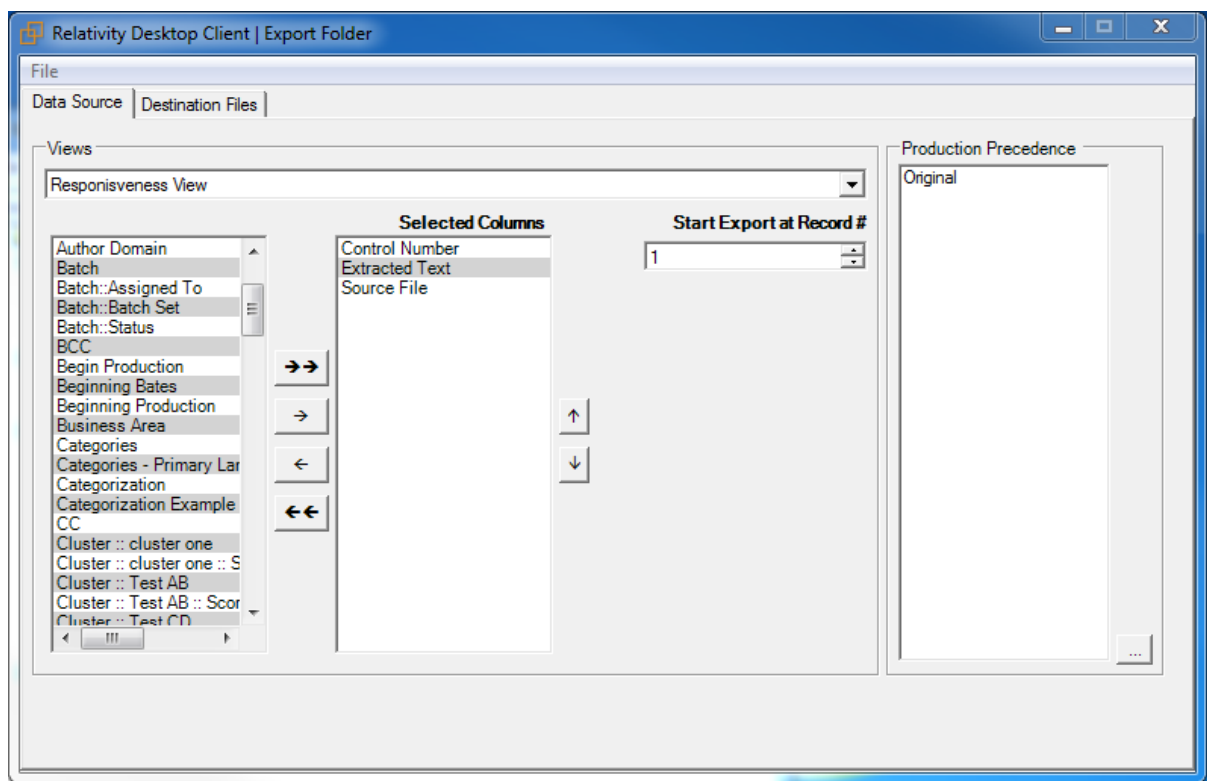


- Browse for your export settings file (.kwx) in the Open dialog.
- Select a view, and click **OK**. Your view is listed on the Data Source tab, and determines the fields listed in the **Selected Columns** box. Other settings from the file are used to populate the Destination Files tab. (You can also modify any settings on the Data Source and Destination Files tab as necessary.)

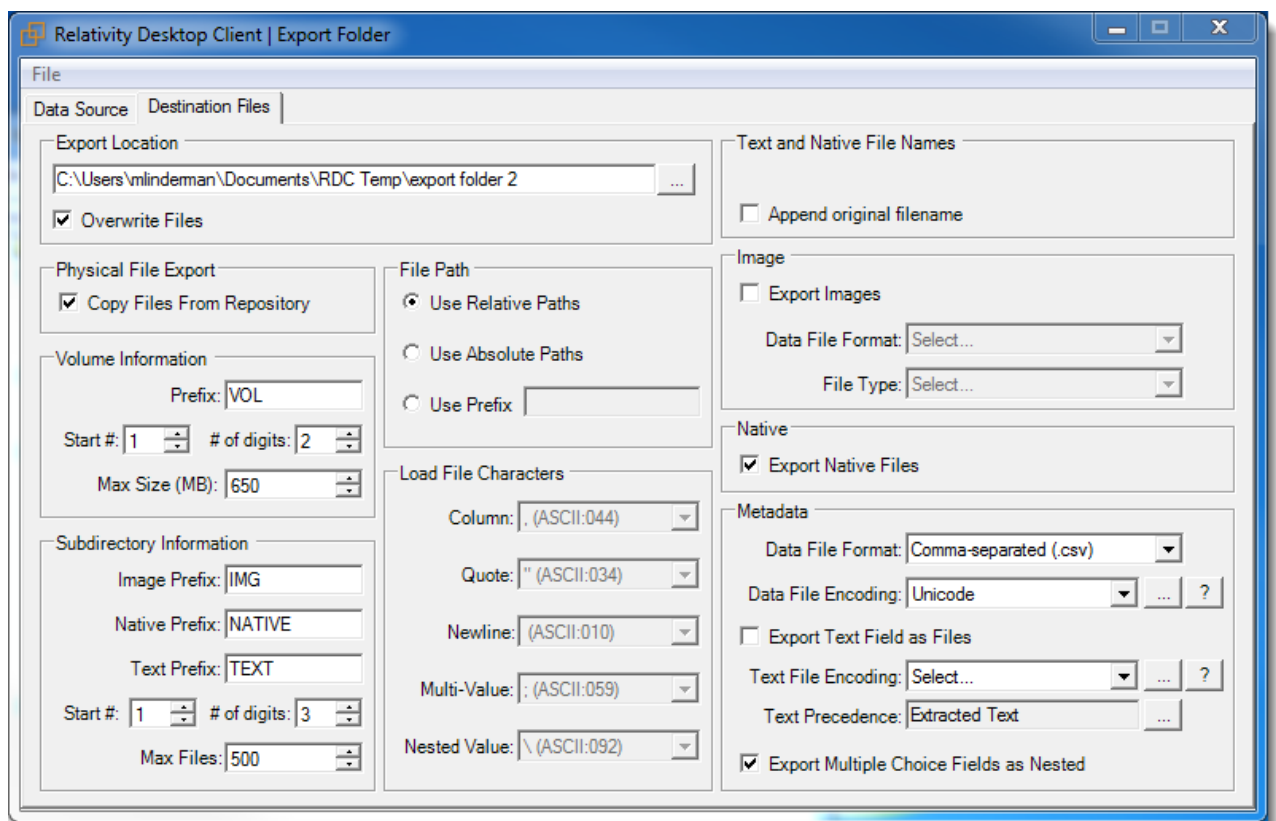
Note: On the Destination Files tab, you may want to select **Overwrite Files** if you are re-exporting the same group of files to the previously used location. See [Export Location](#).



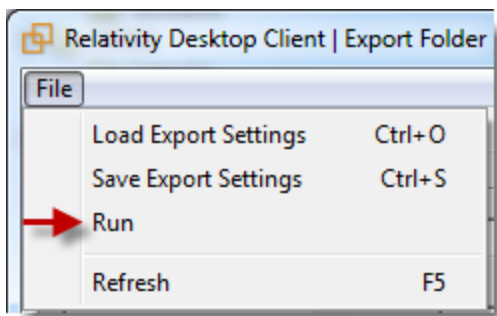
- Continue with step 7.
4. On the Data Source, select a view in the **Views** box. Update the remaining options as necessary. See [Setting options on the Data Source tab](#).



5. Select the Destination Files tab.

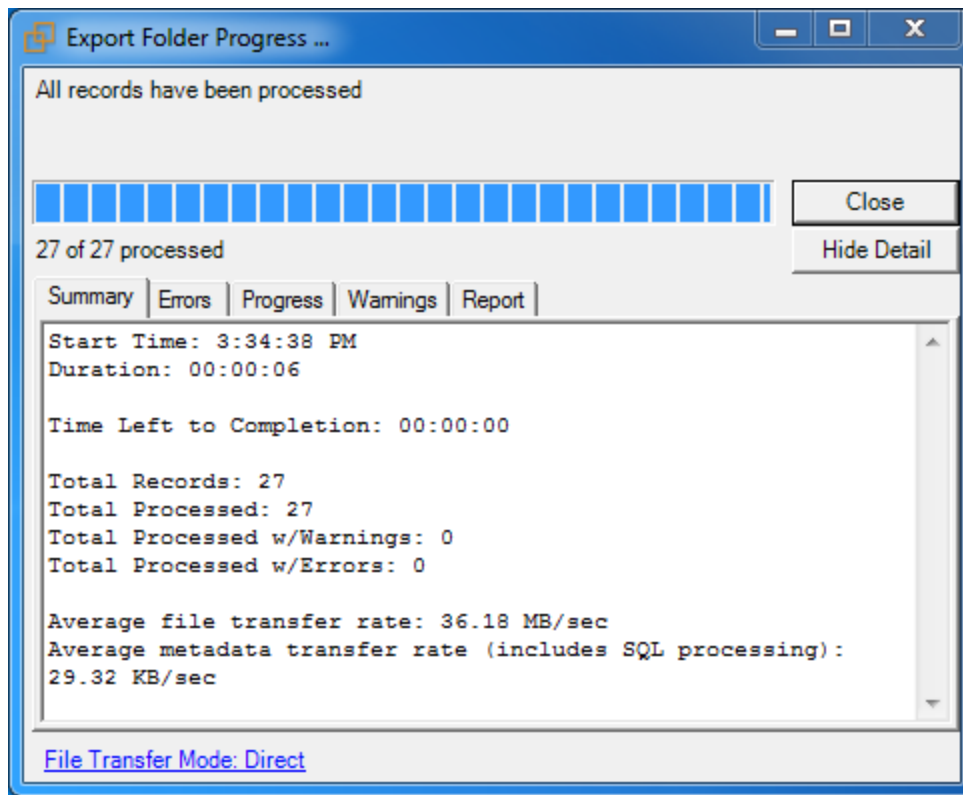


6. Use the information in these topics to set the options available on the tab:
 - Export Location on page 59
 - Physical File Export on page 59
 - Volume Information on page 60
 - Subdirectory Information on page 61
 - File Path on page 62
 - Load File Characters on page 63
 - Text and Native File Names on page 64
 - Image on page 65
 - Native on page 66
 - Metadata on page 67
7. After you have selected your export settings, select **File** and click **Run**.

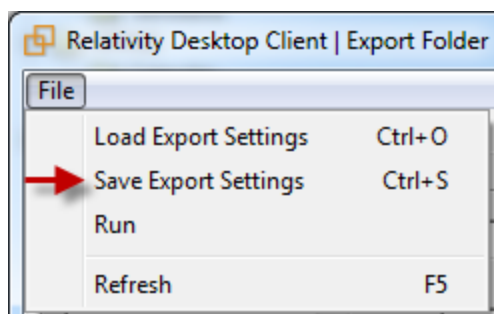


Note: A warning message is displayed if you are missing information required to run the export. Update the settings for the required options, and run the export again.

8. Review the progress of the export. See [Viewing import or export progress in the RDC](#).

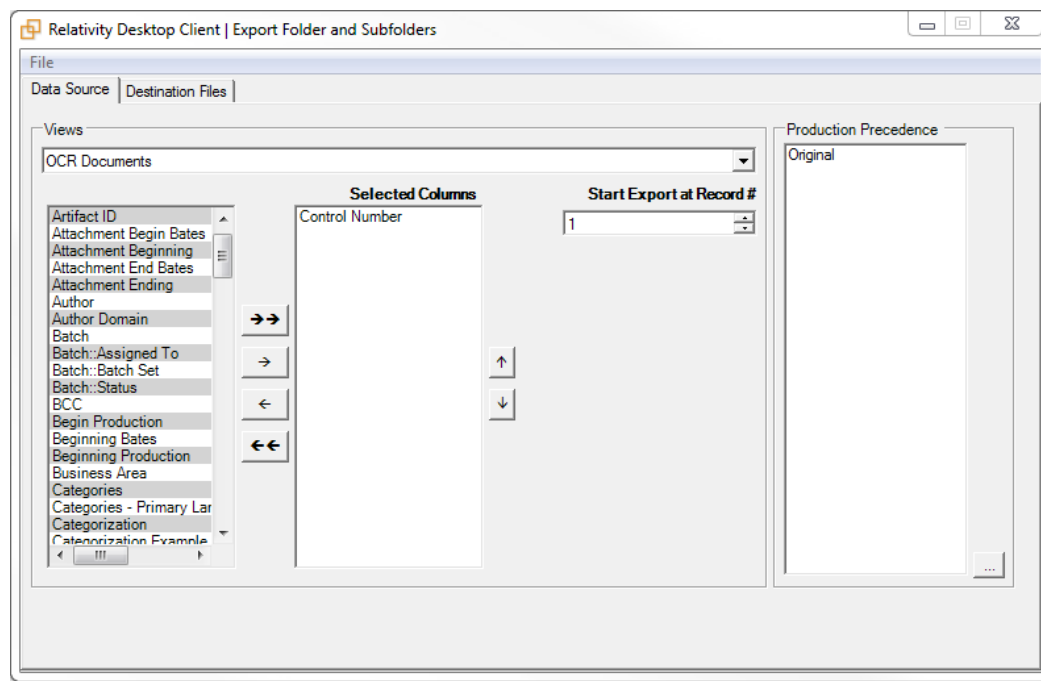


9. (Optional) To save your export settings, point to the **File** menu, and click **Save Export Settings**. Choose a location for the export settings file (.kwx).




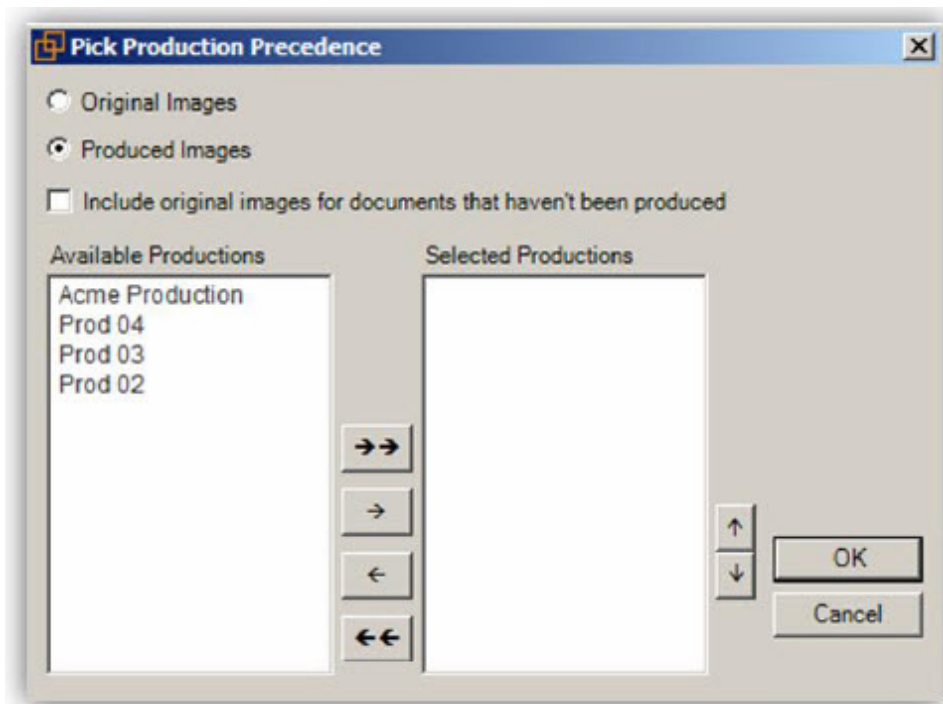
5.5 Setting options on the Data Source tab

The Data Source tab is displayed when you select the option to export production sets, saved searches, folders, and subfolders. You will see similar options on the tab for each of these actions, but you may want to select different settings for them.



On the **Data Source** tab, you can set the following options for the data that you want to export:

- **Views** - select a view for the data that you want to export.
- **Selected Columns** - choose the fields that you want to export by moving them to the **Selected Columns** box. The box on the right displays all available fields, but only those moved to the **Selected Columns** box are exported.
- **Start Export at Record #** select a record number that identifies the initial document for export. The RDC will begin by exporting the document with this record number and continue by exporting documents with subsequent record numbers.
- (Available only for Saved Searches, Folders, and Subfolders) **Production Precedence** - click  to display the Pick Production Precedence dialog box where you can select a group of produced documents for export instead of the original images.



- Select the images that you want to export:
 - **Original Images** - only the original, non-produced images are exported.
 - **Produced Images** - a produced version of the images is exported.
 - **Include original images...** - original images for the documents that are not in a specified production are exported.
- Move the productions that you want to exported to the **Selected Productions** box. To move productions between columns, highlight them and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the precedence of the fields.

Note: Only one version of each document will be produced. If the document is in the topmost production, that version is exported. If not, Relativity checks for the document in the second production and so on. If the document is not a part of any of the selected productions, and **Include original images ...** is enabled, then the original document is produced.

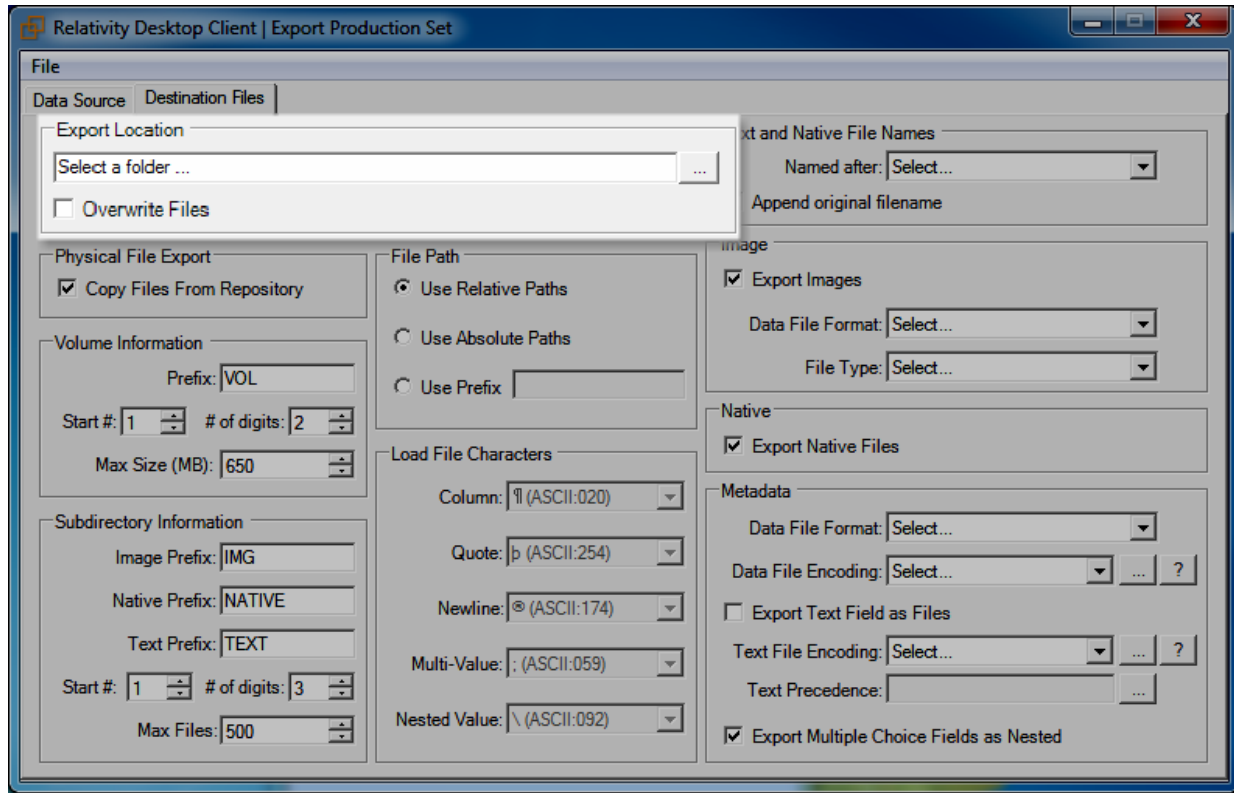
5.6 Settings options on the Destination Files tab

On the **Destination** tab, you can set options that control how the files in folders, searches, and production sets are exported. The Export dialog displays this tab when you select an **Export** option from the **Tools** menu, or when you right-click on a folder or workspace in the RDC. Many of the same options are available for exporting files in folders, searches, and production sets.

Note: In the Text and Native File Name section, the Named after option is available only for Production Sets.

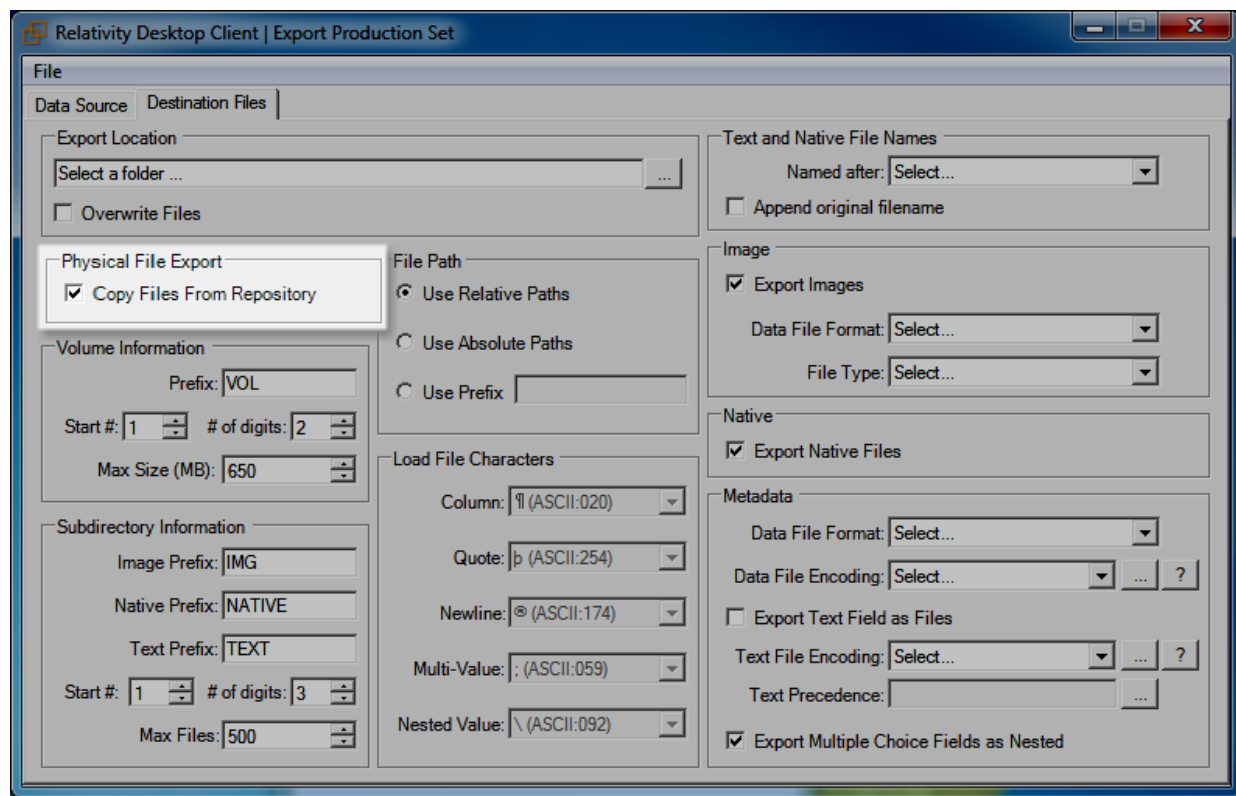
5.6.1 Export Location

In the **Export Location** section, you can select a target directory for exporting folders, searches, and production sets. Click **...** to browse for a location. Select **Overwrite Files** to overwrite any existing files of the same name in the target export directory.



5.6.2 Physical File Export

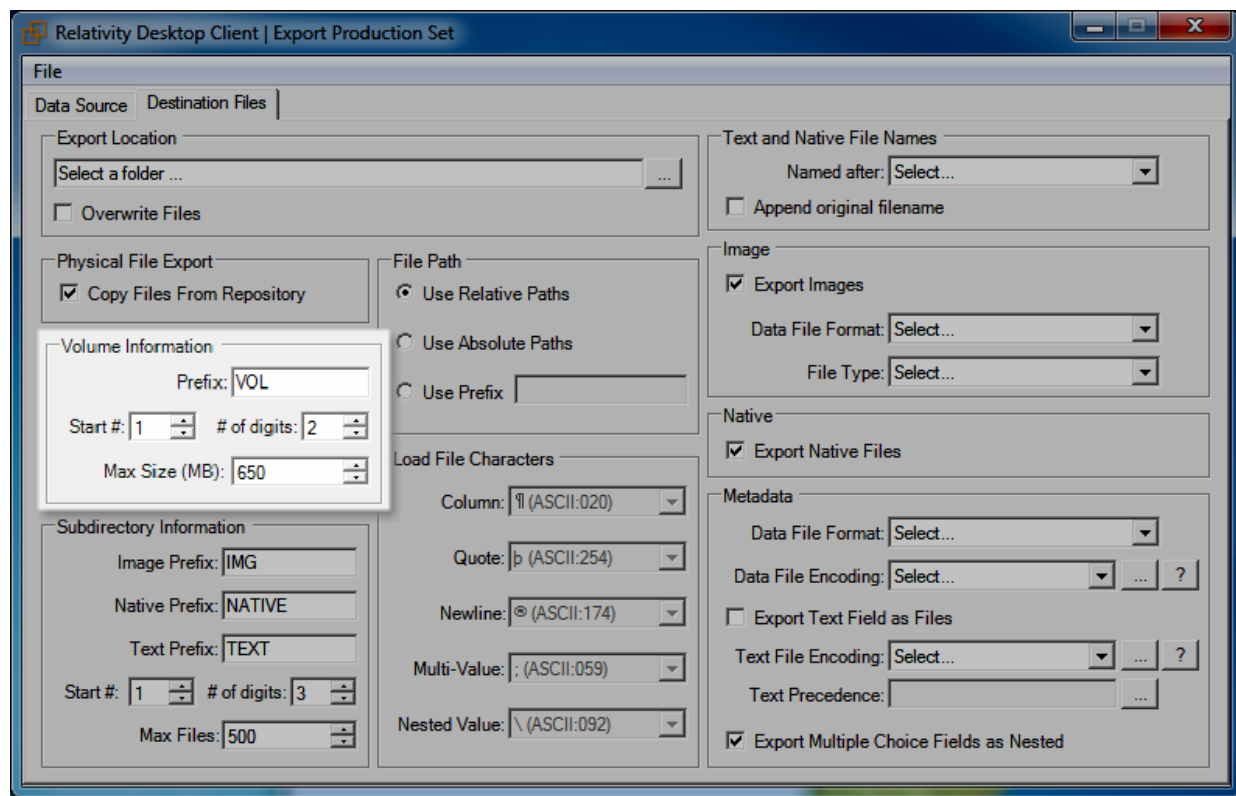
In the **Physical File Export** section, you can select **Copy Files From Repository** option. By default, this option is selected, so files will be copied from the file server to the specified export location.



When the **Copy Files From Repository** option is cleared, the files are not be copied to the export location. Instead, the exported load files reference the repository location of the files.

5.6.3 Volume Information

The options in the **Volume Information** section control the naming and size of the volume identifier.

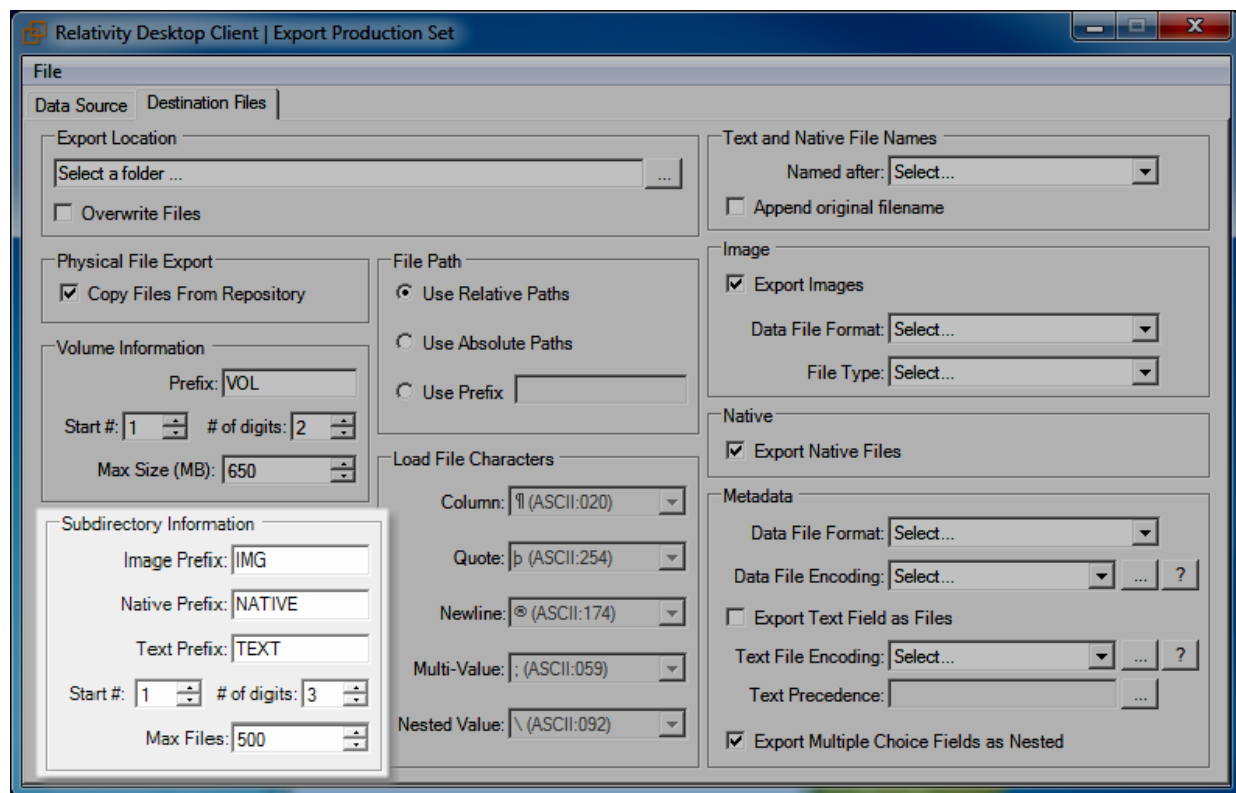


You can set the following options in this section:

- **Prefix** - enter the alpha prefix for the volume identifier.
- **Start #** - select the first number used for the numeric section of the volume identifier. If multiple volumes are created during the export, the number will increment, creating unique volume identifiers.
- **# of Digits** - select the number of digits attached to the prefix. (For example, if you selected 2, the output would be VOL001, VOL002, and so on.)
- **Max size** - select the maximum size allowed for each volume in MBs.

5.6.4 Subdirectory Information

The **Subdirectory Information** controls the naming and size of volume subfolders.

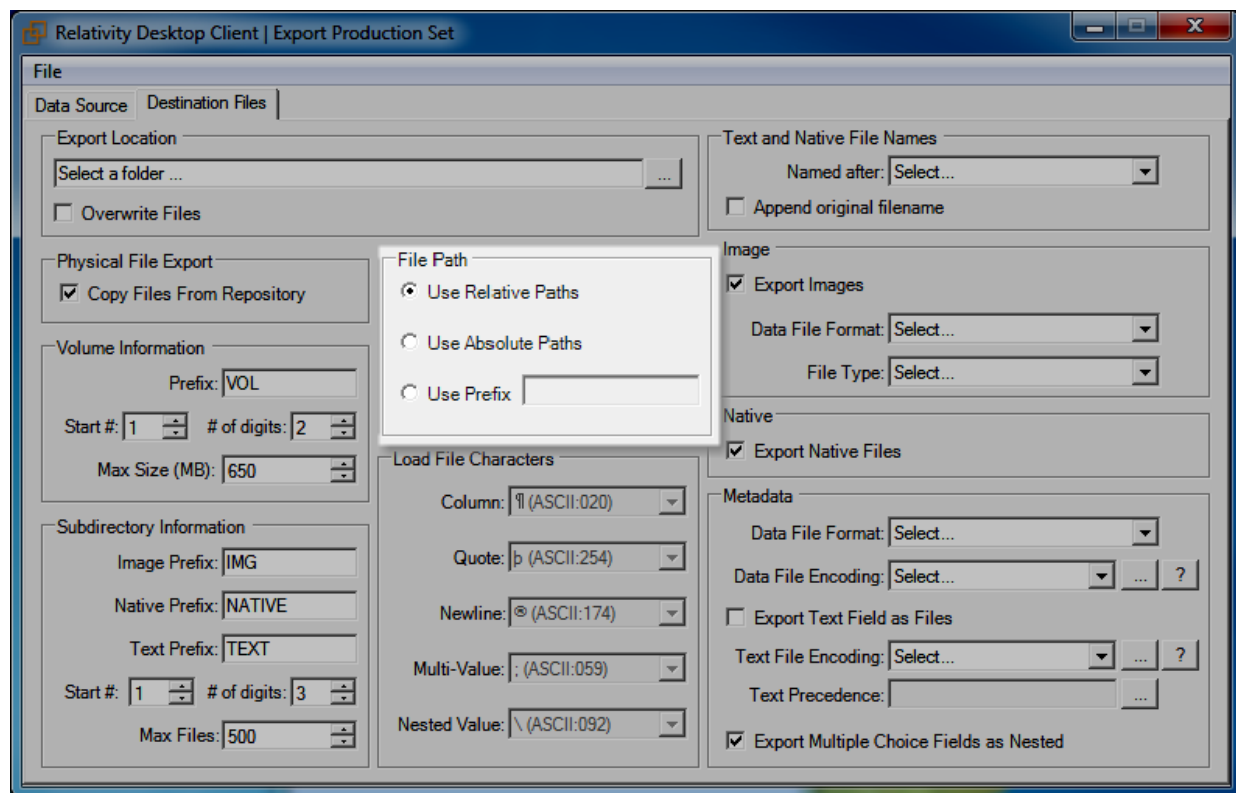


You can set the following options in this section:

- **Image Prefix** - enter the alpha prefix for the subdirectory used to store exported images.
- **Native Prefix** - enter the alpha prefix for the subdirectory used to store exported native files.
- **Text Prefix** - enter the alpha prefix for the subdirectory used to store exported extracted text files.
- **Start #** - select the starting number for the subdirectories.
- **# of Digits** - select the number of digits attached to the subdirectory prefix (For example, if you selected 3, the output would be IMG001, IMG002, and so on.)
- **Max Files** - select the number of files that will be stored in each subdirectory.

5.6.5 File Path

In the File Path section, you can control how the export path for the files is referenced.



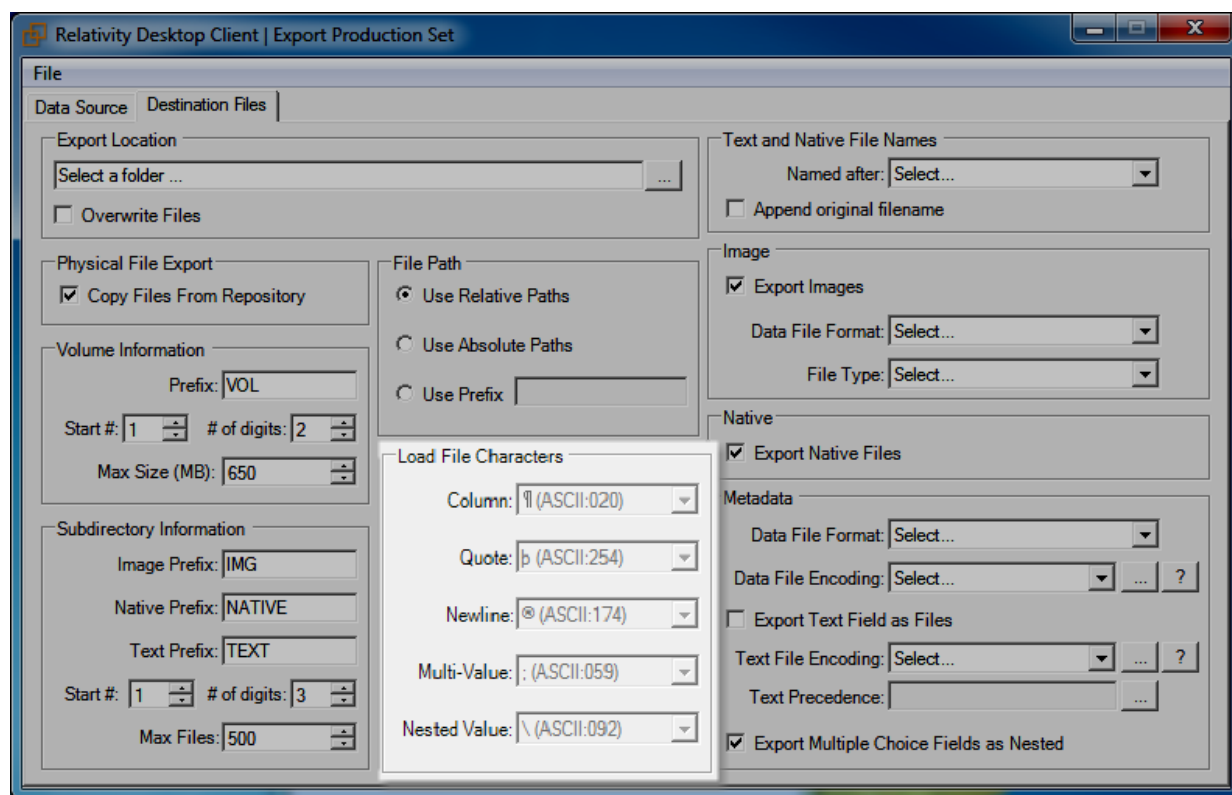
Select one of the following options:

- **Use absolute paths** - paths to exported files are represented as absolute paths.
C:\ Desktop\VOL001\NATIVE001\AS000001.msg
- **Use relative paths** - paths to exported files are represented as relative paths.
.\VOL001\NATIVE001\AS000001.msg
- **Use prefix** - a prefix is added to the relative path, such as a CD drive letter.
D:\VOL001\NATIVE001\AS000001.msg

5.6.6 Load File Characters

In the Load File Characters section, you can select the delimiters that are used in a document-level load file when **Data File Format** in the **Metadata** section is set to **Custom**. Select the following options as necessary:

- **Column** - this delimiter separates columns in the load file.
- **Quote** - this delimiter qualifies the text in each field of the load file.
- **Newline** - this delimiter signifies the end of any extracted text or long text field in the load file.
- **Multi-Value** - this delimiter separates different choices within a choice field.
- **Nested Value** - this delimiter indicates the hierarchy of choices within a choice field.

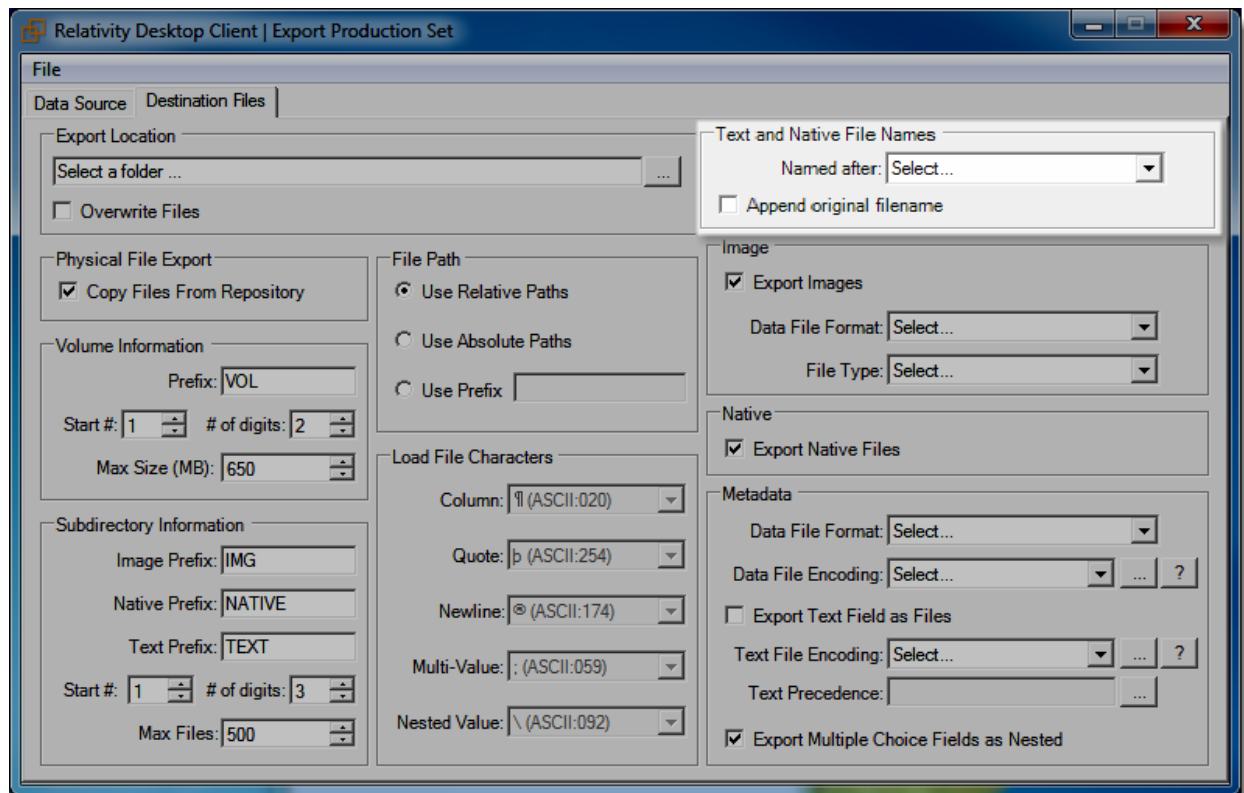


5.6.7 Text and Native File Names

In the Text and Native File Names section, you can select the following options for naming exported native and extracted text files:

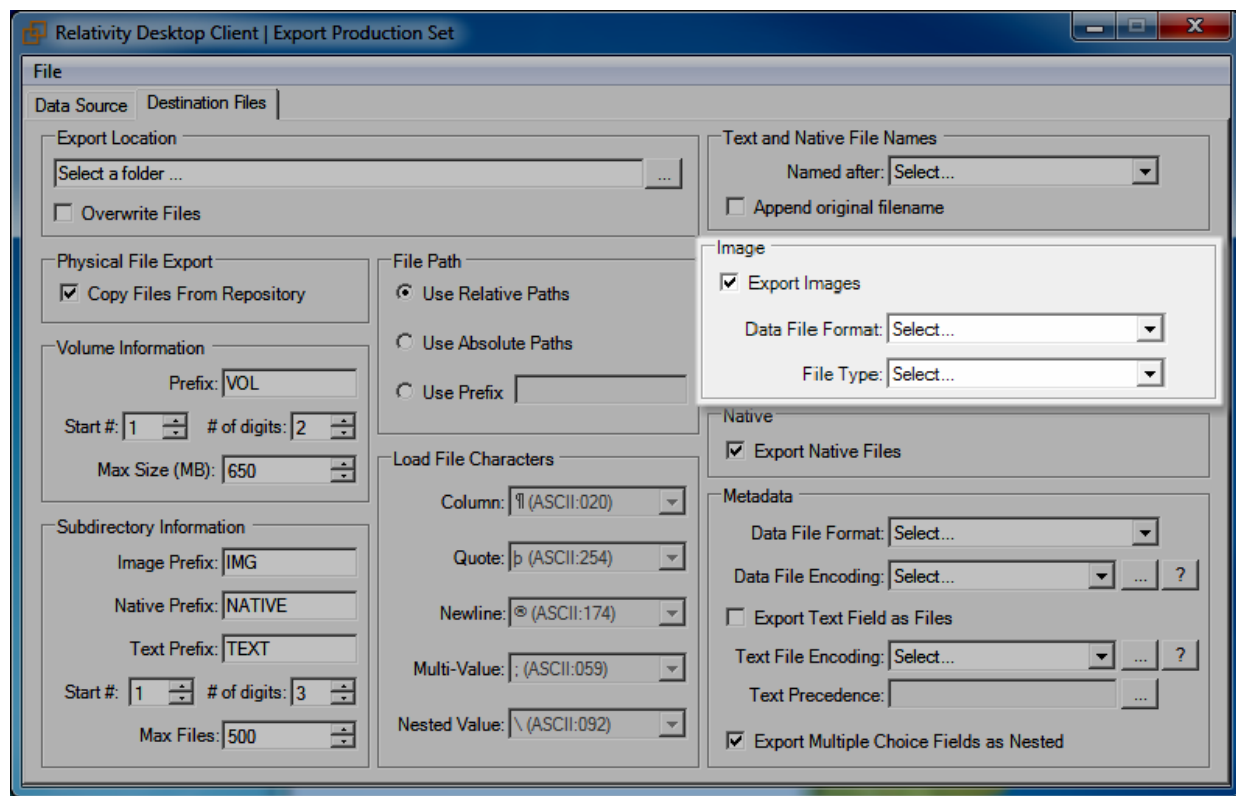
- (Available Only for Production Sets) **Named after** - select one of the following naming convention for exported files:
 - **Identifier** - select this option to name the files after identifier for your workspace.
 - **Beginning production number** - select this option to name the files after the production number. (This number may be the Bates number for a production.)
- **Append original file** - select this option to append the original name of the file to the end of the

exported file name.



5.6.8 Image

In the Image section, you can include images in an export and set the format of the load file.

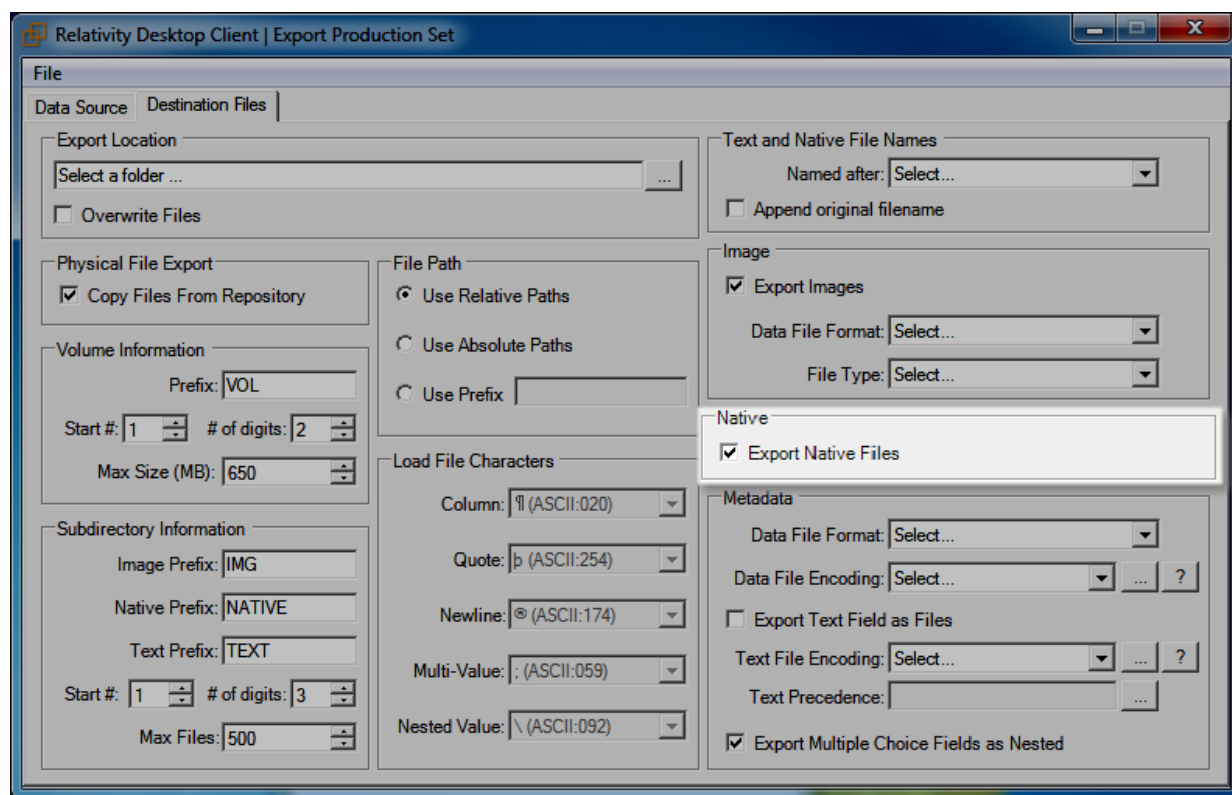


Set the following options:

- **Check Export Images** - select this option to included images in the export. (You must set the **Date File Format** and the **File Type** when images are exported.)
- **Date File Format** - select one of these formats for image-level load file:
 - Opticon
 - IPRO
- **File Type** - select one of these file types:
 - Single-page TIF/JPG
 - Multi-page TIF
 - PDF

5.6.9 Native

In the **Native** section, you can select **Export Native Files** if you want native files exported.

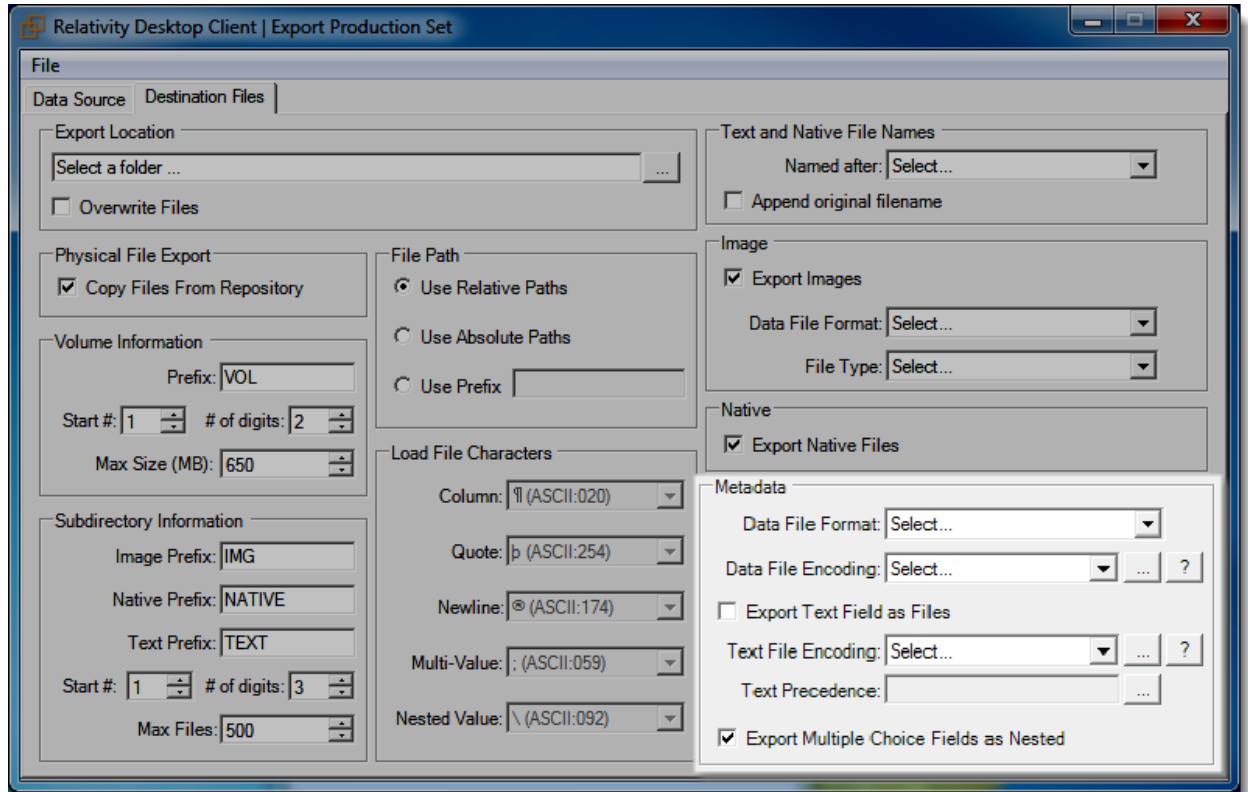





5.6.10 Metadata

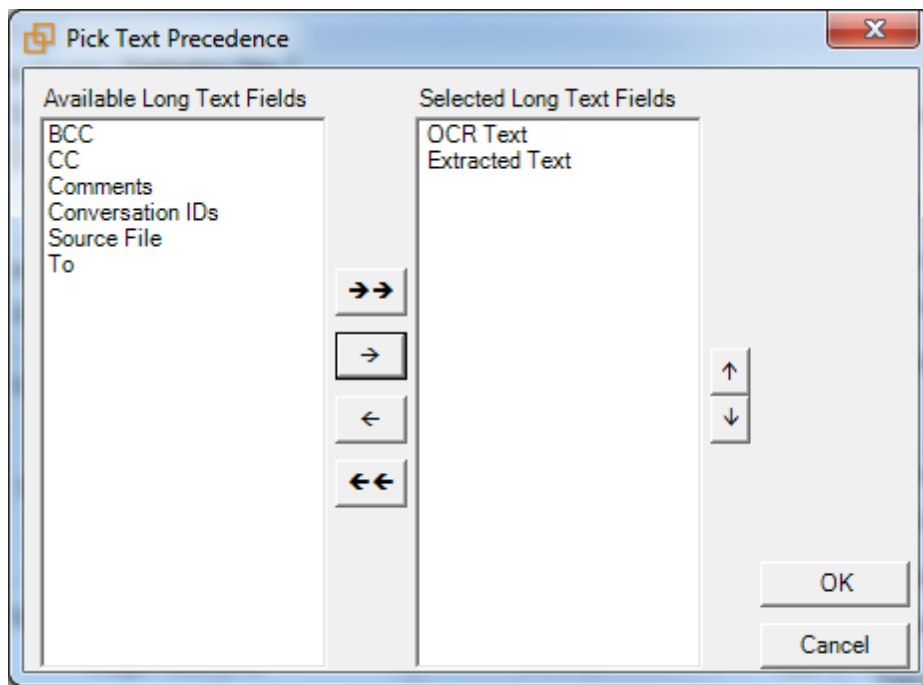
In the **Metadata** section, you can use the following options to control how the document-level load file and extracted text are exported:

- **Data File Format** - select a the format for the document-level load file that is exported:
 - Comma separated (.csv)
 - Tab Delimited (.txt)
 - Concordance - load file is exported with the standard Concordance delimiters.
 - Custom - load file is exported with the custom delimiters that you select in the **Load File Characters** section. See Load File Characters on page 63.

- HTML - load file is in HTML and contains hyperlinks used to launch any exported files.



- **Data File Encoding** - select an encoding for the document-level load file from the drop-down box. Click  for additional options.
- **Export Text Field as Files** - determines how the extracted text or OCR will be exported. Select this option if you want the files exported as individual document-level text files, with one file per document. When this option is cleared, the text is included as part of your load file.
- **Text File Encoding** - select the encoding for the document-level text files. Click  for additional options.
- **Text Precedence** - select and assign an order to long text fields that Relativity will check for text when performing an export. You must select one or more long text fields to use this functionality. Click  to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the **Right** or **Left** single or double arrows. Use the **Up** and **Down** arrows to order the precedence of the fields.



If you added more than one field to the **Selected Long Text Fields** column, Relativity will add the Text Precedence column as the last column in the load file. During an export, Relativity checks the topmost field in the **Selected Long Text Fields** column for text, and if the field is null, it checks the next field in order of precedence for text. When it finds a field that contains text, Relativity adds the contents of that field to the Text Precedence column in the document load file, and then continues checking the fields for the next document.

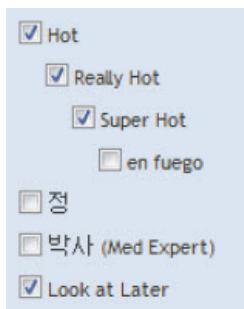
For example, you want the Text Precedence column in the load file to contain the contents of the OCR Text field when it is available for a document and the contents of the Extracted Text field when the OCR Text for a document is null. In the Pick Text Precedence pop-up, you will need to add the OCR Text as the first field in the **Selected Long Text Fields** column followed by the Extracted Text field. If you select only one field in the **Selected Long Text Fields** column, Relativity adds the text to a column with the same name as the field, and does not create the Text Precedence column.

Note: If you want to improve export performance, you do not need to add all of the long text fields that you selected in the Pick Text Precedence pop-up to the Selected Columns option on the Data Source tab. When you do not select these fields on the Data Source tab, but you do add them to **Selected Long Text Fields** column, the content of these fields is added to the Text Precedence column as described above. When you add the long text fields on the Data Source tab, Relativity will also add these columns to the document level load file.

The Precedence Text column will display the file path to the exported files if you selected the **Export Text Field as Files** checkbox.

- **Export Multiple-Choice Fields as Nested** - select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. Child choices are separated by the nested value delimiter, which is a backslash by default.

For example, a document tagged with the following issue field values will display as “Hot\Really Hot\Super Hot; Look at Later.”



6 Configuring the RDC

You can fine-tune the performance of the RDC in your environment by adjusting the configuration settings that control these features:

- **Batch Handling:** You have the option to set several configuration settings that control how the RDC uses batches to load records in the database. Large batch sizes may cause timeouts to occur during the loading process because Relativity initially attempts to load all documents or images in these batches. By default, the RDC uses dynamic batch resizing when a timeout occurs to automatically lower the size of the batch and retry the import. The RDC reduces the batch size by 100 until it determines the optimum number of records for import. It can also reduce the number of records when the data size (in bytes) for the batch approaches the value set for the ImportBatchMaxVolume. See Configuring batch handling settings on page 71.
- **Validation and Auditing:** You have the option to add configuration settings that control whether the RDC performs validation for native and image file types, as well as native and image file locations for all import jobs. You can also set the level of detail that you want captured in the audit log for all import jobs. These settings must be manually added to the configuration file. See Configuring validation and auditing configuration settings on page 72.

6.1 Configuring batch handling settings

Use these instructions to set custom configuration setting for batch handling in your RDC configuration file:

1. Exit the RDC if it is currently open.
2. Navigate to the **kCura.EDDS.Winform.exe.config** file on the machine where the RDC is installed. By default, this configuration file is located in the following directory:

[Installation_Directory]\kCura Corporation\Relativity Desktop Client

Note: Make a backup copy of this file in case you need to rollback any configuration changes made to it.

3. Open the **kCura.EDDS.Winform.exe.config** file in a text or XML editor.
4. Delete the opening comment tag `<!--` displayed before the tag `<kCura.WinEDDS>`, and the closing tag `-->` displayed after the tag `</kCura.WinEDDS>`.

`<!-- <-- Delete comment tag`

`<kCura.WinEDDS>`

`<add key="ImportBatchMaxVolume" value="10485760" />`

`<add key="ImportBatchSize" value="1000" />`

`<add key="ExportBatchSize" value="1000" />`

`<add key="DynamicBatchResizingOn" value="True" />`

`<add key="MinimumBatchSize" value="100" />`

`<add key="WaitTimeBetweenRetryAttempts" value="30" />`

`<add key="CreateErrorForEmptyNativeFile" value="False" />`

```
</kCura.WinEDDS>
```

```
--> <!-- Delete comment tag
```

5. Edit the attribute values as necessary. Modify only the values in the previous code sample.

- **ImportBatchMaxVolume:** This value represents the maximum data size (in bytes) for a batch. When the data size approaches this value, the RDC reduces the batch size by 100 using dynamic batch resizing. The default value is 10485760 bytes (or 10 MB).
- **ImportBatchSize:** This value represents the initial number of records in an import batch. If dynamic batch resizing is enabled, this value may be reset for a job to accommodate the number of records or the size of the data. The default value is 1000 records.
- **ExportBatchSize:** This value represents the number of records in an export batch. The default value is 1000 records.
- **DynamicBatchResizingOn:** When default value of **True** is set, the RDC will automatically use dynamic batch resizing to decrease the batch size by 100 records and retry the import job. When the value is set to **False**, the RDC will timeout when the import job is too large to complete.
- **MinimumBatchSize:** When **DynamicBatchResizingOn** is set to **True**, this value represents lower bound on the batch size. Batch sizes cannot be smaller than this value. The default value is 100 records.
- **WaitTimeBetweenRetryAttempts:** This value represents the time interval in seconds between import attempts made by the RDC. The default value is 30 seconds.
- **CreateErrorForEmptyNativeFile:** When the default value of **False** is set, the RDC imports only the metadata for the record associated with an empty file (of 0 KB), and it displays a message on the Warning tab. When this value is set to **True**, the RDC does not import the metadata for the empty file, and the Error tab displays a message.

Note: The RDC does not import empty files. This configuration value controls only the import of metadata, and where information about an empty file is displayed.

6. Save your changes to the file. You can now log in to the RDC.

6.2 Configuring validation and auditing configuration settings

Use these instructions to customize the configuration settings for native and image validation, as well as audit level.

Before disabling validation, you may want to confirm that your files are all supported types and that the native file paths in the load files are correct. Otherwise, you may encounter the following issues:

- When file type validation is disabled, you will not receive any warns about unsupported file types, so these files may be imaged and result in errors. Disabled file type validation also causes the application to set the Relativity Native Types field to “Unknown Format”.
- When file location validation is disabled, the RDC may temporarily stop and then restart if the load file lists paths that do not contain files. Similarly, the RDC will stop when the load file does not include a path for a native file, but it will load any files prior to encountering this issue.

Complete these steps to configure file validation and auditing:

1. Exit the RDC if it is currently open.
2. Navigate to the **kCura.EDDS.Winform.exe.config** file on the machine where the RDC is installed. By default, this configuration file is located in the following directory:
[Installation_Directory]\kCura Corporation\Relativity Desktop Client

Note: Make a backup copy of this file in case you need to rollback any configuration changes made to it.

3. Open the **kCura.EDDS.Winform.exe.config** file in a text or XML editor.
4. Delete the opening comment tag
<! -- displayed before the tag <kCura.WinEDDS>, and the closing tag --> displayed after the tag </kCura.-WinEDDS>.
5. To disable the validation of native file types for the all jobs, add the following setting between the <kCura.WinEDDS>...</kCura.WinEDDS> tags:

```
<add key="DisableNativeValidation" value="True" />
```
6. To disable the validation of the native file locations for the all jobs, add the following setting between the <kCura.WinEDDS>...</kCura.WinEDDS> tags:

```
<add key="DisableNativeLocationValidation" value="True" />
```
7. To disable the validation of image file types for the all jobs, add the following setting between the <kCura.WinEDDS>...</kCura.WinEDDS> tags:

```
<add key="DisableImageTypeValidation" value="True" />
```
8. To disable the validation of the image file locations for the all jobs, add the following setting between the <kCura.WinEDDS>...</kCura.WinEDDS> tags:

```
<add key="DisableImageLocationValidation" value="True" />
```

Note: To enable validation, you can set any of the values in Steps 5- 8 to False.

9. To disable auditing, add the following setting between the <kCura.WinEDDS>...</kCura.WinEDDS> tags:

```
<add key="AuditLevel" value="NoAudit" />
```

You can set audit level to any of the following values:

- **FullAudit:** Includes create, update, and delete messages. Snapshot is also enabled so all current field values (Audit Details) are captured for updates. This is the default setting.
 - **NoSnapshot:** Includes create, update, and delete messages. Snapshot is disabled so current field values (Audit Details) are not captured for updates.
 - **NoAudit:** Auditing is disabled.
10. Save your changes to the file. You can now log in to the RDC.

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