

Mattricity File Share Importer



User Guide

Version 1.0.3

iManage Work — Cloud and On-Premises

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1. Overview

The Mattricity File Share Importer is a Windows desktop application that bulk-imports documents from Windows file shares into iManage Work. It supports both cloud and on-premises iManage deployments.

The application was designed to handle common errors that can cause migrations to fail, such as missing users, classes, custom values and workspaces, but is not intended to replace utilities such as Metadata Loader and Workspace Generator. Its intention is to reduce the number of errors incurred commonly during migrations, allowing the users to optionally select to automatically generate missing values. All auto-generated values are logged and can be queried later for updates.

Other enhancements have been included in this application, such as support for long file paths greater than 260 characters, files larger than 2 GBs, ability to review grouped data for typos and make corrections on the fly prior to the actual migration. Support for referenced document numbers and versions as well as auto-assignment of these values is also included.

The application uses a SQL staging database to buffer and validate import, and can also be customized to use existing SQL environments.

Lastly, the application theme will be consistent with the desktop's theme it is running on. If the theme is in Light Mode, the application will also appear in Light Mode. For those who prefer Dark Mode, the application will appear in Dark Mode. This is a key feature that is often missed by other applications.

Key Features

- Bulk import from Windows file shares into iManage Work.
- Supports cloud and on-premises iManage deployments.
- SQL staging database with full audit trail.
- Pre-flight value approval — correct typos and skip unwanted values before import.
- Optional auto-generation of missing workspaces, users, custom values, and classes.
- Long path support (paths exceeding 260 characters).
- Support for files larger than 2 GBs.
- Multiple import file formats: pipe, comma, tab, semicolon, and tilde delimited.
- Header row auto-detection when column names match (see [Field Name Conventions](#)), and reusable mapping files.
- Delta migration support — each run is independently tracked by run ID. Overwrite support for updated documents (import as a separate run).
- Dates are formatted in ISO 8601 format (T and Z) regardless of datetime format in import file.
- Light and Dark modes based on Windows theme supported.

Migration Phases

The application is designed for phased migrations:

- Baseline — initial full migration of all documents
- Interim — incremental migrations of documents added since baseline
- Final — last migration before cutover to iManage

Each phase is a separate import run with its own unique run ID, preserving the complete history of all migration phases in the SQL staging database.

2. System Requirements

Requirement	Specification
Operating System	Windows 10 or Windows 11 (64-bit)
Processor	64-bit processor
Memory	4 GB RAM minimum, 8 GB recommended for large migrations
Disk Space	500 MB for application; additional space for log files
Network	Network access to iManage Work server (cloud or on-premises)
Permissions	Administrator rights required for installation
SQL Server LocalDB	Included in the installer — no separate download required

Note: The .NET 8 runtime is embedded in the application executable. No separate .NET installation is required.

3. Installation

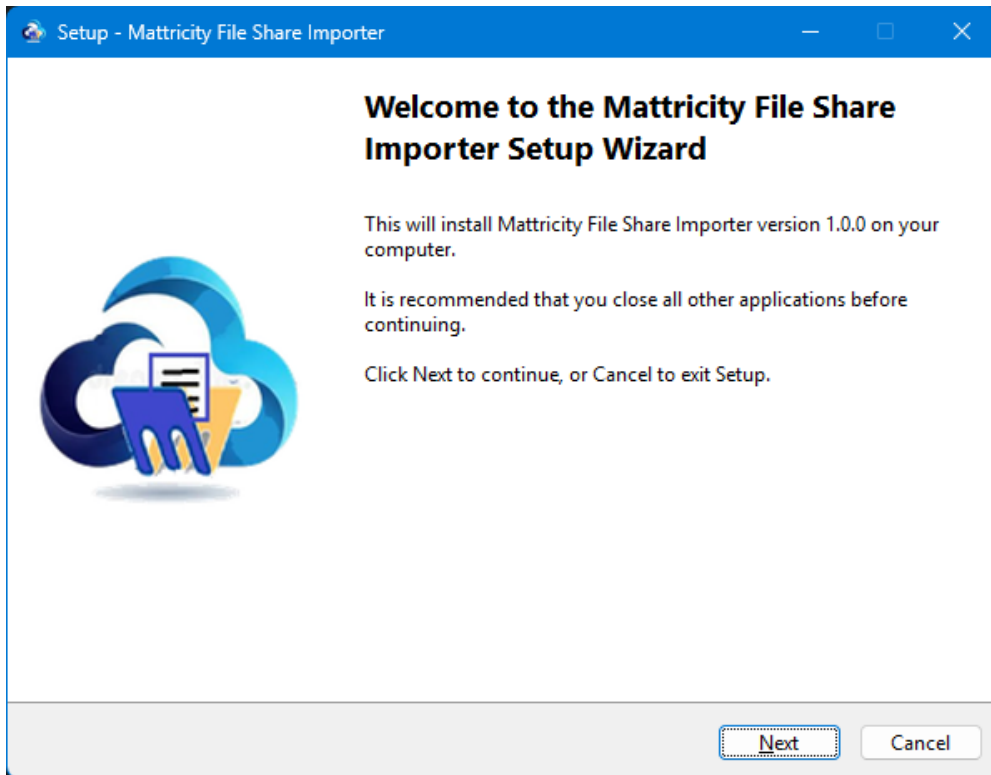
Standard Installation

Run the installer file:

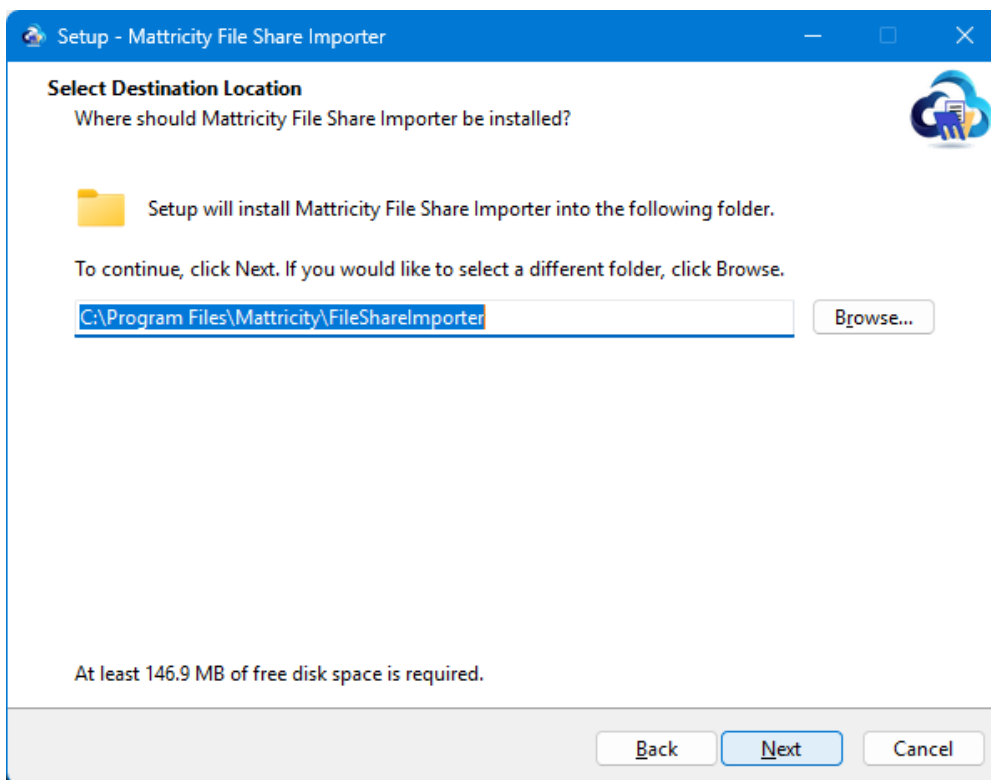
MatricityFileShareImporter_Setup_1.0.3.exe

The setup wizard will guide you through the following steps:

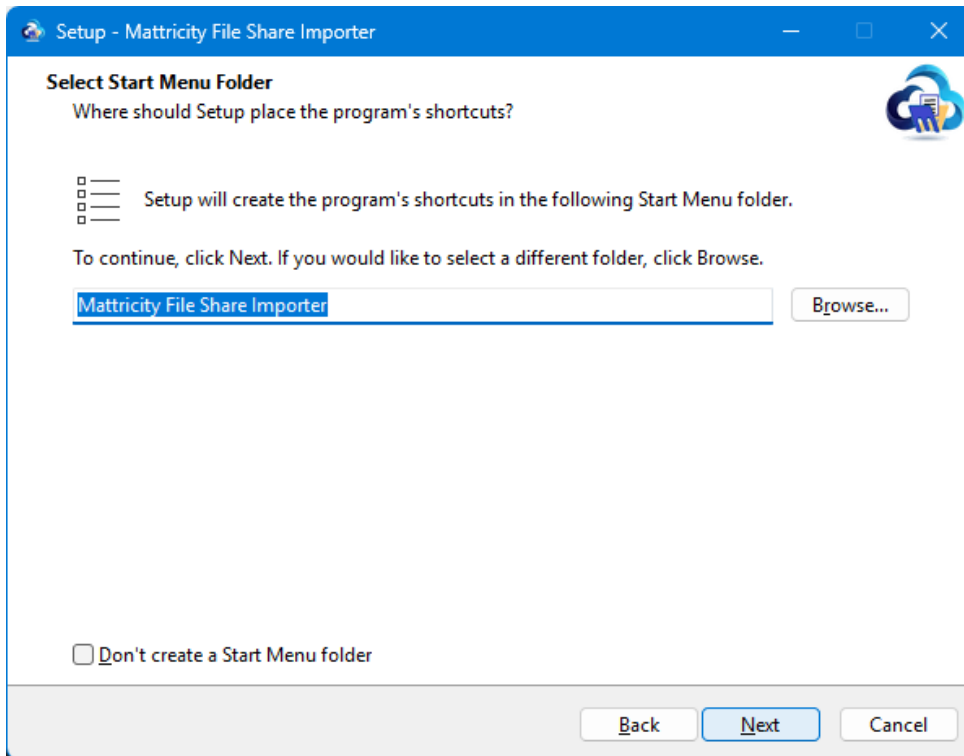
- Welcome screen



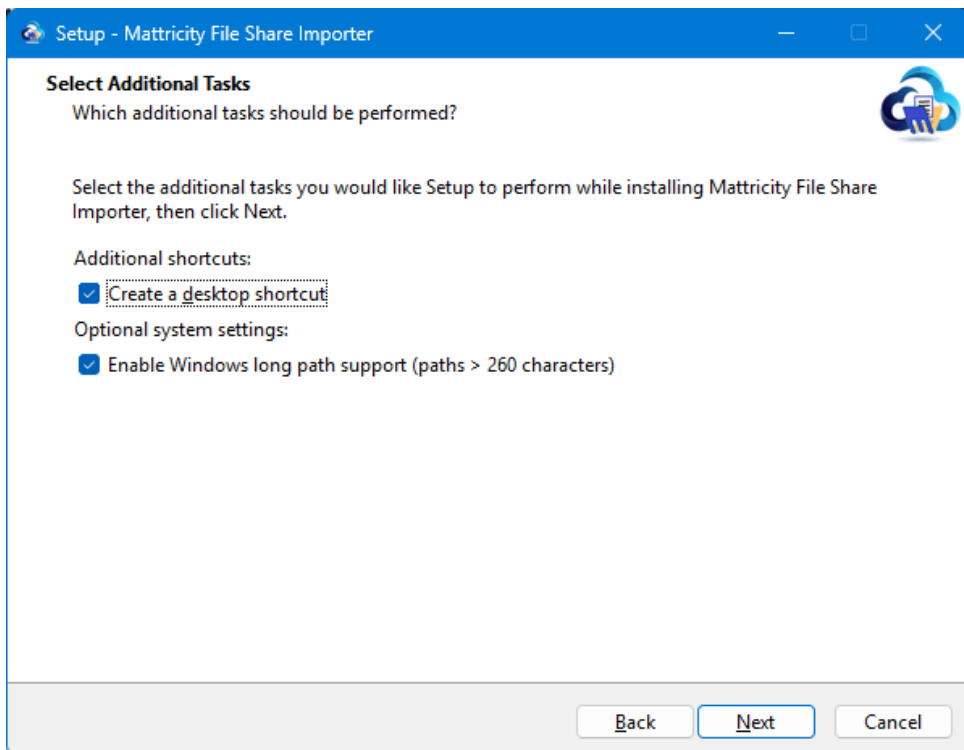
- Select destination folder (default: C:\Program Files\Mattricity\FileShareImporter)



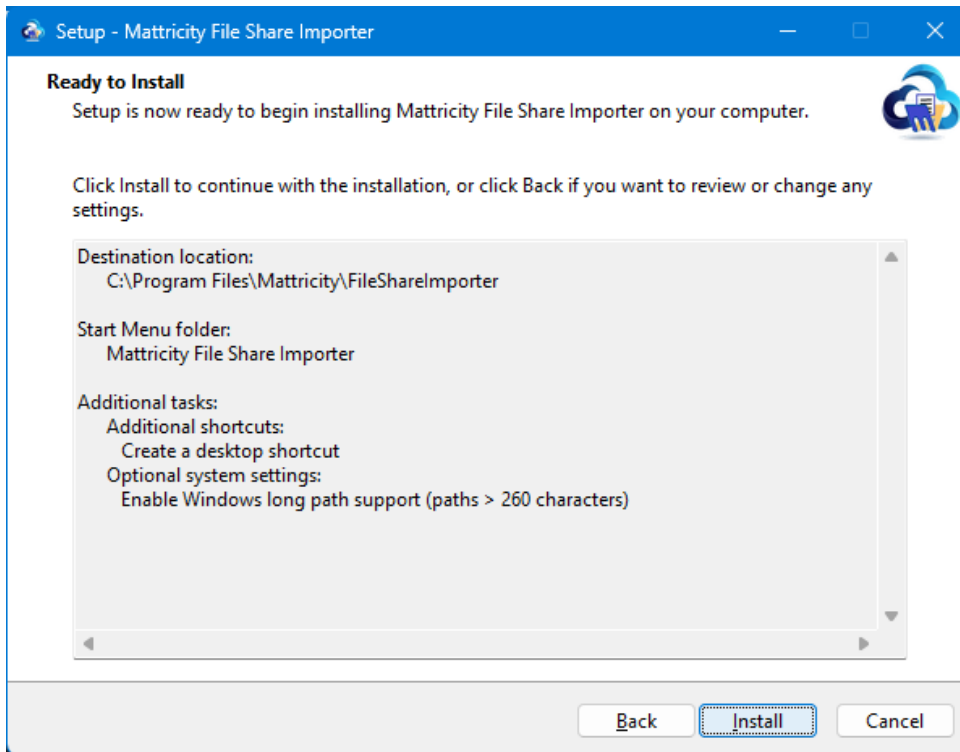
- Select Start Menu folder



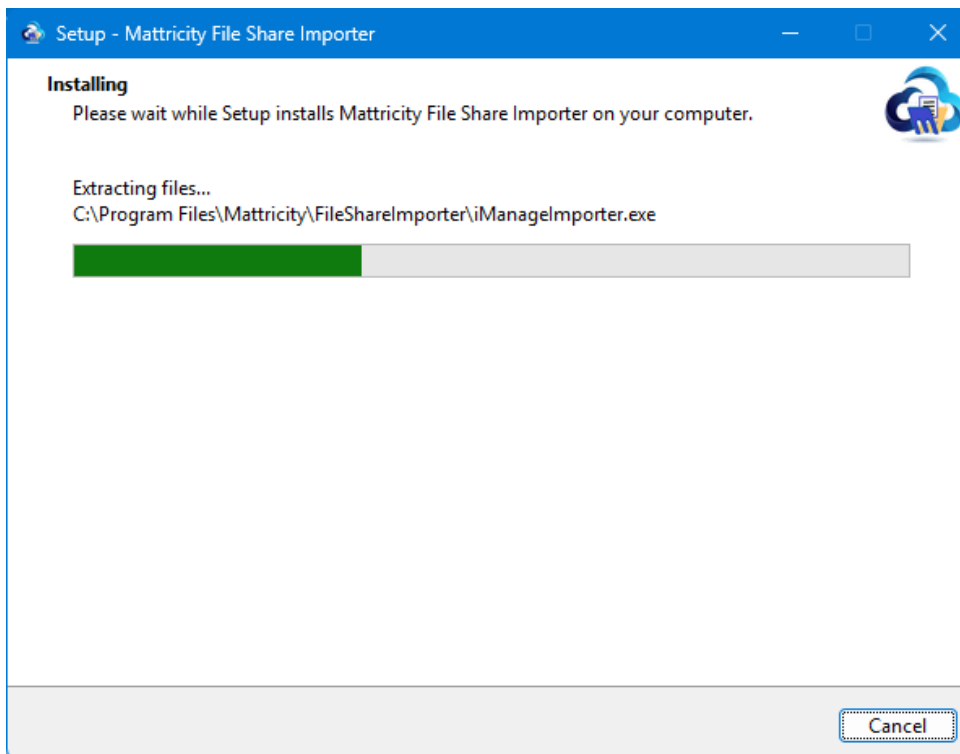
- Optional: Create desktop shortcut and enable Windows long path support



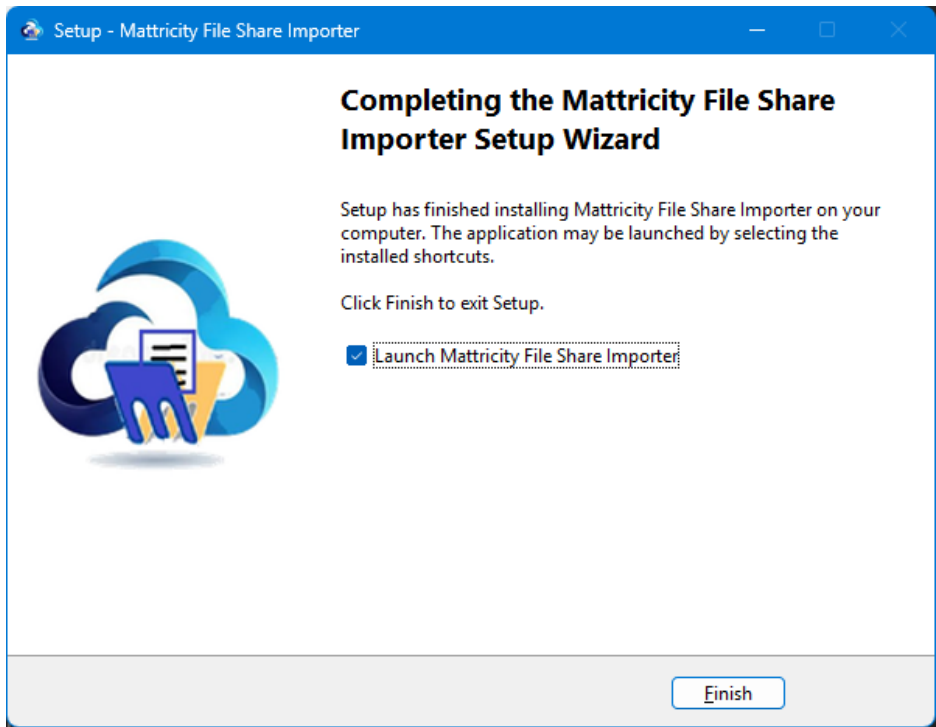
- Installation — SQL Server LocalDB 2022 is installed automatically if not already present



- Click Next to complete the installation



- Finish — optionally launch the application



Silent Installation

For unattended or scripted deployments, the following command-line parameters are supported:

Parameter	Description
/SILENT	Shows progress window but no wizard pages
/VERYSILENT	Completely silent — no UI displayed
/DIR="C:\Custom\Path"	Override the installation directory
/NOICONS	Skip Start Menu shortcut creation
/TASKS="desktopicon"	Create desktop shortcut
/TASKS="longpaths"	Enable Windows long path support (> 260 characters)

Example: `MattricityFileShareImporter_Setup_1.0.3.exe /VERYSILENT /TASKS="desktopicon,longpaths"`

SQL Server Configuration

By default, the application uses SQL Server LocalDB, which is installed automatically. To use a dedicated SQL Server Express or full SQL Server instance, edit the configuration file located in the installation folder:

`iManagelImporter.config.json`

Set the `ConnectionString` value:

```
{ "ConnectionString":  
  "Server=SQLSVR01;Database=IMANIMPORT;Trusted_Connection=TRUE;TrustServerCertificate=True;" }
```

Note: Leave ConnectionString blank or empty to use the LocalDB default.

Long Path Support

For file share migrations involving paths longer than 260 characters, enable Windows long path support. This can be done during installation by selecting the optional task, or manually via Registry:

HKLM\SYSTEM\CurrentControlSet\Control\FileSystem → LongPathsEnabled = 1

4. Licensing

The Mattricity File Share Importer is licensed per engagement with a time-limited license embedded in the application.

- The license expiry date is displayed in the application title bar at all times
- 30 days before expiry a warning dialog appears on launch — the application continues to function normally
- On or after the expiry date the application will not launch
- The application may be installed on multiple machines — there is no machine-specific restriction
- Multiple simultaneous instances on the same or different machines are supported

To renew your license, contact Mattricity:

- Email: cdejesus@mattricity.com
- Web: www.mattricity.com

5. Quick Start

The following steps describe a complete import from a Windows file share into iManage Work.

Step 1 — Pre-Migration Tasks

Metadata Loader

Import custom all custom values, classes and any other metadata. Be sure users are also created in Control Center. File types will be added automatically by iManage.

Cloud Workspace Generator

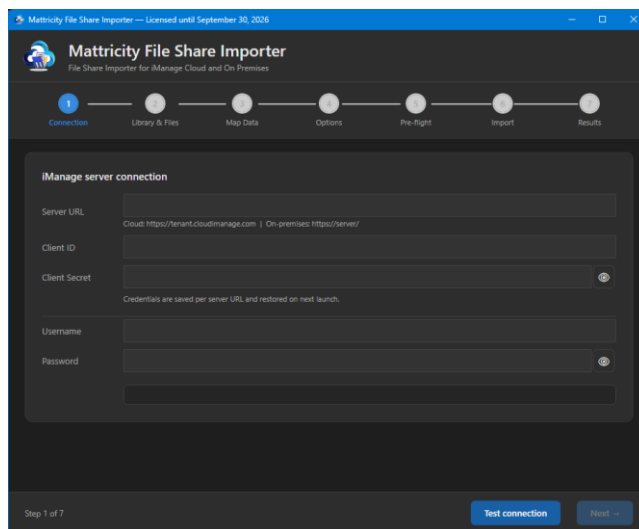
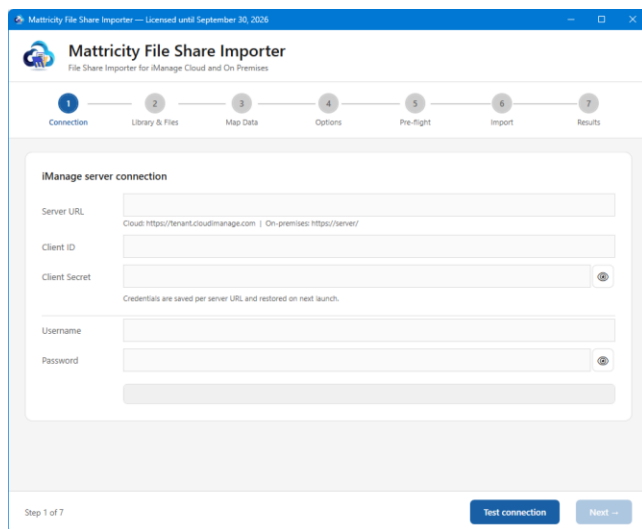
Generate all workspaces prior to migration. Although the Mattricity File Share Importer can automatically generate custom values and workspaces, they will not have the desired descriptions nor naming conventions. The auto-generation option is to ensure migration success, but not intended as a replacement for either Metadata Loader nor Workspace Generator.

Prepare Import File and Map data

Create a delimited text file with one document per row. The file may include a header row with column names matching the field naming conventions described in Field Naming Conventions. Supported delimiters: pipe (|), comma (,), tab, semicolon (;), tilde (~). Please contact us to provide a powershell script that ensures long paths are not excluded in the file share scan.

Step 2 — Launch the Application

Launch the Mattricity File Share Importer from the Start Menu or desktop shortcut. The 7-step wizard is displayed.



Step 3 — Connect to iManage (Page 1)

Enter the iManage server URL, Client ID, Client Secret, username, and password.

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Mattricity File Share Importer

File Share Importer for iManage Cloud and On Premises

1
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7

Connection
Library & Files
Map Data
Options
Pre-flight
Import
Results

iManage server connection

Server URL

Cloud: <https://tenant.cloudimanager.com> | On-premises: <https://server/>

Client ID

Client Secret

Credentials are saved per server URL and restored on next launch.

Username

Password

Step 1 of 7

Test connection
Next →

Click Test Connection to verify. Credentials are saved per server URL and restored on next launch. If the credentials fail (Server URL, client id/client secret, user login and/or password), the “Test Connection” will turn red and indicate a connection failure.

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Matricity File Share Importer

File Share Importer for iManage Cloud and On Premises

1

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Connection

Library & Files

Map Data

Options

Pre-flight

Import

Results

iManage server connection

Server URL

Cloud: https://tenant.cloudimanager.com | On-premises: https://server/

Client ID

Client Secret



Credentials are saved per server URL and restored on next launch.

Username

Cloud requires an email address (e.g. user@domain.com)

Password



Step 1 of 7

X Failed

Next →

Correct the credentials and try again. Once accepted, you will be Connected. Click Next to proceed.

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Mattricity File Share Importer
File Share Importer for iManage Cloud and On Premises

Progress: 1 Connection, 2 Library & Files, 3 Map Data, 4 Options, 5 Pre-flight, 6 Import, 7 Results

iManage server connection

Server URL:
Cloud: https://tenant.cloudimanager.com | On-premises: https://server/

Client ID:

Client Secret:

Credentials are saved per server URL and restored on next launch.

Username:
Cloud requires an email address (e.g. user@domain.com)

Password:

Step 1 of 7 ✓ Connected Next →

Step 4 — Select Library and File (Page 2)

Select the target iManage library from the dropdown. Browse to the import file and select the delimiter.

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Mattricity File Share Importer
File Share Importer for iManage Cloud and On Premises

Progress: 1 Connection, 2 Library & Files, 3 Map Data, 4 Options, 5 Pre-flight, 6 Import, 7 Results

Library, import file & repository

Library:

Import file: Browse...

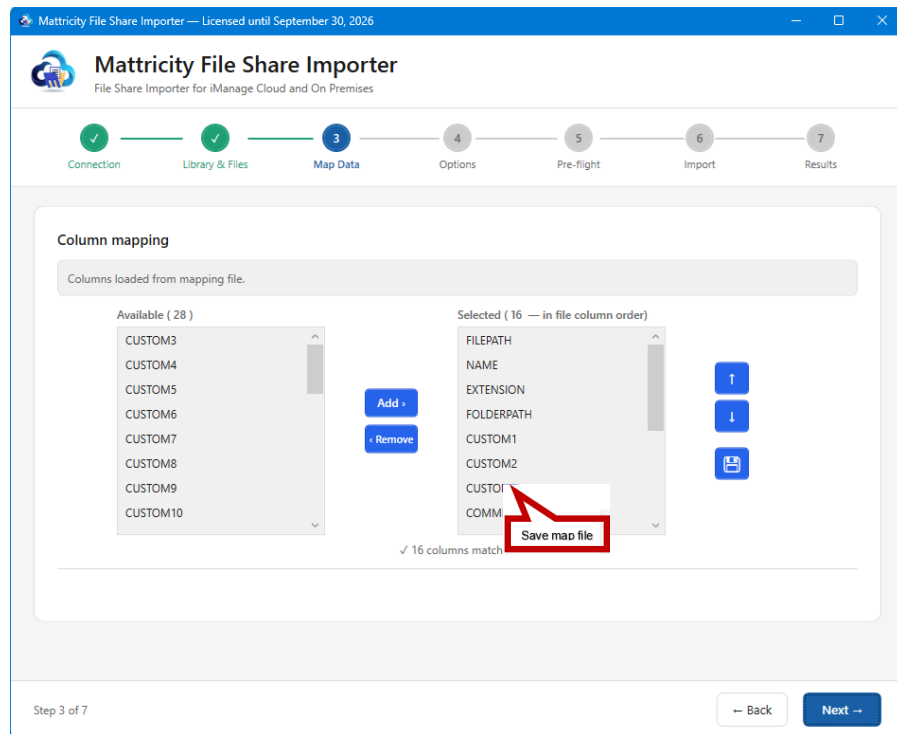
Delimiter:
No recognised header row — columns will be mapped by position on the next page

Mapping file: Browse...

Step 2 of 7 ← Back Next →

Step 5 — Map Columns (Page 3)

If the import file has a header row, columns are auto-populated in the Selected listbox. Otherwise, manually move fields from Available to Selected in file column order. Click Next to load the file into the SQL staging database.



Step 6 — Set Options (Page 4)

Select migration options including auto-generation of missing workspaces, users, custom values and classes. Set the default workspace template if applicable.

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File Share Importer for iManage Cloud and On Premises

✓

Connection

✓

Library & Files

✓

Map Data

4

Options

5

Pre-flight

6

Import

7

Results

Migration options

Auto-generate missing values

☒

Auto-generate missing users (author / operator)

☒

Auto-generate missing workspaces using CUSTOM29 template
Enabling workspace auto-generation automatically enables custom value and class auto-generation (required prerequisite).

☒

Auto-generate missing custom table values and classes

Workspace template

Default template

CORP

Template field

custom29

☐

Enable verbose API logging (for debugging only)
Writes every template search and workspace creation request/response to api_diagnostic_*.txt in the log folder.

Delta migration

☒

Overwrite existing document (no new version — replaces current)
Use for delta migrations. The latest file replaces the existing document in-place.

Step 4 of 7

← Back

Next →

Step 7 — Pre-flight Approval (Page 5)

Review distinct values from the staging table grouped by field type. Modify typos or skip unwanted values before import. Click Apply to update the staging table immediately.

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File Share Importer for iManage Cloud and On Premises

✓

Connection

✓

Library & Files

✓

Map Data

✓

Options

5

Pre-flight

6

Import

7

Results

Pre-flight Value Approval

Review distinct values from the staging table. Modify typos or skip unwanted values before importing.

6 field(s) with distinct values loaded

USERS

EXTENSIONS

CLASSES

CUSTOM1

CUSTOM2

CUSTOM29

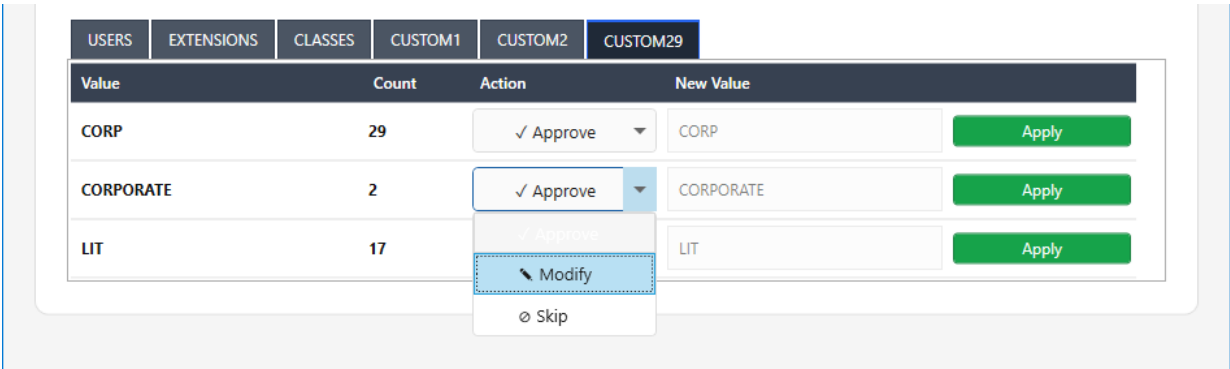
Value	Count	Action	New Value	
ACASE	42	✓ Approve	ACASE	Apply
BBERG	2	✓ Approve	BBERG	Apply
BCUMMINGS	27	✓ Approve	BCUMMINGS	Apply
CPIERCE	21	✓ Approve	CPIERCE	Apply
LWONG	2	✓ Approve	LWONG	Apply
TCLARK	2	✓ Approve	TCLARK	Apply

Step 5 of 7

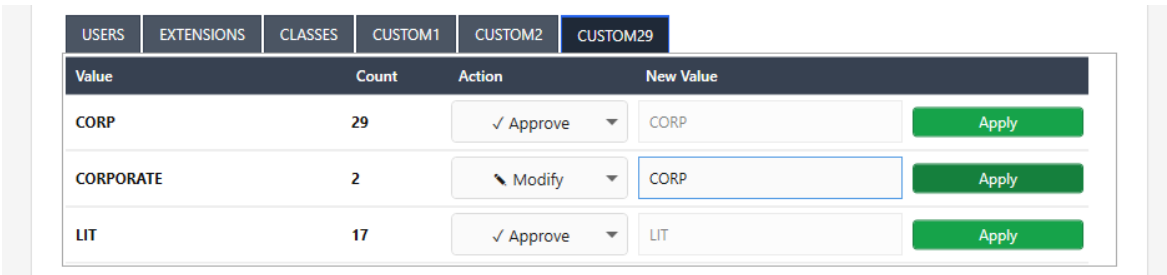
← Back

Next →

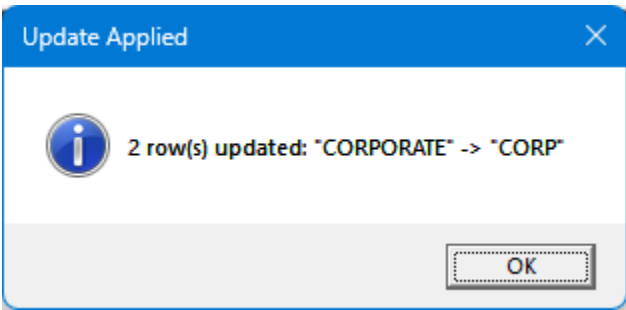
In this Step, you can review the grouped metadata and modify or skip rows by clicking on the row, and selecting Modify from the dropdown.



Make your changes in the “New Value” text box and click the Apply button to update all rows.



A message confirming the number of rows affected from the update will appear. Click OK to continue.

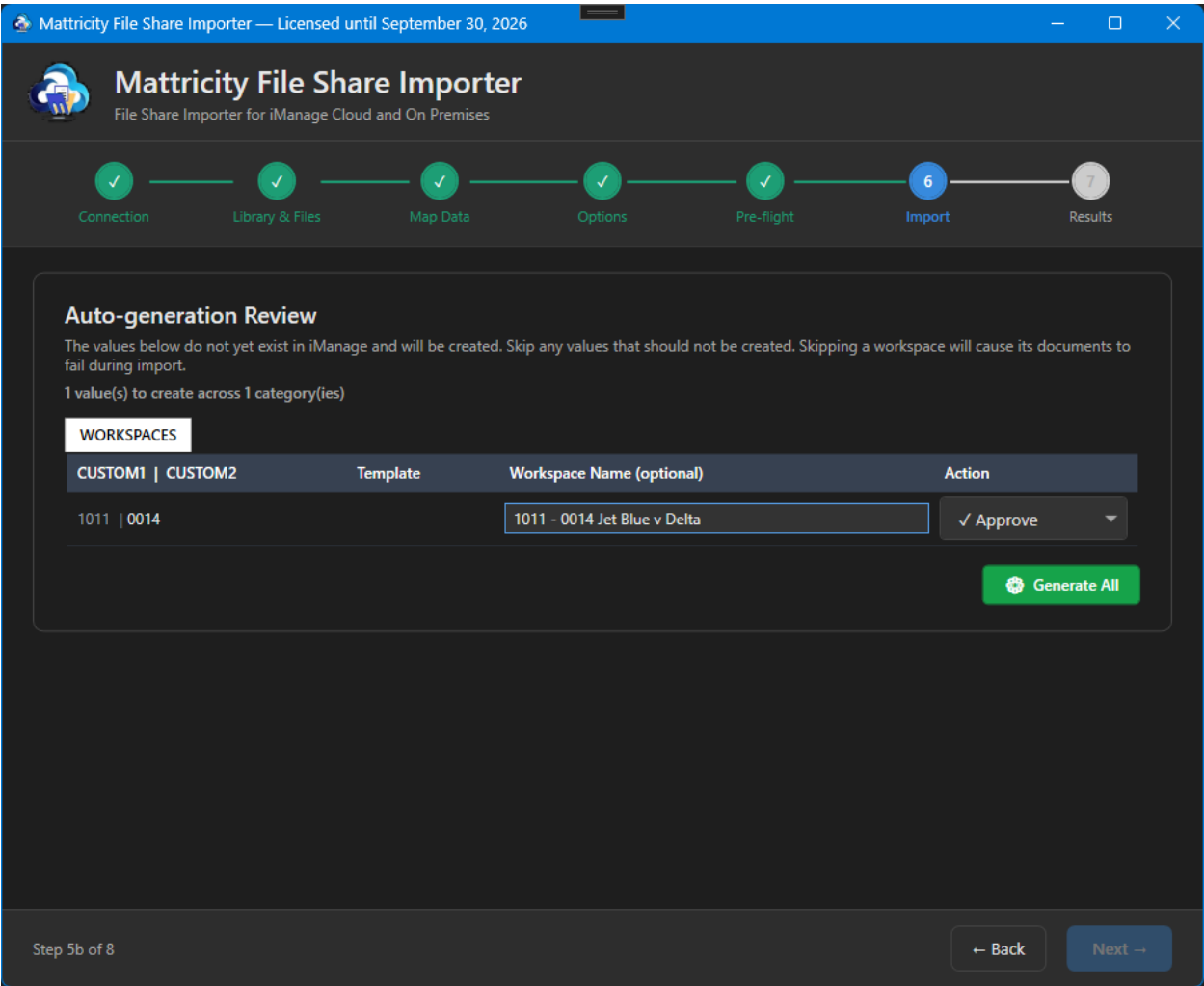


Note, the row that was updated no longer appears. In the example “CORPORATE” was incorrectly entered in the import file. If auto-generate custom values were enabled, “CORPORATE” would be created. In the Pre-flight step, this error is caught and corrected. The total rows for “CORP” is now 31, the original 29 plus the 2 rows that were updated to “CORP” from “CORPORATE”.

Step 8 — Auto-Generation (Page 5b)

If auto-generation options were selected on Page 4, Page 5b will appear where any missing values will be generated. If no auto-generation options were set, this page will be skipped. On this page, all missing values to be created will be listed. You have the option to Skip any, and for workspaces, you have the option to set a workspace name.

New Feature: Auto-generate all values prior to migration for improved performance:



Once all auto-generated objects have been created, click Next to continue.

Step 8 — Import (Page 6)

Click Start Import. The progress bar and log display update in real time. Click Cancel to stop the import. Results are recorded in the SQL staging database. The number of success and errors are displayed. You may click the Cancel button if you see more errors than expected. You can click the Back button to select a new import file, select a different mapping or change your options. Starting the import again will generate a new run and will begin again from the beginning.

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File Share Importer for iManage Cloud and On Premises

✓

✓

✓

✓

✓

6

7

Connection

Library & Files

Map Data

Options

Pre-flight

Import

Results

Document Import

48

Total rows

9

Imported

0

Errors

0

Auto-generated

Processing row 9 of 48...

19%

Import log (Ctrl+C to copy selected rows)

Time	Level	Message
11:24:22	Success	Active 00000001 - Test.doc
11:24:23	Success	Active 00000002 - Test.doc
11:24:25	Success	Active 00000003 - Test.doc
11:24:25	Success	Active 00000004 - Test.doc
11:24:26	Success	Active 00000005 - Test.doc
11:24:27	Success	Active 00000006 - Test.doc
11:24:28	Success	Active 00000007 - Test.doc
11:24:29	Success	Active 00000008 - Test.doc
11:24:30	Success	Active 00000009 - Test.doc

Step 6 of 7

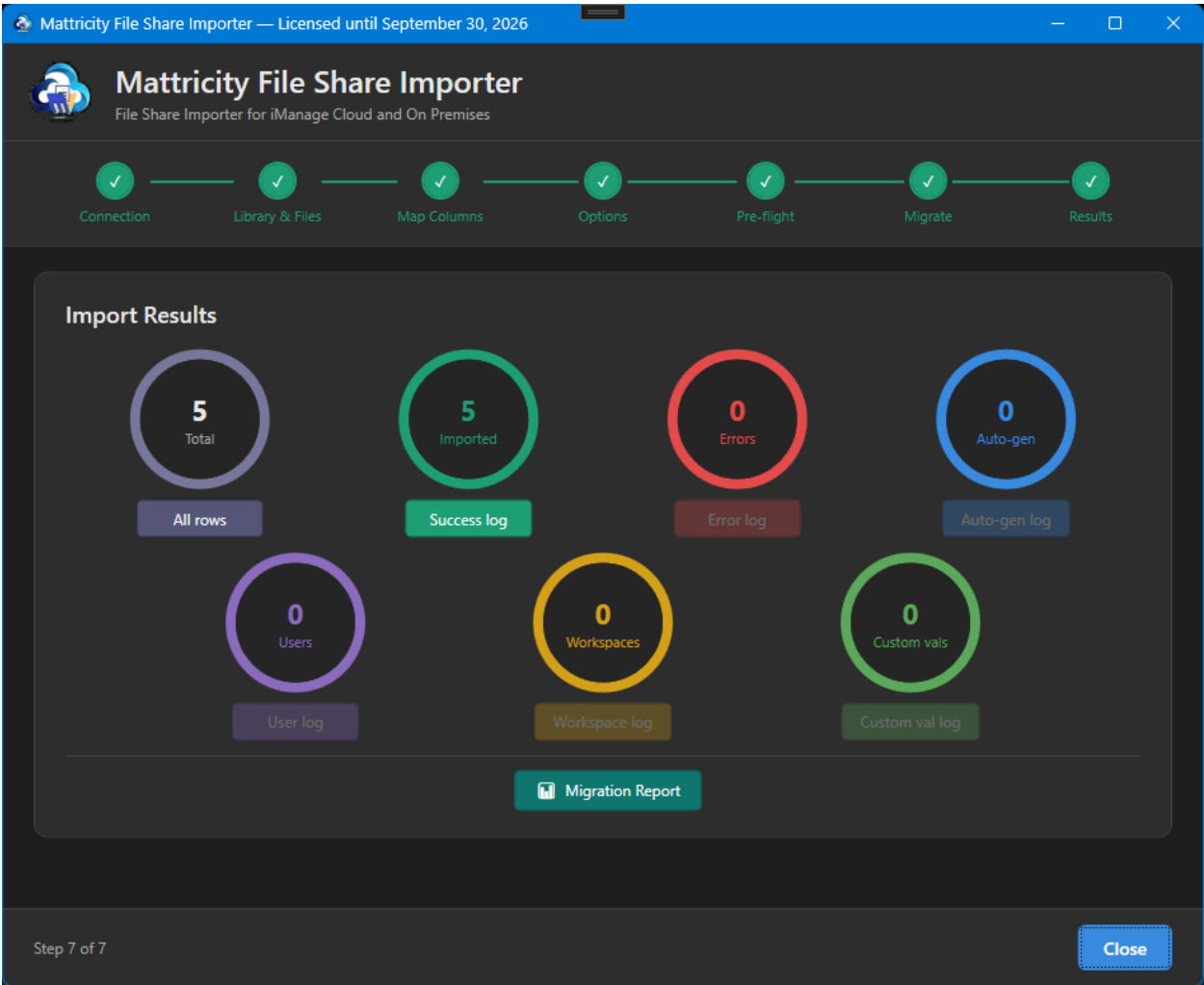
← Back

Cancel

Start import

Step 9 — Review Results (Page 7)

The results dashboard shows counts for imported documents, errors, and auto-generated artifacts. Click the log buttons to open the corresponding log files.



Errors are captured in both text files in the select Log Folder, or in the Documents folder if no Logs folder was selected. In addition, all results are also captured in the LocalDB database. To connect to the LocalDB database, launch SSMS and enter the following information:

6. Page-by-Page Reference

Page 1: Connection

Establishes the authenticated connection to iManage Work.

Field	Description
Server URL	iManage server address. Cloud: https://tenant.cloudimanager.com On-premises: https://server/
Client ID	Application Client ID registered in iManage Control Center
Client Secret	Application Client Secret. Click the eye icon to show/hide
Username	iManage user account. Cloud requires an email address
Password	iManage password. Click the eye icon to show/hide

Note: Credentials are saved per server URL and automatically restored on next launch. Cloud vs. on-premises mode is inferred from the server URL.

Click Test Connection (top right) to verify the connection before proceeding.

Page 2: Library & Files

Field	Description
Library	Target iManage library. Populated from the connected server
Import file	Path to the delimited import file
Delimiter	Field separator: Pipe (), Comma, Tab, Semicolon, or Tilde
Mapping file	Optional. Pre-defines column order for files without header rows
Log folder	Destination for log files. Defaults to Documents\iManageImporter

Page 3: Map Data

Maps import file columns to iManage field names.

- If the import file has a header row, columns are auto-populated from it
- If a mapping file is selected, columns are loaded from it
- Otherwise, manually move fields from Available to Selected in file column order
- Use the Up/Down buttons to reorder fields in the Selected list
- Click the save icon to save the current mapping as a reusable mapping file

The import mode selection at the bottom of the page:

- Flat File — reads directly from the import file (no SQL staging)
- SQL Server — loads into the staging database enabling pre-flight approval

Page 4: Options

Option	Description
Auto-generate missing users	Creates author/operator accounts in iManage if they do not exist
Auto-generate missing workspaces	Creates workspaces using CUSTOM29 as the template search field. Automatically enables custom value auto-generation
Auto-generate custom values and classes	Creates missing custom table values and document classes in iManage
Default template	Direct template ID used when no CUSTOM29 match is found (e.g. Active!9133)
Template field	iManage field used to find the workspace template (default: custom29)
Default value	Fallback template value when the row has no value in the template field

Option	Description
Verbose API logging	Writes detailed API request/response logs to api_diagnostic_*.txt
Overwrite existing document	Replaces the current document version in-place. Use for delta migrations

Page 5: Pre-flight Value Approval

Displays distinct values found in the staging table, grouped by field type in tabs. Each tab shows the distinct values with their row counts.

Action	Description
Approve	Accept the value as-is (default). No changes made to the staging table
Modify	Enter a corrected value in the New Value field and click Apply. All matching rows in the staging table are updated immediately. A confirmation message shows the number of rows updated
Skip	Mark all rows with this value as SKIPPED. Skipped rows are excluded from import. A confirmation message shows the number of rows skipped

Note: Corrections made on this page update the SQL staging table directly. The import will use the corrected values, reducing the need for auto-generation in iManage.

- CUSTOM1 tab — distinct client values. Modify here to correct the parent before correcting matters
- CUSTOM2 tab — distinct matter values shown with their parent CUSTOM1 (client | matter)
- EXTENSIONS tab — values longer than 4 characters are flagged with a warning symbol
- USERS tab — combined distinct values from both AUTHOR and OPERATOR columns

Page 5b: Auto-Generation

If auto-generation options were selected on Page 4, this page will identify all the objects to be generated, including users, classes, custom values and workspaces. You have the option to skip any of the listed candidates for auto-generation, and for workspaces, you also have the option to enter a workspace name.

- Click Skip on the pull down to Skip any value to avoid auto-generation.
- Click Rescan to rerun the scan for missing values.
- Click Generate to begin. The progress bar and log update in real time.
- Click Cancel to stop the auto-generation. Completed rows retain their SUCCESS status
- After Next when the auto-generation has completed.

Proceed to Page 6 to start the import.

Page 6: Import

Executes the import from the SQL staging database into iManage Work.

- Click Start Import to begin. The progress bar and log update in real time

- Click Cancel to stop the import. Completed rows retain their SUCCESS status
- After a completed run, a Re-run checkbox appears to reset all rows to PENDING for re-testing
- View partial results by clicking the View partial results link after cancellation

The import log shows each row with timestamp, status, row number, and message. A horizontal scrollbar allows viewing longer messages.

Page 7: Results

Displays the import results dashboard with seven circles:

Circle	Color	Description
Total	Grey	Total rows processed in this run
Imported	Green	Successfully imported documents
Errors	Red	Failed rows. Click Error log to open the retry file
Auto-gen	Blue	Total auto-generated artifacts
Users	Purple	Auto-generated user accounts
Workspaces	Gold	Auto-generated workspaces
Custom vals	Green	Auto-generated custom values and classes

Click any log button to open the corresponding log file in Notepad. The Open logs folder button opens the log folder in Windows Explorer.

7. Import File Format

File Structure

The import file is a delimited text file with one document per row. An optional header row may be included as the first line.

Supported Delimiters

Delimiter	Character	Notes
Pipe		Default and recommended
Comma	,	Use with caution if values contain commas
Tab	\t	Common export format from spreadsheets
Semicolon	;	
Tilde	~	Useful when values contain other common delimiters

Header Row

If the first row of the import file contains column names matching the field naming conventions below, it is automatically detected and used to populate the column mapping on Page 3. Header detection is case-insensitive.

Field Naming Conventions

The following field names are recognized. These names are used in both header rows and mapping files:

Field Name	iManage Field	Notes
FILEPATH	Source file path	Required. Full path to the file on the file share
NAME	Document name	Document name in iManage. Defaults to filename if blank
EXTENSION	File extension	Without leading period. Auto-assigned from file if blank
FOLDERPATH	Folder path	Backslash-separated path within the workspace
AUTHOR	Author	iManage user ID of the document author
OPERATOR	Operator	iManage user ID of the document operator
CLASS	Document class	e.g. AGREE, PLEADING, RESEARCH
SUBCLASS	Document subclass	Child of CLASS
TYPE	File type	Auto-assigned from extension if not mapped
COMMENT	Comments	Document description or notes
DOCNUM	Document number	If not mapped, iManage assigns the next available number
VERSION	Version number	If not mapped, defaults to version 1
FILECREATEDATE	File create date	ISO 8601 format: 2009-02-01T10:35:00Z
FILEEDITDATE	File edit date	ISO 8601 format: 2010-10-13T15:43:00Z
CUSTOM1	Custom field 1	Typically client code
CUSTOM2	Custom field 2	Typically matter number (child of CUSTOM1)
CUSTOM3–CUSTOM12	Custom fields 3–12	Short string values (up to 64 characters)
CUSTOM13–CUSTOM16	Custom fields 13–16	Long string values (up to 256 characters)
CUSTOM17–CUSTOM20	Custom fields 17–20	Numeric values (stored as string)
CUSTOM21–CUSTOM24	Custom fields 21–24	DateTime values (ISO 8601 format)
CUSTOM25–CUSTOM28	Custom fields 25–28	Boolean values (stored as string)

Field Name	iManage Field	Notes
CUSTOM29	Custom field 29	Typically practice area or department
CUSTOM30	Custom field 30	Child of CUSTOM29

Note: FOLDERPATH leading and trailing backslashes are trimmed automatically. EXTENSION leading periods are trimmed automatically.

8. SQL Staging Database

Overview

When SQL Server mode is selected on Page 3, the import file is loaded into a local SQL Server staging database before import. This enables pre-flight corrections, parallel processing, and a complete audit trail.

The database is created automatically on first launch at:

- LocalDB: (localdb)\MSSQLLocalDB — database: iManageImporter
- Custom: configured in iManageImporter.config.json

Key Tables

Table	Description
dbo.import_runs	One row per import run. Contains run ID, source file, library, status, and row counts
dbo.import_staging	One row per document. Contains all field values plus status (PENDING, IMPORTING, SUCCESS, ERROR, SKIPPED), document ID, workspace ID, and folder ID after successful import
dbo.import_generated	One row per auto-generated artifact (WORKSPACE, USER, CUSTOM_VALUE). Contains the iManage object ID and name
dbo.preflight_cache	Temporary pre-flight approval data. Cleared on each session start

Field	Description
Server Type	Database Engine
Server Name	(localdb)\MSSQLLocalDB
Authentication	Windows Authentication
Encryption	Optional
Trus Server Certificate	Checked

Useful Queries

All errors for a run:

```
SELECT row_number, error_message, filepath FROM dbo.import_staging WHERE run_id = '<run_id>'
AND status = 'ERROR'
```

Auto-generated workspaces:

```
SELECT object_id, object_name, custom1, custom2, notes FROM dbo.import_generated WHERE
run_id = '<run_id>' AND object_type = 'WORKSPACE'
```

Documents imported into a specific workspace:

```
SELECT name, filepath, document_id FROM dbo.import_staging WHERE run_id = '<run_id>' AND workspace_id = 'ACTIVE!4365'
```

Summary by status:

```
SELECT status, COUNT(*) as cnt FROM dbo.import_staging WHERE run_id = '<run_id>' GROUP BY status
```

Run IDs

Each import session creates a new run ID (GUID) in `dbo.import_runs`. All staging rows for that session reference this run ID. Multiple migration phases (baseline, interim, final) are preserved independently — records are never overwritten between runs.

9. Pre-flight Corrections

Purpose

Pre-flight corrections allow you to review and fix data quality issues in the staging table before the import runs. Corrections are applied directly to the staging database, so iManage receives clean data without requiring auto-generation of incorrect values.

Common Corrections

- Typos in user IDs: JCARIGAN → JCARRIGAN
- Incorrect custom values: CORPORATE → CORP
- Wrong class names: PLEADINGS → PLEADING
- Unwanted file extensions: skip `.tmp`, `.log`, `.bak` files

Workflow

1. Navigate to Page 5 (Pre-flight).
2. Select the tab for the field you want to review (e.g. CUSTOM29).
3. Locate the value to correct. Values are sorted alphabetically so typos appear near their correct version.
4. Change the Action dropdown to Modify.
5. Enter the corrected value in the New Value field.
6. Click Apply. A confirmation message shows the number of rows updated.
7. Repeat for all corrections needed.
8. Click Next to proceed to the import.

CUSTOM1 and CUSTOM2

CUSTOM1 (client) and CUSTOM2 (matter) have a parent-child relationship. Use the dedicated tabs:

- CUSTOM1 tab — modify the client code itself. All associated matters follow automatically
- CUSTOM2 tab — shows values as CLIENT | MATTER. Modifications are scoped to the specific client-matter combination

10. Delta Migrations

Overview

A delta migration imports documents that were added or modified after the baseline migration. Each migration phase is a separate import run with its own run ID.

Delta Migration Workflow

- Prepare a new import file containing only the documents to be migrated in this phase
- Return to Page 2 and select the new import file — this creates a new run ID automatically
- Complete the wizard as normal — existing workspaces are found and reused, not recreated
- New client/matter combinations will have workspaces and custom values auto-generated as needed

Overwrite Existing Documents

For documents that have been updated since the baseline:

- Overwrite will be attempted against ALL documents in the import file. Prepare a separate mport file just for overwrites.
- Check Overwrite existing document on Page 4
- iManage will replace the current document version in-place (no new version created)
- The document ID remains the same
- If the document version were assigned by iManage, and the full path is the same as a previous successful import, the Overwrite option will replace the previous imported file.

Baseline Records Preserved

Baseline migration records in the SQL staging database are never modified by a delta run. Each run is independently queryable by run ID. The complete migration history is retained for the life of the project.

11. Troubleshooting

Issue	Likely Cause	Resolution
Connection fails on Page 1	Incorrect URL, credentials, or network access	Verify the server URL format. Cloud: https://tenant.cloudimanage.com Check network access to the iManage server
Only FILEPATH appears in Selected list on Page 3	Wrong file selected on Page 2 (e.g. mapping file selected instead of import file)	Return to Page 2 and select the correct import file
0 successes shown on Results page	Log file delimiter mismatch	Ensure the import file delimiter matches the selection on Page 2

Issue	Likely Cause	Resolution
NRC_RECORD_NONEXISTENT error	Folder not found in iManage. Often caused by a custom value typo not corrected in pre-flight	Check CUSTOM29 value in staging table. Correct the value on Page 5 and re-run
Import immediately shows previous results	All staging rows already have SUCCESS status	Check the Re-run checkbox on Page 6 to reset rows to PENDING
DirectoryNotFoundException on import start	Log folder does not exist	The folder is created automatically. Ensure write access to Documents\iManageImporter
License expired dialog on launch	License expiry date has passed	Contact Matricity to renew: info@matricity.com
Pre-flight Apply button does nothing	Version prior to v141	Upgrade to the latest version

12. Appendix

A. Field Name Reference

Complete list of recognized field names for use in import file headers and mapping files:

Standard fields: FILEPATH, NAME, EXTENSION, FOLDERPATH, AUTHOR, OPERATOR, CLASS, SUBCLASS, TYPE, COMMENT, DOCNUM, VERSION, FILECREATEDATE, FILEEDITDATE

Custom fields: CUSTOM1 through CUSTOM30

B. Custom Field Types

Fields	Data Type	Max Length
CUSTOM1–CUSTOM12	Short string	64 characters
CUSTOM13–CUSTOM16	Long string	256 characters
CUSTOM17–CUSTOM20	Numeric	Stored as string in staging
CUSTOM21–CUSTOM24	DateTime	ISO 8601 format: YYYY-MM-DDTHH:MM:SSZ
CUSTOM25–CUSTOM28	Boolean	Stored as string in staging
CUSTOM29–CUSTOM30	Short string	64 characters. CUSTOM30 is child of CUSTOM29

C. Mapping File Format

A mapping file is a single pipe-delimited line listing field names in the order they appear in the import file:

FILEPATH|NAME|EXTENSION|FOLDERPATH|CUSTOM1|CUSTOM2|CUSTOM29|COMMENT|AUTHOR|OPERATOR|CLASS|FILECREATEDATE|FILEEDITDATE

Save the mapping file from Page 3 using the save icon button. The file can be reused across import sessions for files with the same column structure.

D. Contact Information

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