

Mattricity File Share Importer



User Guide

Version 1.0.7

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 (cloudimanager.com) and on-premises iManage deployments.

The application uses a SQL staging database to buffer and validate import data before it reaches iManage, enabling pre-flight corrections, audit trails, and multi-phase migration strategies. The SQL database is installed during the application setup, and can also utilize existing SQL Servers.

Key Features

- Bulk import from Windows file shares into iManage Work
- Supports cloud and on-premises iManage deployments
- Document and version assignment option
- SQL staging database with full audit trail
- Pre-flight value approval — correct typos and skip unwanted values before import
- Auto-generation of missing workspaces, users, custom values, and classes
- Support for large files (tested to 20+ GB) via streaming upload
- Long path support (paths exceeding 260 characters)
- Multiple import file formats: pipe, comma, tab, semicolon, tilde delimited
- Header row auto-detection and reusable mapping files
- Delta migration support — each run is independently tracked by run ID
- Time-limited licensing with expiry date visible in title bar
- Unlimited number of documents migrated per license (the free trial is limited to 100 documents)

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

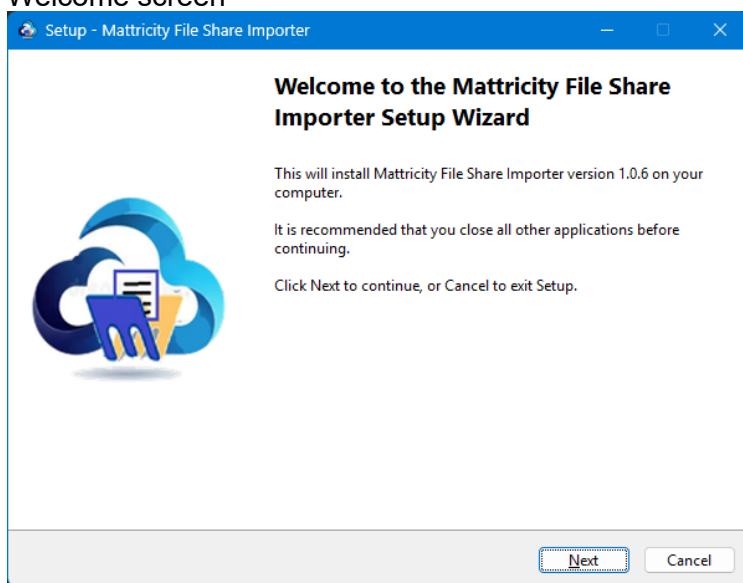
Standard Installation

Run the installer file:

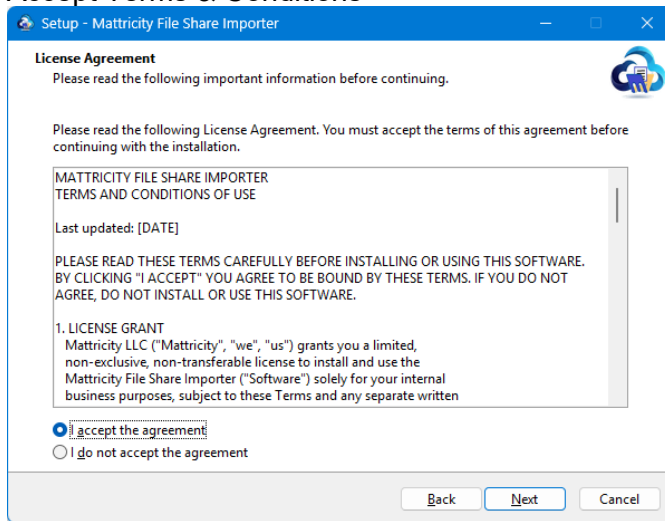
MatricityFileShareImporter_Setup_1.0.7.exe

The setup wizard will guide you through the following steps:

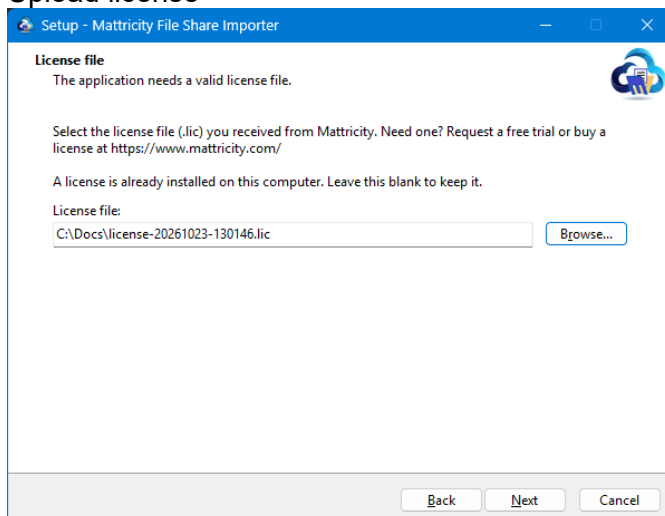
- Welcome screen



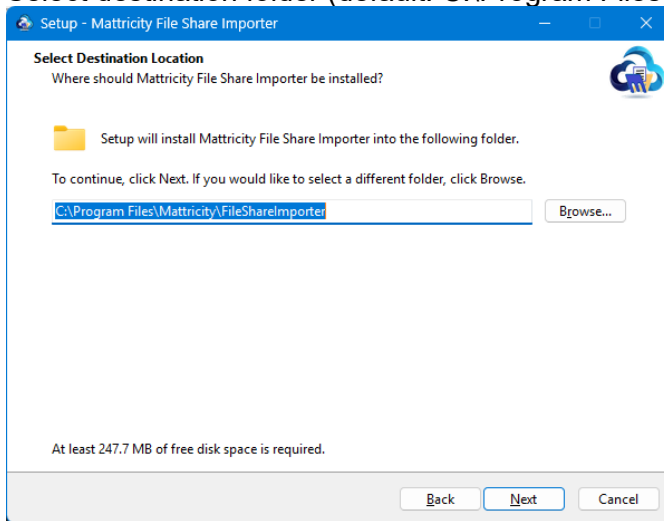
- **Accept Terms & Conditions**



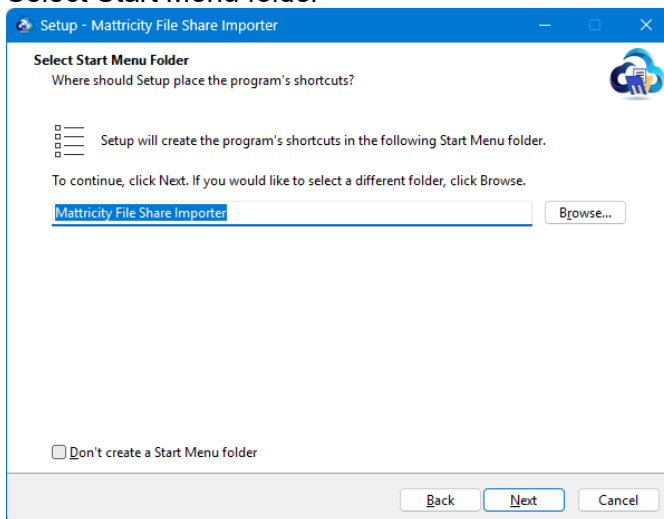
- **Upload license**



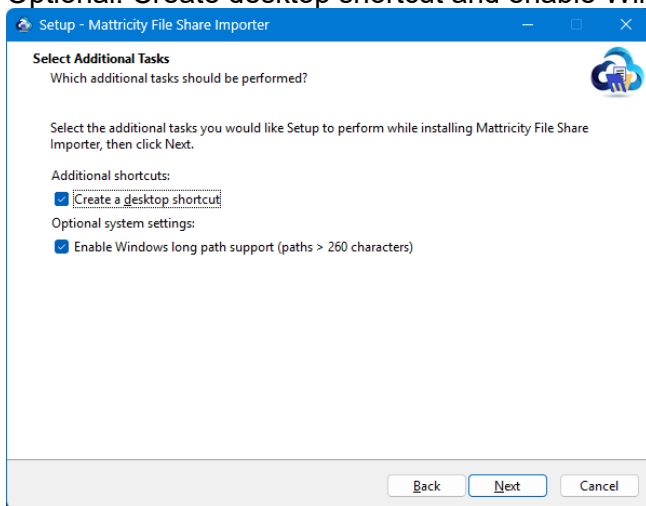
- Select destination folder (default: C:\Program Files\Mattricity\FileShareImporter)



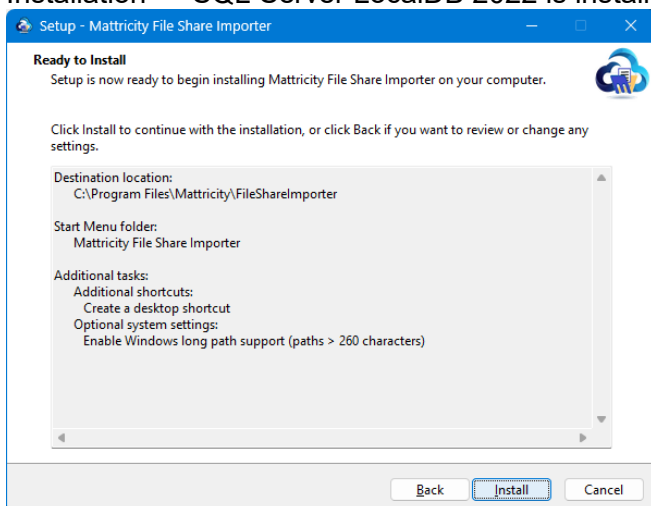
- Select Start Menu folder



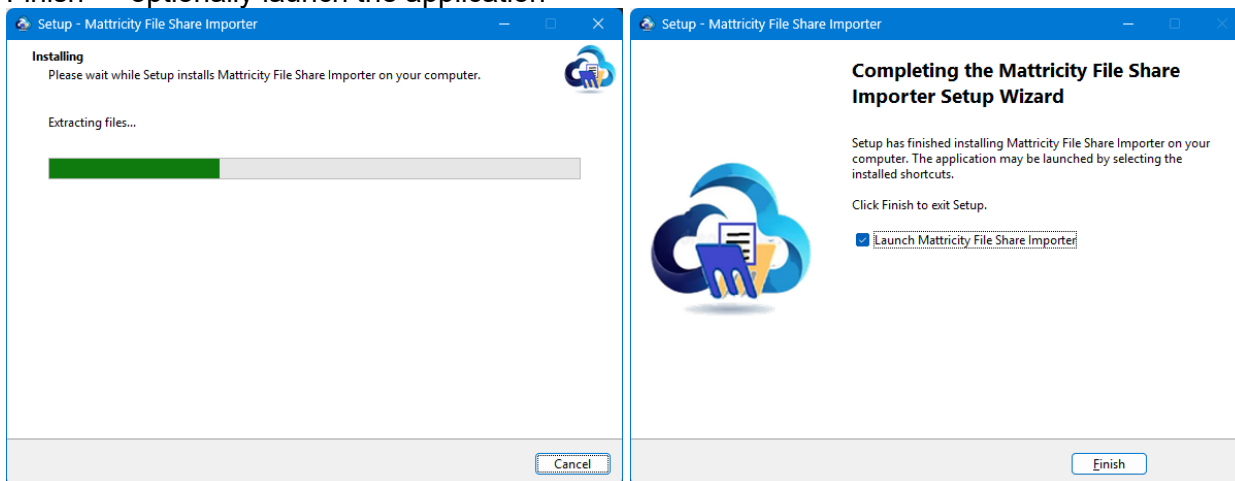
- Optional: Create desktop shortcut and enable Windows long path support



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



- 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
/LICENSEFILE="C:\path\license.lic"	Installs the license file during setup. It is checked and then copied to the machine-wide license folder (C:\ProgramData\Matricity\FileShareImporter\license.lic), so every user on that computer is covered.
/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: MatricityFileShareImporter_Setup_1.0.7.exe /VERYSILENT
/TASKS="desktopicon,longpaths" /LICENSEFILE="C:\Documents\license.lic"

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 requires a license file (license.lic) for each engagement. The license is a small, signed file that you import into the application. After purchase, you receive the application installer and your license file by email. A renewed license file can be imported later and extends the expiration date.

Title bar: The title bar always shows your license status. A paid license shows “Licensed to <name> until <date>”. A free trial shows the days left or the expiry date, along with the documents used out of the 100 allowed.

Reminder: For paid licenses, a reminder dialog appears at launch during the last 30 days before expiry. The application continues to work normally.

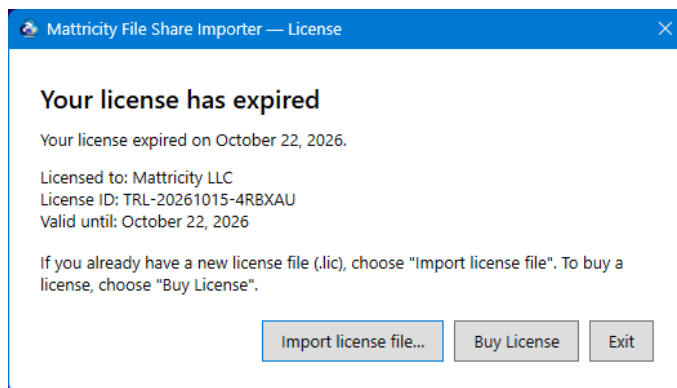
Last day: The license works through its last day, which is the expiry date shown.

After expiry: After the expiry date the application won't open for work. It shows a license window, where you can import a new license file or choose Buy License.

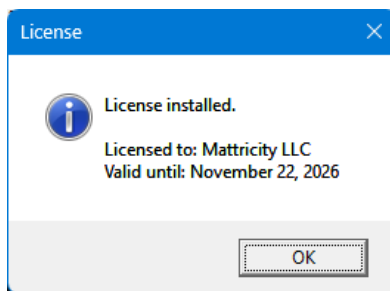
Free trial: The trial lasts 7 days and allows up to 100 imported documents. When the limit is reached the run stops cleanly, and the remaining rows stay pending. They import normally once a full license is installed.

Machines: The license is not tied to a computer, so you can install the application on multiple machines. Multiple simultaneous instances on the same or different machines are supported.

Upon expiration, when you attempt to launch the application, you will see the following message:



You can import a new license, if available, or click on the Buy License to purchase a new license. Once a new valid license is imported, you will see the following confirmation:



Buying or renewing a license

To buy or renew a license, choose a plan at <https://mattricity.com/#Pricing> and place the order. You can do this at any time without contacting Mattricity. Your license file will be emailed to you, normally within one business day. You can import the new license file by clicking the **License...** link on the bottom of the application's main page or Ctrl+L (see image below). Select and import the new license file. Close and relaunch the application for the new license to take effect. No reinstall is needed. If you buy before your current license expires, the new term is added after the current expiry date. Licenses cannot be extended or adjusted in the middle of a term.



The screenshot shows a login form with two input fields: 'Username' and 'Password'. The 'Username' field has a placeholder text 'Cloud requires an email address (e.g. user@domain.com)'. The 'Password' field has a toggle icon on the right. Below the form, there is a progress indicator 'Step 1 of 7' and a link 'License...' which is circled in red. To the right of the link are two buttons: 'Test connection' and 'Next →'.

Questions?

Email info@mattricity.com

5. Quick Start

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

Step 1 — Prepare the Import File

Request the free FileShareReport tool from <https://mattricity.com> and choose Free Tool from the menu. Complete the form and a download link is emailed to you. The script will create an initial baseline snapshot of your file shares, and when rerun, reports any changes from the original snapshot for deltas. Or 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 [Section 7](#). Map the columns, add/remove columns, and ensure to include any required fields.

Supported delimiters: pipe (|), comma (,), tab, semicolon (;), tilde (~).

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 Customer Name, iManage server URL, Client ID, Client Secret, username, and password. You can request a client id and client secret from iManage. Click Test Connection, then 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. Optionally select a mapping file or you can map your fields in the next Step. Lastly, you can define a starting document number, ensuring a gap for your assigned document numbers and any new workspaces if you optionally select to auto-generate missing workspaces.

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. If the column datatype does not match the header row, such as a date field contains a path, you will see a SQL error indicating a data type mismatch. Ensure your columns match their respective headers.

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. Select Overwrite to overwrite modified documents during delta migrations. The Overwrite setting will apply to the full import list.

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. If auto-generation of custom values or workspaces was selected, you will see Page 5a. On Page 5, the values to be added are listed, and you can optionally set the workspace name, or accept CUSTOM1 – CUSTOM2 as the default.

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.

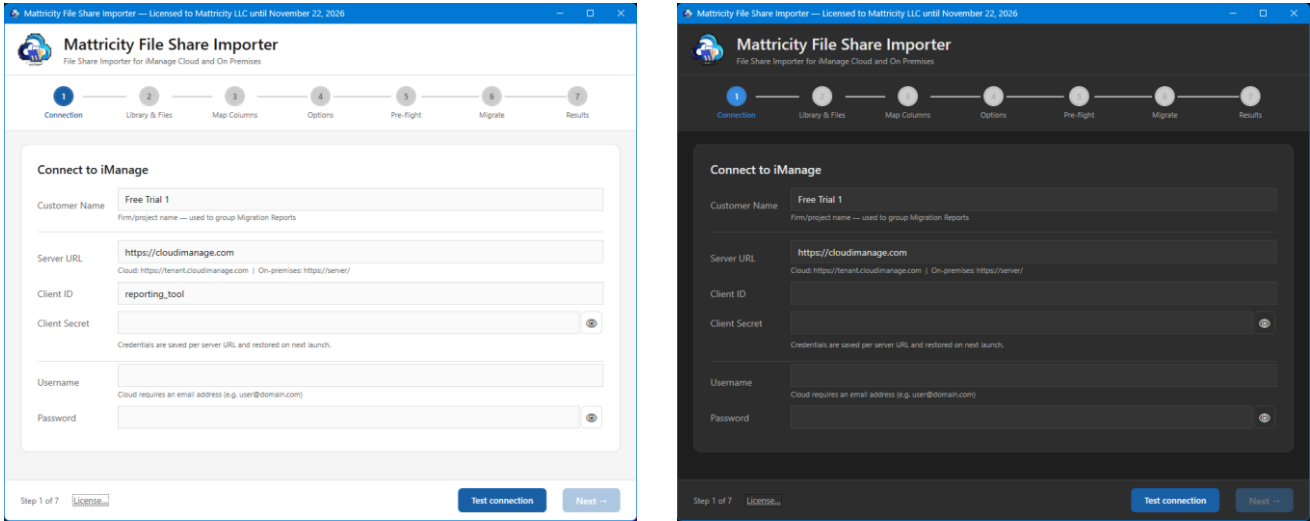
Step 9 — Review Results (Page 7)

The results dashboard shows counts for imported documents, errors, and auto-generated artifacts. Click the log buttons to open the corresponding log files. A Migration Report will also be available aggregating totals per “Customer Name” from Page 1, including overall totals, and current run counts.

6. Page-by-Page Reference

Page 1: Connection

The application adjusts to your environment’s theme to support both Light, Dark and Custom modes. Establishes the authenticated connection to iManage Work.



Field	Description
Customer Name	Used to identify all the migration runs (baseline, interim and final deltas) associated with a project to compile a full Migration Report associated with a single project. When running multiple migrations for different customers, enter a distinct Customer/Project Name to consolidate reports and totals per project.
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 to verify the connection before proceeding. Click Next if successful, or re-enter credentials and try again.

Page 2: Library & Files

If there are more than one database the logged in user has access to, you may select the target database from the drop down list or accept the user’s default library.

Select the mapped import file prepared for this migration run. The import file must have a valid delimiter, saved as a UTF-8 format to preserve Unicode, and may contain a header. Optionally, you can select a saved mapped file, or map the columns in the next step.

Here you can also set the starting document number in iManage for new content or Go Live. If you are assigning document and version numbers and plan to select the option on Page 4 to auto-generate workspaces, you must set the new document number to ensure the new workspaces do not conflict with any assigned document number as iManage will automatically assign the next available number for the workspace. If the new starting number is set, the newly created workspaces will use a docnumber above the starting document number, preserving your assigned document number range.

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
Docnum Range Protection	Optionally, set the starting document number in iManage.

Page 3: Map Data

Maps import file columns to iManage field names.

- If the import file has a header row with the required field names, columns are auto-populated from it
- If a mapping file with the required field names 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
- SQL may report any data inconsistencies here, which will need to be corrected to proceed.

Page 4: Options

Select auto-generation options, including users, custom values, classes and workspaces. When selecting to auto-generate workspaces, custom values is also selected to ensure workspace generation success. Select a template custom field. Custom29 is the default. Select a default template if column is blank. Overwrite will apply to the entire import session. Ensure the import file contains only the documents to overwrite.

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
Template field	iManage field used to find the workspace template (default: custom29)
Default template	Select a template from the drop down list to default the template if the field is blank. Used when auto-generating workspaces is enabled.
Delta Migrations (Overwrite)	Replaces the current document version in-place. Use for delta migrations against the entire import file. Create an import file with only modified documents intended to be overwritten.
Diagnostics	Writes detailed API request/response logs to api_diagnostic_*.txt

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.

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

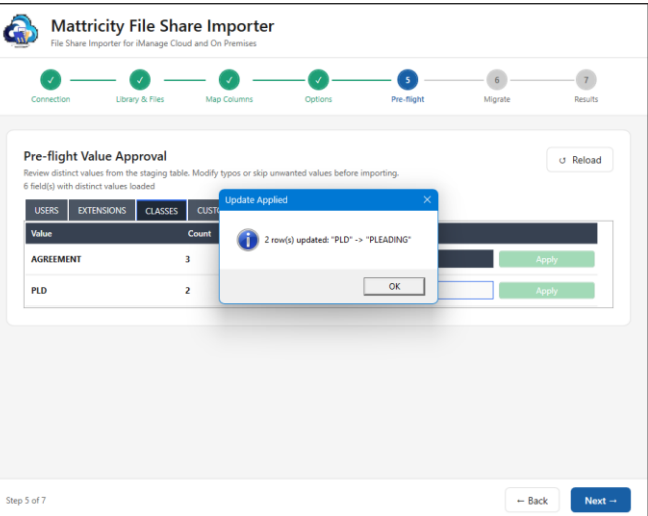
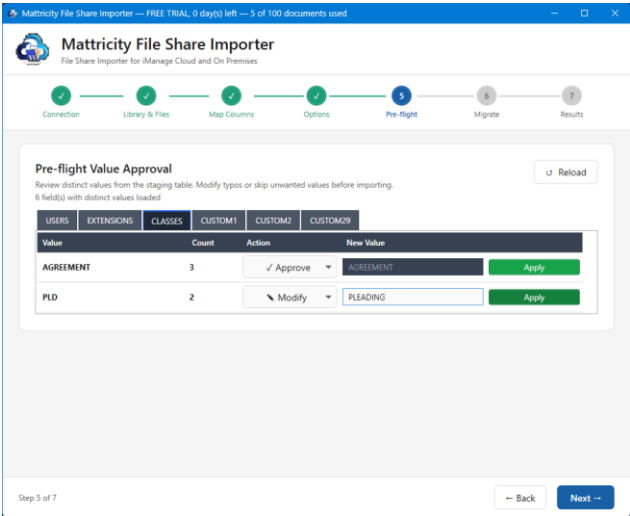
USERS EXTENSIONS CLASSES CUSTOM1 CUSTOM2 CUSTOM29

Value	Count	Action	New Value
CLOUDADMIN	5	✓ Approve	CLOUDADMIN Apply
MATTRICITYADMIN	5	✓ Approve	MATTRICITYADMIN Apply

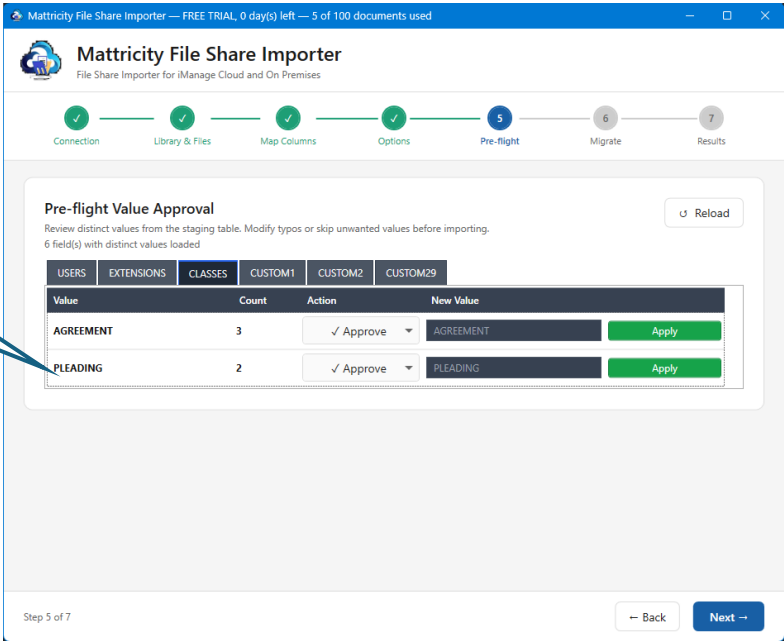
Step 5 of 7 Back Next

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

Below, when reviewing CLASSES, the class “PLD” was intended to be “PLEADING”, as it exists in iManage. If auto-generation of custom values and class is selected, PLD would be created. This step allows all PLD rows to be updated to PLEADING, ensuring the class is consistent:



PLD have all been updated with PLEADING

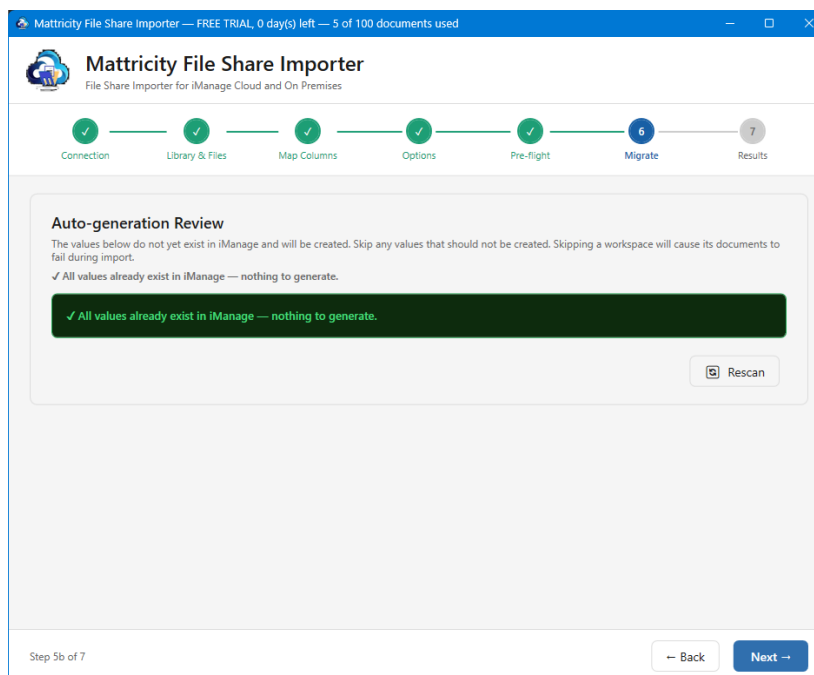


Note: Corrections made on this page update the SQL staging table directly. The import will use the corrected values, reducing the need for auto-generation in iManage.

- CUSTOM1,3-12,29 tab — distinct custom values. Modify here to correct the parent before correcting child values (custom1/29)
- CUSTOM2, 30 tab — distinct child values shown with their parent values
- EXTENSIONS tab — values longer than 4 characters are flagged with a warning symbol, but may be valid file types. Review to ensure iManage will recognize the listed EXTENSIONS as file types, or replace with defaults, such as TXT or DOCX. An APPLICATION is not required as it is assumed by the EXTENSION.
- USERS tab — combined distinct values from both AUTHOR and OPERATOR columns

Page 5A: Auto-Generation Approval

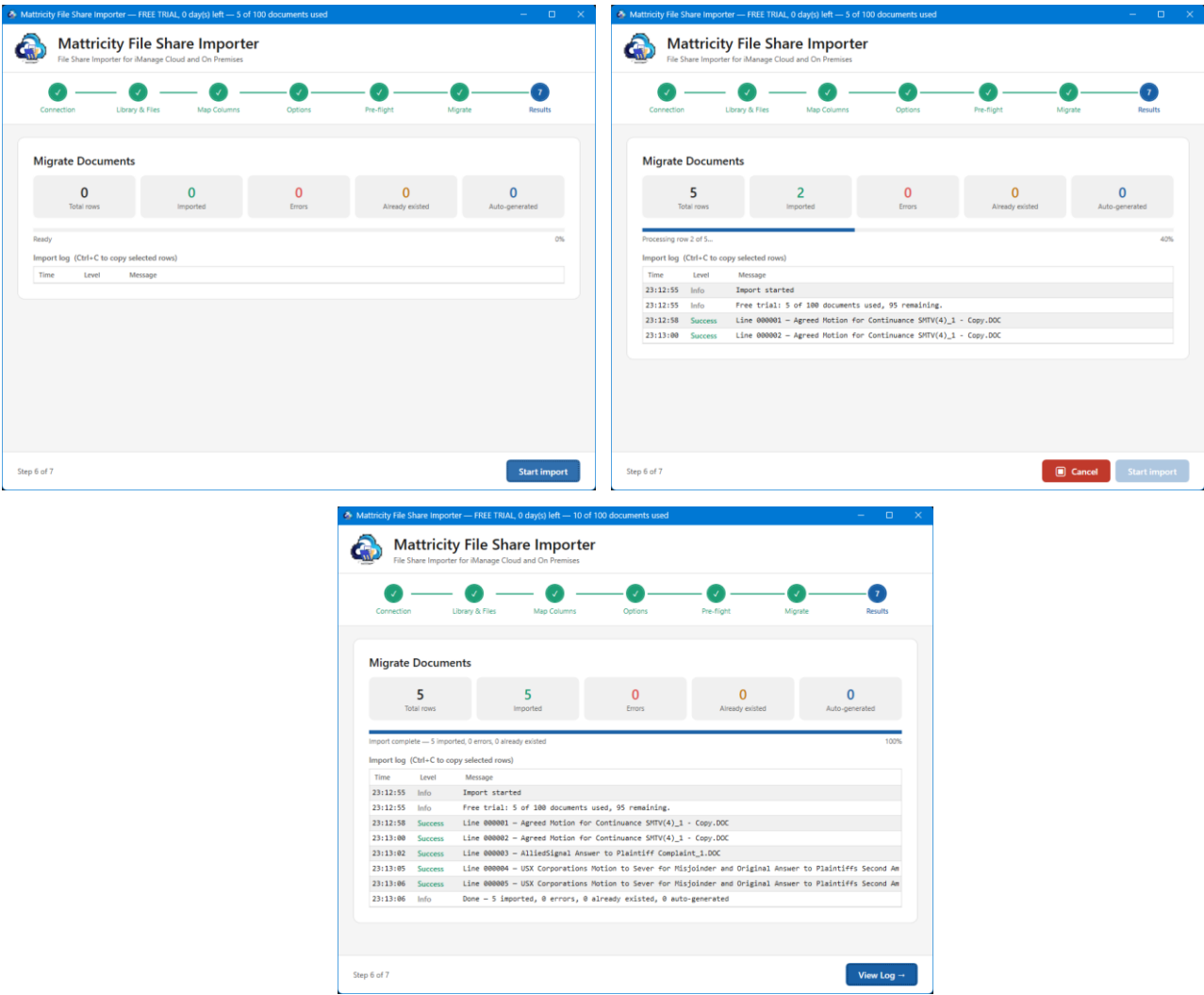
If any auto-generation options were selected on Page 4 – Options, Page 5A will list all the values that currently do not exist in iManage. Users will have the option to approve or skip any value shown, and can cancel the process as well. For workspaces, users can enter a full workspace name. The default workspace name is the CUSTOM1 – CUSTOM2 values, similar to the naming convention used in the Cloud Workspace Generator. All metadata and workspaces should be generated prior to migration, but this step will mitigate migration errors. If no auto-generation options are set, this page will not display.



Page 6: Import

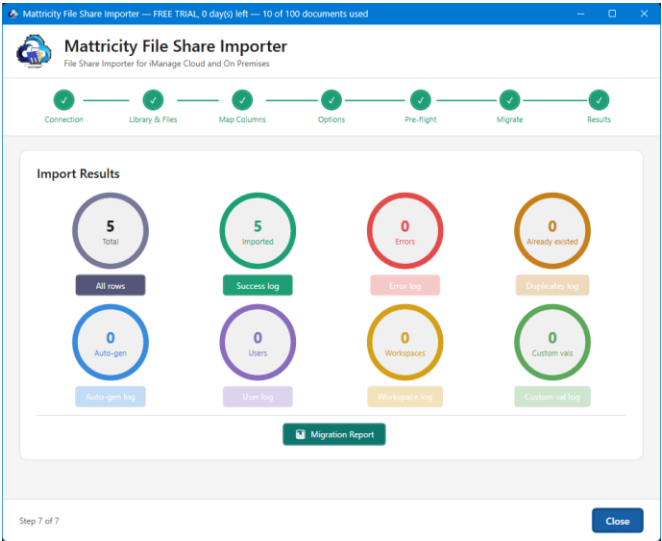
Executes the import from the SQL staging database into iManage Work.

- 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. If you see mounting errors with no successes, this may indicate an access or network issue. Check the FILEPATH and ensure you have access to the network shares and the iManage server is accessible.
- The import log shows each row with timestamp, status, row number, and message. A horizontal scrollbar allows viewing longer messages. When import completes, click Next to Results.



Page 7: Results

Displays the import results dashboard. Buttons are disabled if no report is available.



Report	Description
All Rows	Total rows processed in this run
Success Log	Successfully imported documents
Error Log	Failed rows. Click Error log to open the retry file
Duplicate Log	Document already exists. If overwrite is not enabled, and a DOCNUM and VERSION was attempted to be re-imported, this log captures the rows.
Auto-gen	Total auto-generated artifacts
Users	Auto-generated user accounts
Workspaces	Auto-generated workspaces
Custom vals	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.

Additionally, there is a Migration Report button. This button will show the results of the current run, and the aggregate run if the Customer Name (project name) was entered during a previous run:

Sample:

```
# Migration Report
# Customer   : Free Trial 1
# Server     : https://cloudimanage.com
# Library    : Mattricity
# Generated  : 2026-10-22 22:10:20

=====
CURRENT RUN
Source : 5SandboxDocs.txt
Loaded : 2026-10-22 22:04:42
=====
Total unique documents      :          5

Success                     :          5
Already Existed (not re-counted) :          0
Skipped                     :          0

File Not Found              :          0
Access Denied               :          0
File Locked                 :          0
Write Protected             :          0
Invalid Parameter (Zero Byte) :          0
Document Profile Invalid    :          0
Workspace Not Found         :          0
Gateway Error               :          0
No Record Found             :          0
Rate Limited                :          0
Stuck / Cancelled           :          0
Other Error                 :          0

Docnum range                : 3,060 - 3,064
-----
Success rate                 :          5 (100.0%)
-----

=====
AGGREGATE - Free Trial 1 | Mattricity
Runs      : 2 (2026-10-15 - 2026-10-22)
=====
```

Total unique documents	:	5
Success	:	5
Already Existed (not re-counted)	:	0
Skipped	:	0
File Not Found	:	0
Access Denied	:	0
File Locked	:	0
Write Protected	:	0
Invalid Parameter (Zero Byte)	:	0
Document Profile Invalid	:	0
Workspace Not Found	:	0
Gateway Error	:	0
No Record Found	:	0
Rate Limited	:	0
Stuck / Cancelled	:	0
Other Error	:	0
Docnum range	:	3,060 — 3,064

Success rate	:	5 (100.0%)

Note: Documents are deduplicated by iManage document ID.
Latest import attempt per document is counted once only.

7. Import File Format

File Structure

The import file is a delimited text file with one document per row. The file format should support Unicode. UTF-8 format is recommended. 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)
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

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

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:

- 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

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.cloudimanager.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
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\iManagerImporter
License expired dialog on launch	License expiry date has passed	In the license window that appears, choose Import license file... to import a new license, or choose Buy License to purchase one.

Log Files

Log files are written to the log folder (default: Documents\iManagerImporter) after each import run:

File	Contents
import_YYYYMMDD_HHMMSS.txt	Complete log of all events: SUCCESS, ERROR, WARNING, AUTOGEN
success_YYYYMMDD_HHMMSS.txt	Successful rows with row number, document name, and file path
errors_YYYYMMDD_HHMMSS.txt	Failed rows in import file format. Can be used directly as a retry import file
api_diagnostic_YYYYMMDD_HHMMSS.txt	Detailed API request/response log. Only created when Diagnostics logging is enabled on Page 4

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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