Mattricity iManage Exporter



User Guide

Version 1.0.1

iManage Work — Cloud and On-Premises Mattricity LLC 2026

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Contents

Before You Begin 3
Installing 3
Silent installation 7
Page 1: Connection 7
The service account (cloud) 8
Test Connection 8
Page 2: Library & Files 8
Selection of documents 9
All documents 11
Next 11
Page 3: Metadata 11
Page 4: Folders & Versions 12
Folder Structure 12
Versions & Filenames 13
Page 5: Export 14
While it runs 15
When it finishes 15
Page 6: Reports 16
Exporting in Batches 17
How batches are made 17
Exporting one batch 17
Checking what has been done 17
Using several computers 17
Settings Files 18
iManageExporter.config.json (SQL Server) 18
iManageExporter.fields.json (search fields on page 2) 18
Your own settings 19
Troubleshooting 19
On-Premises Batches 20

About the Exporter

The Mattricity iManage Exporter copies documents, and their metadata, out of an iManage Work library into a folder structure you choose, and records what it did in a SQL Server database. Use it for backups, business continuity, or moving a library to another system.

It works with iManage Cloud and with on-premises iManage Work. A six-step wizard walks through the job:

1. **Connection** – sign in to iManage and choose where reports are stored.
2. **Library & Files** – choose the library and which documents to export.
3. **Metadata** – choose the metadata that is written to the reports.
4. **Folders & Versions** – choose the folder layout, the versions and the file names.
5. **Export** – run the export and watch its progress.
6. **Reports** – review runs, batch status and the export report, and save them as files.

For every document version the Exporter saves the file, its SHA-256 checksum and the metadata you selected. Nothing in iManage is changed: the Exporter only reads.

Before You Begin

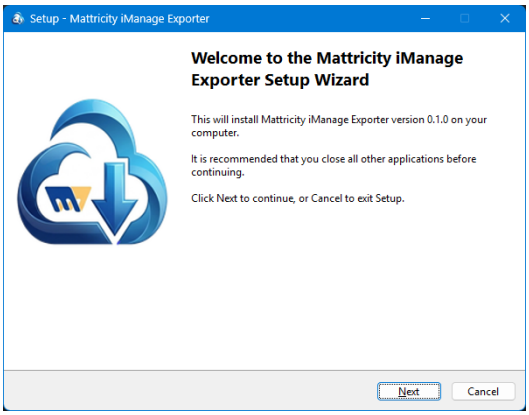
Install the Exporter on a Windows 10 (version 1809 or later) or Windows 11 64-bit computer, with access to the iManage server and to a SQL Server. Nothing else needs to be installed: the program carries its own .NET runtime.

You will need:

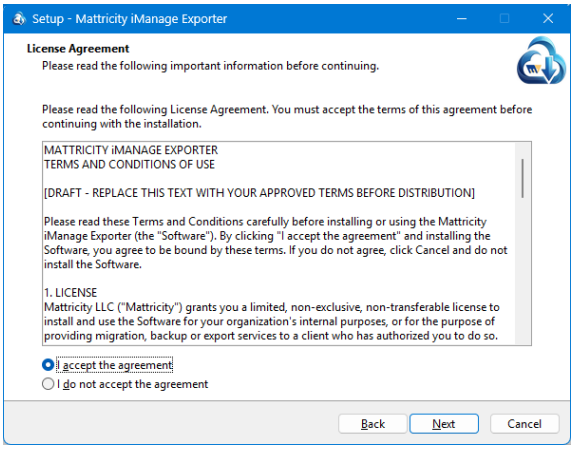
- An iManage user that can read the documents to be exported (the Exporter reads only).
- The iManage **Client ID** and **Client Secret** for an application registered for the Exporter.
- **Cloud only:** a second account, the *service account*, with Library Migration access (see Page 1).
- A SQL Server and a login that may create a database, or an existing empty database. Windows authentication is recommended.
- An export folder with enough free space. The Admin Portal in Control Center shows how much storage the library uses.

Installing

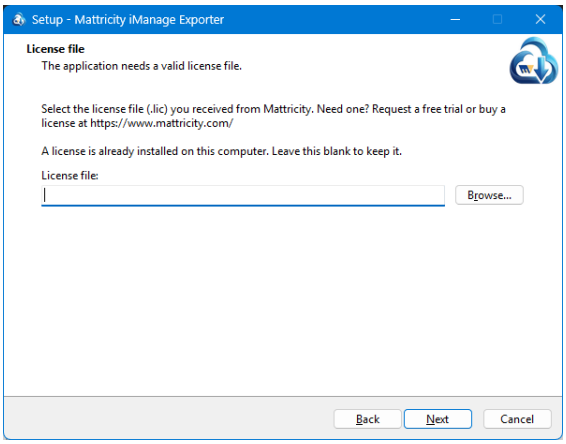
1. Run `MattricityiManageExporter_Setup_0.1.0.exe` as an administrator.



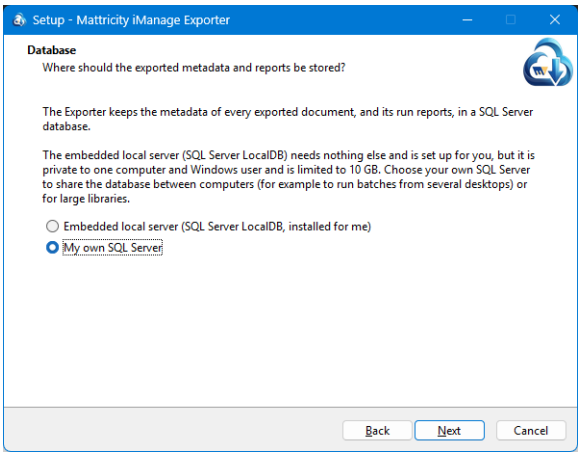
2. Accept or change the install folder.



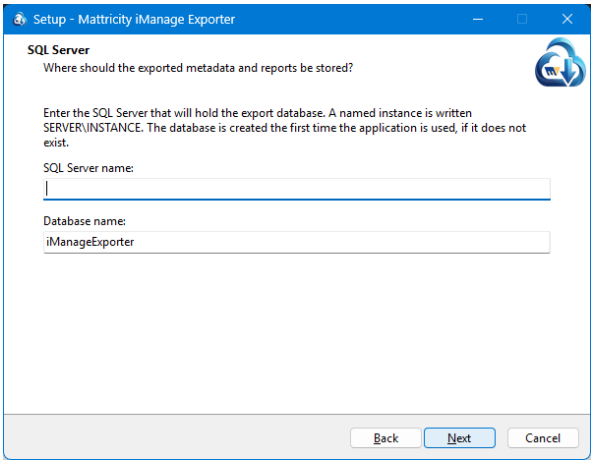
3. Enter your license key file.



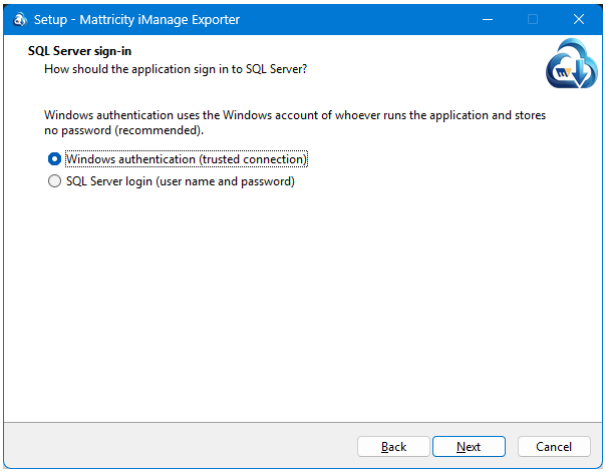
4. Use the embedded SQL Database (LocalDB) or enter the **SQL Server name** (a named instance is written `SERVER\INSTANCE`) and a **database name**. The maximum size allowed for the embedded LocalDB is 10 GBs. If you think your export will be larger, or you plan to use the batching option for exporting All Documents, select your own SQL Server.



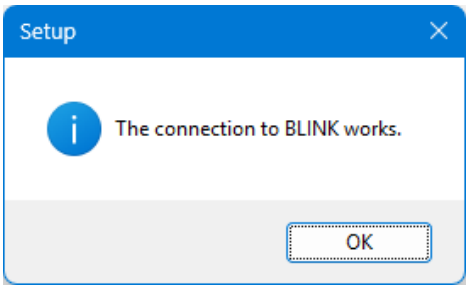
5. If selecting your own SQL Server, enter the server name or server name\instance.

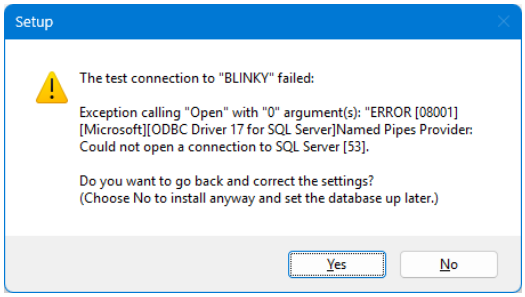


6. Choose **Windows authentication** (recommended), or a SQL Server login with its user name and password.

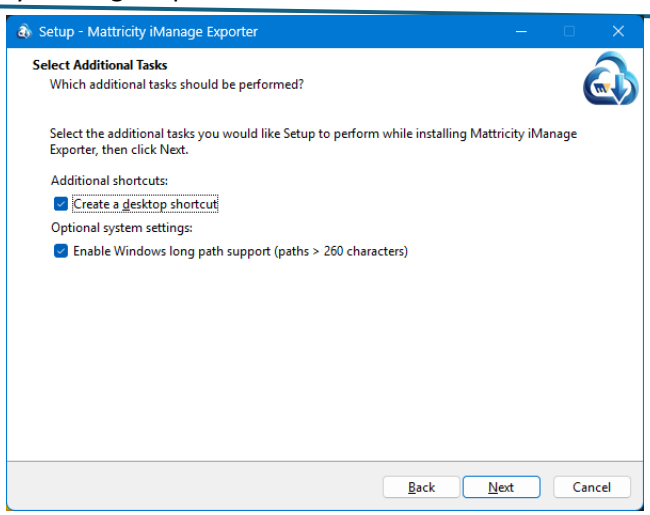


7. Setup tests the connection and tells you the result. If the test fails, you can go back and correct the settings or install anyway and set the database up later.

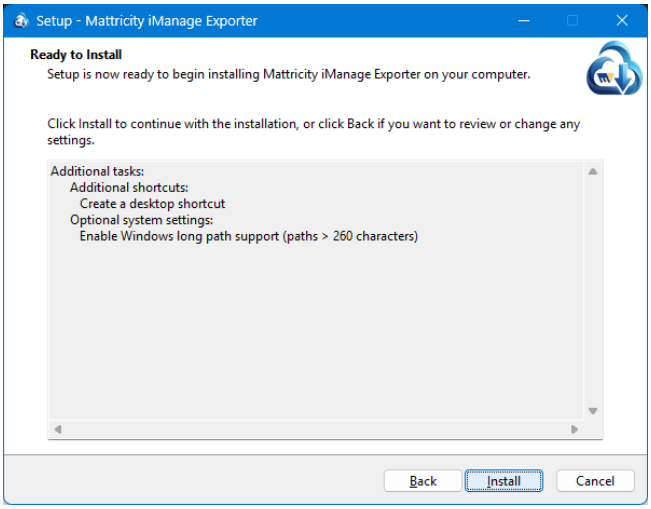




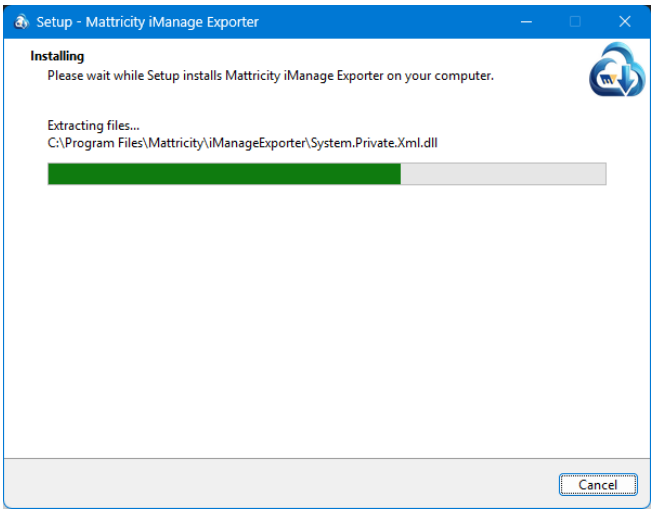
8. Optionally click to **Create a desktop** shortcut and **Enable Windows long path support**. Do this when the exported folder paths may be longer than 260 characters.



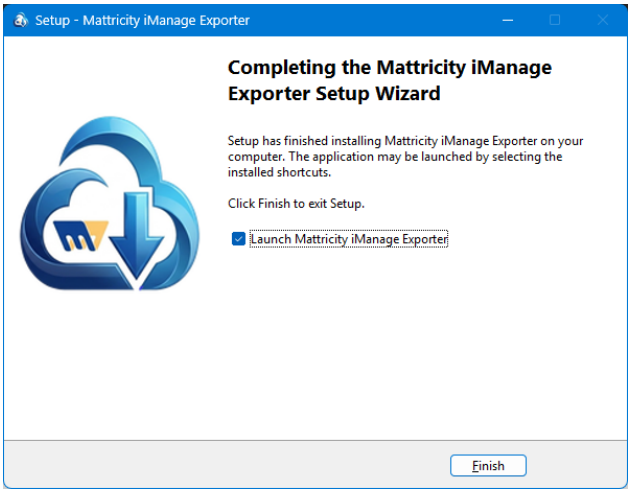
9. Review the installation options and click to Install.



10. Complete the installation.



11. Optionally l aunch the application and close.



The settings are saved in `iManageExporter.config.json` in the install folder, and the database and its tables are created the first time the program needs them (when you leave page 2). A SQL Server login's password is stored in that file in plain text, so protect the folder or use Windows authentication.

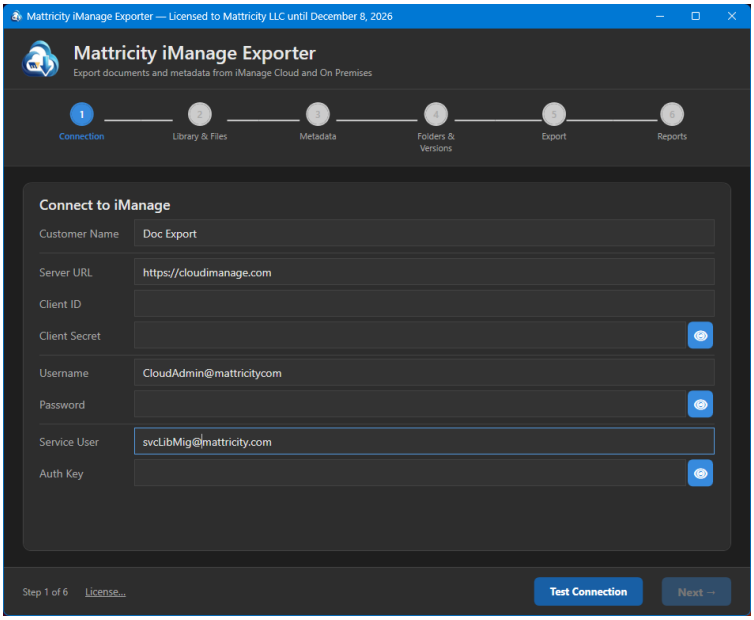
Silent installation

```
setup.exe /VERYSILENT /SQLSERVER=SQL01 /SQLDB=iManageExporter /SQLAUTH=windows
setup.exe /VERYSILENT /SQLSERVER=SQL01 /SQLDB=iManageExporter /SQLAUTH=sql
/SQLUSER=sa /SQLPASSWORD=...
```

A silent install without `/SQLSERVER` leaves an existing configuration file unchanged.

Page 1: Connection

Enter how to reach iManage and press **Test Connection** in the footer. Next stays unavailable until the test succeeds.



Field	What to enter
Server URL	Cloud: `https://tenant.cloudimanage.com`. On-premises: `https://server/`.
Customer Name	The firm or project name. It groups the reports, and it identifies the export when several computers work on one library (see Batches). Use the same name on every computer.
Client ID / Client Secret	The values of the application registered in iManage for the Exporter.
Username / Password	The iManage user that exports. On the cloud the user name is an email address. The eye button shows or hides the password, and a warning appears when Caps Lock is on.
Service User / Auth Key	**Cloud only.** This service account must have Library management privileges. See below.

The service account (cloud)

On the cloud the Exporter lists the library with iManage's fast library crawl, which only a *Library Migration* service account may use. That account can list documents but cannot download them, so the Exporter uses two sign-ins:

- the **Username and Password** search for and download documents;
- the **Service User and Auth Key** (the service account's password) list every document and version.

Create the service account in Control Center and give it Library Migration access. The Auth Key is used for the session and is **not saved**, so enter it each time. Enter a valid Client ID and Client Secret.

On-premises installations do not use a service account, and the two boxes are not shown.

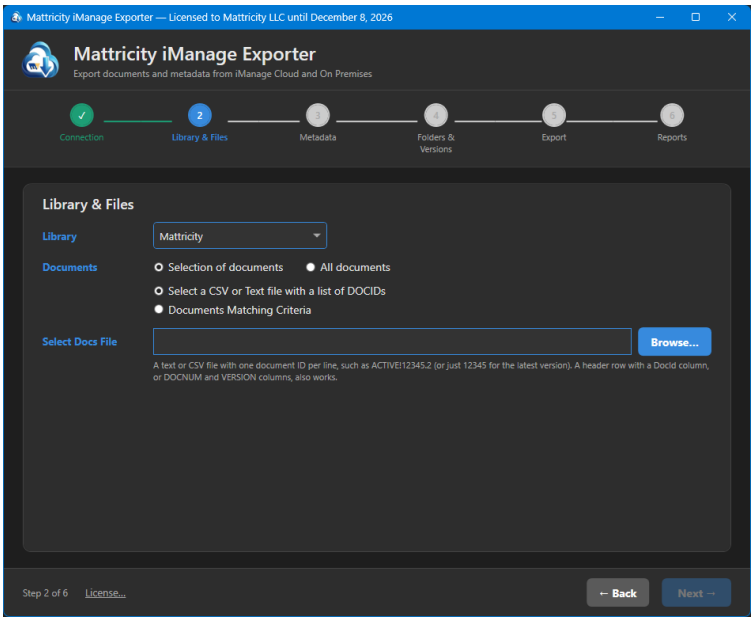
Test Connection

The test signs in with the user, reads the list of libraries, and on the cloud also signs in with the service account and checks that it may crawl the first library. A message explains any failure, for example a wrong password or a service account without Library Migration access. When the test passes, the button turns green and reads "✓ Connected", and Next becomes available. A failure turns it red ("✗ Failed"); the reason is shown on the page and when you hover over the button.

Page 2: Library & Files

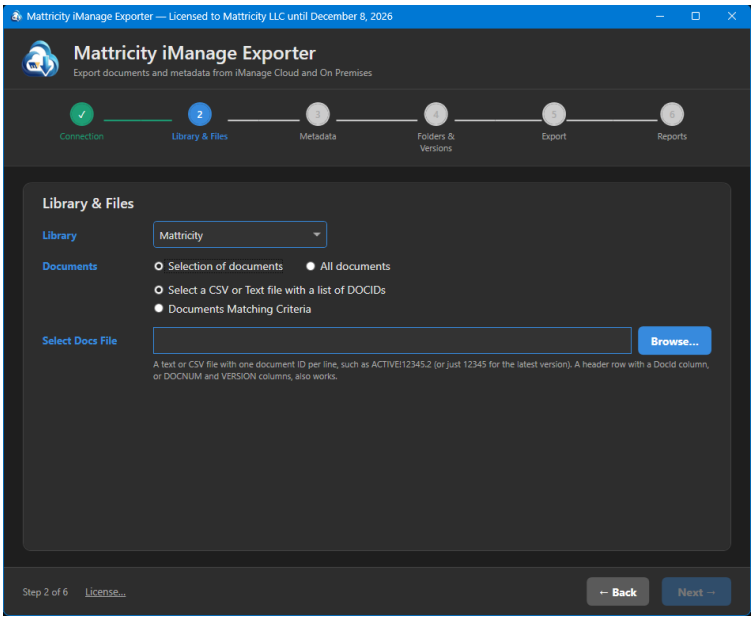
Choose the **Library**, then decide which documents to export. Use **Preview Count** to check the result before you continue. A preview only counts documents; it exports nothing.

There are two ways to choose: **Selection of documents** and **All documents**.

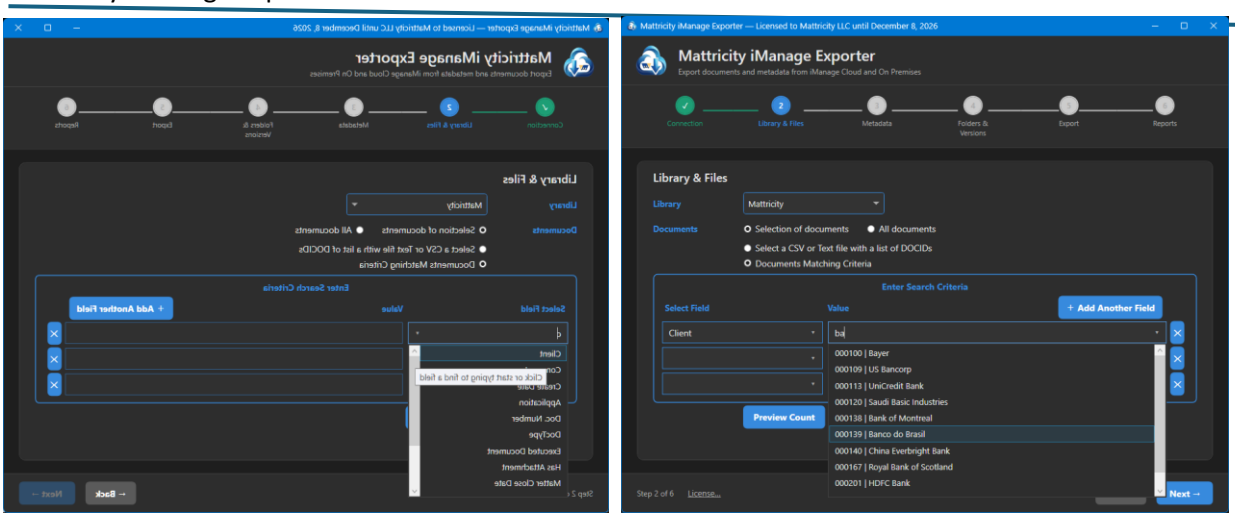


Selection of documents

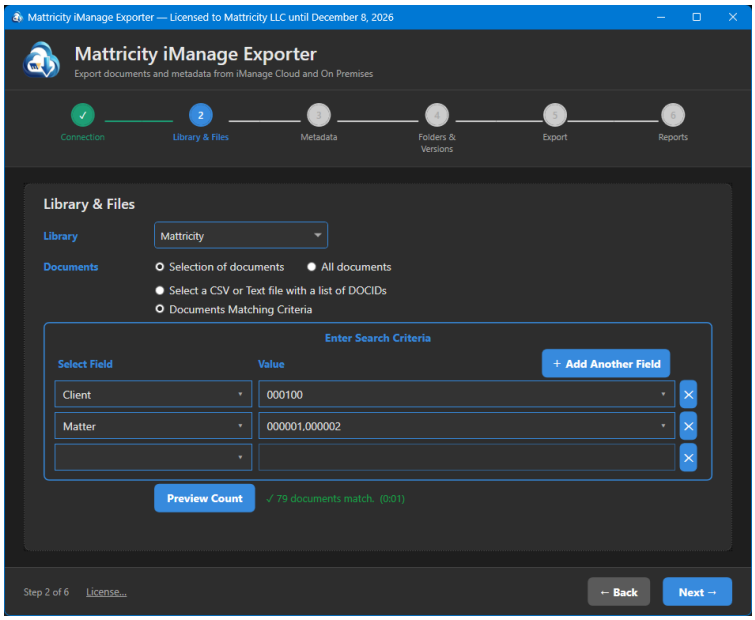
Select a CSV or Text file with a list of DOCIDs. Browse to a text or CSV file with one document per line, either as `ACTIVE!12345.2` (a library, document number and version) or as a bare document number such as `12345` for the latest version. A header row with a `DocId` column, or with `DOCNUM` and `VERSION` columns, also works. The page reports how many documents it found and warns about lines it could not use, for example IDs that belong to another library. A list file belongs to one library, so the file box is emptied whenever you change library or connection.



Documents Matching Criteria. Build a search from lines. Each line has a field, chosen from the **Select Field** list, and a value:



- Click the field box to see the list or start typing to narrow it (typing "date" shows every date field). A field can be used once.
- The **Value** box changes with the field. Custom fields and users offer suggestions: click the box to see the first values, or type to narrow them. These boxes take several values: each value you choose is added after a comma (for example two matters of one client), and documents with any of them match. Values you already chose are not offered again. Dates take a *from* and a *to* date, document numbers take a range, and Has Attachment is Yes or No.
- Every line that is filled in must match (AND). Blank lines are ignored. Dates and numbers are inclusive.
- Three lines show to begin with. **Add Another Field** adds more, and the box scrolls. The ✕ clears a line, or removes an added one.
- Choosing the second custom field of a pair (for example Matter) adds its first (Client) for you. The Matter suggestions follow the client on the line above.

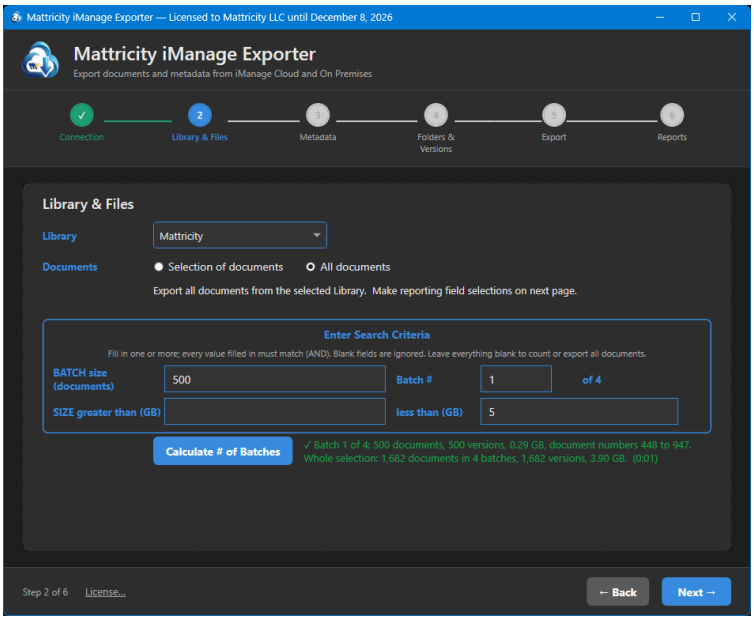


The list of fields comes from the library: the standard document fields, plus every custom field that has a caption (Client, Matter, Practice, Status and so on). To add a field, correct the search name of a field, or hide one, see *Settings Files*.

Press **Preview Count** to see how many documents match. If the server cannot accept a search on a field, the message tells you which one; the Exporter does not fall back to scanning the library for those fields.

All documents

Exports every document in the library. On the cloud this page then offers:



- **Batch size (documents)** and **Batch #:** split a very large library into batches of an equal number of documents. See *Exporting in Batches*.
- **Size greater than / less than (GB):** keep only the versions larger and/or smaller than a size. Use *less than* to leave out very large files such as video, or *greater than* to export just the large ones. These limits work on the cloud only.

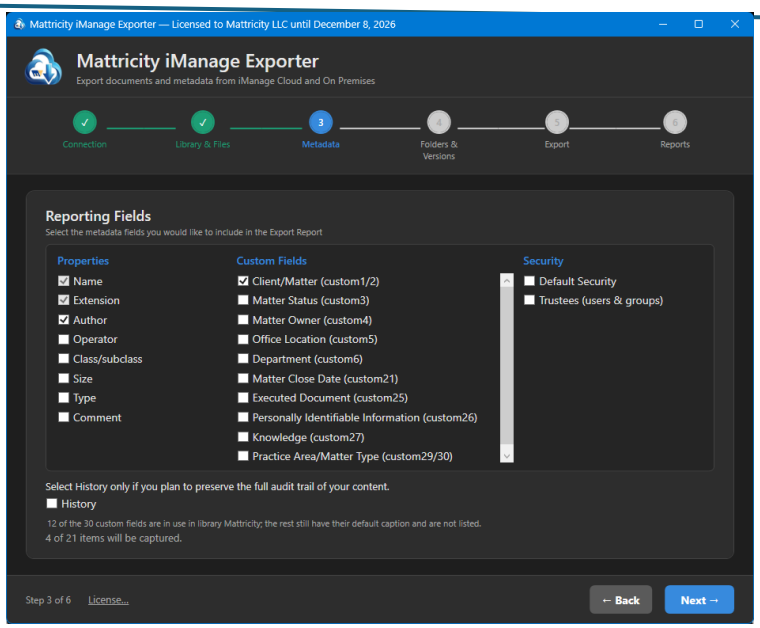
Preview Count lists every version in the library, so on a large library it takes minutes (about five to seven minutes for 500,000 documents). It reports the documents, versions and total size. With a batch size entered the button reads **Calculate # of Batches**. **Stop Count** cancels it.

Next

When you leave this page the Exporter creates the database and its tables on the SQL Server if they are missing, and upgrades them if they are from an earlier version. If the SQL Server cannot be reached the page tells you which settings file to check.

Page 3: Metadata

Tick the metadata fields to include in the Export Report. The fields are grouped as **Properties**, **Custom Fields**, **Security** and, at the end, **History**.



- **Properties** are the standard profile fields: author, operator, class, subclass, type, comment, size, and the document's status flags. Workspace name and the folder path inside the workspace are here too. The folder path is known when you export all documents, and is not available for a list of IDs.
- **Custom Fields** shows the library's own captions (Client, Matter, Practice and so on) instead of Custom1, Custom2 and Custom29. Fields the library does not use are not listed. *Custom field descriptions* adds the descriptions of the Custom1 and Custom2 values, for example the client and matter names.
- **Security** has the default security, and optionally the trustees (the users and groups with access). Trustees takes one extra request per version, so the export is slower.
- **History** adds the document's audit history. Select it only if you need to preserve the full audit trail of your content. It takes one extra request per version, and whether it is available depends on the server.

By default, some fields are stored, name, extension, document's dates. They appear in the SQL tables but only the selected fields become columns of the Export Report.

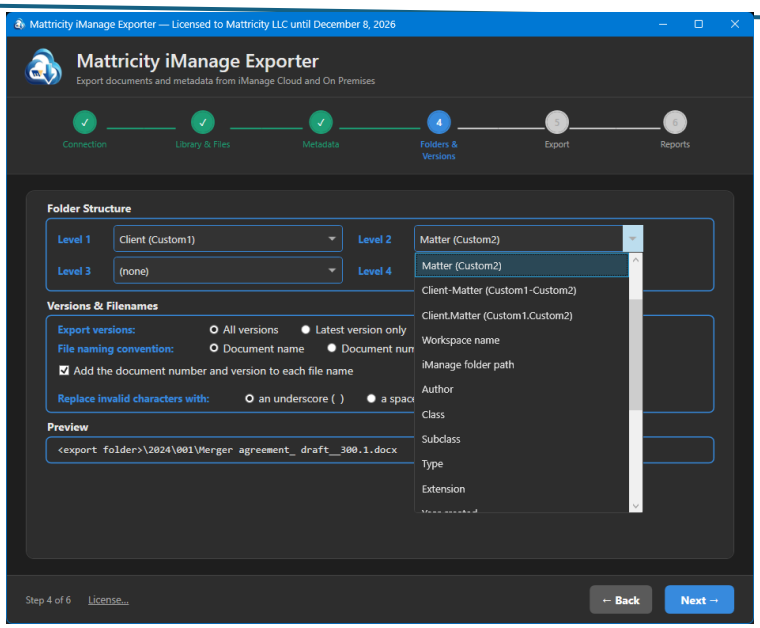
When you export a later batch of the same library (see *Exporting in Batches*), the fields automatically checked based on the earlier batch to ensure reporting consistency across all batches.

Page 4: Folders & Versions

This page decides where each file goes and what it is called. The **Preview** at the bottom shows one example path built from your choices, so you can see the result before exporting.

Folder Structure

Choose up to four values, **Level 1** to **Level 4**. Each becomes a folder level, from the top down. The values you can choose from are:



- the library;
- the custom fields the library uses, by their captions (Client, Matter and so on);
- the workspace name and the folder path inside the workspace;
- author, class, subclass, type and extension;
- the year the document was created or last edited.

To flatten the structure, choose **Custom1-Custom2** or **Custom1.Custom2** as a level. This puts the client and the matter in one folder, for example `2024-001` or `2024.001`. Only the codes are used, not the descriptions. If one of the two is empty the other is used alone, and if both are empty the folder is `_blank`.

A document with no value for a chosen field goes in a folder called `_blank`. Leave all four levels empty to put every file in the export folder itself.

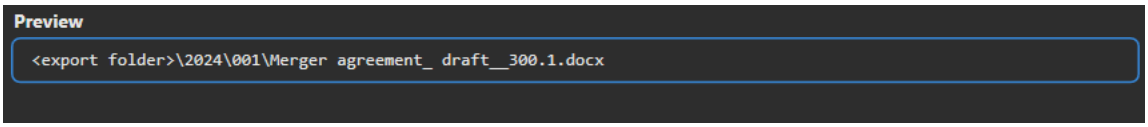
Versions & Filenames

Setting	Choices
Export versions	**All versions**, or **Latest version only**.
File naming convention	**Document name**, or **Document number and version only** (for example `123456_1.docx`). The short form helps when folder paths would be too long for Windows.
Add the document number and version to each file name	When ticked, each file name gets a suffix built from the **Pattern**. The default pattern `_{docnum}.{version}` gives `test_300.1.docx`.
Replace invalid characters with	An underscore or a space. Windows does not allow the characters : \ / * ? " < > or the vertical bar in a file or folder name, so they are replaced.

If two files would still have the same name, the Exporter adds the document number and version so that nothing is overwritten. If a path would be too long for Windows, the file falls back to the *document number and version* name. Very long folder names are shortened.

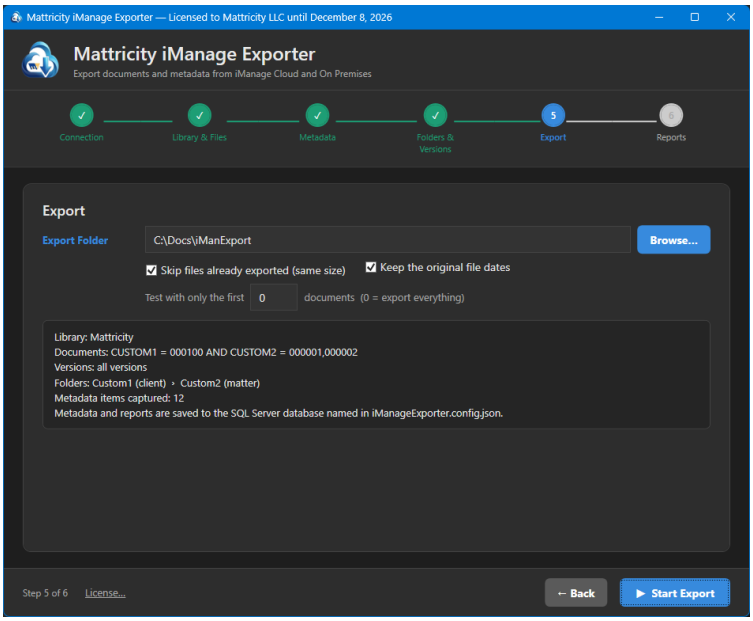
The Preview line warns you when the pattern is empty or does not contain both `{docnum}` and `{version}`.

When you export a later batch of the same library, this page opens with the settings of the earlier batch, so the folders and file names match.



Page 5: Export

Choose the **Export folder**, check the summary of your choices, and press **Start Export** in the footer.

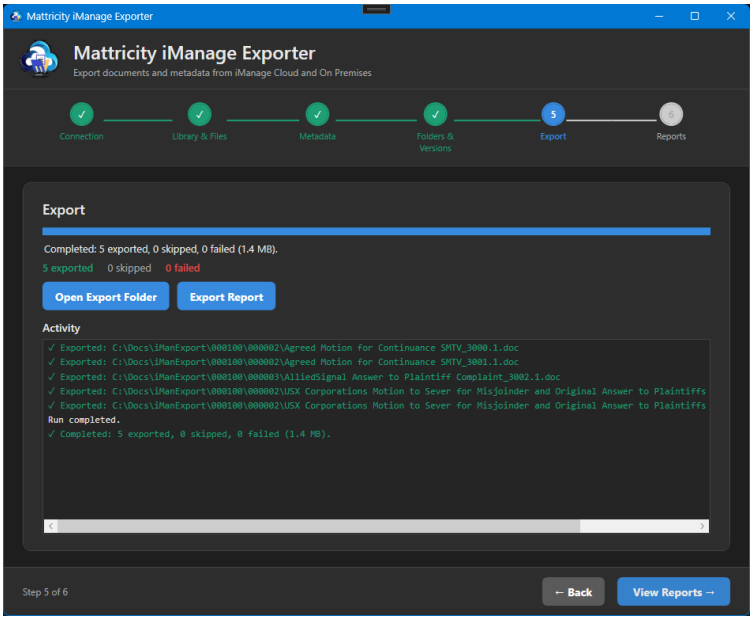


Option	What it does
Export folder	Where the files are written. Type a path or use **Browse**. The folder is created if it does not exist.
Skip files already exported (same size)	A file that is already in the export folder with the same size is not downloaded again. This lets you stop and restart a run, or repeat a run, without starting over. A file you deleted is exported again. A different export folder exports everything.
Keep the original file dates	The exported files carry the document's original dates instead of today's.

Option	What it does
Test with only the first N documents	Exports just the first N documents, to try your folder layout and file names before the full run. Enter 0 to export everything.

While it runs

The status line shows progress as *N out of M document versions*, and the **Activity** list shows what has been done, including any problem. Right-click the activity list and choose **Copy the whole log** to copy it. The red **Cancel Export** button stops the run cleanly; files are written under a temporary name and only renamed when complete, so a stopped run leaves no half-written files.



If iManage signs the session out during a long run, the Exporter signs in again by itself, and if iManage asks it to slow down, it waits and continues.

A document that cannot be exported does not stop the run. It is marked as failed with the reason, and the run finishes with the number of failures. If you export in batches and another computer is already exporting an overlapping batch, the run stops at the start with a message naming that computer. See *Exporting in Batches*.

When it finishes

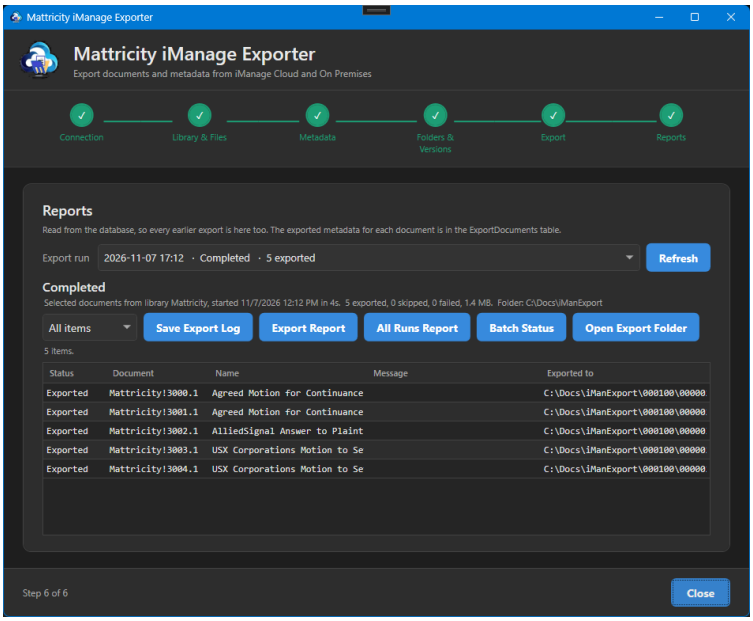
The summary shows how many versions were exported, skipped and failed, and their total size. From here:

- **Open Export Folder** opens the folder in Windows.
- **Export Report** saves a CSV of the fields you ticked on page 3, with the file path of each exported document.
- **View Reports** moves on to page 6.

The metadata of every exported document, its SHA-256 checksum and its status are saved in the SQL Server database, in the `ExportDocuments` table, whether or not you save a report.

Page 6: Reports

The reports are read from the SQL Server database, so every earlier export of the library is here too, not only the one you just ran. Choose a run under **Export run**; the list shows each document's name, ID, status, where it was exported to, and a message for any that failed.



Button	What it saves or shows
Export Report	A CSV of the selected run: the file path of each exported document, then the fields you ticked on page 3.
All Runs Report	One CSV with the documents of every run for this library. Use it when an export was split over several runs or several computers.
Batch Status	Which batches are completed, running or not yet run, across every computer that uses this customer name. It can be saved as a CSV. See *Exporting in Batches*.
Save Export Log	The log of the selected run (every document, its status and message), as a CSV file.
Open Export Folder	Opens the export folder in Windows.
Refresh	Reads the runs again, for example to see a run started on another computer.

The exported metadata of each document is kept in the `ExportDocuments` table, so you can also query it with SQL, or build your own reports from it.

Exporting in Batches

A large cloud library is easier to export in batches of an equal number of documents, one batch at a time or on several computers at once. Batches are available with **All documents** on the cloud.

How batches are made

The Exporter lists every document number in the library and cuts the list into batches of the size you choose. Each batch holds the same number of documents, even when the document numbers have large gaps, and the last batch simply takes whatever is left. **Batch #** is the batch you want *out of* the total; it is not the number of batches. For example, a batch size of 100,000 on a library of 507,000 documents makes 6 batches, and Batch # can be 1 to 6.

Exporting one batch

1. On page 2 choose **All documents** and enter the **Batch size (documents)**.
2. Press **Calculate # of Batches**. The result shows the number of batches ("of 6") and, for the batch chosen, its documents, versions, size and the document numbers it covers. This is a full count of the library, so it takes a few minutes.
3. Enter the **Batch #** you want. Changing the batch number does not need a new calculation; the list is kept for 12 hours. Changing the batch size, the size limits or the library does.
4. Continue through pages 3, 4 and 5 and start the export.
5. For the next batch, come back to page 2, enter the next Batch # and continue. The metadata fields on page 3 and the folder and file settings on page 4 are filled in from the earlier batch, so every batch is consistent.

The export uses the list from the count and does not search the library again. Batches can be combined with the size limits: the size limits are applied first, and then the remaining versions are cut into batches.

Checking what has been done

When you choose a batch, page 2 reports whether it has been exported before: *"Batch 1 was completed on … by …"* appears in red, and pressing Next asks whether you want to export it again (files already exported are skipped if they are still in the export folder). A batch that another computer is exporting right now cannot be started.

The **Batch Status** button on page 6 lists every batch as completed, running or not yet run, for all computers. Save it as a CSV for your records.

Using several computers

Several computers can each export a different batch of the same library at the same time, if they use:

- the **same Customer Name** on page 1;
- the same **SQL Server database** (the same `iManageExporter.config.json` connection);
- the same **batch size**, so that the batches are the same.

When a batch starts, the Exporter records it in the database. If another computer already has an overlapping batch running, the export stops at once with a message naming that computer, and nothing

is exported twice. A running batch shows it is alive every minute; if it has not for ten minutes, for example after a crash, it is treated as stopped and the batch can be started again.

The Exporter checks for file name clashes within one run only. When batches are exported into the same folders, keep the names unique: use the same folder and file naming settings on every computer, and add the document number and version to each file name (page 4). Use **All Runs Report** on page 6 to get one report across all the runs.

Settings Files

The Exporter uses three small files. All of them are text and can be edited with Notepad. Close the Exporter before you edit one.

iManageExporter.config.json (SQL Server)

In the install folder, next to the program. It holds the connection to the SQL Server database, and is written by the installer.

```
{
  "ConnectionString":
"Server=SQL01;Database=iManageExporter;Trusted_Connection=True;TrustServerCertificate
=True;"
}
```

To move the database to another server, change `Server=` and restart. With a SQL Server login the connection string holds the user name and the password in plain text, so keep the folder's permissions tight. The installer keeps the previous copy as `.bak`.

iManageExporter.fields.json (search fields on page 2)

In the install folder. The "Select Field" list on page 2 is built from the standard document fields and the library's captioned custom fields. This file adds a field, corrects the name iManage's search uses for a field, or hides a field. It is kept when you upgrade the program.

```
[
  { "key": "retention", "label": "Retention Days", "editor": "Number", "filter":
"retain_days" },
  { "key": "comments",  "label": "Comments",       "editor": "Text",   "filter":
"comments" },
  { "key": "body",      "remove": true }
]
```

Entry	Meaning
key	The field's own name. An entry with the key of a built-in field replaces that field.
label	What the list shows.
editor	The kind of value box: Text, Lookup, User, Date, Number or YesNo.
filter	The name iManage's search uses for the field. Dates add `_from` and `_to`.
remove	`true` hides the field.

If Preview Count reports that the server did not accept a search on a field, correct that field's `filter` here and restart. Lines beginning with `//` are comments.

Your own settings

The last server URL, user name, customer name and export folder are remembered for you in `%AppData%\Mattricity\iManageExporter\iManageExporter.settings.json`. Your password is stored encrypted for your Windows account only. The Client ID and Client Secret for each server are stored in the same file, so that you do not have to enter them again. The service account's Auth Key and the list file chosen on page 2 are never remembered.

Troubleshooting

What you see	Likely cause and what to do
Test Connection shows ✗ Failed	Hover over the button or read the message on the page. Check the server URL, the Client ID and Secret, and the user name and password. On the cloud the user name must be an email address.
"Service account…" message on the cloud	The service account (Service User and Auth Key) is wrong, or it does not have Library Migration access. Ask your iManage administrator to grant it in Control Center.
"Could not use the SQL Server set in iManageExporter.config.json" when leaving page 2	The SQL Server cannot be reached or the login may not create the database. Check `Server=` in the config file, the login's permissions, and the network or firewall. The message shows the file's location.
SQL errors such as "Invalid column name 'batch_number'" when you query the database yourself	The database is from an earlier version. Move past page 2 once in the new version, which upgrades the tables.
Preview Count takes several minutes	On the cloud, All documents lists every version in the library. About five to seven minutes for 500,000 documents is normal. Press Stop Count to cancel.
"Batch n was completed…" in red	That batch was already exported. Choose another Batch #, or continue and answer Yes to export it again.
"Stopped - batch in use"	Another computer is exporting an overlapping batch. See *Exporting in Batches*. A batch is released after ten minutes without a sign of life.
The list file reports IDs of another library	The file lists documents of a different library. Choose the matching library, or choose another file.
"The server did not accept the document search" on a criteria line	iManage's search does not know the field by the name the Exporter sent. Remove that line, or correct the field's `filter` in `iManageExporter.fields.json`.

What you see	Likely cause and what to do
A value box shows "Lookup unavailable"	The suggestions could not be read. You can still type the value.
Files are missing from the folder on a second run	With *Skip files already exported* ticked, files that are already there are not copied again. Untick it to export everything again.
Some files fail with a path or file name error	The path is too long for Windows. Choose *Document number and version only* for the file names, shorten the folder structure, or enable Windows long path support.
The run finished with failures	Open page 6 and look at the Message of each failed document. Run the export again: documents already exported are skipped, and only the failed ones are tried again.

For anything else, copy the activity log on page 5 (right-click and choose *Copy the whole log*) and send it to Mattricity support.

On-Premises Batches

On-premises iManage Work has no library crawl, so the Exporter has no size limits, batch boxes or Preview Count for All documents there. To export an on-premises library in pieces, a SQL script run on the iManage database produces a list of documents, and the Exporter exports that list.

1. Run one of the supplied SQL scripts against the iManage Work database. Each script selects a batch of documents (for example by document number range, by client and matter, or by date) and returns their document numbers.
2. Save the result as a text or CSV file with one document per line, as `12345` or `LIBRARY!12345.1`, or with `DOCNUM` and `VERSION` columns.
3. In the Exporter, choose the library on page 2, then **Selection of documents** and **Select a CSV or Text file with a list of DOCIDs**, and choose the file. The page reports how many documents were found.
4. Continue through pages 3 to 5 as usual. Repeat with the next list for the next batch, using the same settings on pages 3 and 4.

[Insert the Mattricity SQL scripts and sample output here]