

# Simple File Upload

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# Table of Contents

<b>1 Simple File Upload</b> .....	<b>3</b>
1.1 Special considerations .....	3
1.2 Workspace security permissions .....	3
1.3 Accessing Simple File Upload .....	4
1.4 Uploading new documents .....	4
1.5 Replacing documents .....	6
1.6 Simple File Upload for processing errors .....	8
1.6.1 Viewing audits for processing errors .....	12

# 1 Simple File Upload

Simple File Upload, formerly Single File Upload, gives users the ability to add new documents to Relativity.

## 1.1 Special considerations

Keep the following considerations in mind:

- When you upload a document using Simple File Upload, Relativity imports the following metadata:
  - ArtifactID
  - Control Number
  - Extracted Text
  - Relativity Folder Name
  - Has Images
  - Has Native
  - Relativity Native Type
  - Supported By Viewer
  - System Created By
  - System Created On
  - System Last Modified By
  - System Last Modified On
  - File Name
  - File Size
- Simple File Upload provides the capacity to upload any document format that is also supported by the legacy ActiveX viewer.
- The direct upload of EXE, DLL, and HTML files is prohibited in Simple File Upload for security reasons. An error message will display if you attempt to upload them.
- You can search extracted text with keyword search. However, if Data Grid is enabled on a field, keyword searching is disabled.

## 1.2 Workspace security permissions

To configure workspace security permissions for Simple File Upload:

1. Navigate to the **Relativity Utilities** console on the **Workspace Details** tab.
2. Click **Manage Workspace Permissions**.
3. Click **Edit Permissions** for a group on the **Group Management** tab.
4. Grant access to the workspace security permissions listed in the table.

Object Security	Tab Visibility	Other Settings
<ul style="list-style-type: none"> <li>Document - View, Add</li> <li>New Document (child)</li> </ul>	<ul style="list-style-type: none"> <li>Documents</li> </ul>	<ul style="list-style-type: none"> <li>Admin Operations: Allow Import</li> </ul>

- The New Document button will appear in all workspaces. You can only remove the button by removing the Add Document permission from individual users.
- If you are upgrading from Relativity 9.6 or below, the New Document permission is disabled upon upgrade.

### 1.3 Accessing Simple File Upload

Access Simple File Upload within a workspace in the Documents tab. The application functions on the Folders, Clusters, and Field Tree browsers.


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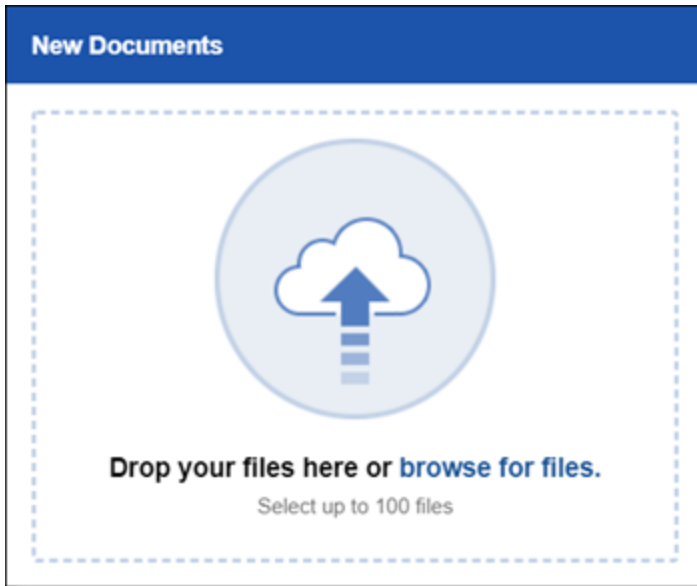
**Note:** You need to have the Add Document permission to access the New Document button.

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### 1.4 Uploading new documents

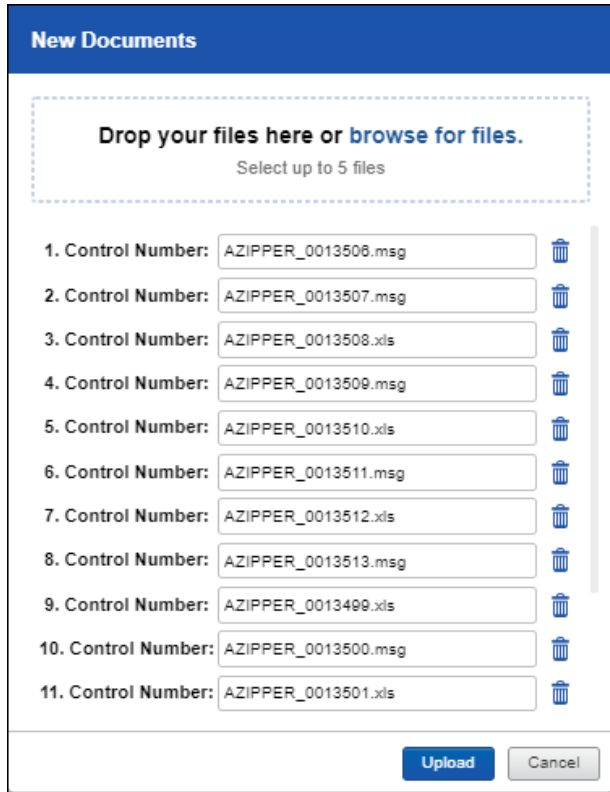
To upload a new document to a workspace:

1. Click **New Documents** icon (  ), which is located to the left of the View bar. The New Documents pop-up window appears.
2. On the New Documents dialog, drag and drop or browse for files that you want to upload. The default value is 20 files. See the Note below for how your Admin can increase the default value, if needed.

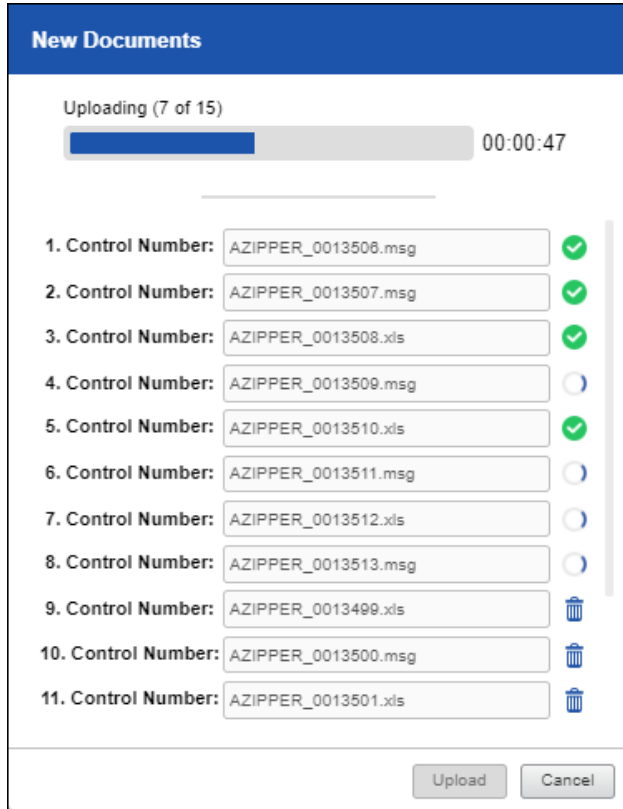


- The **SFUMaxFilesToUpload** instance setting determines the maximum number of documents you can upload using Simple File Upload. Admins can set the maximum number of documents that you can upload at one time up to 100. When the instance setting is set to 100, you can only upload up to 100 files at one time with Simple File Upload. If you select more than 100 files, Relativity will only upload the first 100 files you selected. Any files after the first 100 will not upload. A warning message will display in the pop-up if more than 100 files are selected.
- The direct upload of EXE, DLL, and HTML files is prohibited in Simple File Upload for security reasons. An error message will display if you attempt to upload them.

The selected files will display in a list. If you choose not to upload one of the selected files, click the delete icon next to the file's name in the pop-up.



3. Click **Upload**. When a document uploads successfully, a green check mark appears next to the file name. A progress bar tracks the progress of all the files selected.



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**Note:** You cannot upload a document that shares a Control Number with a document that already exists in Relativity. If you want to replace a document, use the Replace document native icon in the Review Interface. See [Replacing documents below](#).

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## 1.5 Replacing documents

The Viewer supports the ability to replace natives and images as an option in the **Document Actions** drop-down menu. For more information, see the Admin Guide.

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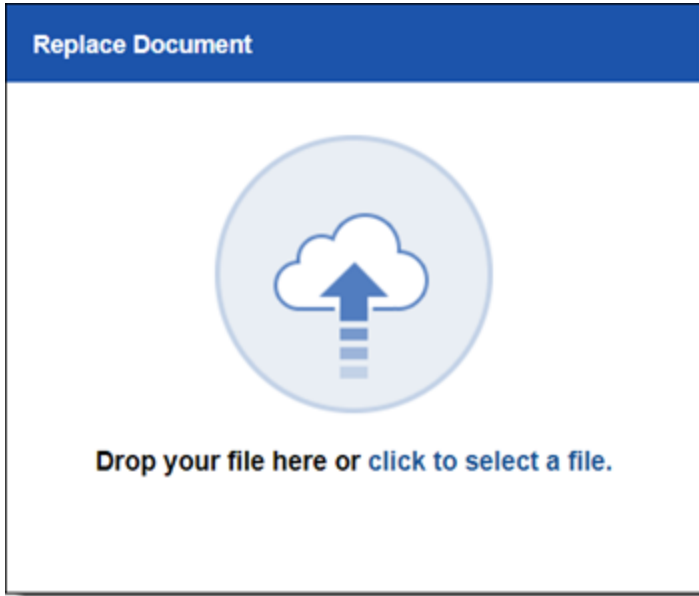
**Note:** You need edit, add, and delete document permissions as well as to access the Replace document native icon.

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To replace a document in the viewer:

1. Open a document.

2. Navigate to the layout and click **Replace document native**. The Replace Document pop-up window opens.



3. Drag and drop or select the document that you would like to replace the current document in the viewer with.

On replace, the following meta data is uploaded:

- ArtifactID
- Control Number
- Extracted Text
- Folder Name
- Has Images
- Has Native
- Relativity Native Type
- Supported By Viewer
- System Created By
- System Created On
- System Last Modified By
- System Last Modified On
- FileName
- FileSize
- FileExtension

If you replace a document with a document that shares the same control number, Relativity overwrites the following fields:

- FileName
- FileSize
- FileExtension
- Extracted text
- Supported By Viewer
- Relativity Native Type
- Has Native
- System Last Modified On
- System Last Modified By

## 1.6 Simple File Upload for processing errors

If you have the Simple File Upload application installed on your workspace, you have the option of opening an individual processing error, downloading the errored file, and uploading the repaired file as a replacement after you resolve the error outside of Relativity.

This is available through the Error Actions console, which appears on the Processing Error Layout after you have configured your environment with the assistance of a support representative.

- This option is available only for document-level errors that have a status of Ready to Retry.
- The Error Actions console is hidden from the error layout if the option to **Download and upload files with processing errors** is not checked for the Processing Error object in the workspace security console. In order to access this functionality, every user, including system administrators, must be included in a group where this option has been manually checked after installing or upgrading the Simple File Upload application.
- The **Download and upload files with processing errors** permission was added in Relativity 9.5.219.30.



Workspace Security DevWorkspace

Group Management

Object Security

Tab Visibility

Other Settings

## Object Security

Level 1

NAME NONE VIEW EDIT DELETE ADD SECURITY EDIT

Search

Processing Error	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Download and Upload files with processing errors										
Persistent Highlight Set	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pivot Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Processing Data Source	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Processing Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Processing Set	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production Data Source	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production Placeholder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RAR Saved Cat. Results	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RAR Saved Cat. Results Set	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RARComparison	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Cancel Close

To upload a Simple file for a processing error, perform the following steps:

1. Navigate to the **Processing | Document Errors** tab, locate the error you'd like to resolve, and click on the name of the error in the **Current Error Message** field to get to the document error layout.

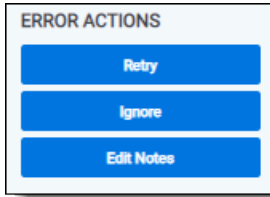
List

1 - 15 of 15 100 per page

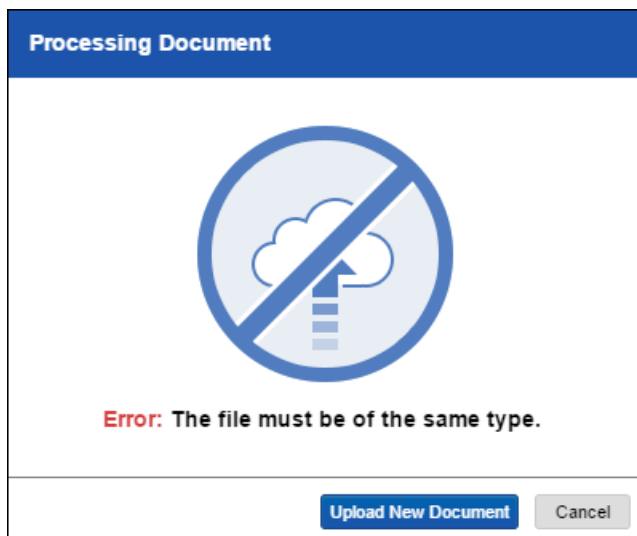
#	File ID	Current Status	Current Category	Current Error Message	Source Location	Custodian	Processing Set	Processing Data Source	Number of Retries	R
1	93	Ready to retry	Password Protected	Error occurred when attempting to open the Excel workbook. The workbook may be password protected.	\\files.t019.ctus014128.r1.kcura.com\T019\ProcessingSource\ProcessingTruthTestFiletypes\Excel\Error\5.XLT	TEST, Processing	New Processing SET	TEST, Processing - 1118907	0	
2	78	Ready to retry	Password Protected	Error occurred when attempting to open the Excel workbook. The workbook may be password protected.	\\files.t019.ctus014128.r1.kcura.com\T019\ProcessingSource\ProcessingTruthTestFiletypes\Excel\Error\4.XLS	TEST, Processing	New Processing SET	TEST, Processing - 1118907	0	
3	83	Ready to retry	Password Protected	Error occurred when attempting to open the Excel workbook. The workbook may be password protected.	\\files.t019.ctus014128.r1.kcura.com\T019\ProcessingSource\ProcessingTruthTestFiletypes\Excel\Error\6.XLS	TEST, Processing	New Processing SET	TEST, Processing - 1118907	0	

2. Click **Download File** on the Error Actions console on the right side of the layout. Note that when you do this, you're downloading the document from the same folder patch displayed in the Document file

location field on the document error layout.

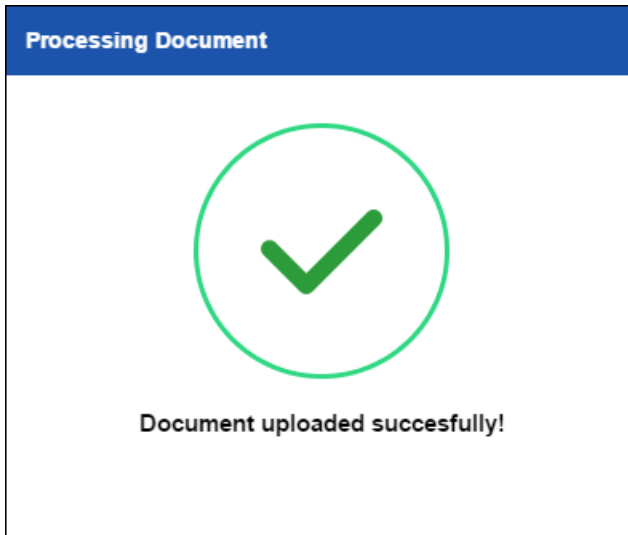


3. Once the file appears in the lower-right hand corner of your browser window, either open or save it to your local machine.
4. Outside of Relativity, address the error to repair the file. For example, if the error was due to password protection because you didn't previously provide that password in the Password Bank, enter it now to decrypt the file and then save the decrypted file to your local machine so that you can upload it here.
5. Once you've repaired the file, return to the document error layout and click **Upload Replacement File** on the Error Actions console.
  - You must upload a file of the same extension as the file you downloaded or you will receive an error. If you receive this error, either click **Upload New Document** to return to your file explorer or click **Cancel** to return to the document error layout.

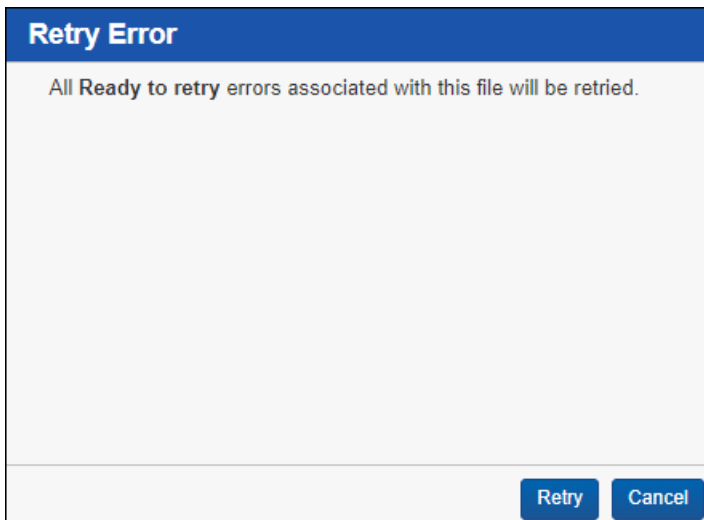


6. Confirm that the upload completed successfully. Note that when you replace a document in this way, the Document file location, File ID, and Name values of the replacement document are identical to


those of the file you downloaded.



7. Click **Retry** in the Error Actions console.
8. When the Retry Error pop-up opens, click **Retry**.



9. The current status will change to **Resolved**.

Document Error Details	Other Details
Processing Data Source:	Smith, Jane - 1056878
Processing Set:	Processing Set 001
Custodian:	Smith, Jane
Source Location:	\\files\T046\ProcessingSource\PasswordProtectedFiles\Pre2007BasicPasswordProtectedWordFile - Test1234!.doc
File ID:	1
Current Category:	
Number of Retries:	2
Current Status:	Resolved 
Document:	
Notes:	

For more information, see Processing error resolution.

### 1.6.1 Viewing audits for processing errors

When you use Simple File Upload for processing errors, Relativity audits your actions, which you can view via the View Audit button on the processing error layout. When you open the audit view, you can see such actions as **File Download** and **File Upload**, along with the processing error file download and replacement paths, among other details.

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**Note:** Auditing for Simple File Upload for processing errors was added in Relativity 9.5.219.30.

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History of ProcessingError: 00000000000000001643		
User Name	Action	Timestamp
Select...	Select...	(All)
Details Filter: (All)		
Admin, Relativity	File Download	6/19/2017 1:41:00 PM CDT
<i>Processing Error File Download Path: \\localhost\files\EDDS1034329\Processing\1051031\INV1034329\SOURCE\0\1950.PDF (8503)</i>		
Admin, Relativity	File Upload	6/14/2017 2:38:09 PM CDT
<i>Processing Error File Replacement Path: \\localhost\files\EDDS1034329\Processing\1051031\INV1034329\SOURCE\0\1950.PDF</i>		
Service Account, Relativity	Create	6/14/2017 11:33:37 AM CDT

Viewing all items in sets of  per page

You can also access audit information through the History tab by filtering on the Object Type field for **ProcessingError** and on the Action field for **File Download** and/or **File Upload**.

Action	Object Type	User Name
<input type="button" value="SET"/> <input type="button" value="Cancel"/>	ProcessingError <ul style="list-style-type: none"> <li>OCRLanguage</li> <li>OCRProfile</li> <li>OCRSet</li> <li>PasswordBank</li> <li>PasswordEntry</li> <li>PersistentHighlightSet</li> <li>PivotProfile</li> <li>ProcessingDataSource</li> <li><b>ProcessingError</b></li> <li>ProcessingProfile</li> <li>ProcessingSet</li> <li>Production</li> <li>ProductionDataSource</li> <li>ProductionInformation</li> <li>ProductionPlaceholder</li> <li>RARComparison</li> <li>RARSavedCatResults</li> <li>RARSavedCatResultsSet</li> <li>RelativityApplication</li> <li>RelativityScript</li> </ul>	

OR
  AND

(Show All)

Document Query

Export

File Download

File Upload

Generate Report

Images - Created

Images - Created for Production

Images - Deleted

Import

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