


## IMPORT DATA

To import data, follow these steps:

- ☛ On **Database** pane, make sure required case & database is opened
- ☛ Only default **Fields & Folders** are created
- ☛ Click **Import**
- ☛ On the **Import** tab, Click **New Import**
- ☛ Ensure **Image, OCR Text & Native files** are checked
- ☛ Select **CSV** or **Summation** or **Concordance** option
- ☛ Click **Next**
- ☛ Select the **Load File Path** from 
- ☛ Check **Headers in load file**
- ☛ Click **Next**
- ☛ Click **Automap**
- ☛ Ensure that all fields are mapped & then Click **Next**
- ☛ Click **Start** to verify the log file & then Click **Next**
- ☛ Check **Skip** to skip the records for the BegDoc if the same BegDoc is already present (OR)  
**Update** to update the records for the BegDoc if the same BegDoc is already present
- ☛ Click **Next**

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- ☛ Click **Finish** to finish the import process
- ☛ Click **Yes** to upload data files
- ☛ You can see that replicator start to **upload date file** to the server
- ☛ Click **Refresh** & then click **View Status** to know the current status
- ☛ Right click on import item & then select **Upload files**
- ☛ Click **Yes** to upload files
- ☛ Click **Refresh** & then click **View Status**
- ☛ **Files are uploaded & organized**
- ☛ Right click on import item & then select **Import OCR Text**
- ☛ Click **Refresh** & then click **View Status**
- ☛ **OCR Text is imported**
- ☛ Right click on import item & then select **Custodian folder creation**
- ☛ Click **Refresh** & then click **View Status**

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- ☛ **Custodian folder is created**
  
- ☛ Right click on import item & then select **Document family creation**
  
- ☛ Click **Refresh** & then click **View Status**
  
- ☛ **Document family is created**
  
- ☛ Click **Administration** tab
  
- ☛ Click **Refresh**
  
- ☛ **Fields** are created with data
  
- ☛ Click **Folders**
  
- ☛ **Folders** are created with data