

# How to migrate data from another review platform to Logikcull

A guide for migrating active projects to Logikcull

## Overview

Migrating an active matter from an alternative review platform into Logikcull can bring significant cost savings and improved functionality, while allowing you to maintain work product and continuity of review. This guide shows you how, from initial considerations to the technical details. We've broken the process into three parts:

1. Exporting your data
2. Importing your data to Logikcull
3. Post-upload quality control

## Initial Considerations

Before you begin migrating an active project, you'll want to identify a point person who can handle the technical aspects of migration.

They should:

- Understand your database structure and be able to generate data/production exports from the platform you are migrating off of.
- Be familiar with load files and have access to zipping tools such as [7zip](#) or [Winzip](#) for Windows and [Archiver](#) or [Keka](#) for Mac.
- Have access to Logikcull account with account admin permission or Project Creator permission and project admin rights.
- Review [Logikcull's production requirements](#) and feel comfortable [performing production uploads](#) in Logikcull.

You'll also want to think through the following questions:

- How much data will be involved in your migration? Entire database archives are typically large. Before exporting your data, you may want to split the exports into smaller chunks. For speed and ease of use, we typically recommend breaking your data up in 200-300 GB sizes and around 500k documents per batch. Here are few resources to help calculate how long a transfer would take:
  - [Check your Upload Internet speed](#)
  - [Calculator](#) to determine how much time and bandwidth it takes to move large files
- What documents are most urgent? Consider prioritizing your data uploads based on certain criteria, such as unreviewed vs. reviewed documents.
- Will you test a sample set? Exporting and uploading a small sample set is a good way to preview results before working with the entire archive. Will you need a second look? Feel free to share with us your sample metadata DAT load file for a quick evaluation.
- Deduplication does not occur for database uploads in Logikcull. Are there more data to be processed after the import?
- **Redaction coordinates made from existing database cannot be migrated.** Capture burned in redactions in the images instead?
- Work product such as tags, notes, comments etc. from existing database can be mapped as new fields in Logikcull and can be searchable but cannot be directly mapped to Logikcull's tagging, notes and comments interface. How important is this?
- Produced records with bates stamped images will need to be captured and uploaded separately as these cannot be associated to the original version of the document. Do you have previously produced documents?
- Normalization of data time zone. Is this important?

## 1. Exporting your data

The migration process begins by exporting your data from your current review platform. The goal of this process is to prepare your archive for easy upload into Logikcull and preserve any existing work product. Work product such as tags, notes, comments, etc., from existing databases can be mapped to new fields in Logikcull. However, redaction coordinates made from existing database cannot be migrated. Produced records with Bates stamped images will need to be uploaded separately, as these cannot be associated with the original version of the document.

- Below is a listing of other review platforms, please refer to their export documentation to help create your archive:

[Everlaw](#)  
[Disco](#)  
[Nextpoint](#)

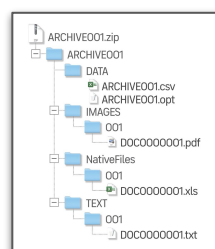
[Relativity](#)  
[Summation](#)  
[Concordance](#)

[Lexbe](#)  
[Cloudnine](#)  
[Goldfynch](#)

- When conducting an export from another platform, export settings should include the following:
  - **LOAD FILES** - Contain the required metadata load file DAT and an image load file OPT.
    - Metadata load files makes use of three (3) main delimiters and suggested characters:
      - Column (separates load file columns) - ASCII 020 (¶)
      - Quote (marks the beginning and end of each load file field) - ASCII 254 (p)
      - Newline (marks the end of a line in any extracted or long text field) - ASCII 174 (®)
    - Metadata load files must include at least the "Begin Doc" field. You can provide any additional fields in the load file and should include all metadata and work product fields including production number fields. Refer to [Logikcull's mappable fields](#) to see the the list.
      - We recommend including fields containing family relationship
      - Fields that cannot be mapped to Logikcull directly can be imported in as new fields, or not imported at all.
    - Date and time fields in the metadata load file should be separate fields and formatted as follows:
      - Date format - mm/dd/yyyy, mm-dd-yyyy, yyyy-mm-dd, or yyyyymmdd
      - Time format - hh:mm:ss [AM|PM], hh:mm [AM|PM], hh:mm:ss, or hh:mm
      - Months (mm), days (dd), and hours (hh) may all be denoted by a single digit.
  - **IMAGES** - Logikcull supports these image formats:
    - Single page black and white TIFF and color JPEG
    - Multi-page black and white TIFF
    - Multi-page PDF (black and white, or color)

**Note:** In order to utilize Logikcull's image document viewer, an image must exist although this is not a requirement in order to proceed with database uploads. You can proceed without images but you will only have access to download native files or view text files (if included). In addition, typical data migration with images should not have endorsements unless documents are made up of 3rd party productions.
  - **NATIVES** - Native paths must be provided in the DAT file.
  - **TEXT** - Text paths must be provided in the DAT file.
- Data must be compressed in a single Zip file per upload and should NOT be password protected or made up of multipart zips.
- Within the Zip, folder structure should reflect the same relative path to corresponding natives, text, and images referenced in the load files. For example:

.\ARCHIVE001\IMAGES\001\DOC0000001.pdf  
 .\ARCHIVE001\NativeFiles\001\DOC0000001.xls  
 .\ARCHIVE001\TEXT\001\DOC0000001.txt



To learn more go to [support.logikcull.com](https://support.logikcull.com) or [learning.logikcull.com](https://learning.logikcull.com)

To schedule a training, contact your Logikcull Account Manager or Customer Success Manager

## 2. Importing your data to Logikcull

Once you've exported your data from your old review platform, you're ready to begin moving it to Logikcull. Here, Logikcull will help you automatically map your old fields to your new platform.

If you'll be migrating data over several uploads, consider the timeline of your coming review. Begin with the data that needs to be accessed first, such as unreviewed documents or files needing a second-pass review.

1. When you have a completed the archive export and meets Logikcull's production requirements, ① create a new project in your Logikcull account.

NOTE: During project creation, be mindful of the ② timezone setting. Typically, source database timezone should match destination. You have the option to set and normalize your Timezone by choosing UTC.

**Create a new Project**  
Click here to create a new project (i.e. matter)

**Project Name**  
My new migrated project

**Account**  
Logikcull

**Billing/Client Code**  
012345

**Deduplication Preference**  
[Icons for deduplication options]

**For**  
Migrated Data from X review platform

**Timezone ②**  
Set timezone for project  
(GMT+00:00) UTC

**MS Word (.DOC) Rendering**  
Set your doc rendering setting  
Show revisions

**MS Powerpoint (.PPT) Rendering**  
Set your PPT rendering setting  
Dynamic (With speakernotes if they exist)

**MS Excel (.XLS) Rendering**  
Set your XLS rendering setting  
Landscape orientation

[Fewer options and processing defaults](#)

**Cancel** **Create Project**

2. Go to the Uploads tab, click "Create a new upload" and select ① "Database Upload". The next step will ask for the load files which should be accessible outside of the zip from your exported data.

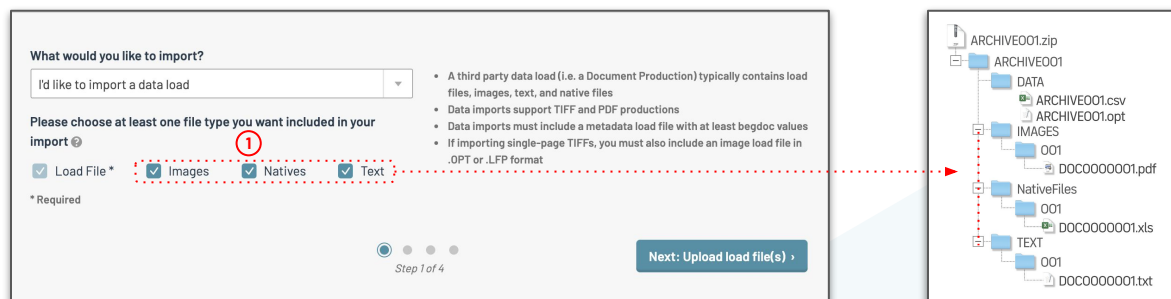
**Create a new Upload**

**File Upload**  
Drag and drop your PST, ZIP, etc... files here.

**Cloud Upload**  
Choose this to upload files from cloud-based services.  
[Icons for Google Drive, Box, OneDrive]

**① Database Upload**  
Choose this to upload production volumes and load files.

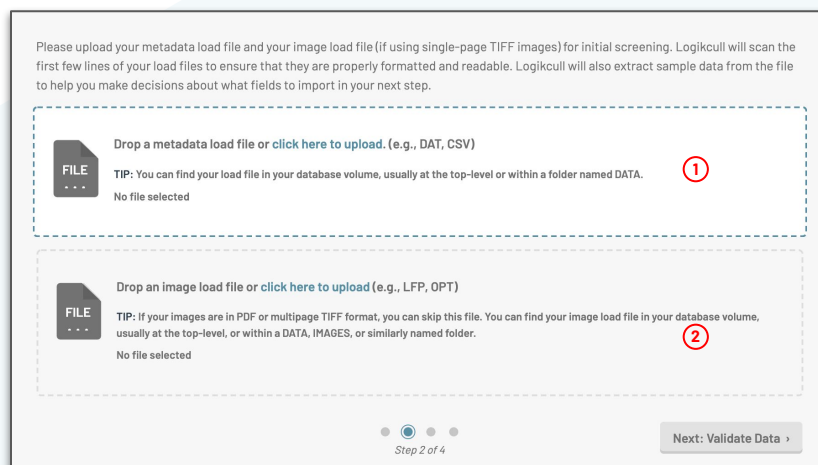
3. Select "I'd like to import a data load" and checkmark ① Images, Natives and/or Text, depending on what was included in the export. Usually, the volume should have ② subfolders titled "Images", "Natives" and/or "Text" that will let you know what was provided.



4. Drag and drop, or click to upload your load files. The top box ① is for .DAT or .CSV files; the bottom box ② is for .OPT or .LFP files.

### Helpful Tip: Image load files

If the images are in multi-page PDF/TIFF format and the filenames are named by their corresponding Bates number, attaching an image load file (i.e. OPT/LFP file) is optional, e.g. For Begin Doc BATES000001, with a multi-page image named as BATES000001.pdf or BATES000001.jpg, Logikcull will automatically locate the images and load accordingly.



- Map your import fields. Logikcull will automatically map suggested matches based on the ① similarity of the field names, and mark the rows in green. It is recommended to check that they are mapped correctly; the definition of the field and the sample data that pulls from the first three lines of your load file can help as references to confirm or modify this choice. All fields will have to be mapped before you can move on to the next step. When mapping any fields, you can either choose to: (1) import them into an existing Logikcull Document field, (2) import them as a new custom field, or (3) not import them.

### Helpful Tips: Field Mapping

- If there is no corresponding Logikcull field for one of the imported fields, it may be helpful to choose the "import as a new field" option so the metadata is still searchable in Logikcull, as needed.
- If you're uploading multiple datasets from your old platform, you only have to map fields once! ② Mapping templates can be re-used when uploading multiple productions, as the fields are expected to be consistent. When you're done with the initial field mapping, save it as a template in the bottom left then select that template for subsequent uploads.
- If you have a large number of fields, you can checkmark select fields, or use the ③ "bulk map" dropdown to quickly select unmapped/mapped fields, or deselect all fields. Then, you can choose to "import as new", "do not import", or "reset to Logikcull selections" in a single action.
- After successfully mapping all fields, validate the load file. If you encounter any errors during load file validation, please contact support through in-app chat for assistance.

Map fields

IMPORTED FIELD	REQUIRED LOGIKCULL FIELD	DEFINITION
Native File Link	Native File Link ①	Required field: A link to a copy of the original file.

③ 23 fields
Import as new
Do not import
Reset to Logikcull suggestions
Mapping temp... ②

IMPORTED FIELD	LOGIKCULL FIELD	DEFINITION	SAMPLE DATA
<input type="checkbox"/> Begin Doc ①	Begin Doc	The beginning control number of a document, i.e., the number of the first page.	FAM0000001 FAM0000002 FAM0000009
<input type="checkbox"/> End Doc	End Doc	The ending control number of a document, i.e., the number of the last page.	FAM0000001 FAM0000008 FAM0000017
<input type="checkbox"/> Begin Family	Begin Family	The beginning control number of a document family, i.e., the number of the first page of the first document in the family.	FAM0000001 FAM0000001 FAM0000001
<input type="checkbox"/> End Family	End Family	The ending control number of a document family, i.e., the number of the last page of the last document in the family.	FAM0000017 FAM0000017 FAM0000017
<input checked="" type="checkbox"/> Begin Attach	Select		FAM0000002 FAM0000018 FAM0000023
<input checked="" type="checkbox"/> End Attach	Select		FAM0000017 FAM0000021 FAM0000025

- Upload your data volume. ① This should be the entire set of images/natives/text files compressed in a single .zip file. Input a name for this import. Click Next to upload and validate the volume.

**Name your import**

ARCHIVE001

**Notes**

My first database migration

☐ Attempt OCR if no text is detected

**Upload a data volume**

Your data volume must be compressed as a .ZIP file before you upload it. Once your transfer is complete, Logikcull will validate your volume by ensuring that it contains all necessary files and is error free.

Drop a file or [click here to upload your data volume.](#) ①

No file selected

Step 4 of 4

Next: Validate Data Volume

- While data is transferring, indicated by the blue progress bar, do not logout or disconnect your session as it will interrupt the transfer.

ARCHIVE001

Your file is uploading.

[Click here to stop and cancel this upload.](#)

19% 733.72 MB of 3.64 GB uploaded in 6 Minutes, 30 Seconds. (est. 00:26:34 remaining)

1. Transferring

### Helpful Tips

- Make sure your computer doesn't go into sleep mode, as this interrupts the transfer.
  - If the file is on a network/shared drive, make sure you have continuous connection. If not, copy that file to a local drive and start the transfer from there.
- When the progress bar turns green, you can safely disconnect and log out. At this stage the data is in Logikcull and processing will begin. If you run into any errors or have any questions about this workflow, feel free to contact our support team through in-app chat!

ARCHIVE001

Created on April 8th, 2020

Processing 34 of 35 Docs

1. Transferring - Done

2. Processing 00:00:39

3. Post-Processing

4. Complete

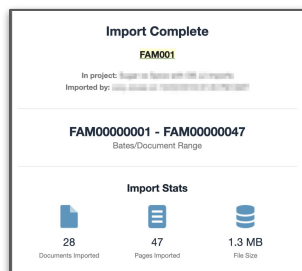
### Helpful Tip: Upload Times

Consider the timeline of your review once you've migrated documents in to Logikcull. If you're migrating your archive through several uploads, begin with the data that needs to be accessed first. Once the data is successfully transferred to Logikcull (green progress bar), rule of thumb for processing 200-300GB of data takes around 3-4 days.

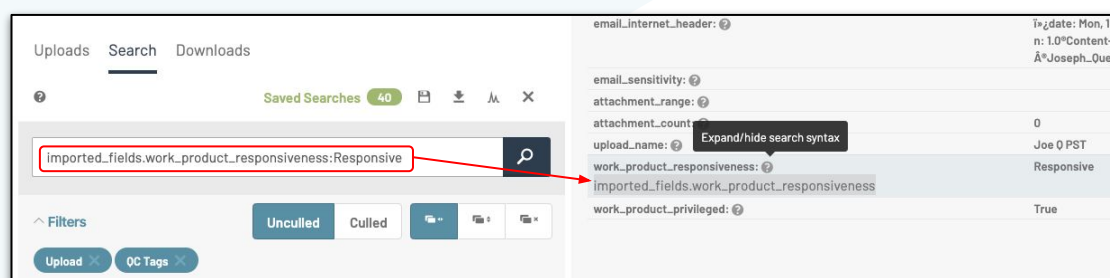
### 3. Post-upload quality control and setting up your review

Once your data is uploaded to Logikcull, you'll want to give it a quick review to ensure everything is ready to go. Here are our top QC tips, plus more suggestions to help you set up and get into your continued review quickly.

- Once your upload completes you'll receive a notification via email and in-app.



- Before you can start reviewing, analyzing, and searching your data we recommend performing these helpful post-upload quality control checklist:
  - ☐ Check that the entire document Bates range and page count shown in the upload report matches your data load file.
  - ☐ Where applicable, check the images, natives and text are displayed in the document viewer. Please note that some images may reflect slip sheets as intended depending on the file type or production.
  - ☐ If parent-child exist, also known as a document family, utilize the Family Status carousel filter to verify that "Is Parent" and "Is Child" items were properly identified.
  - ☐ Check the expected File or Email information from your DAT or CSV metadata load file such as document date, file path, email from/to/cc/bcc etc. were loaded appropriately.
  - ☐ Execute a [bates number search](#) to find specific Begin Doc or Control ID number.  
Sample syntax: **bates:FAM00000001**
  - ☐ If there are any corrections, note that Logikcull allows you to perform [overlays](#) to update any of these items; images, natives, text or metadata information.
  - ☐ For database uploads, search through your imported metadata fields to transfer work product by bulk tagging results.



You're now migrated and ready to go! As you continue your review, here are some additional resources that may be of help:

[FAQ Page](#)

[Starter Guide](#)

[Logikcull courses](#) to get you acquainted with the basics at your own pace in your own time.

Remember, support is available in-app 24/7 if you need it and Logikcull has no limits on the users you can add to your account, so bring in your whole team. If you need anything more, contact us in-app via chat or email [support@logikcull.com](mailto:support@logikcull.com)

To learn more go to [support.logikcull.com](https://support.logikcull.com) or [learning.logikcull.com](https://learning.logikcull.com)

To schedule a training, contact your Logikcull Account Manager or Customer Success Manager