

The Epicor ECM Export Utility

If you need to export documents and data from your Epicor ECM database, you can use the Epicor ECM Export utility on any workstation with HTTP access to configure, test, and schedule jobs to export image content and metadata from your Epicor ECM solution.

Objectives

- In this course, we'll show you how to install, configure, and use the Content Export tool.
- We will also show you how to use the Export Jobs Admin screen.

Select a topic **or tap the right arrow** to get started.

Installing the Epicor ECM Export Utility

Once you've obtained a license for the Epicor ECM Export tool, you can install it from the Client Service Application.

Note that you'll want to run the export tool from a workstation with enough storage space to handle the size of your export.

Click the Modules tab, then click Document Export System.

Follow the on-screen prompts, and the tool and the Export Windows Service will be installed.

The Service provides the structure to handle background system functions that facilitate the export process.

To run the Content Export tool, click your computer's start button and search for Epicor ECM Export.

You may want to right-click and select either Pin to Start or Pin to taskbar to make it easy to launch and find in the future.

Click the Exporter to launch it.

Tap the next arrow to learn how to use the Export tool.

Using the Epicor ECM Export Utility

Once you've launched the Epicor ECM Export Tool, enter the URL of your Epicor ECM instance, and enter your credentials in the Username field.

We suggest using your Epicor ECM administrator account, as security class restrictions apply in the export tool just as they do in Epicor ECM.

Click Log in.

Enter your password, then click Log In.

The Export tool populates with information from your system. You'll notice the fields section contains a list of all fields in your Epicor ECM solution.

First, choose a location for your export.

Add a Description, then choose the fields you need to export.

Choosing no fields will export all fields by default.

Next, define your output format: CSV, XML, or Manifest.

Manifests are used to export the entirety of an ECM system's structure and components for import into another Epicor ECM system.

Choose a format for exporting your content items.

Because an Epicor ECM document can consist of multiple content items of different types, you can choose how they'll be organized when downloaded.

Choose Multiple directories to create one directory per document or single directories to put all content for documents in a batch into a single folder.

Next, decide if you want one XML file per document or a single XML file for the entire export.

For documents made of multiple file types, you can merge the mixed content into a single format.

Not merging results in a faster export and will preserve your content in its original format.

Now, define the scope of your export.

Use the available filters to define your search by date range, folder, or a custom search—which you can build in the Retrieve screen's Text Search accordion, then copy and paste here.

Filenames for your export are determined by the format you define here.

We've defined ours as {Title} {CreatedOn}

Do you want to delete the original documents after the export?

Or mark each exported document as Exported?

For example, if you want to run an export every month and only export newly created documents, you'll want to mark them as exported so they won't repeatedly be exported with each new job.

Should you delete files, they will be placed in the Epicor ECM Recycle Bin.

You can specify a limit for how long items will remain in the recycle bin before being hard deleted here.

Need to determine the size of your export before you commit?

Tap the Compute Size button to see a report of the disk space required by the export.

Finally, test the export, set a schedule, or run your export.

Use these settings to save and this dropdown to load previous export jobs.

We recommend scheduling your export jobs off peak hours, to ensure optimal network performance for your users.

Let's test ours.

Here, we can see the results.

Details about your export jobs are saved in the admin screen's Export Jobs page.

Tap the right arrow to test your knowledge.

Knowledge Check

What does a manifest export contain?

The Export Jobs Admin Screen

Details about your Export jobs are saved in the Admin screen's Export Jobs page.

Here is where you can initiate an export as well as handle administrative functions such as viewing a history of export jobs and pausing, stopping, and restarting them in Epicor ECM.

Click Admin, then Export Jobs.

The table provides a detailed history of export jobs as well as information on jobs currently running.

You can filter by status or machine name and click Refresh to get the latest details on your export jobs.

To pause or stop an export, select a job in the table and click stop or pause.

You can also resume a paused export job or restart it using these controls.

Data is delivered from the Export Tool in the format you choose. The filenames use the title and creation date we specified in the export utility.

This is an example of the fields chosen in this export and what the folder structure resembles.

Tap the right arrow to continue to the course recap.

Recap

In this course, we showed you how to install, configure, and use the Epicor ECM Export tool, as well as how to use the Export Jobs Admin screen to view a detailed history and manage currently running export jobs.

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