

# Guide to Importing Load Files into Goodfact

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## What is a Load File?

Think of a load file like a moving box with two things:

1. A detailed inventory list (a spreadsheet saved as a .dat or .csv file)
2. All the actual items (your documents)

Just like how a moving box keeps your items organized with a list of what's inside, a load file keeps your documents organized with a spreadsheet that lists all your documents and their information.

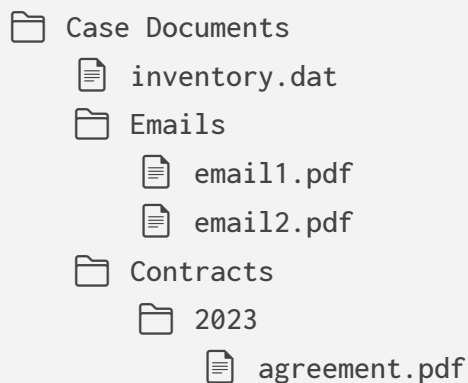
## Understanding the Inventory List (The Spreadsheet)

The inventory list in your load file is a spreadsheet, typically saved as a ".dat" file. While it might have a different file extension, it's still just a spreadsheet like Excel, but saved in a special format that legal software understands best. Each row represents one document, and each column contains information about that document.

(Some systems might save this spreadsheet as a .csv file instead - both formats work with Goodfact!)

## Understanding File Locations (Paths)

Imagine you have folders organized like this:



```
Case Documents
├── inventory.dat
├── Emails
│   ├── email1.pdf
│   └── email2.pdf
└── Contracts
    └── 2023
        └── agreement.pdf
```

The location of a file is written as a path, showing which folders you need to open to find it:

- `Emails/email1.pdf` means: look in the Emails folder, then find email1.pdf
- `Contracts/2023/agreement.pdf` means: look in the Contracts folder, then the 2023 folder, then find agreement.pdf

## What Goodfact Needs in Your Load File

### Required:

- A spreadsheet file (.dat or .csv) that lists your documents, including one column showing the path to each document
- All documents in folders next to your spreadsheet

That's it! Everything else is optional.

### Optional Information:

Goodfact supports additional fields that your document review tool can include as columns in the spreadsheet. When you import the load file into Goodfact, you'll be able to select which field in your load file maps to the corresponding field in Goodfact. For example, if your load file includes a field called "Prod doc id", you'll be able to tell Goodfact to interpret "Prod doc id" as "Production Document Id"

Here's the list of additional, optional fields Goodfact supports:

- Production Document Id: The official ID given to a document during legal production
- Internal Document Id: Your internal reference number for the document
- Date: When the document was created or sent
- Subject: What the document is about (like email subject lines)
- From: Who created or sent the document
- To: Who received the document
- Has Redactions: Notes if the document contains redacted content (any content in this field is interpreted as "yes, there are redactions")
- Tags: Any labels or categories assigned to the document

## Importing Your Load File

You can import your load file in two ways:

1. As a zip file containing everything
2. By dragging the folder containing your spreadsheet and documents directly into Goodfact

# Exporting Load Files from Your Document Review Tool

When exporting from your document review tool:

1. Choose these settings:
  - Export format: Load file or Production
  - Preferred spreadsheet format: .dat file with Concordance delimiters
2. If your tool exports as .csv instead:
  - Make sure it uses comma (,) as the separator
  - Use double quote (") as the quote character (sometimes called quotechar)
3. Always make sure:
  - The spreadsheet is at the top level of your export
  - Document paths in the spreadsheet match where the files are stored
  - Files are exported relative to the spreadsheet

## Common Problems to Avoid

- **Incorrect File Paths:** Make sure the paths in your spreadsheet match exactly how your folders are organized
- **Spreadsheet Location:** Keep your spreadsheet (.dat or .csv) in the main folder, not in a subfolder
- **Missing Files:** Ensure all documents mentioned in the spreadsheet are included in your folders

## Advanced Use

### Parent-Child Relationships (Optional)

If you need to show that some documents are attachments to others (like email attachments), you can use these optional columns:

- Parent Production Document Id
- Parent Internal Document Id

List the ID of the parent document (like the email) in one of these columns in the row for the attachment.

## Need Help?

If you're having trouble, check that:

1. Your spreadsheet (.dat or .csv) is at the top level of your folders
2. The paths in your spreadsheet correctly point to your files
3. All your documents are included in the folders

Remember: A load file is just like a moving box - it keeps your documents organized and includes a list of what's inside. As long as your spreadsheet can find your documents, Goodfact can import them!