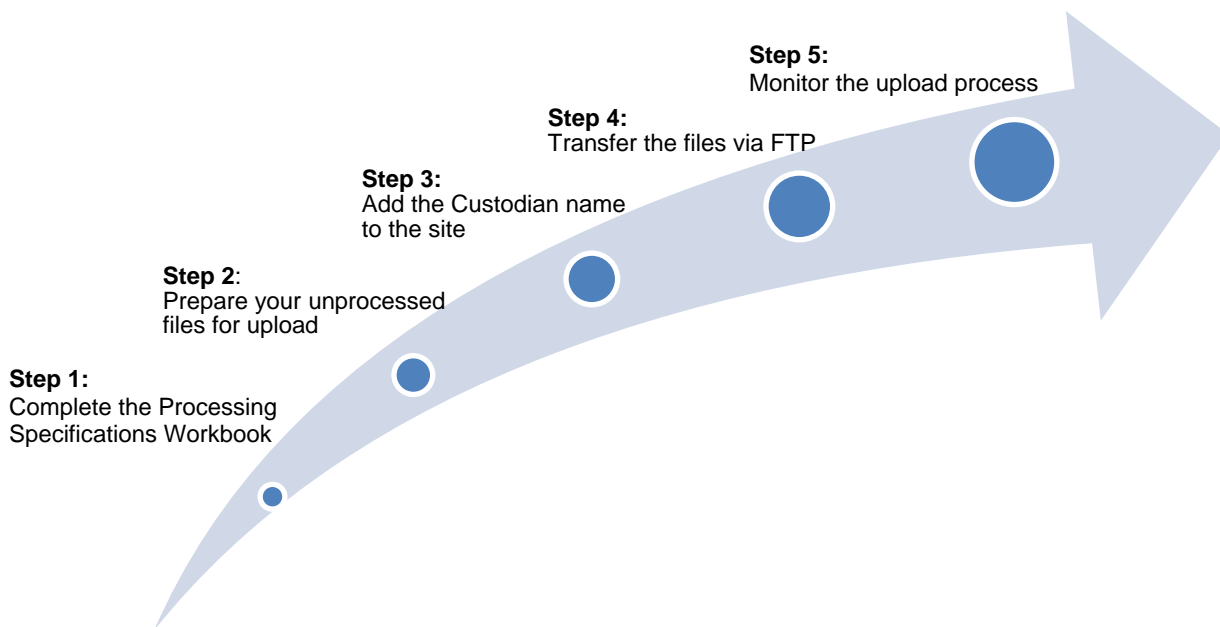



Automated Data Processing (Unprocessed Data)

The automated data processing is accomplished in several simple steps, outlined below, and described in detail in the subsequent pages of this document.



Complete the Processing Specifications Workbook

Download the [Processing Specifications Workbook](#) and complete the Adobe Acrobat form. Submit the completed form to your OpenText Project Consultant (PC). Your PC will inform you when the specifications are in place. Do not complete step 4, transferring the files via FTP, until you hear from your OpenText PC.



Processing Specifications

Matter Number:

Project-Level Settings

Each setting has a menu listing available options. Contact your Project Consultant with questions.

To use the global numbering scheme for all custodians or a select few, please enter *Use Global Numbering* in the **Control Number** field for the corresponding custodian in the [Custodian Names and Settings](#) section of this document.

<p>Site Name: <input type="text"/></p> <p>Time Zone: <input type="text" value="Casablanca UTC (default)"/></p> <p>Global Starting Number: <input type="text" value="For example, ABC00000001"/></p> <p>Global Suffix: <input type="text"/></p> <p>Deduplication Type: <input type="text" value="Global - Entire data set"/></p>	<p>Exclude System Files: <input type="text" value="Yes - Exclude for collection"/></p> <p>Extract Embedded – Docs: <input type="text" value="No (Recommended)"/></p> <p>Extract Embedded – Email: <input type="text" value="No (Recommended)"/></p> <p>Include Native Email: <input type="text" value="Yes"/></p>
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2 Prepare your unprocessed files for upload

Compress your files into a ZIP or RAR file. Use a RAR file for foreign language (Unicode) documents.

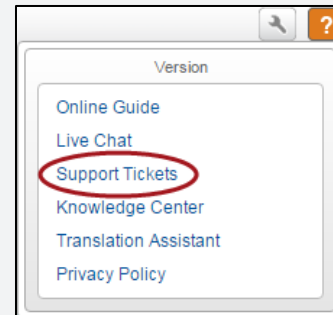
- The maximum file size is 10 GB. Smaller file sizes are recommended, as we can typically process two smaller files faster than one large file.
- PST files do not need to be zipped; the maximum file size is 10 GB.

3 Add the Custodian name to the site

Ensure the custodian name is included in the Processing Specifications Workbook.

If you have access to Support Tickets (ST), you can add the custodian name to the site yourself.

- Access ST and select the **Processing Options** tab.
- In the Custodian section of the page, select **Add Custodian**.
- Enter the name of the custodian and the FTP folder name (in lowercase) in the appropriate fields.
- Select the appropriate options from the remaining fields and click **Add**.



Add Custodian

Custodian Name *

FTP Folder Name *

Number By ▼

Sub Collection * ▼

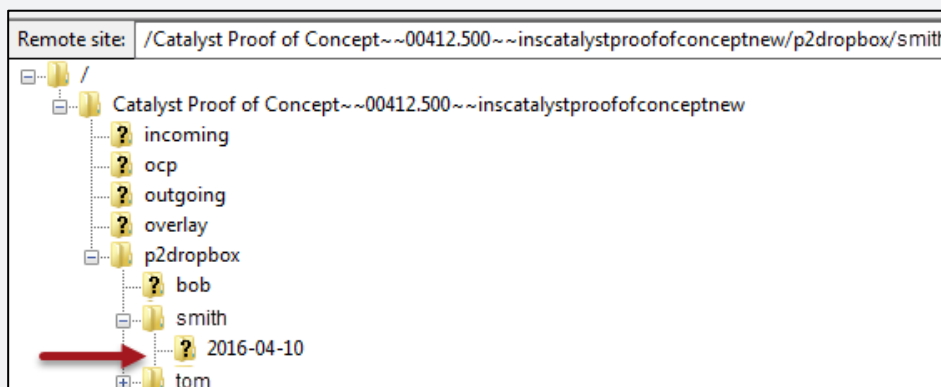
Processing Language * ▼

* Indicates a required field.

4 Transfer the files via FTP

Transfer the ZIP, RAR, and PST files via our FTP.

- OpenText supplies the password and login information.
- Locate the correct site name and drag the files into the appropriate **p2dropbox** folder with today's date.



Q: What are the other FTP folders used for?

A: The other FTP folders are described below.



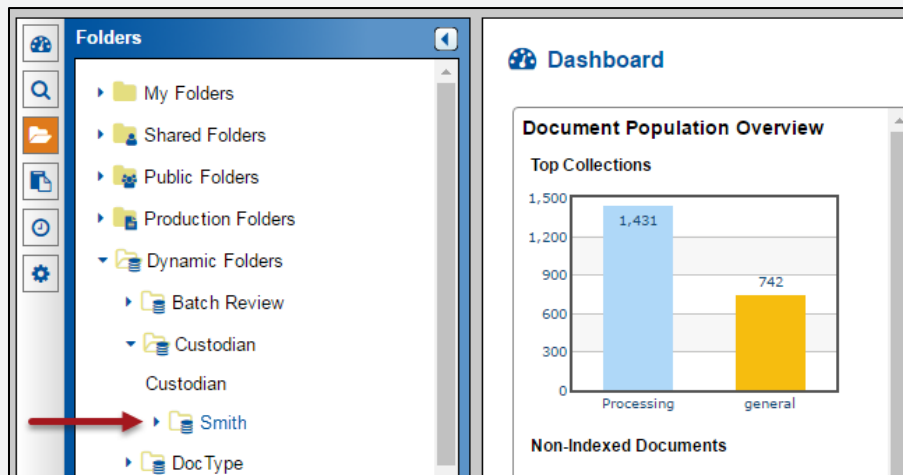
FTP Folder	Intended Purpose	Deliverables
OCP (Outside Counsel Productions)	Single-page TIFF images and DAT files provided by outside counsel	Use this folder to upload OCP documents and load files
Overlay	Overlay files: Metadata or image/text file overlays	Overlay mapping must be in place to upload: <ul style="list-style-type: none"> • MDB (metadata overlays) • MDB with path to image/text files (file overlays) • ZIP files containing images and text associates with MDB files (file overlays)
Incoming	Processed documents with load file	ZIP files and an MDB load file in proper format
Outgoing	Data and/or documents that should not go through automation	Use this folder to upload any other types of data. Note: Tickets are not generated with data is uploaded to this folder, so inform your PC of the upload via email.

5 Monitor the upload process

You will receive updates regarding the processing and upload processes via email. Once the processing is complete, the upload process begins automatically.

Some steps in these processes take longer than others. The time it takes to process and upload files depends on the number of files you've uploaded, the size of these files, and whether other processing jobs are in the queue.

When you're notified the upload is complete, you can see your documents loaded into Insight. They'll appear on the Dashboard and in the Dynamic Folder structure.



To access processing reports, select **Processing** from **Monitors & Reports**. Change the report parameters by selecting appropriate options from the drop-down menus at the top of the page.

