Automated Data Loading of Production Documents

When loading documents from outside counsel to OpenText, here are your options and the steps for automated OCP loading.

Options

Manual
(OpenText prepares)
$ per hour plus data loading charges
∨
✅ **DONE**

Automated
(You prepare and send to OCP folder on the FTP)
$ data loading charges only
∨
📄 Self-Preparation Details

1 📝 Preparing Files:

File Names:

Must be named with the BegControl number. (Example: ABC000001.tif). If you can't rename them, send them to Catalyst for manual upload.

Loose Files:

Can be loaded without a metadata file. Don't forget the BegControl number must be the filename.

Single Page TIFFs:

An Opticon (.opt) file is needed.

Delivering more than one document per record....

Delivered	Displayed	Indexed	
📄	**Doc = Native**	Native gets indexed	■ Natives, text, and images do not have to be in the same folder.
📄🖼️	**Image = Native**	Text gets indexed	
📄📄	**Native = Native**	Text gets indexed	■ Automatic Detection of Native, Image, Text.
📄📄🖼️	**PDF = Image (then .tif or .jpg)**	Text gets indexed	

2 Preparing Data:

Metadata Rules

Metadata is optional, but if you are sending metadata, here are the specifications.

- Use Insight field names that exist on your site OR let OpenText know how to map the fields before you copy to FTP.
- Do not deliver data to system fields (see Insight Fields List).
- Text file needs to have a .DAT extension.
- The collection name is required. If multiple collections, deliver with delimiters between them. Consider using "OCP" as the collection name.
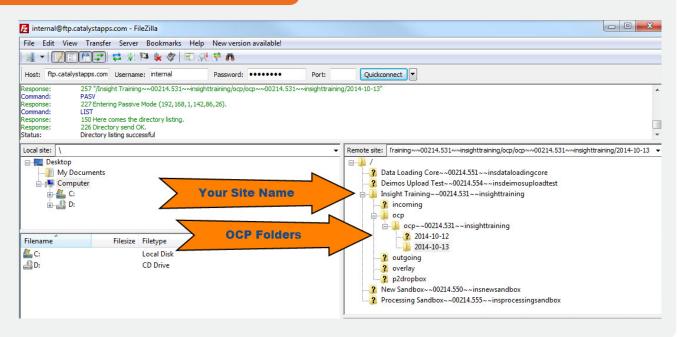
Examples of acceptable delimiters:

Column	Text Delimiter
¶ (pilchrow)	Þ (thorn)
	(pipe)	^ (caret)

Q: What if I don't want all of the data loaded to my records in Insight? Can I restrict what's loaded from the load file?

A: Yes. Just let OpenText know which fields you do not want loaded.

3 Drop OCP to the FTP

[4] Check Your Progress

OCP Uploads-Ticket Communications

Tickets are created and sent to the account manager.

The first ticket is created when the FTP picks up the zipped file in the OCP folder. *Notice the [OCP].

[ocp] ftp automation for zip file /mnt/fs08/ftproot/internal/New Sandbox~~00214.550~~insnewsandbox/ocp/ocp~~00214.550~~insnewsandbox/2014-09-12/OCPVolume.zip of size bytes

After OCP processing has built the MDB loadfile and transferred the files for normal automated data loading, an upload ticket is created.

There will be ongoing entries into the ticketing system, showing the progress of the load. The ticket will close automatically with a successful QC check.

Why would it fail?
Avoid these common mistakes.

- File names do not match the begcontrol.

- Single page TIFFs are delivered with no .opt file.

- Inappropriate delimiters were used (e.g. commas).

- Loadfile was not a .dat file, but an .mdb. (Use regular data loading for .mdb loads.)

- The fields are not recognized and there is not a mapping in place.

- Extraneous files loaded with loose documents that are included in the loadfile.

Q: What if I want outside counsel to drop the files on the FTP? Will they see all of the other folders we have there?

A: No, we can provide outside counsel with a secure login/password so they can access only the OCP folder.