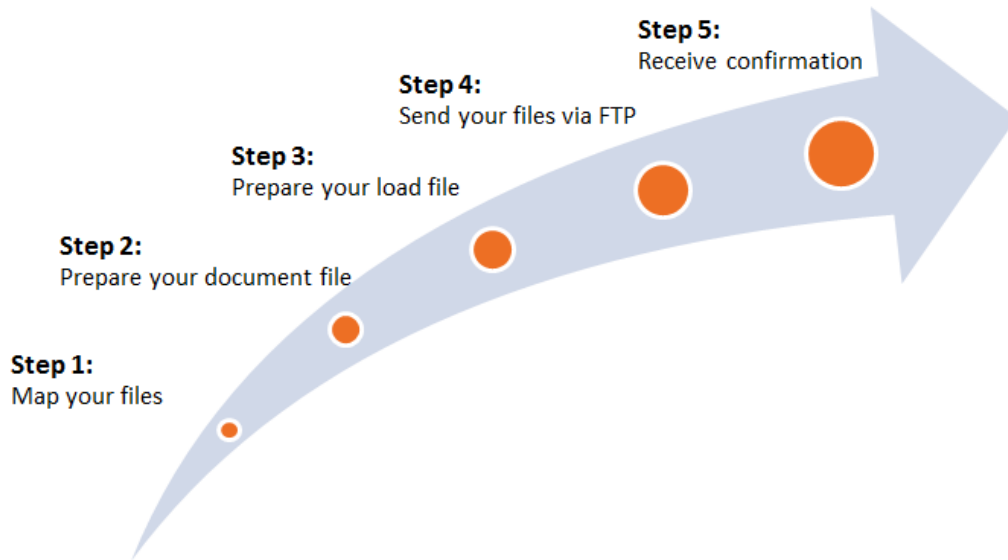


Automated Data Loading (Processed Data)

The automated data loading process is accomplished in five simple steps, outlined below, and described in detail on the subsequent pages of this document.



1 Map Your Files

To ensure your processed data is uploaded correctly, map the fields you are delivering (Delivery Field) to the fields on the site (Destination Field) in an Excel spreadsheet. Send this spreadsheet to your project consultant, who will inform you when it is in place.

The screenshot shows a Microsoft Excel spreadsheet with the following data:

	A1	Delivery Field	B	Destination Field
1		Delivery Field		Destination Field
2		BATES_BEGIN		BegControl
3		BATES_END		EndControl
4		ATTACH_BEGIN		BegAtt
5		ATTACH_END		EndAtt
6		PAGE_COUNT		PageCount
7		CUSTODIAN		Custodian
8		ALL_CUSTODIANS		OtherCustodians
9		DOC_TITLE		Title
10		DOC_SUBJECT		DocSubject

A large blue arrow points from the text below towards the spreadsheet, indicating the mapping process.

Map your source files to the destination fields in a Microsoft Excel spreadsheet. Destination fields must match site fields.

2 Prepare Your Documents File

Ensure your documents file adheres to the following specifications:

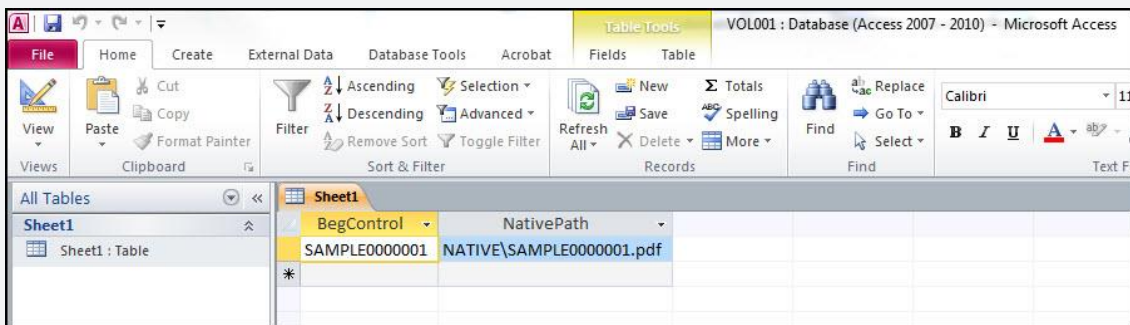
- Compress document files into a .zip or .rar file. We do not accept multi-part .zip or .rar files.
- Loose files must be zipped.
- Must be less than 10GB.
- File names should not contain spaces, special characters, periods, or extra dot extensions. Use lower case. **Example:** vol001.zip

3 Prepare Your Load File

Ensure your load file adheres to the following specifications:

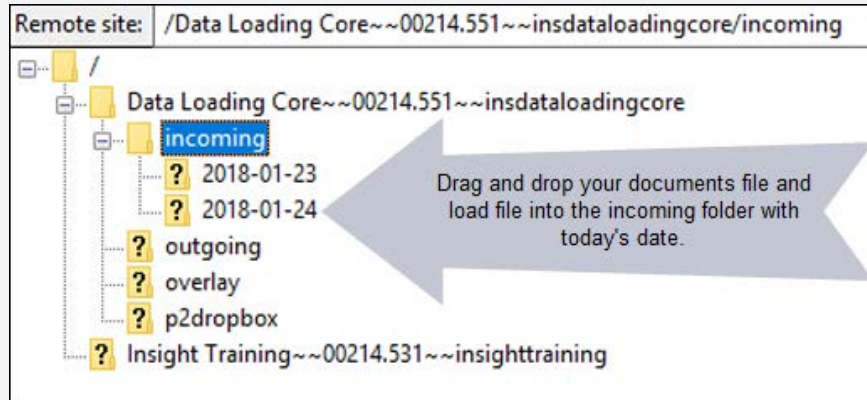
- The load file must be an Access Database (.mdb or .accdb) or .dat file.
- Each upload is limited to 100,000 records.
- Name the load file the same as the documents file discussed in step 2 and send it separately.
- File names should not contain spaces, special characters, periods, or extra dot extensions. Use lower case.

Example: vol001.mdb



4 Send Files Via FTP

- OpenText supplies the password and login information.
- Locate the correct site name and drag the files into the **incoming** 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
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 associated with .mdb files (file overlays)
P2 Dropbox	Processing specifications instructions and raw data for Catalyst to process.	Use this folder to upload items such as: <ul style="list-style-type: none"> The Processing Specifications Workbook Container files for all “loose” documents .pst files, which can be uploaded as is Note: <ul style="list-style-type: none"> Do not upload files in encrypted formats Upload .ost files to the Outgoing folder
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 when data is uploaded to this folder, so inform your PC of the upload via email.



Receive Confirmation

The person listed as the Account Manager for the site will receive the confirmation via email.

