opentext™ + ☀Catalyst
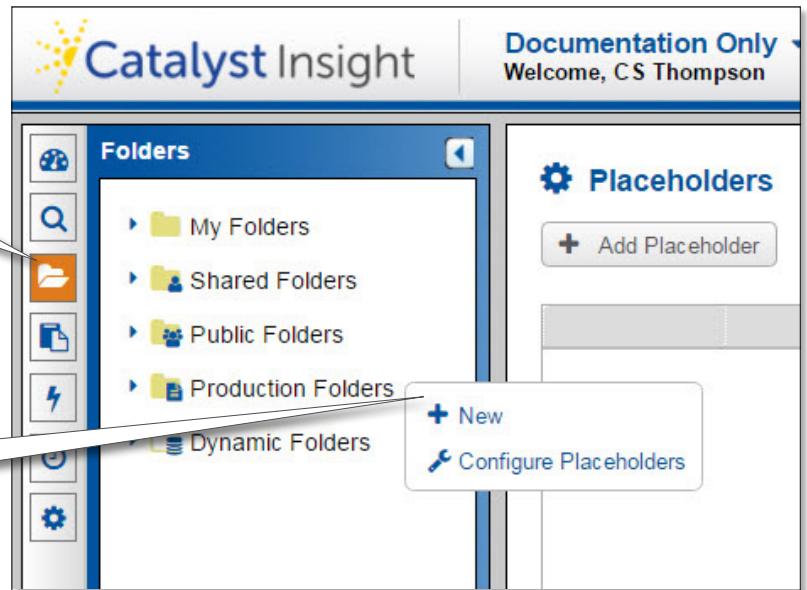
Insight Review | Quick Guide to Productions

Your **OpenText** Project Consultant will walk you through the production module for your first few productions. Do not run productions on your own if you are new to the process.

STEP ONE

Placeholders for All Productions

• Select the Folders button.

• Use the drop down menu to see the New and Configure Placeholders options.

• First configure placeholders for all productions on your site.

Catalyst Insight | Documentation Only
Welcome, CS Thompson

Folders
▸ 📁 My Folders
▸ 📁 Shared Folders
▸ 📁 Public Folders
▸ 📁 Production Folders
📁 Dynamic Folders

➕ New
🔧 Configure Placeholders

⚙ **Placeholders**
➕ Add Placeholder

Sample Placeholder

Place Holder ✕

Name
Native Files

Placeholder Text
This document has been produced in native format.

Second Text
◉ Text
○ Field
Native

Third Text
○ Text
◉ Field
Filename ▾

Comments
This is to be used for native files.

Save   Cancel

• Provide a descriptive name for the placeholder.

• This is the text that will show on the placeholder.

• When selecting Field, the text from the field will show on the placeholder.

For details on how to use the Insight Production Module, see
http://support.catalystsecure.com/insight/documentation_center/index.htm#Production_Module.htm
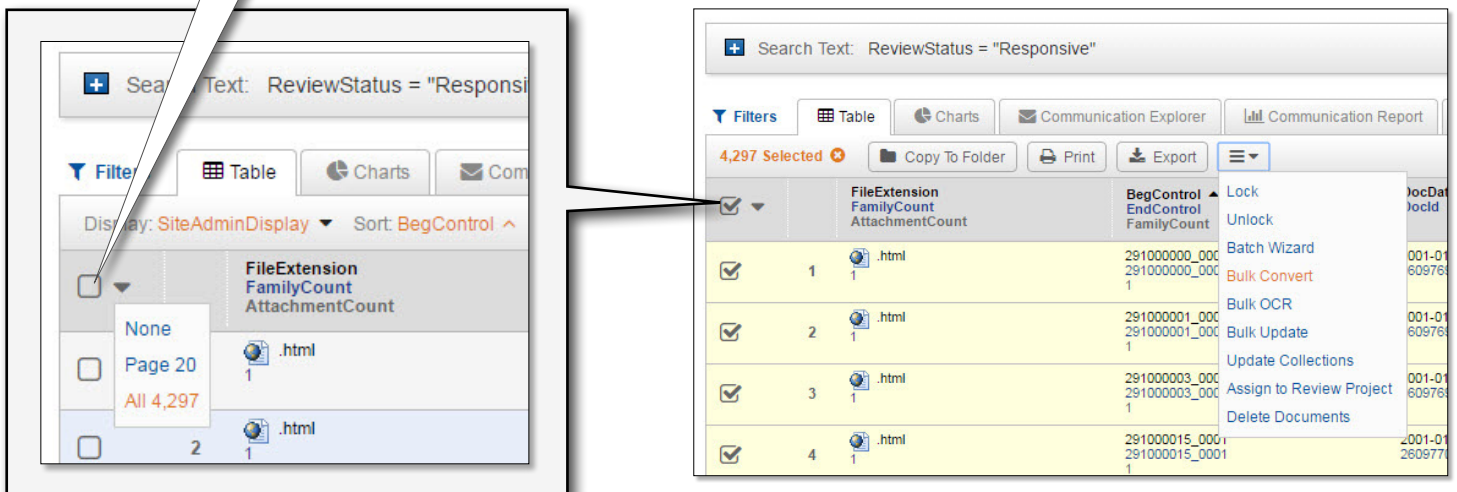
STEP TWO

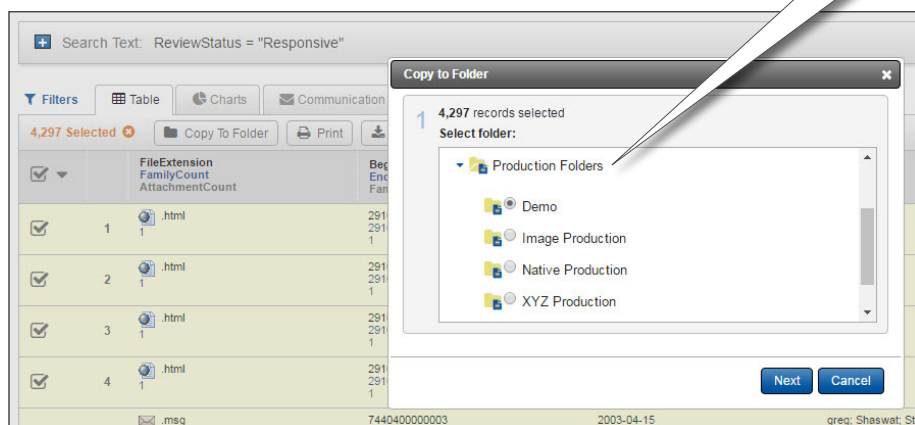### Setting up the Folder, Converting to PDF and Collecting the Documents

- Create a new production folder by selecting New from the menu on the right.

- Provide a Name and Description when prompted.
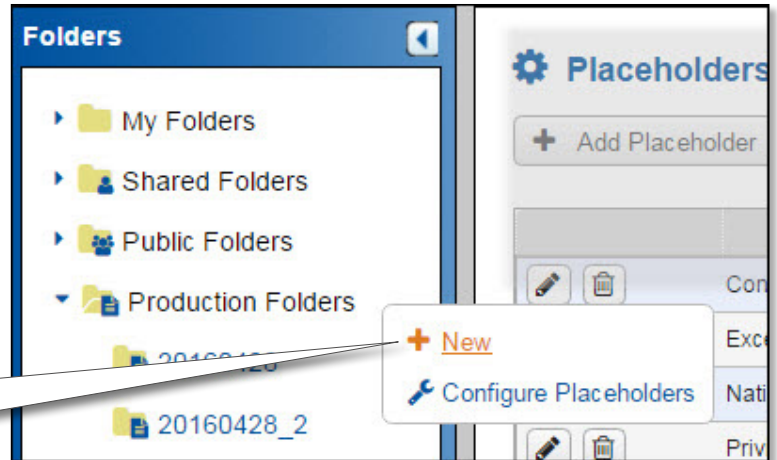
- Use the checkboxes and bulk Convert to PDF (unless you are running a Native production).

- Add the documents you want to produce to the Production Folder.

STEP THREE
Preparing the Specifications

Production 04282016

- Show Detail
- Clone
- Edit
- Delete

- Using the drop-down next to the folder, select Show Detail.

Production for Production 04282016

Run | Save

Basic Information

Production Name:
Production 04282016

Contact Email:
csthompson@crs.com

Volume:

Comments:

Created By:
csthompson

Create Date:
2016-04-29 01:38:49 PM GMT-06:00

Date Format:
Mar 14, 2001 ▼ | 12 Hrs ▼

Redaction Set:
Default ▼

- Enter Volume information and Comments (optional).

- Select the Redaction Set from which to pull redacted documents.

- Choose the format for data with dates.

Reviewing the Status of the Conversion.

After saving the specifications and copying the documents to the folder, return to this section to resolve any noted problems. You can skip this section until you are ready to run the production.

- If you select this box (Automatically replace conversion error files with placeholder), select the placeholder and whether you want to produce the native.

- Items in red need to be resolved. Click on the number to return the documents in Table mode.

Status

Pages (Estimated):	Redactions Not Finalized:	Converted:
17,885	0	748
Documents:	Redaction Errors:	Not Converted:
3,629	0	2,874
Redactions:	Redactions In Progress:	Conversion Errors:
0	0	8

QC Rules

Privileged = "Privileged"   302   Approve

☑ Automatically replace conversion error files with placeholder?
Placeholder:
Conversion Error ▼   ☐ Include Native
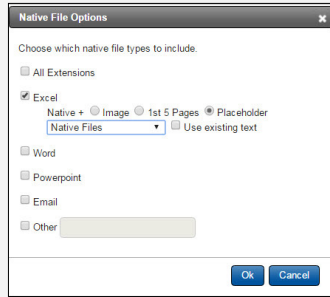
- The QC Rules you set up will flag documents. You either have to re-review these or Approve to include them in the production.

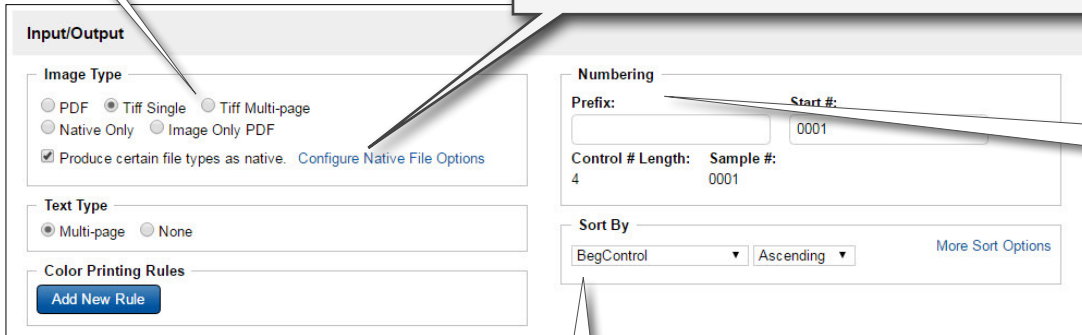**What happens to files that didn't convert?**

First, try to bulk convert them through Table mode. Click on the red number and then use the checkboxes and select bulk convert.

If they still don't convert, produce them in native or remove them from the production.

- Select the format for the production. If you produce some file types as native, select Configure Native File Options and fill in the details.
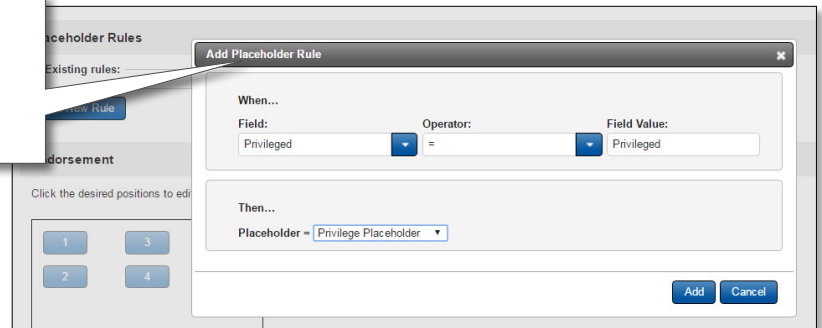
Native File Options

Choose which native file types to include.

- [ ] All Extensions
- [x] Excel
  - Native + ○ Image ○ 1st 5 Pages ● Placeholder
  - Native Files ▼ [ ] Use existing text
- [ ] Word
- [ ] Powerpoint
- [ ] Email
- [ ] Other [_____]

Ok   Cancel

- What does "use existing text" mean? If there is a text file associated with the record, then you can use the existing text of the document. If this is not selected, the text that will be provided will be the placeholder text.

Input/Output

Image Type
- ○ PDF ● Tiff Single ○ Tiff Multi-page
- ○ Native Only ○ Image Only PDF
- [x] Produce certain file types as native. Configure Native File Options

Text Type
- ● Multi-page ○ None

Color Printing Rules
[Add New Rule]

Numbering

Prefix: [_____]   Start #: [0001]

Control # Length: 4   Sample #: 0001

Sort By
BegControl ▼   Ascending ▼   More Sort Options

- If you want the Production Number endorsed on the documents, put in the numbering details here.
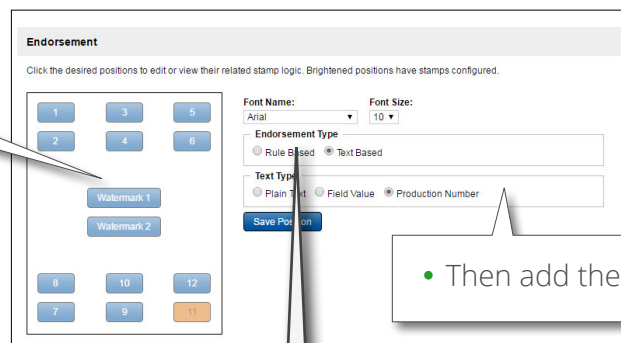
- Don't forget to select your sort order.

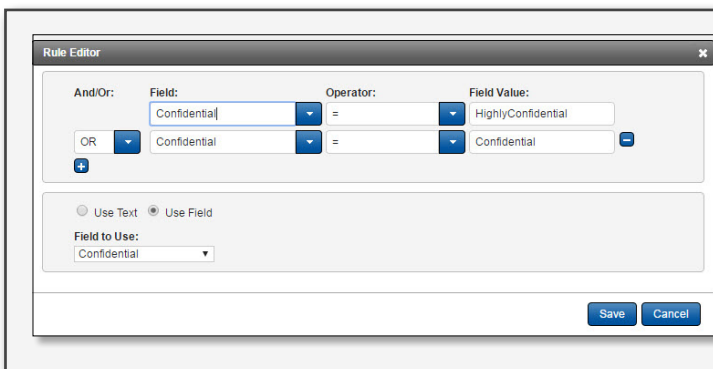- Use Placeholder Rules to add placeholders for certain types of documents.

Placeholder Rules

Existing rules:

[New Rule]

Add Placeholder Rule

When...

Field: Privileged ▼   Operator: =   Field Value: Privileged

Then...

Placeholder = Privilege Placeholder ▼

Add   Cancel

Endorsement

Click the desired positions to edit...

| 1 | 3 |
| 2 | 4 |

Use the Endorsement section to include instructions on where to place endorsements and what should appear in the endorsement.

- First, select the location.

Note, you can have endorsements in more than one location.

Endorsement

Click the desired positions to edit or view their related stamp logic. Brightened positions have stamps configured.

| 1 | 3 | 5 |
| 2 | 4 | 6 |

Watermark 1
Watermark 2

| 8 | 10 | 12 |
| 7 | 9 | 11 |

Font Name: Arial ▼   Font Size: 10 ▼

Endorsement Type
○ Rule Based ● Text Based

Text Type
○ Plain Text ○ Field Value ● Production Number

[Save Position]

- Then add the details.

Rule Editor

And/Or:	Field:	Operator:	Field Value:
	Confidential	=	HighlyConfidential
OR ▼	Confidential	=	Confidential

+

○ Use Text ● Use Field
Field to Use:
Confidential ▼

Save   Cancel

Endorsement Type: Text Based will appear on every document. They are either text you enter (Plain Text) or text from a field (Field Value). Production Number will endorse a number on each document. Specifications for the production number were entered above.

Rule Based are endorsements that only appear on the documents specified (e.g. only documents coded as "Confidential" will receive an endorsement.)

Load Files

Image Load File(s)
- ☐ DII - Summation Load File
- ☐ DOJ - DOJ Summation Load File and Text Reference LST File
- ☑ LFP - IPro Image Load File
- ☑ OPT - Opticon Image Load File

Load File Format:
Custom ▼

File Name:
Production4292016

Extn:
.DAT

Field Delimiter:
¶[char(20)] ▼

Text Qualifier:
^[char(94)] ▼

Description:

- Select the image load file type.

- Choose the data Load File Format. If you choose custom, select field and text delimiters.

- Use these links to change the order of the fields or change the names of the fields.

Configure Field Order
Configure Field Aliases

Unassigned Fields
- FileExtension
- Filename
- FileSize
- FileType
- FolderID
- Hash
- HasRedactions

Assigned Fields
- DocDate
- From
- To

Production Fields

Assigned Fields
- OrbAttachID
- OrbNativeFilePath
- OrbParentID
- OrbPdfFilePath
- OrbProductionBegAttach
- OrbProductionBegControl
- OrbProductionComment

Configure Field Order
Drag to re-order
- DocDate
- OrbVolumeName
- To
- OrbAttachID
- OrbNativeFilePath
- OrbParentID
- OrbPdfFilePath
- OrbProductionBegAttach
- OrbProductionBegControl
- From
- OrbProductionEndAttach
- OrbProductionEndControl
- OrbProductionID
- OrbProductionPageCount
- OrbProductionRange
- OrbTextFilePath
- OrbTiffFilePath
- OrbProductionComment

Save   Cancel

Configure Field Aliases

Fields	Alias Names
DocDate	Date
From	
OrbAttachID	AttachID
OrbNativeFilePath	
OrbParentID	
OrbPdfFilePath	
OrbProductionBegAttach	BegAttachment
OrbProductionBegControl	BegBates
OrbProductionComment	Comment
OrbProductionEndAttach	EndAttachment
OrbProductionEndControl	EndBates
OrbProductionID	
OrbProductionPageCount	

Save   Cancel

- Using the arrows, select the metadata to produce.

Custom Fields
NewField1

Add New Custom Field

Custom Field Name:
Production

Custom Field Type
- ○ Rule Based   ● Text Based

Text to Use:
Production1234

Delete Custom Field

- There is an option to add custom fields to your load file.

QC Rules

Warning when ...
Privileged = "Privileged"   Edit Delete

Add New Rule

- Put in QC Rules to flag documents that have certain coding.

Delivery Options

Instructions:

Shipping Information
Add Shipping Information

Add Shipping Information
Address:

Phone:

Method:
Standard Overnight ▼

Add   Cancel

- Add delivery instructions and shipping Information

STEP FOUR

Resolve Issues

Go back to the Status section of the details. Resolve all problems (redactions, conversions, warnings, etc.)

STEP FIVE

Run the Production

When all issues under Status are resolved, the Run button will be enabled. Select the Run button to run the production.

STEP SIX

Post Production Options

We will overlay your original records in your database with production information upon request. See the Production Fields list located in the Load File section of the details to see the fields that will be updated to the original records. (e.g. ProductionBegControl, ProductionID, etc.)

If you want your Production Documents uploaded to your site, inform your **OpenText** Project Consultant and we will load the endorsed documents. We recommend adding them to a different Collection and locking the documents so the coding does not get changed. The produced versions are linked to the originals so that you can quickly navigate from version to version.

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