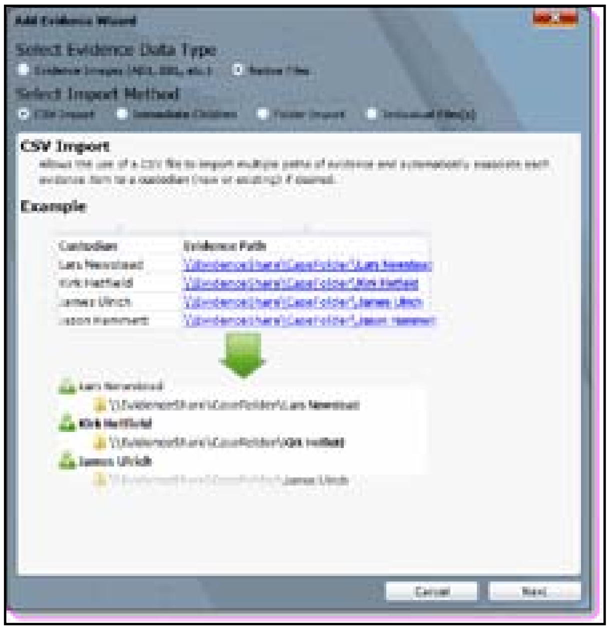
Loading Data

1 Adding Evidence Using the Evidence Wizard

1. In the *Project List* panel, click next to the project to which you want to add evidence.
2. Select **Evidence**.
3. In the *Add Evidence Wizard*, select the *Evidence Data Type* and the *Import Method*.



4. Click **Next**.
5. The next screen will differ depending on the Import Method that you selected.

   a. If you are using the *CSV Import* method:

   - If the CSV file uses the first row as headers rather than folder paths, select the **First row contains headers** check box, otherwise, clear it.
   - If the CSV file uses the first column to specify custodians, select the **First column contains custodian names** check box, otherwise, clear it.
   - Click **Browse**, browse to the CSV file, and click **OK**. The CSV data is imported based on the check box settings.

   b. If you are using the *Immediate Children* method:

   - If you want to automatically create custodians, select **Sub folders are custodian names**, other wise, clear it.
   - Click **Browse**, enter the IP address of the server where the evidence files are located and click **Go**.
   - Browse to the parent folder and click **Select**.

   c. If you are using the *Folder Input* or *Individual Files* method:

   - Click **Browse**, enter the IP address of the server where the evidence files are located and click **Go**.
   - Expand the folders in the left pane to browse the server.
   - In the right pane highlight the parent folder or file and click **Select**.

6. If you want to specify a custodian, select one from the *Custodian Name* drop-down list or type in a new custodian name to be added.
7. Specify a **Timezone**.
8. (Optional) Enter a *Description*. This is used as a short description that is displayed with each item in the *Evidence* tab.

10. Click **Next**.

11. In the *Evidence to be Added and Processed* screen, you can view the evidence that you selected so far. From this screen, you can perform one of the following actions:

- **Add More**: Click this button to return to the *Add Evidence* screen.
- **Add Evidence and Process**: Click this button to add and process the evidence listed.

2 Importing Evidence Using Import

1. In the *Project List* panel, click next to the project to which you want to add evidence.

2. Select **Import**.

3. In the Import dialog, select the file type:

- **DII:** Summation file.
- **CSV:** A delimited file type, such as a CSV file.
- **Concordance/Relativity:** A delimited DAT file type that has guidelines as to what delimiter should be used in the fields.

4. Enter the location of the file, or **Browse** to the location.

5. (optional) Select the Image Type:

- **OPT**: Concordance file type with option settings
- **LFP**: Ipro file type containing load images and information.

6. Enter the location of the file, or **Browse** to the location.

7. Select the Import Destination:

- **Existing Document Group**: Select this to add the documents to an existing document group. Select the group from the drop-down.
- **Create New Document Group**: Select this to add the documents to a new document group. Enter the name of the group in the field next to this radio button.

8. Click **Map Fields** to map the fields from the load file to the appropriate fields. Mapping the fields will put the correct information about the document in the correct columns in the Project Review. Any errors that have to be corrected before the file can be imported are reported at this time.

Note: If you need custom fields, you must create them in the Custom Fields tab on the Home page before importing in order to map to those fields.

9. Select the *Import Options* for the file. These options will differ depending on which file you select.

- DII Options:
  - **Page Count Follows Doc ID**: Check to have the page number appear after the Doc ID number in the Doc ID field.
  - **Import OCR/Full Text**: Check to import OCR/Full Text documents in the file.
  - **Import Native Documents/Images**: Check to import Native Documents and Images in the file.
- Concordance/Relativity or Generic Options:
  - **First Row Contains Field Names**: Check to have the first row to contain field names.
  - **Field, Quote, and Multi-Entry Separators**: Select the symbols for the different separators that you want to use.
  - **Return Placeholder**: Select the symbol that you want to you as a return placeholder.

10. Select the dates from the Date Options drop-down.

11. Select the Record Handling Options.

- **New Record**: Add to add new records. Skip to ignore new records.
- **Existing Record**:
  - **Update**: Select to update duplicate records with the record being imported.
  - **Overwrite**: Select to overwrite the duplicate records with the record being imported.
  - **Skip**: Select to skip the duplicate file.

12. Select the *Run Import Options*.

- **Validation Only**: Check to validate the path information, the records containing the correct fields, and the physical files.

3 Uploading Transcripts

Case/Project managers with the Upload Transcripts permission can upload transcript (.txt) files and put them in transcript groups. You can only add transcripts one at a time. Transcript Groups must be created before you can upload transcripts.

1. Click the **Project Review** button next to the project in the *Project List* panel.
2. In the *Case Explorer*, right-click the **Transcripts** folder and select **Upload Transcript**.
3. Browse to the location of the transcript .txt file.
4. Select a *Transcript Group* from the drop-down.
5. Enter the name of the *Deponent*.
6. Select the *Deposition Date*.
7. If you are uploading more than one transcript on the same day, speci-fy the volume number to differentiate between the transcripts uploaded on the same date.
8. Check the *This transcript contains unnumbered preamble pages* to indicate that there are pages prior to the testimony. If you check this, enter the number of preamble pages prior that occur before the testimony. These pages will be numbered as "Preamble 0000#." The numbering continues as normal after the preamble pages.
9. Click **Upload Transcript**.

4 Uploading Exhibits

1. Click the **Project Review** button next to the project in the *Project List* panel.
2. In the *Case Explorer*, right-click the **Transcripts** folder and select **Upload Exhibits**.
3. Select the *Transcript Group* where you want to place the exhibit.
4. Browse to the exhibit file.
5. Enter a *Description* of the exhibit.
6. Click **Upload Exhibit**.