



JOB NUMBER:

FIRM NAME:
CONTACT:
CASE:
MATTER #:

DATE IN:
DATE DUE:
TIME DUE:
SALE REP:

PROJECT SUMMARY

Scan Blowback OCR EBS CD Duplicate Coding Other

Original Data: Boxes CD DVD Via Email/FTP Grade Level

NUMBERING

Match Bates Numbers
Non-label Pages: Do NOT scan Suffix
Assign Image Key
Prefix: With Space
Pages: Without Space
Suffix: Other

Example:

DOCUMENT BREAKS

Physical Boundaries (Staple, clips)
Tabs
Slip Sheet
Index (Client provided)
Other
Group loose pages as one document

ATTACHMENT BREAKS

Per folder Largest binding Other

FIELDS CAPTURE

1.
2.
3.
4.

DOCUMENT SELECTION

Scan all
Per index
P-N-C per
Post-it Notes R & R Own Page 1/w & 1/wo
Mylar Flags On page Own Page Do not scan
Std Language Once All Do not scan

YES NO
Binder Covers
Binder Spines
Redwelds
Folder Covers
Folder Tabs
Divider Tabs
Photo Backs
Box tag

Oversize: Size 4 size Reduce 11x17
Legend Only Reduce 8.5x11

Color: Scan B/W Scan in Color
Photos / Graph Other:

Media: Scan Scan & Dup Do not scan

Other media instruction:

SPECIAL INSTRUCTIONS:

BLOWBACKS

PAPER:

- Regular
- 3-HD

SELECTION:

- Print All
- Print Selected

of sets: _____

OPTIONS:

- Print Image Key (Bates#)
- Slip sheet per doc. break
- Reassemble

OTHER INSTRUCTIONS:

POST PROCESSING

Yes

EBS (Endorse)

No

Image Key (Bates #)

UL UM UR

Other _____

LL LM LR

Yes

OCR

No

Single-page

Include .txt files on CD

Multi-page

Include OCR in database

Yes

CODING

No

STANDARD

- Author / From
- Recipient / To
- CC
- BCC
- Subject / Title
- Doc_Type

OTHER

- _____
- _____
- _____
- _____
- _____
- _____

Yes

PDF

No

PDF per document break

or

PDF per _____

Bookmar per _____

.....
 Searchable PDF

or

Non-searchable PDF

PDF NAMING INSTRUCTIONS

First Bate # Other: _____

Bate Range _____

FILE STRUCTURE

- Single-Page TIFF File Format
- Multi-Page TIFF File Format
- PDF File Format

ATTACHMENT BREAKS

Concordance EX

Concordance 8

.dat:

- Concordance delimiters
- Comma delimiters
- BegDoc / EndDoc / Pages
- OCR
- Capture Fields
- Other (see Special Instructions)

.csv - Comma delimiters

BegDoc / EndDoc / Pages

OCR

Capture Fields

Other (see Special Instructions)

.opt - Opticon

.lfp - Ipro

.oll - Trial Director / Sanction

.mdb - Ringtail

.dii - Summation

Other: _____

Custom Path: _____

SPECIAL LOAD FILE INSTRUCTIONS

CD / DVD DUPLICATION

Number of Originals:

CD: _____ Copy X: _____

DVD: _____ Copy X: _____