

eDiscovery EDMS Uploader

and Process CFA Uploader

Background

The **eDiscovery EDMS Uploader** is designed to ease the workflow of uploading files to: the Case File Archive; Appointed defense attorneys via *eShare*; and to private retained attorneys via attachments in an Email that will be encrypted by the City's server. Other paper documents may still be scanned using coversheets containing barcodes generated from CMS templates.

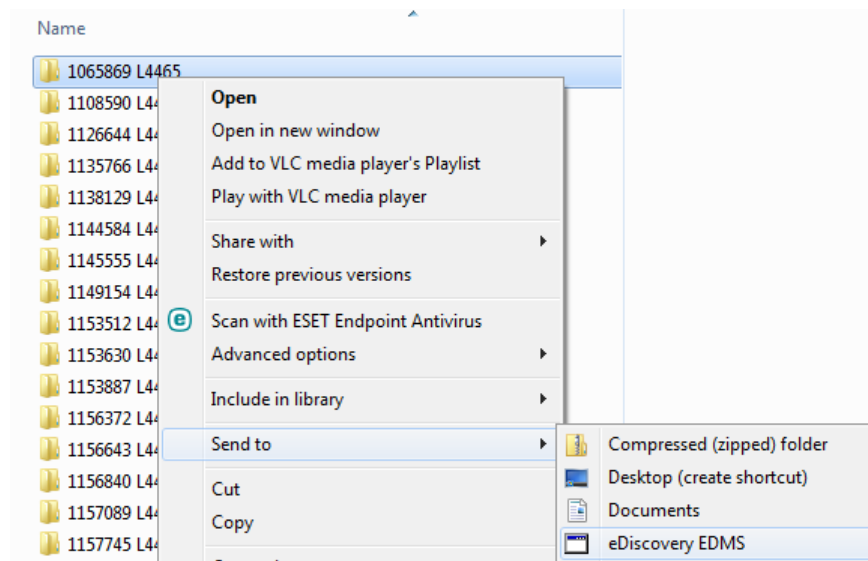
Instructions for the Process CFA uploader are generally identical, but eDiscovery options are not available.

Procedure

Before making any disclosures via *eShare*, the initial discovery with a coversheet containing barcodes (including a valid court case number!) generated from CMS should be scanned into the system using existing procedures. Alternatively, make sure a complaint has been uploaded and the defendant's name is listed on a text file in the root of the case folder.

Folders, digital media files, or compressed (zipped) folders may all be sent to the Case File Archive and *eShare* using the eDiscovery EDMS Uploader. To send a file:

1. Right-click on a file or a group of files and select the **Send to >** menu item, then **eDiscovery EDMS**.



2. The Uploader window will appear with options for you to select. Depending on whether the file is already in the Case File Archive, some options will be disabled.

3. Select the destination office for discovery or select **City Attorney CaseFile Archive** to only add the file to the Case File Archive.
4. Make sure that the correct CMS number is in the **CMS Case Number** field.
 - Hint: If you begin the file name with the CMS number and then an underscore (“_”), the CMS number will automatically appear here.
5. If your case has multiple Defendants and your disclosure does not have barcodes, select the **Defendant** name.
6. Optionally, select the **Type of File** if you want it to go into a specific subfolder. Most media files and files that follow the naming conventions will be saved in the correct folder by the server without using this option. Note that the options here have changed:
 - LEDIS folders are the first three options.
 - Old folders are available below the separator.
7. Select any Additional Options you need:
 - **Add eDiscovery Cover Sheet** is only available for files already in the Case File Archive. This option additionally sends an eDiscovery Cover Sheet with the Defendant’s information to the destination you selected.
 - **Print Placeholder Sheet** is only available for files already in the Case File Archive. This option prints a place holder for the paper case file on your default printer, indicating that digital media is available.
 - **Send Photograph Summary** is only available if you are sending multiple image files. This option generates a pdf document of the photographs and sends it to the destination you selected. The original photographs will not be sent but will instead be uploaded to the CaseFile Archive along with the summary. This is useful for handling many large photographs as the file size is greatly reduced and the transfer will be much faster.
8. You can preview most files by clicking the **Preview** button.
9. Click the **Submit File** button once you have verified all information is correct.
10. A window will open for you to do further processing depending on the destination you selected:
 - Appointed attorneys, including **Primary Public Defender**, **Alternate Public Defender**, **Office of Assigned Counsel**, or **Multiple Conflicts Counsel** cause the L:\CaseFile_Archive_FOR_DISCLOSURE folder to open so that you can wait for a log file to appear and verify a successful upload.
 - The **Retained Counsel** option is only available for files already in the Case File Archive. This selection causes Outlook to open a preformatted Email with the new discovery as attachments. After you send the email, you will receive a message asking if you want to save the email in the Case File Archive (18_Private Attorney Share folder).
 - **City Attorney CaseFile Archive** opens an explorer window to the case number that you indicated so that you can wait for the file to appear and verify the upload.

Help

This Help document can be opened by pressing the F1 key on the top row of your keyboard.