

# OTCS-MCP Implementation Plan

## Executive Summary

Incremental enhancement plan for OTCS-MCP: from 40 tools to 54 capabilities. No architectural overhaul—we extend existing patterns (batch operations, tool profiles, switch handlers) to add 5 orchestrators, 5 bots, and 4 supporting tools.

## Current Architecture

The codebase has all patterns needed:

- Tool profiles system in index.ts
- Batch operations (applyRMHoldBatch, applyRMCrossRefBatch)
- Parallel processing (upload\_folder pattern)
- Single switch statement for handlers

Files to modify: src/client/otcs-client.ts (add methods), src/index.ts (add tools), src/types.ts (add interfaces)

## Phase 1: Foundation Tools

Add 4 new transactional tools:

1. otcs\_share - Document sharing (create/list/revoke)
2. otcs\_batch\_classify - Batch RM classification
3. Enhanced search - Metadata filters, date ranges
4. otcs\_content\_extract - Text extraction for analysis

| Tool                | Client Methods                       | Effort |
|---------------------|--------------------------------------|--------|
| otcs_share          | createShare, listShares, revokeShare | Small  |
| otcs_batch_classify | applyRMClassificationBatch           | Small  |
| Enhanced search     | searchWithMetadata                   | Small  |
| Content extract     | extractContent                       | Medium |

## Phase 2: Orchestrators

Add 5 orchestrator tools in new src/orchestrators/ directory:

1. otcs\_legal\_hold\_process - End-to-end legal hold
2. otcs\_classification\_process - Bulk classification
3. otcs\_workspace\_lifecycle - Provision/health/closeout
4. otcs\_intelligent\_filing - Smart document filing
5. otcs\_review\_cycle - Document review management

Each orchestrator follows: DISCOVER → ANALYZE → PREVIEW → EXECUTE → NOTIFY

Phase 3: Tool Profiles

Extend TOOL\_PROFILES in index.ts:

- orchestrator: All orchestrator tools
- legal: Legal/compliance persona tools
- records: Records management persona
- automation: Bot-related tools

| Profile      | Primary Use Case   | Key Tools                                  |
|--------------|--------------------|--|
| orchestrator | Process automation | legal_hold_process, classification_process |
| legal        | Compliance teams   | rm_holds, legal_hold_process, share        |
| records      | Records managers   | rm_classification, classification_process  |
| automation   | Bot services       | All orchestrators + workflow tools         |

File Structure

After enhancement:

src/ ■■■ client/ ■ ■■■ otcs-client.ts (+300 lines) ■■■ orchestrators/ (NEW) ■ ■■■ legal-hold.ts ■ ■■■ classification.ts ■ ■■■ workspace-lifecycle.ts ■ ■■■ intelligent-filing.ts ■ ■■■ review-cycle.ts ■■■ types.ts (+100 lines) ■■■ index.ts (+200 lines)

Key Decisions

1. Keep single switch statement - Adding 10 cases is manageable
2. Orchestrators as separate modules - Clean separation, testable
3. No database layer (MVP) - In-memory state during execution
4. Reuse all existing patterns - No new architectural concepts