

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