



Insight - Deactivation, Data Export, Document Deletion, and Nearline Storage Request

Instructions

When you no longer need an active site or portion of the site, you have several options. Our options allow you to shut down a site completely and request a Data Export, Delete Documents or put the site into a state of Nearline Storage. Physical media in our possession can be returned to you or destroyed. Please indicate your preference on the form.

Deactivation and Document Deletion

When you no longer need an active site or the documents you can request to deactivate the full site, a portion of the site, or delete a portion of the documents on the site. Below are the options available for Insight matters:

Deactivation Full Site – No Export

OpenText will delete the site and all associated records. You will not receive the documents and data associated with the site. OpenText will not maintain any copies and the site cannot be restored.

Deactivation Full Site – With Export

OpenText will delete the site and all associated records, but you will receive a data export of all records (documents, coding, and metadata). To restore the site in the future, the site will be created as a new site and your data export will be loaded to the new site.

Deactivation Partial Site – With Export

OpenText will delete only the records that you identify in the Folder/Collection section, but you will receive a data export of those records (documents, coding, and metadata). If you wish to restore the records in the future, your Data Export will be loaded as new records.

Partial Site Document Deletion – No Export

OpenText will delete only the records that you identify in the Folder/Collection section. You will not receive an export of the documents and data of these records, and OpenText will not maintain any copies.

Nearline Storage

Often cases go dormant for months at a time, but deactivation of the site is not a viable option. With Nearline Storage, access to the full site or specific portion of the site is removed, however restoring access maintains all other objects (folders, users, projects, etc.) and does not require use of a Data Export. This option should be selected if there's a high probability the site will need to be restored.

Nearline Full Site

OpenText will place the full site into Nearline Storage. All access is removed from the site.

Nearline Partial Site

OpenText will place only the records that you identify in the Folder/Collection section into Nearline Storage. All access is removed for only those records.

Data Export Only

When you need to export a specific set of records or the entire site.

Data Export Only

OpenText will send you a Data Export of the requested records (documents, coding, and metadata), but we will not delete any documents or data.

What Your Data Export Looks Like

The delivery includes a load file and all document versions including XML, native, PDF, redactions, image documents that have been OCR'd in PDF format, and extracted text. All Data Exports include extracted text and load files. The load file build process extracts text from the XML documents and creates the extracted text file and extracts metadata from the XML documents for insertion into the load file.

The load file has pointers to all document versions, so you can decide whether to load or ignore any of the files. No other objects (folders, users, projects, etc.) will be included in a Data Export. While we can use a Data Export to restore a site, only the XML documents and associated files will be restored, other objects (folders, users, projects, etc.) can't and won't be restored, because the site was deleted.

Form

Please complete this form to deactivate, delete documents, or nearline the site (or a portion of the site). **Once this form is completed, please email the form to your OpenText Project Manager.**

Note: If you have a delinquent outstanding balance, Data Export Operations will be delayed until you make arrangements with OpenText.

Action Requested

Insight Site Name:

Deactivation Full Site - No Export (Full site - Delete all data and documents)

Deactivation Full Site - With Export (Full site export of documents, coding, metadata, and delete all data and documents)

Deactivation Partial Site - With Export (Partial site export documents, coding, metadata and delete data and documents based on Folder/Collection)

Partial Site Document Deletion - No Export (Partial site deletion of data and documents based on Folder/Collection)

Nearline Storage Full Site (remove access to all documents)

Nearline Storage Partial Site (remove access to documents based on Folder/Collection)

Data Export Only (export documents without deactivating site)

Note: Please check with your OpenText Project Manager for the cost associated with the option that you choose.

Note: If you have selected Deactivation Partial Site, Partial Site Document Deletion, or Nearline Storage, please make sure to consider the site's deduplication settings.

Folder Collection:

****If you selected Full Site, please type the Insight Site Name here.**

Doc Count:

Certification of Destruction

Yes

No

If Different from Authorization Contact

Recipient:

Company:

Email Address:

Physical Media

Media at OpentText:

Return to the address in Shipping Instructions
Destroy physical media (where applicable)

A Certification of Destruction of
Media is required upon Completion:

Yes
No

If Different from Authorization Contact

Recipient:

Company:

Email Address:

Note: There will be a per Media Charge for this service. Please confirm the current per media charge with your Sales Representative/Project Manager.

Media Shipping Address

Recipient:

Company:

Title/Department:

Phone:

Email:

Delivery Address To:

Additional comments or instructions:

Authorization

I have the proper authority to initiate this request.

Title/Position:

Name:

Email Address:

OpenText Project Manager:

Date of Request:

Signature:

By providing your electronic signature you agree to the information on this form and the prices associated with the work requested. If you have any questions, contact your OpenText Project Manager.