



OBT IA CRAWLER · USER MANUAL

User manual

From the initial report to the migration outputs

Product	OBT IA Crawler
Document	User manual v3.0
Date	2026-10-03
Replaces	Version 2.0 (July 2026)
Application	OBT IA Crawler for Windows (desktop)
Issued by	OBTechnologies (Eduardo Ortega Busutil)

OBTechnologies

Eduardo Ortega Busutil · sole trader · trading as OBTechnologies

Contents

The application at a glance.....	3
1. Launch the initial report.....	3
2. Read the result	3
3. Classify with AI.....	4
4. Next phases	4
5. Frequently asked questions.....	4
Support.....	5

The application at a glance

OBT IA Crawler analyses a document source **read-only**: it never moves, deletes or changes anything. Everything it proposes (what to migrate, what to archive, which metadata to apply) comes out in reports and result files.

The application is in Spanish; the screen names below are given in Spanish with their meaning.

Section	Purpose
Analizar (Analyse)	Choose the source and launch the initial report
Trabajos (Jobs)	Each analysis, its progress, downloads and next phases
Conexiones (Connections)	Connections to folders, SharePoint and OneDrive
Qué puedo hacer (What I can do)	What your licence includes and how much balance is left
Ajustes (Settings)	Licence, default report language and installation details

To practise without real data, **Trabajos** includes a complete sample **demonstration** analysis.

1. Launch the initial report

1. Open **Analizar**.
2. **Origen** (Source): choose the connection. In SharePoint you can analyse one site, several or all sites in the tenant; for a folder, the whole folder.
3. **Informe** (Report): the customer name for the cover, the type of organisation, the **report language** (English, Spanish, French or German) and how many documents are read inside for the sample.
4. Options: look for personal data, data-loss-prevention (DLP) recommendations, and whether to propose a single library or a single content type.
5. For SharePoint, **Comprobar volumen** (Check volume) tells you how much there is and how long it will take before anything starts. It does not read documents.
6. Click **Generar informe** (Generate report).

The analysis continues in **Trabajos**, with its percentage and what it is doing at each moment.

2. Read the result

Each job shows:

- **Proceso** (Process): which step of the full process you are at and what is left (the same six steps across the application).
- **Resultado** (Result): the main indicators (documents, volume, duplicates, obsolete content, personal data).
- **Descargas** (Downloads): the report as **PDF** (for management), **Excel** (document-by-document detail) and **JSON** (for integrations).
- **Salidas para OBT Migrator** (Outputs for OBT Migrator): the proposed architecture and the files OBT Migrator can apply during the migration.

3. Classify with AI

From a finished report, **Clasificar con IA** (Classify with AI) goes through the documents and proposes the type, area, sensitivity and business metadata for each one.

- Documents are read on your computer; only a text extract is sent to the AI, processed inside the European Union.
- Every classified document is deducted from your licence package. Technical files (code, system files...) are resolved on the computer and do not count.
- If it is interrupted, running it again continues where it stopped: documents already classified are not charged again.
- If the project balance runs out, classification stops and the application tells you to contact OBTEchnologies to extend it.

When it finishes, the **final report** is generated: architecture, content types and taxonomy calculated from all the classified documents. The application highlights it in the job so it is not lost among the downloads.

4. Next phases

From the report job, these open inside the same window:

Phase	What you do
Metadatos y revisión (Metadata and review)	Only what the AI could not resolve with confidence, grouped by folder and type: confirm or correct a whole group at once and only touch the exceptions
Saneamiento (Clean-up)	Duplicates, obsolete and trivial content in groups: decide what not to migrate, what to archive and what to keep. Decisions on sensitive content require a note
Buscador con IA (AI search)	Natural-language questions about the analysed documents, with filters by type, customer, area and sensitivity
Gobierno continuo (Continuous governance)	Compares each report with the previous one and flags what has changed: new risky folders, more personal data...

None of this touches the source: what is approved is exported in files (for example `saneamiento-aprobado.json`) that OBT Migrator applies during the migration. Every decision is recorded with who made it.

The phases available depend on your licence; **Qué puedo hacer** shows which ones it includes.

5. Frequently asked questions

Is anything changed at the source? No. The application only reads.

Can I close the application while it is analysing? It is better to leave it open. If it is closed, the analysis can be run again and classification continues where it stopped.

Why does the report mention a "sample"? For the initial report a sample of documents is read inside; for the rest, the name, size and dates are used. AI classification does read every document.

A certificate is about to expire: what do I do? The application warns you 60 days in advance. Click **Configurar SharePoint en un clic** to renew it.

Where are my analyses? In `%APPDATA%\OBT IA Crawler`. Downloads open from each job.

Support

soporte@obtechnologies.com