

eDiscovery Platform Production-specific Quick Reference Card

Production Tasks


Getting Started

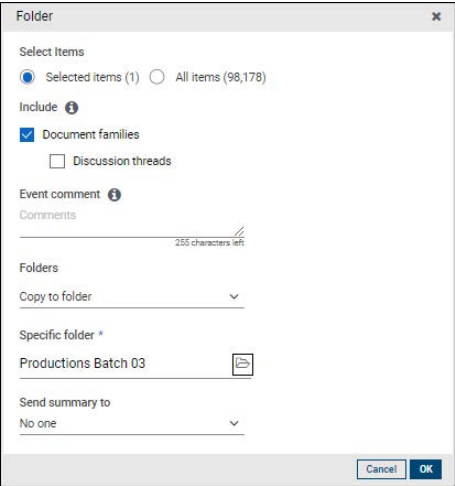
Prerequisite: This procedure assumes you have Case Administration rights.

1. Create a production folder.
2. Copy documents to the production folder.
3. Cache the production folder for quicker results.
4. Verify production options.
5. Lock and produce the folder.
6. Review the production.
7. Export.

For more information, refer to the *Export and Production Guide*.

2. Copy documents to the Production Folder

1. From **Analysis & Review**, search and select the documents you want to produce.
2. Click **Bulk actions menu**  icon and select **Folder**, copy the selected documents to the production folder created in Step 1.

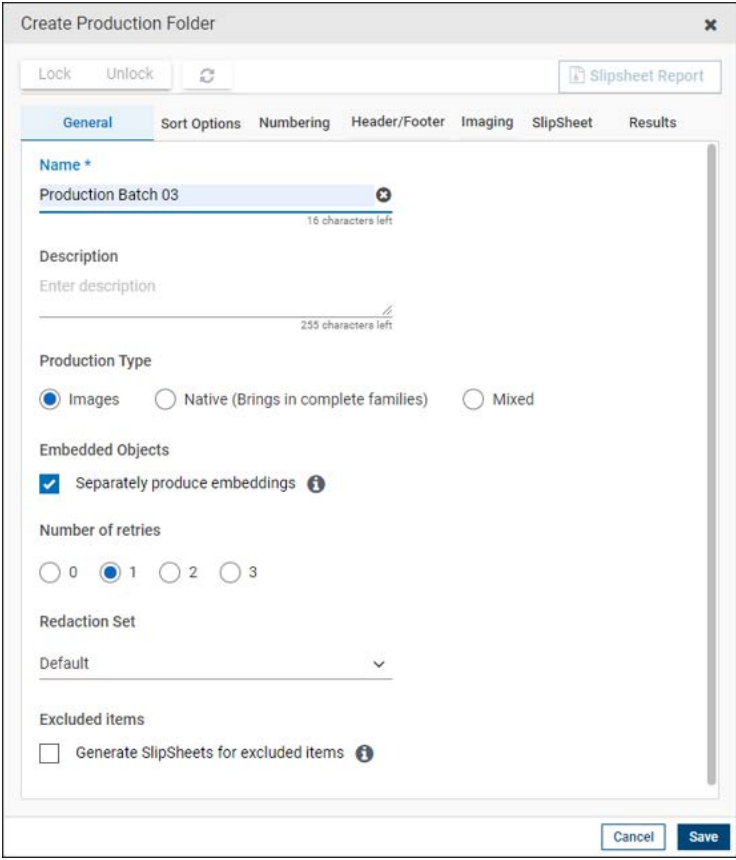
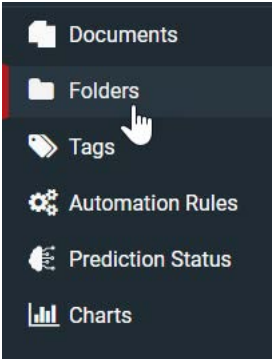


1. Create a Production Folder

Production Folder can be created as part of the Case Template under All Processing or by using the following steps:
Select the case that you want to produce.




1. On the left navigation bar of Analysis & Review page, click **Folders**.
2. Click to select the **Productions** folder.
3. Click **New Folder**.
4. In the Create New Production Folder dialog box, choose option **As Sub-Folder of Selected Folder** and click **OK**.
5. In the Create Production Folder dialog box, under the **General** tab specify the production folder name and set the production options.
6. Under the **Numbering** tab, specify the document identification numbering format.
7. Click **Save**.

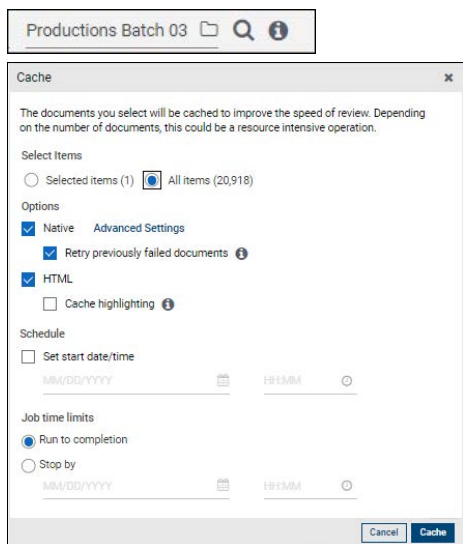
Note: When creating consecutive production folders, ensure that you specify a different numbering scheme for each folder.



3. Cache the Production Folder (Optional)


Prerequisite: Cache the production folder to review documents and redactions within the production folder. If a review is not necessary, go to step 4.

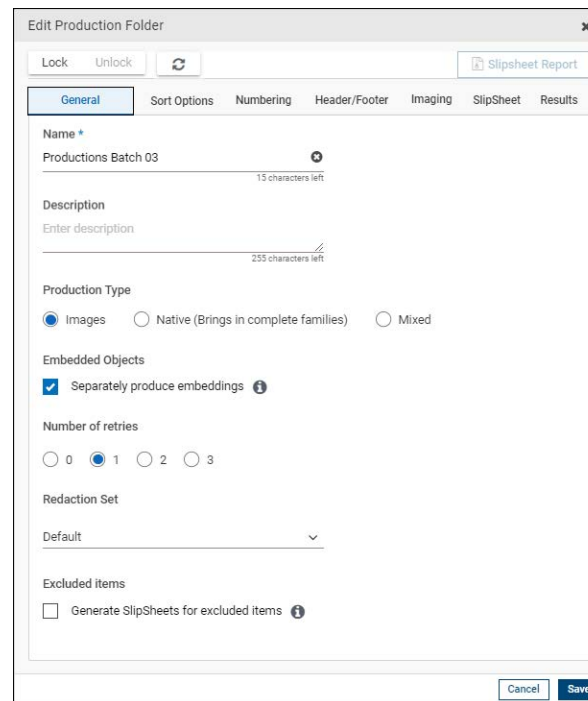
1. Click the **Folder option**  icon, select the production folder and click **Search** .
2. Click **Bulk actions menu** , and select **Cache**.
3. Select **All items** and **Run to completion**.
4. Click **Cache**.



Note: If you are reviewing the folder in Review Mode as text, select both Native and HTML options. Otherwise, only select the **Native** option.



4. Verify Production Options (Optional)

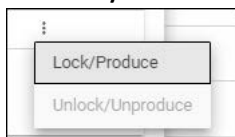
1. On the left navigation bar, click **Folders**, and then click the **Folder Actions**  icon associated with the populated, cached production folder.
2. Select **Edit**.
3. In the **Edit Production Folder** dialog box, review the options under each tab to verify that they are set accurately and click **Save**.



5. Lock and Produce

After you have verified the production options,

1. Click the **Folder option** .
2. Click the **Folder Actions**  icon associated with the populated, cached production folder.
3. Click **Lock/Produce** to lock the folder.





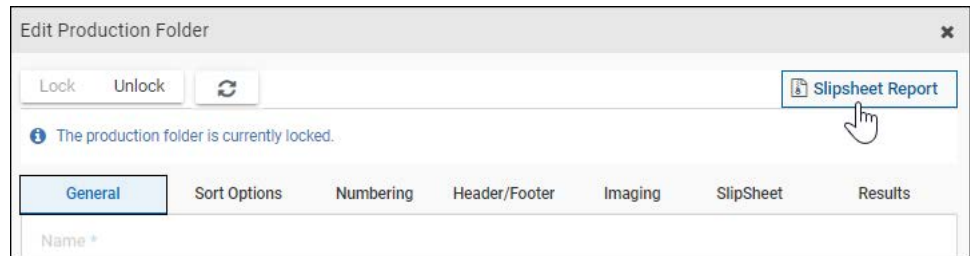
6. Monitor Progress

Track the production job progress in the Jobs dialog box by clicking on the **Jobs** icon.



7. Review the Production

- To generate the slipsheet report when the production has completed, click **Slipsheet Report** in the **Edit Production Folder** dialog box.
- Use the **Advanced Search** to find production issues.
- Review documents in the production folder. Click the **Folder option**  icon, select the production folder and click **Search**  icon to display the documents.
 - In the Simple view, verify the Production numbering displays as expected.
 - From **Review** Mode, verify everything displays correctly.
- Check headers, footers, and redactions.
- From the **View** menu, click **Production**.
- Select the name of the production folder.
- Documents display in the same format in which they are exported.






8. If necessary, Preview, Fix Problems and Reproduce

The most common errors found during production involve:

- Timeouts.
- Content retrieval errors.
- Native file rendering issues.

Veritas eDiscovery Platform provides the ability to preview potential problem documents selected for export, estimate export time, and flag items which are likely to cause problems.

9. Export

- Click the **Folder option**  icon, select the production folder and click **Search**  icon.
- Click **Bulk actions menu**  icon, and select **Export**.
- Select **Production** tab.
- Select the production folder.
- Set the remaining production options as desired.

Note: For any documents that may have failed during export, check the Export Errors filter for the production to view and identify the cause; repeat steps 9 and 10 as necessary.

