eDiscovery Platform Production-specific Quick Reference Card

Production Tasks

Getting Started

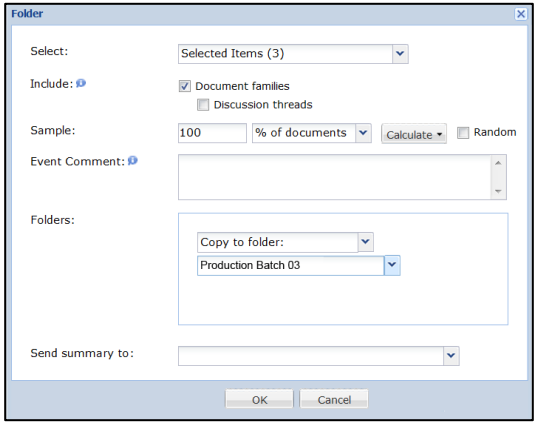
Prerequisite: This procedure assumes you have Case Administration rights.

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**, select the documents you want to produce.
2. From **Actions** > **Folder**, copy the documents to the production folder created in Step 1.

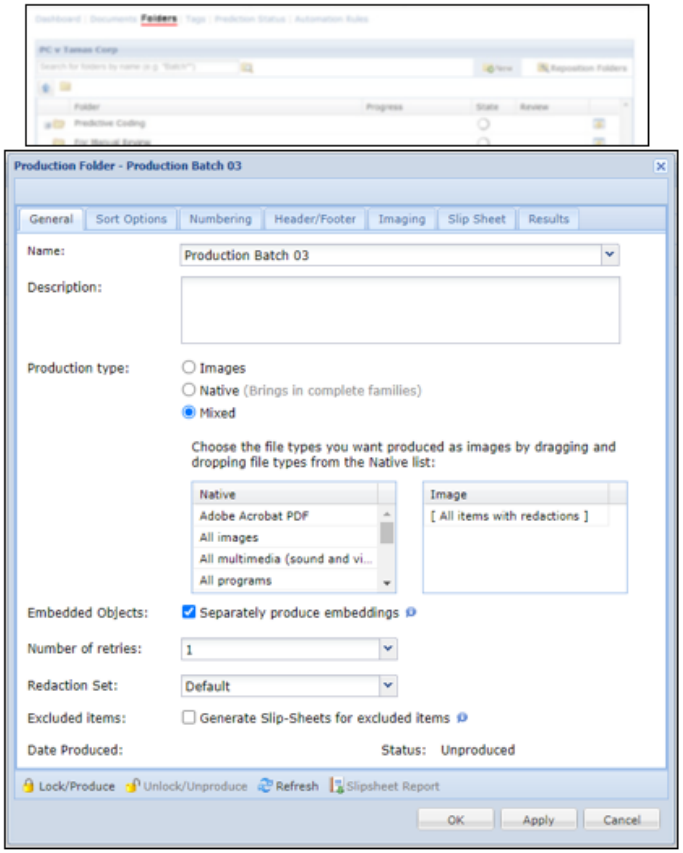


1. Create a Production Folder

Select the case that you want to produce.

1. From Analysis & Review, click Folders.
2. Click the **Productions** folder to select it.
3. Click **New**.
4. Select As Sub-folder of Selected Folder.
5. From the Production Folder dialog box, name the production folder.
6. Set the production options.
7. Click **OK**.

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



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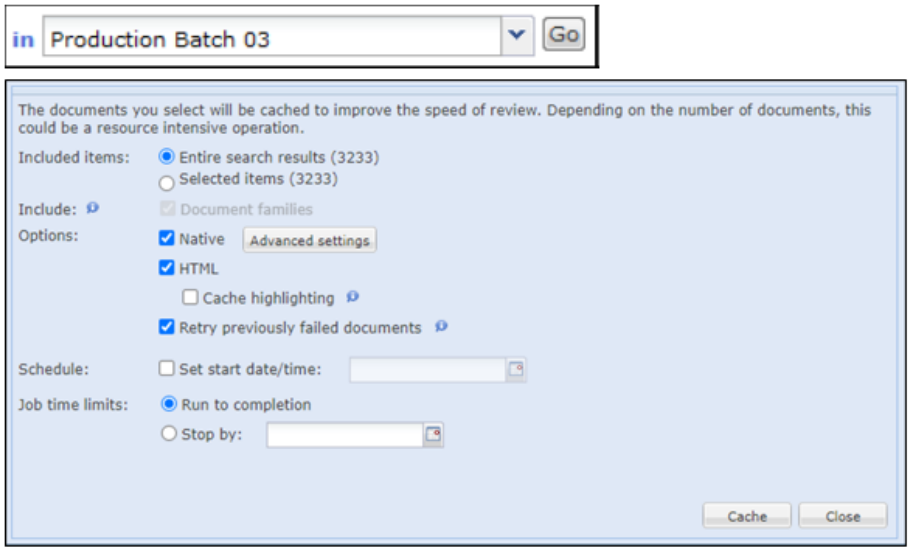
3. Cache the Production Folder (Optional)

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

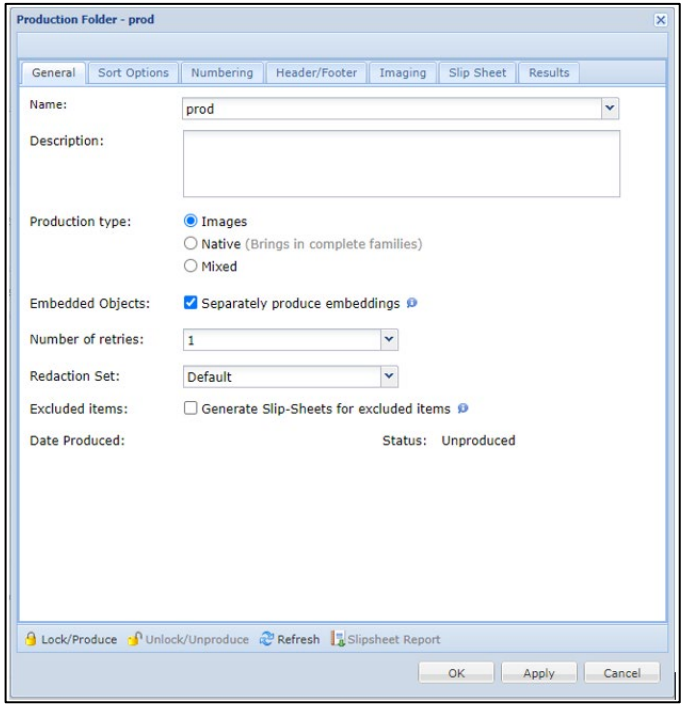
1. From the folder menu, select the production folder and click **Search**.
2. From **Actions**, click **Cache**.
3. Select Entire Search Results and Run to Completion.
4. Click **Cache**.



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

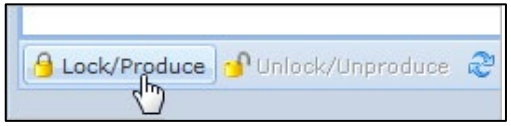
4. Verify Production Options

1. From the folder menu, click the **Edit** icon associated with the populated, cached production folder.
2. Select **Edit**.
3. From the **Production** folder window, review the options under each tab to verify they are set accurately.



5. Lock and Produce

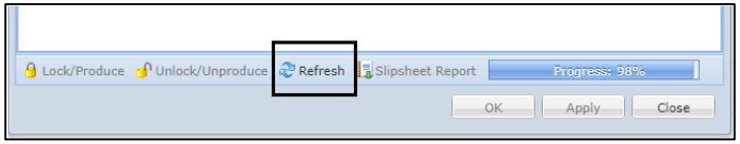
After you have verified the production options, lock and produce the folder.



6. Monitor Progress

Check the progress of a production by clicking the production folder's Refresh button. The production's Progress bar and the current statistics display on the Production Tab.

You can also track the production job progress in the Jobs window or the Jobs page.



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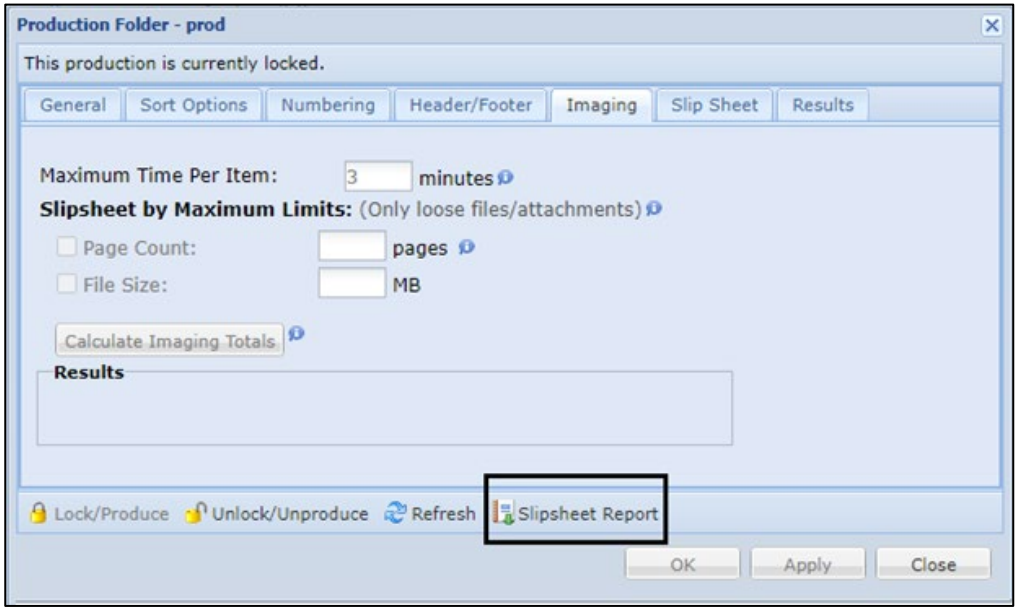
7. Review the Production

1. To generate the slipsheet report when the production has completed, click the **Slipsheet Report** link in the Production folder dialog box.
2. Use the **Advanced Search** to find production issues.
3. Review documents in the production folder. From the folder menu, select the production folder and click **Search** to display the documents.
   - In the **List** view, verify the Production numbering displays as expected.
   - From **Review** Mode, verify everything displays correctly.
4. Check headers, footers, and redactions.
5. From the **View** menu, click **Production**.
6. Select the name of the production folder.
7. 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:

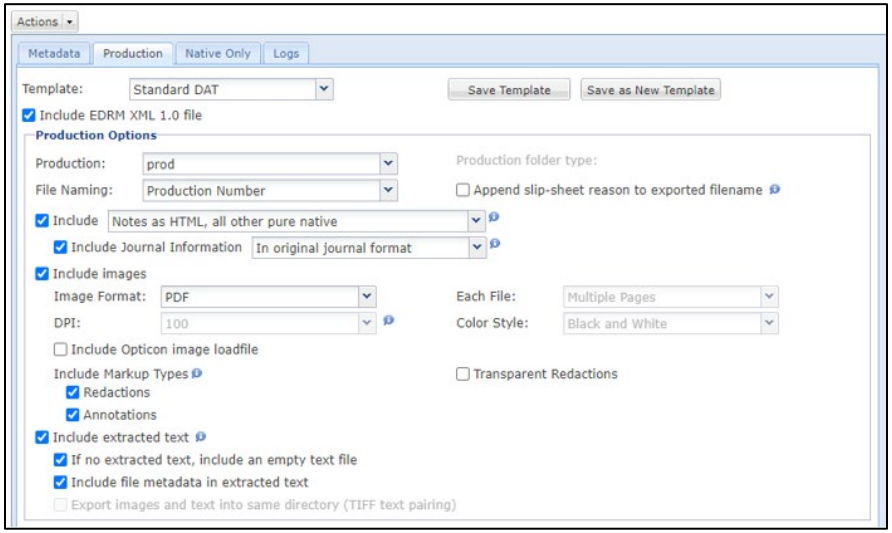
- Timeouts.
- Content retrieval errors.
- Native file rendering issues.

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

1. Select the production folder from the Folder menu and click **Search**.
2. Click **Export**.
3. Select Type: **Production**.
4. Select the production folder.
5. 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.



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