

Production Tasks

GETTING STARTED

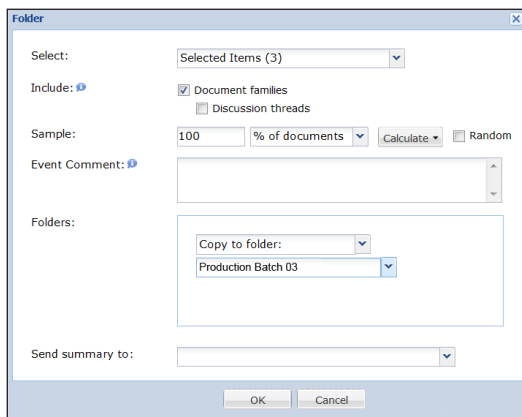
Before you begin: This procedure assumes you have Case Administration rights.

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

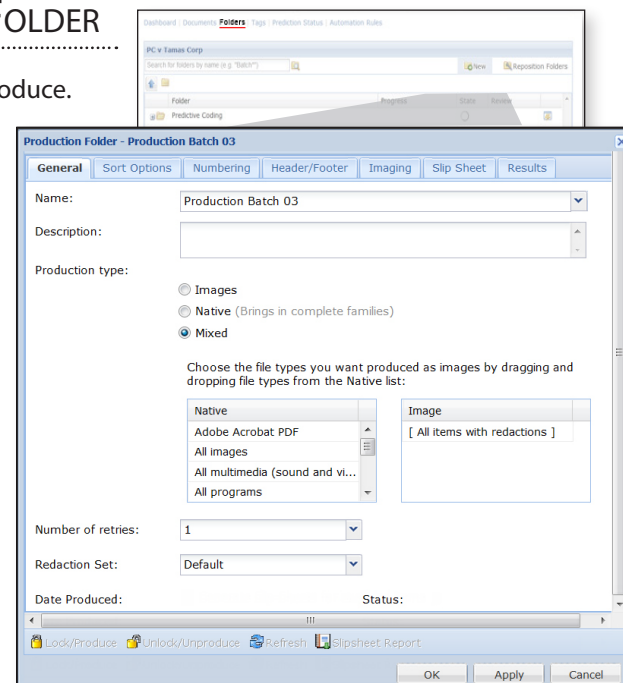
1. From **Analysis & Review**, select the documents you want to produce.
2. From **Actions > Folder**, copy the documents to the production folder created in Step 1.



1. CREATE A PRODUCTION FOLDER

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

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

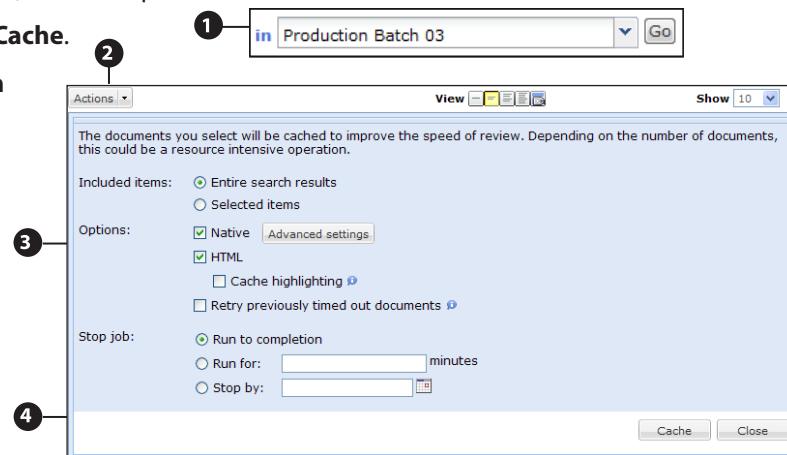


3. CACHE THE PRODUCTION FOLDER (OPTIONAL)

Before you begin: 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**.

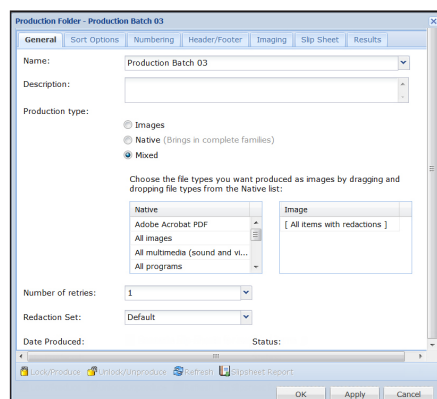
4. Click **Cache**.
- Note:** If you are reviewing the folder in Review Mode as text, select both **Native** and **HTML** options. Otherwise, only select the **Native** option.



PRODUCTION TASKS CONTINUED...

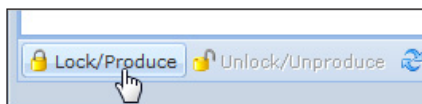
4. VERIFY PRODUCTION OPTIONS

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

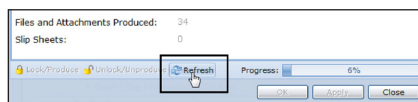
After you've verified the production options, lock and produce the folder.



6. MONITOR PROGRESS

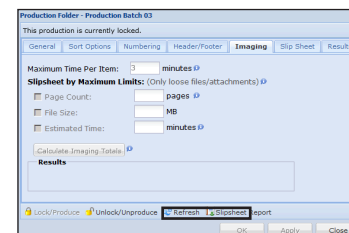
Check the progress of a production by clicking the production folder's Refresh button. The production's Progress bar and the current statistics display on the Production Tab.

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



7. REVIEW THE PRODUCTION

1. To generate the slipsheet report when the production has completed, click on 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 List view, verify the Production numbering displays as expected.
-
- From Review Mode, verify everything displays correctly. Check headers, footers, and redactions.
 - A. From the View menu, click Production.
 - B. Select the name of the production folder.
 - C. Documents display in the same format in which they are exported.

8. IF NECESSARY, PREVIEW, FIX PROBLEMS AND RE-PRODUCE

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 8 and 9 as necessary.

