# Veritas eDiscovery Platform™

## Export and Production Guide

10.1.3

VERITAS™

# *Veritas eDiscovery Platform™: Export and Production Guide*

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# Export and Production Guide

The *Export and Production G*uide provides administrators and case end users of the Veritas E-Discovery Platform with details on how to prepare, export, or produce data in the application. This guide also provides details on various file types and hidden content, and describes tasks, best practices, and troubleshooting techniques associated with advanced export and production.

This section contains the following sections:


- *"About This Guide" in the next section*
- *"Revision History" on page 6*
- *"Technical Support" on page 8*
- *"Documentation" on page 8*
- *"Documentation Feedback" on page 8*


# About This Guide

As a supplement for case administrators, and a companion to the Case Administration Guide, the Export and Production Guide is intended to help you understand the export and production features in greater detail. It also describes best practices for performing exports and productions.

**Note:** You must have appropriate user permissions to perform advanced exports and production tasks. Check with your eDiscovery administrator for more information.

# Related Documents

Refer the following documents for additional information related to Export and Production:

- *Veritas eDiscovery Platform Case Administration Guide*
- *Production Reference Card*

# Revision History

The following table lists the information that has been revised or added since the initial release of this document. The table also lists the revision date for these changes.

| Revision Date | New Information |
|---|---|
| July 2022 | • Updated the View Log icons in the images throughout the document. |
| March 2022 | • Updated the content as per UI change in Analysis & Review tab for 508 compliance. |
| December 2021 | • Updated version for release 10.1 |
| March 2021 | • Updated the Production Options<br>• Added information on Imaging Tool Upgrade feature related changes<br>• Updated the Export to an External Drive section<br>• Minor edits |
| March 2020 | • Removed RMS option to export in decrypted format<br>• Minor edits |
| October 2018 | • Added information for Privilege and Redaction logs. See *"Logs" on page 93*.<br>• Minor edits |
| March 2018 | • Minor edits |
| June 2017 | • Minor edits |
| July 2016 | • Re-branding changes |
| August 2015 | • Designate custom export location: metadata/production/native-only<br>• Removed Rights Management Guide |
| March 2015 | • Image accessibility<br>• Added Reporting Section<br>• New Production Membership Rëport<br>• Branding and minor edits |
| October 2014 | • Check box to export email headers<br>• Item level support for Production exports<br>• New user interface options for Metadata and Production export<br>• Newly designed export template format<br>• New export options with tag and folder selections<br>• Branding edits and updated screenshots<br>• RMS option to export in decrypted format<br>• Added slip sheet report worksheets (top level and item level)<br>• Export Native View PST File Options drop down has been removed<br>• View production slip report through Analysis & Review module |
| December 2013 | • Minor edits |

| Revision Date | New Information |
|---|---|
| June 2013 | • Export audit reports<br>• Ability to modify non-system export templates<br>• Release template updates and edits<br>• Bcc/DL EV Journal metadata and production selections added - applies to EV 10.0.2 and later versions<br>• Email header search (locator hit) exports<br>• Tagging enhancements & removal of Propagate tags to attachments & embedding option<br>• Deprecated production premediation. This feature is replaced with image remediation which is more comprehensive and tightly integrated with the product. For more information, see *"Image Remediation" in the Case Administration Guide*. |
| September 2012 | • Slip sheet improvements<br>• Release template updates and edits |
| March 2012 | • If the export XML output is too large for one file, you can request that export divide up the output based on the number of documents. Previously, if export needed to split the XML output, it was based on file size (MB).<br>• When retrying an export job, the documents are copied into the original export folders instead of creating new retry subfolders following a text or native naming convention.<br>• When "include native" is selected and the source files are NSF, the NSF output is put in a folder shared across all the rolled over XML files. The NSF files are not separated into an XML specific native folder.<br>• Minor updates, edits and format changes throughout. |
| Feb 2012 | • Branding and minor formatting changes only |
| Nov 2011 | • New top menu navigation, and enhanced Metadata and Production export workflow including new tabbed options<br>• Create, save, apply export templates<br>• Other minor updates throughout |
| May 2011 | • Integrated Export Troubleshooting Guide content and merged in Advanced Export section (removed) from Case Administration guide<br>• Added other minor related export and production content, including the following features:<br>– Production Premediation support feature<br>– Production Slip Sheet Reporting |
| Feb 2011 (and prior) | • Export Troubleshooting Guide (Release Independent) |

# Technical Support

Technical Support maintains support centers globally. All support services will be delivered in accordance with your support agreement and the then-current enterprise technical support policies.

For information about our support offerings and how to contact Technical Support, visit our website:

https://www.veritas.com/support

You can manage your Veritas account information at the following URL:

https://my.veritas.com

If you have questions regarding an existing support agreement, please email the support agreement administration team for your region as follows:

| | |
|---|---|
| Worldwide (except Japan) | CustomerCare@veritas.com |
| Japan | CustomerCare_Japan@veritas.com |

# Documentation

Make sure that you have the current version of the documentation. The latest documentation is available from:

- **Documentation** link at the bottom of any page in the Veritas E-Discovery Platform landing page.
- **Veritas Technologies LLC. All rights reserved. Products Web site:** https://www.veritas.com/product/a-to-z

# Documentation Feedback

Your feedback is important to us. Suggest improvements or report errors or omissions to the documentation. Include the document title, document version, chapter title, and section title of the text on which you are reporting. Send feedback to:

*eDiscovery.InfoDev@veritas.com*

You can also see documentation information or ask a question on the Veritas community site.

https://vox.veritas.com/

# Overview

Exporting and producing data in the eDiscovery Platform can be greatly simplified when you take certain precautions and plan ahead for the results you want to achieve. Depending on your export or production output requirements, the application provides various configuration and project management options to help you prepare and run your jobs successfully.

This guide describes each export and production type and the differences between them, including what potential issues and outcomes to consider before export or production, and how to perform the tasks necessary to successfully export and produce your data.

**Note:** Users must have the **System Manager, Group Admin, Case Admin, Case Manager,** or **eDiscovery Admin** role with export or production or both folder privileges and access to the case data intended for export/production.

## How to Use this Guide

This guide is divided into three main sections:

1. Performing Exports
2. Running Productions

   **Note:** This section discusses how to create production exports. For a definition and more information, refer to About Production Exports.

3. Troubleshooting Exports and Productions

Refer to this guide as a whole, or in part, depending on whether you use the platform for one or both processes. In either case, use the troubleshooting section to address any issues you may experience with exporting or producing your data.

## When Should I Contact Support?

If issues do occur during export or production, first try the troubleshooting tips and techniques in this guide, and then refer to the sections on when and how you should contact Technical Support for assistance in Troubleshooting Exports and Productions.

# About Export and Production

Case administrators may want to export or "package" case data in a format that can be more readily and directly loaded into a downstream application for review and analysis. Depending on output requirements, administrators can choose to create exports to either retain original document formats (called "native" export), or produce "metadata" exports. Metadata exports contain specific identification information about the document and can be converted to an XML using the industry standard EDRM XML 1.0 format, or other available load file formats. Administrators can choose to perform a "native only" export, or in metadata and production exports, select the option to include native file formats. For more information about metadata options, see Table 2: Metadata Export Selections in Performing Exports.

When addressing non-standard export requirements, administrators can create custom templates using the “Load File Exports Templates” option under “All Processing” on the top navigation bar. For more information, see Using Load File Export Templates.

## About Production Exports

Production is the stage in the eDiscovery process in which documents are prepared for delivery to a requesting party. Further, when administrators want to package and deliver already-produced documents according to specified requirements, they prepare a production export. For more information, see *“Performing Production Exports” on page 88*.

# Performing Exports

This section describes what you should know before you export, and best practices for performing various exports, how to prepare for large-scale exports, and how to manage your exported jobs. For Production exports, see *"Performing Production Exports" on page 88*.

**Note:** For a case created in pre-10.1 release, the following operations are not available until Imaging Tool Upgrade is run for that case after you upgrade eDiscovery Platform to release 10.1:

- Bulk action menu > Cache
- Bulk action menu > Redact
- Bulk action menu > Export > Production
- Review: Native, Redaction, and Production View

For details, see the *Imaging Tool Upgrade Guide*.

Refer to the following topics in this section:


- *"Exports Overview" on page 13*
  - *"Export Process Workflow" on page 14*
  - *"About Metadata and Metadata Exports" on page 15*
- *"Export Best Practices" on page 16*
  - *"Before You Export…" on page 16*
- *"Performing Exports" on page 17*
  - *"Metadata Exports" on page 20*
  - *"Production Exports" on page 24*
  - *"Native Only Exports" on page 31*
  - *"Managing Large Exports" on page 34*
  - *"Using Load File Export Templates" on page 35*
  - *"Applying Standard Load File Formats (Transforms)" on page 39*
  - *"Exporting with Nested Attachments" on page 40*
  - *"Exporting Email Header Search Results (Locator Hits)" on page 42*
- *"Generating logs" on page 47*
- *"Viewing, Managing, Accessing and Printing Exported Files" on page 48*
  - *"View Results" on page 48*
  - *"Export to an External Drive" on page 49*
  - *"Pause/Resume an Export (for Metadata Exports)" on page 50*
  - *"Retry or Finish the Export" on page 51*

  - *"Use Auto-Retry" on page 52*
- *"Metadata Reference and Summary Information" on page 53*
  - *"XML Export Files" on page 53*
  - *"XML Summary Files" on page 58*
  - *"Extended Metadata Summary" on page 64*

# Exports Overview

Veritas eDiscovery allows you to efficiently export content in a variety of formats so that it can be presented to legal parties or ingested by other third party legal applications. Flexible export options make it easy to prepare, process and customize your documents and metadata.

You can save time and avoid potential issues, (before and during the export process), by familiarizing yourself with the export workflow and following the guidelines in the *Export Best Practices* section.

Version 8.0 enhancements include:

- **Item Level Production Exports —** You can choose to export only relevant items in a Production export (any excluded, non-relevant family items will produce a slip sheet). For example, you can lock and produce an item level image and execute a production export of just that item level image. Similarly, you select certain items and not the entire document family in mixed mode for a production export.

  **Note:** Metadata and Native Only exports only export entire document families and do not support exports at the item level.

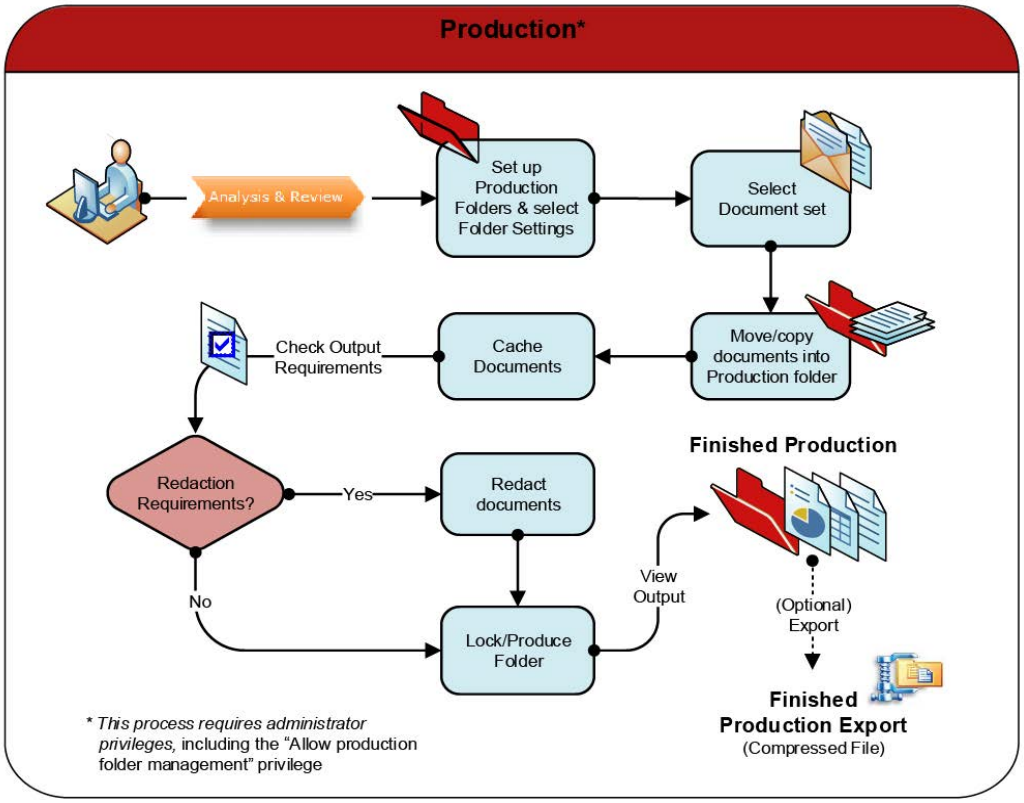
- **Tags and Folders Option for Metadata and Production Exports —**You can select specific tags and folders during export. This is accomplished through the tags and folders Metadata Field tabs on the Metadata or Production export menus. Similar to what is available with other export options, you can save and preserve your tag and folder selections in a custom template for use in either Metadata or Production exports. You can also share the template with other users that have permissions set to access it.

Version 10.0 enhancements include:

- PrizmDoc has replaced IGC to export the final PDF/TIFF images in production export.
- Production options on the **Production** tab now provides a new **Include Markup Types** option for selectively burning either **Redactions** or **Annotations**, or both.
- The **Transparent Redactions** option is made visible by default, so that redactions can be burned in the transparent mode.
- PDF is now the default Image Format instead of TIFF.
- Removed the following production options:
  - Color Depth
  - Page Size
  - Validate TIFF Files
  - Hide Redaction Reasons

## Export Process Workflow

The export feature allows you to prepare documents in organized batches for review at a later stage.




**Note:** This process also applies (in general) when performing a production export. See *"Performing Production Exports" on page 88*.

When a set of documents in a case are selected for export, case administrators then prepare the documents according to their output requirements. Requirements may specify multiple batches to be exported, customized report formats (such as specific delimiters), or require the data to be in one or more load file formats, such as CSV or DAT. The finished export is packaged as a .zip file ready for download or delivery.

(Optionally, you can provide a description by labeling the export batch for quick reference later in your process. Start and end times are automatically associated with the batch.)

## About Metadata and Metadata Exports

In a metadata export, the Veritas eDiscovery Platform creates an EDRM XML file containing metadata, and if selected, transforms the original file formats (loose files, PSTs, NSFs), into other specified formats for review in other downstream applications. (Native PSTs, which do not contain metadata, are converted to MSG formats).

If native files are included in the metadata export, they are placed in a single directory with the files named based on their Veritas eDiscovery Platform document ID to streamline the process of loading the documents into a downstream review application. The original folder path information is contained in the XML metadata. (Language information and attachment hierarchy are included in XML exports.

**What if Native Export is Required?**

You can choose to perform a Native Only export. A Native Only export is where the structure and format of the original content is reproduced as it appeared in the native source. However, Veritas recommends using metadata export, as it contains more information about the files you are exporting, and native file formats can always be included.

The following table shows how files are handled during export, depending on the type.

**Table 1: Metadata and Native Exports and File Types**

| Export Type | Original File Type | Exported File Type | Example |
|---|---|---|---|
| Metadata | PST | MSG | 0.3.11.2809.msg |
| | NSF | NSF<br>(entryid added to message inside NSF file) | |
| | Loose Files | Loose files with IDs:<br><clearwell docid>.<br><originalextension> | 0.7.10.2134.xls |
| Native | PST | PST | |
| | NSF | NSF | |
| | Loose Files | Loose Files (same name) | revenue.xls |

In a metadata export, more information about the files is included for quick reference.

# Export Best Practices

Whether you perform basic or advanced exports, you can prepare your export jobs with the following methods in mind to ensure your output is successful. This section describes how to handle large exports that are separated into multiple parts because they exceed the size limits that are specified in the system settings area. It also describes the format of the XML export and summary files.

## Before You Export…

When you prepare a set of documents for export, consider the following "checklist" items to help you select the appropriate options and ensure your export job will be successful:

- Check the **size of your document set**.
  - For larger exports, see *"Managing Large Exports" on page 34*.
  - For export/print report file size limits and security, see *"Performing Exports" on page 17*.

  **Note:** Keep larger exports to less than 1,000,000 documents by using folders, tags, or export batches to organize document sets.
- Be aware that Metadata and Native Only exports do not support item level only exports (items are single attachments that are independent of the parent document or email). This means that any items that you have selected for Metadata and Native Only exports will also export all the other items in the same document family.
- Check your output requirements for the following:
  - **customized load files** or **native files.** See *"Metadata Exports" on page 20***.**

  **Note:** The *Native Only* export format does not create customized load files. Associated metadata is only available in the EDRM XML file. If you are required to export only native files use the *Native Only* option; otherwise Veritas recommends the Metadata option as the preferred export type.
  - **file and report formats**. See *"Exporting Metadata" on page 40* and *"Extended Metadata Summary" on page 64*.
  - **nested attachments**. See *"Exporting with Nested Attachments" on page 40*.
  - **data security**. See *"Performing Exports" on page 17*.
- Check whether a **production export** is required. See *"Performing Production Exports" on page 88*.
- Will **multiple exports** of a certain format, or customized load file formats be required? See *"Using Load File Export Templates" on page 35*.
- Determine what **reporting** options you need. See *"Extended Metadata Summary" on page 64*.
- Consider adding utility nodes to improve export performance. Refer to the *Utility Node Guide* for deployment and more information.

# Performing Exports

On any search results screen that displays a list of documents, you can export documents to a zip file and download the file to your computer. (To export data to an external drive, see *"Export to an External Drive" on page 49*.

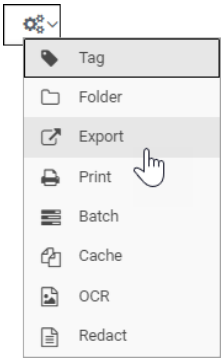
**To export data in the Veritas eDiscovery Platform**

1. Submit a search to find the documents you want to export (as described in *"Performing Searches" in the Veritas eDiscovery Platform User's Guide*).

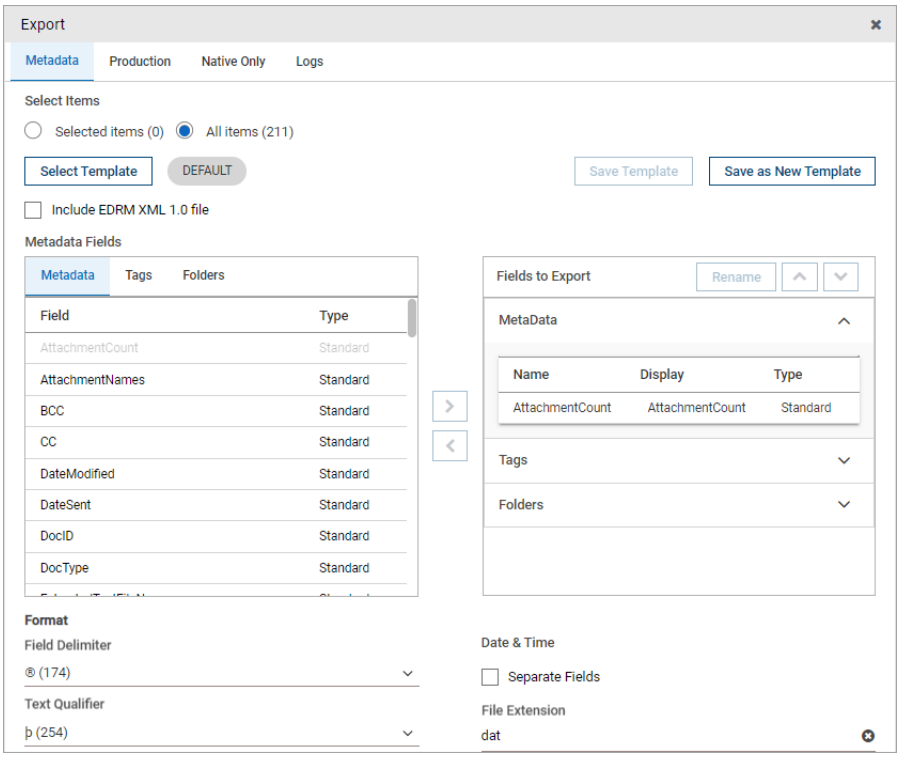
2. You can export all the documents in your search results set, or select one or more documents on the current screen by clicking the check box next to the appropriate document(s) to be exported. To select all the documents on the current screen, click the check box in the column heading.

   **Note:** You can export production email files, attachments, and loose files for analysis in an external TIFF analysis application and then import the TIFF files back into the platform after the analysis is complete.

3. On any screen that shows a list of documents, click **Bulk action menu** icon and select **Export**.



The export options window opens on **Metadata** tab.




In the default Metadata export, there are six sections available to select appropriate options: *Metadata Fields*, *Format*, *Tags, Folders*, *Options*, and *Output*. (Production exports include additional *Production* options.) You can set options that control how the files in folders, searches and tagged content are exported. These sections vary depending on the template type.

If you are performing multiple exports based on unique requirements, you can customize your settings by first creating a template. See *"Using Load File Export Templates" on page 35*.

4. Click the tab for one of the following exports you want to perform:

   – **Metadata**—Export a metadata file (EDRM XML, CSV, or other review application formats you may have installed) with optional user-generated metadata (such as tag and folder information) and native file content. This option is useful for productions that are being loaded into a downstream review application. For supported load file formats, see *"Metadata Reference and Summary Information" on page 53*.

   **Note:** CSV files use ISO-8859-1 encoding. UTF files use UTF-8 encoding.

   – **Production**—Export all the documents in your set that are part of a locked production folder. The number of documents may be less than the total number of documents shown in the top navigation bar.

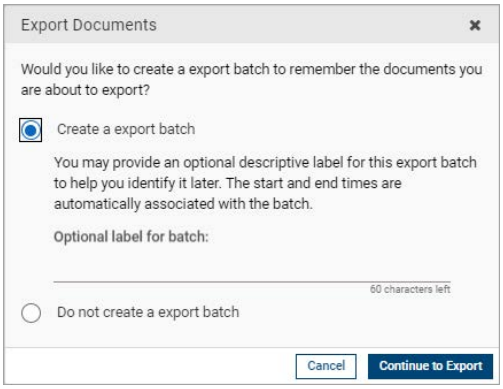
   – **Native Only**—Export only the original native emails and files (with the original filenames and optionally their original folder structure) and any associated metadata. This is generally used for pure native productions.

**Notes:**

- The *Native Only* export format does not create customized load files. Associated metadata is only available in the EDRM XML file. Use the *Native Only* option only if you are required to export native files; otherwise Veritas recommends the Metadata option as the preferred export type.
- Item level exports are only supported by a Production export. If items are selected for a Metadata or Native export, please be aware that *ALL* items in the same document family will be exported (in addition to the items that were originally selected).

5. Specify the following information, depending on your export type:
   - For Metadata exports, see Table 2: *Metadata Export Selections*.
   - For Production exports, see Table 3: *Production Export Selections*.
   - For Native Only exports, see Table 4: *Native Only Export Selections*.
6. Click **Selected items** or **All items** (for the number of documents selected on the current screen, or the total number of documents).

   Upon export, the Export Documents window appears:




   By default, an export batch will be created for this selected or total document set with the file name `clearwell_export`.

7. Choose an option:

   A. If you want to create a batch, to include a description, enter a label for the batch (optional).

   B. If you do not want a batch created, click **Do not create an export batch**.

   - To start the export, click **Continue to Export**.

## Metadata Exports

The following table lists all available sections and options associated with metadata exports (based on the "DEFAULT" template).

**Note:** Metadata Fields and Formats are only available in the "DEFAULT" template. Veritas recommends performing metadata exports as the preferred export type.

**Table 2: Metadata Export Selections**

| Section/Field | Description |
|---|---|
| Template | Keep the standard "DEFAULT" (DAT type) settings, or choose a template from the Templates window.<br>Standard available templates include:<br>– **EDRM XML 1.0**<br>– **Simple CSV** [or] **Simple CSV UTF**<br>– **Standard CSV** [or] **Standard CSV UTF**<br>– **Standard DAT** [or] **Standard DAT UTF**<br>– **Extended CSV** [or] **Extended CSV UTF**<br>– **Extended DAT** [or] **Extended DAT UTF**<br>See *XML Export Files* for a full description of each type.<br>Except for EDRM XML 1.0, the non-system templates listed above are now configurable. Some of the operations you can perform:<br>– **Save Template**—To *intentionally* overwrite the original template<br>– **Save as New Template** — Retains the original template while creating a new one based on it<br>– **Delete**—If the template is not used, it can be deleted so as to reduce obsolete selections in the pick list.<br>– Assign template to a specific case—These templates can be assigned to certain cases.<br>For more information, see *"Modifying Non-System Templates" on page 38*.<br>Or, select from any available custom-created metadata templates. To create a new metadata template (based on "DEFAULT" settings only) click **Save as New Template**. (For more information, see *"Using Load File Export Templates" on page 35*.)<br>**Note:** Veritas supports both UTF-8 and ISO-8859-1 encoding for the "DEFAULT" template, and any customized templates. However, only UTF-8 encoding is supported for all other ("System" type) templates.<br>If you choose one of the CSV or DAT formats, the **Include EDRM XML 1.0 file** check box is automatically selected, allowing you to preserve and export the EDRM XML output in addition to CSV or DAT. |

**Table 2: Metadata Export Selections**

| Section/Field | Description |
|---|---|
| **Metadata Fields** | |
| | **Metadata**<br>(DEFAULT or custom templates only)<br>The group type of Metadata fields:<br>• **Standard—**Fields included in all XML exports<br>• **Extended—**Additional fields not included in Standard Metadata field<br>• **Custom—**Unique fields/attributes (as defined by administrator) in a load file<br>Then select from available fields to include in the export by moving them to the list on the right. |
| | **Tags**<br>Select from available tag list those tags you want to include in the export by moving them to the **Fields to Export (In Order)** box to the right. By default, tags are exported in separate columns. See **Format -> Tags** entry in this table to change the column format. |
| | **Folders**<br>Select from available folder list those folders you want to include in the export by moving them to the **Fields to Export (In Order)** box to the right. By default, folders are exported in separate columns. See **Format -> Folders** entry in this table to change the column format. |
| **Fields to Export (In Order)** box | Highlight each selection, then click **Rename** to specify its display name, and order in which it will appear by clicking **Move Up** or **Move Down**.<br>You can change the order of the Metadata, Tags and Folders sections and the fields within those sections but you cannot combine fields from different sections. |
| **Format**<br>(DEFAULT or custom templates only) | |
| | In the following fields, select the appropriate formats for the export file:<br>• **Field Delimiter—**Character separating the columns in the file<br>• **Text Qualifier—**Character marking the beginning and end of each field |
| | • **Encoding**—Specify either **UTF-8** or **ISO-8859-1**<br>• **Include headers as first line—**Select this option if the column headers should be the first line of the file |
| Date & Time | By default, the **Separate fields** option is selected. Clear this option if the date and time should be grouped together in the same field. |
| | • **File Extension**—Type the file extension to be applied to the export file |
| **Tags** | Select any of the tag format options to apply to your metadata export:<br>• **Column Format**—One tag per column (default) where each tag will be in a separate column or All tags in one column (regardless of tag sets).<br>• **Include full hierarchies with tag names** — Hierarchal view of tag names<br>• **Include Tag Event Comments** — All tag event comments are included in the export file |
| **Folders** | Select any of the folder format options to apply to your metadata export:<br>• **Column Format**—One folder per column (default) or All folders in one column.<br>• **Include full paths with folder names**— Hierarchal view of tag names |

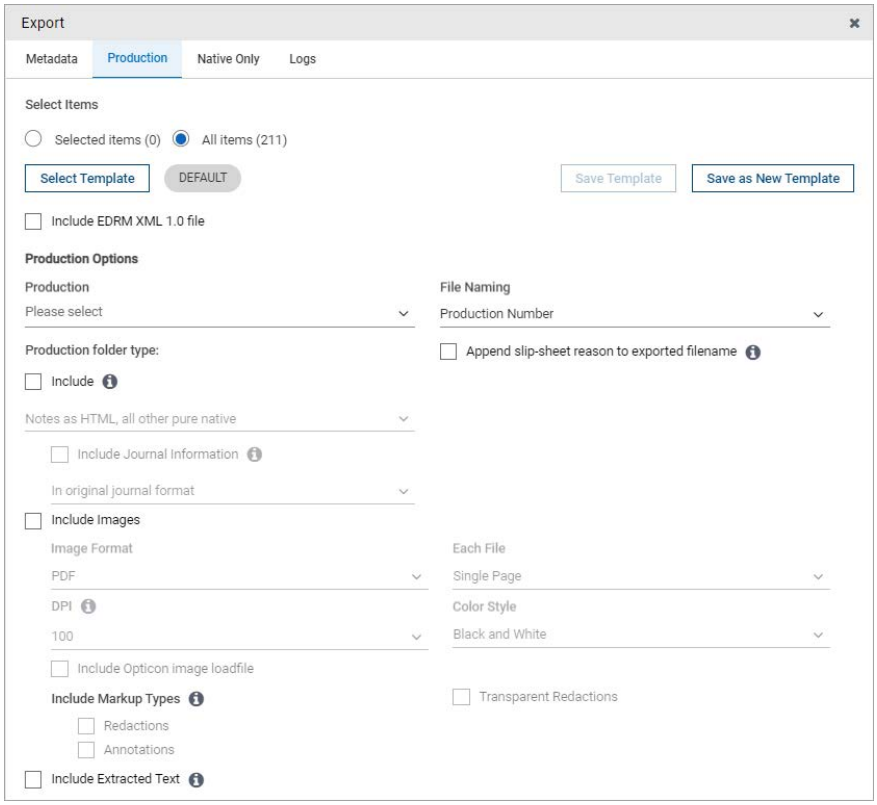
**Table 2: Metadata Export Selections**

| Section/Field | Description |
|---|---|
| **Options** | |
| | Select any of the following options to apply to your metadata export:<br>• **Include batching information**—Identification information about the batch of documents selected for export is included in the export file<br>• **Include item notes**—Item notes are included in the exported file.<br>– **Include complete history**—Entire history for all item notes are included in the export file<br>• **Include discussion thread**—Information about the discussion thread to which the selected documents belong are included in the export<br>• **Include file flags**—Flags associated with files are included in the export file<br>– **Include one column per flag**—Each flag will be in a separate column<br>• **Include extended metadata**—Extended data is included in the report<br>• **Include custodian & location info**—Include custodian and location information in the exported zip file.<br>– **One row per custodian**—Each custodian will be in a separate row<br>To specify the custodians to include, click **Select Custodians** to open the selection window. You can search for custodians and then highlight entries to select them. Click **OK** to add your selections to the exported file.<br>**Include email headers**—Exports all email header information. To successfully export email header information (locator hits), you must have a viable email header search that have search hits. This will significantly increase the job completion time. It is strongly recommended that you only include email headers in conjunction with advanced search > email header criteria.<br>• **Include:**<br>– **Messages in native format & native loose files—** Messages are exported in .msg format. Email messages are exported in their native format. Because of size limitations, Lotus Notes emails are exported into a single NSF container (not as individual message files). Selected alone, this option only exports the original messages (without envelope information) in native format.<br>**Include Journal Information—** Journal information can be included as part of the native file in two ways:<br>**Note:** To export messages that do not contain any journal information in the message, leave the **Include Journal Information** option unchecked.<br>– **In original journal format—** The contents of each item are exported in the same format as when imported. For example, when opening an exported item in Outlook, the Journal header information appears in the body, and the original body content is an attachment to that email.<br>– **By merging recipients list—** These are "unified" messages, expanding the original message to include merged information from the parent message. For example, when opening an exported item in Outlook, the actual contents of the email appears in the body (not in an attachment), and the recipient list includes the Journal recipients information.<br>**Note:** For details about output folder structure for native files included in a metadata export, including rollover directories, see *"File and Folder Structure for Metadata Output" on page 34*.<br>– **Messages in HTML format (excluding attachments) & native loose files—** Messages are exported in HTML format. |

**Table 2: Metadata Export Selections**

| Section/Field | Description |
|---|---|
| | • **Include extracted text**—Include the actual text of the documents in a text file. For redacted documents, only non-redacted text will be included in the extracted text.<br>– **If no extracted text include an empty text file—**Exports empty text files for documents that have content which cannot be indexed<br>– **Include file metadata in extracted text—**The file's metadata is included as part of the text file<br>• **Break out attachments as separate items**—All attachments will be treated separate from the other exported files<br>**–Break out embeddings as separate items—**All embedded content in attachment files will be treated separate from the other exported files |
| **Output** | |
| | Select one of the following options:<br>• **Create downloadable (zip) file**—Creates a zip file that you can download by clicking Jobs on the top of the screen.<br>• **Access from appliance only**—Creates a file. The locations drop-down menu displays the available physical export locations. Select the location and the file will be saved to the target export location. Export locations are determined by Access Group membership and the type of configured locations associated with an Access Group. For more information on Access Groups see "*Case Administration Guide: About Access Groups*".<br>Here are the factors that determine target export locations:<br>If you are *not* a member of an Access Group configured for locations:<br>– The export file is written to the case home directory.<br>– If the external location is set using the property browser, then select the target location from the drop-down location menu. See *"Export to an External Drive" on page 49*.<br>If you are a member of an Access Group configured for locations:<br>– Use the locations from the drop-down menu to select the target export file. The available locations are based on the access level settings allowed by your Access Group. To add or modify the list of export locations go to **All Cases->Locations**. To change the association of Access Groups to location, go to **System > Users > Access Groups**.<br>**Note:** In the Jobs window, move your cursor over the ⓘ symbol to view the information needed to identify the file. Your eDiscovery administrator can use the job ID to download the files.<br> <br> |
| **WARNING: Each selected item also exports all other items in the same document family** | Metadata exports do not support item level exports and will export *ALL* items in the document family. |

## Production Exports




Selecting **Export > Production** tab displays the Production export options.

A production export is similar to a metadata export, with added configuration and imaging options. For example, you can name documents based on a document's production number instead of the Veritas eDiscovery Platform document ID, and include an Opticon image load file and specify image format including (if applicable) image resolution, color, and page selections. For multi-page image productions, the production number of the first page is used for naming.

The following table lists all available sections (similar to Metadata export options) associated with production exports (based on the "DEFAULT" template).

**Note:** Metadata Fields and Format options are only available in the "DEFAULT" template.

**Table 3: Production Export Selections**

| Section/Field | Description |
|---|---|
| Template | Keep the standard "DEFAULT" (DAT type) settings, or choose a template from the Templates window.<br>Standard available templates include:<br>– **EDRM XML 1.0**<br>– **Simple CSV** [or] **Simple CSV UTF**<br>– **Standard CSV** [or] **Standard CSV UTF**<br>– **Standard DAT** [or] **Standard DAT UTF**<br>– **Extended CSV** [or] **Extended CSV UTF**<br>– **Extended DAT** [or] **Extended DAT UTF**<br>See *XML Export Files* for a full description of each type.<br>Except for EDRM XML 1.0, the non-system templates listed above are now configurable. Some of the operations you can perform:<br>– **Save**—To *intentionally* overwrite the original template<br>– **Save as New Template** — Retains the original template while creating a new one based on it<br>– **Delete**—If a template is not used, it can be deleted to reduce obsolete selections in the pick list.<br>– Assign template to a specific case—These templates can be assigned to certain cases.<br>For more information, see *"Modifying Non-System Templates" on page 38*.<br>Or, select from any available custom-created metadata templates. To create a new production template (based on "DEFAULT" settings only) click **Save as New Template**. (For more information, see *"Using Load File Export Templates" on page 35*.)<br>**Note:** By default, the platform supports **UTF-8** encoding. To specify a different encoding option, see *Extended Metadata Summary*.<br>If you choose one of the CSV or DAT formats, the **Include EDRM XML 1.0** check box is automatically selected, allowing you to preserve and export the EDRM XML output in addition to CSV or DAT.<br>If an existing production export template created in pre-10.0 release with Validate TIFF Files, Color Depth, Page Size, Hide Redaction Reasons options is applied after upgrade to release 10.0, then all of these mentioned options are ignored, and the rest of the field options from the template are applied. |
| **Production Options** | |
| Production | Select the production batch to export. |
| File Naming | Select whether to name each file in the production by production number or production ID. |

**Table 3: Production Export Selections**

| Section/Field | Description |
|---|---|
| Append slip-sheet reason to exported filename | Slip-sheets are generated for a particular reason and act as placeholders for natives or images. Check this option if you want to append the reason to end of the filename for each slip-sheet to easily identify the files in a directory later. For example:<br>`filename-000002_Not_Included_In_Production_Slipsheet.tif`<br>Slip-Sheet Reasons:<br>• Fully Redacted—Item was Redacted completely<br>• Imaging Error (Production Error) — Unable to create image of item<br>• Conversion Error (Production Export Error) — Image failed to convert to TIFF<br>• Native Not Imported (LFI Native Unavailable) — Load File did not import Native<br>• Native Placeholder (Mixed Mode Image) — Bates stamped Native placeholder<br>• Not Produced Item— Item not Produced with family |
| Include native files | Select one of the following native file options:<br>• **All messages in HTML and loose files in native format**—All native files to be exported in HTML format.<br>• **Notes as HTML, all others pure native**—Includes Lotus Notes as HTML files, all other supported files in pure native format. Native files are included only for documents that are not redacted.<br>**Note:** When you select this option for NSF source files, the NSF output is put in a folder shared across all the rolled over XML files. The NSF files are not separated into an XML specific native folder.<br>• **Include Journal Information**<br>When the option is unchecked, the journal information is not included in the native files, but the merged recipient lists can still be exported as metadata.<br>Messages in HTML format will always have the merged recipient list (**By merging recipients list**).<br>– **In original journal format.** (Same as for Metadata exports) The contents of each item are exported in the same format as when imported. For example, when opening the exported item in Outlook, the Journal header information appears in the body, and the original body content is an attachment to that email<br>– **By merging recipients list.** (Same as for Metadata exports) These are "unified" messages, expanding the original message to include merged information from the parent message. For example, when opening the exported item in Outlook, the actual contents of the email appears in the body (not in an attachment), and the recipient list includes the Journal recipients information. |

**Table 3: Production Export Selections**

| Section/Field | Description |
|---|---|
| Include images | Select this option if the production export should also include images according to the specified criteria:<br>• **Image Format**—Select either TIFF or PDF. Starting with release 10.0, PDF is the default image format.<br>• **DPI**—Resolution in dots per inch (DPI), for TIFF only. By default, 100 DPI is set, it can be changed to 200, 300, and 600. Increasing DPI will increase the size of TIFF export significantly.<br>• **Color Style**—Black & white, or Color<br>• **Each File**—Presentation of each file on a single page or multiple pages<br>Select the options:<br>• **Include Opticon image loadfile**—Select to add Opticon image loadfile. If the Opticon formatted image loadfile should be included with the production export. For more information about Opticon files and formats, refer to Veritas's *Load File Import Guide*.<br>• **Include Markup Types** - select either **Redactions** or **Annotations**, or both. Redactions option is selected by default.<br>• **Transparent Redactions** - redactions along with reason codes can be burned in transparent mode. This option is visible by default, so that redactions can be burned in transparent mode. |
| **Include extracted text** | Include the actual text of the documents in a text file.<br>– **If no extracted text include an empty text file—**Exports empty text files for documents that have content which is cannot be indexed<br>– **Include file metadata in extracted text**—The file's metadata is included as part of the text file<br>– **Export images and text into same directory (TIFF text pairing)**—A TIFF file and its matching text file images are exported into the same directory location. |
| **Metadata Fields** | |
| | **Metadata**<br>(DEFAULT or custom templates only)<br>The group type of Metadata fields:<br>• **Standard—**Fields included in all XML exports<br>• **Extended—**Additional fields not included in Standard Metadata field<br>• **Custom—**Unique fields/attributes (as defined by administrator) in a load file<br>Then select from available fields to include in the export by moving them to the list on the right. |
| | **Tags**<br>Select from available tag list those tags you want to include in the export by moving them to the **Fields to Export (In Order)** box to the right. By default, tags are exported in separate columns. See Tags subsection to change the column format. |
| | **Folders**<br>Select from available folder list those folders you want to include in the export by moving them to the **Fields to Export (In Order)** box to the right. By default, folders are exported in separate columns. See Folders subsection to change the column format. |

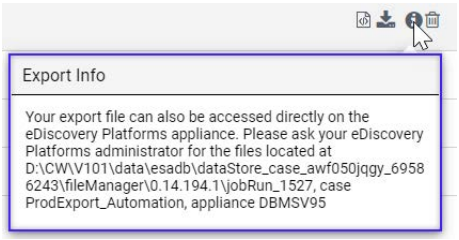
**Table 3: Production Export Selections**

| Section/Field | Description |
|---|---|
| **Fields to Export (In Order)** box | Highlight each selection, then click **Rename** to specify its display name, and order in which it will appear by clicking **Move Up** or **Move Down**.<br>You can change the order of the Metadata, Tags and Folders sections and the fields within those sections but you cannot combine fields from different sections. |
| **Format**<br>(DEFAULT or custom templates only) | |
| | In the following fields, select the appropriate formats for the export file:<br>• **Field Delimiter—**Character separating the columns in the file<br>• **Text Qualifier—**Character marking the beginning and end of each field<br>• **Encoding**—Specify either **UTF-8** or **ISO-8859-1**<br>• **Include headers as first line—**Select this option if the column headers should be the first line of the file |
| **Date & Time** | By default, the **Separate fields** option is selected. Clear this option if the date and time should be grouped together in the same field.<br>Select from available date and time formats. |
| | • **File Extension**—Type the file extension to be applied to the export file |
| **Tags** | Select any of the tag format options to apply to your production export:<br>• **Column Format**—One tag per column (default) where each tag will be in a separate column or All tags in one column (regardless of tag sets).<br>• **Include full hierarchies with tag names** — Hierarchal view of tag names<br>• **Include Tag Event Comments** — All tag event comments are included in the export file |
| **Folders** | Select any of the folder format options to apply to your production export:<br>• **Column Format**—One folder per column (default) or All folders in one column.<br>• **Include full paths with folder names**— Hierarchal view of tag names |

**Table 3: Production Export Selections**

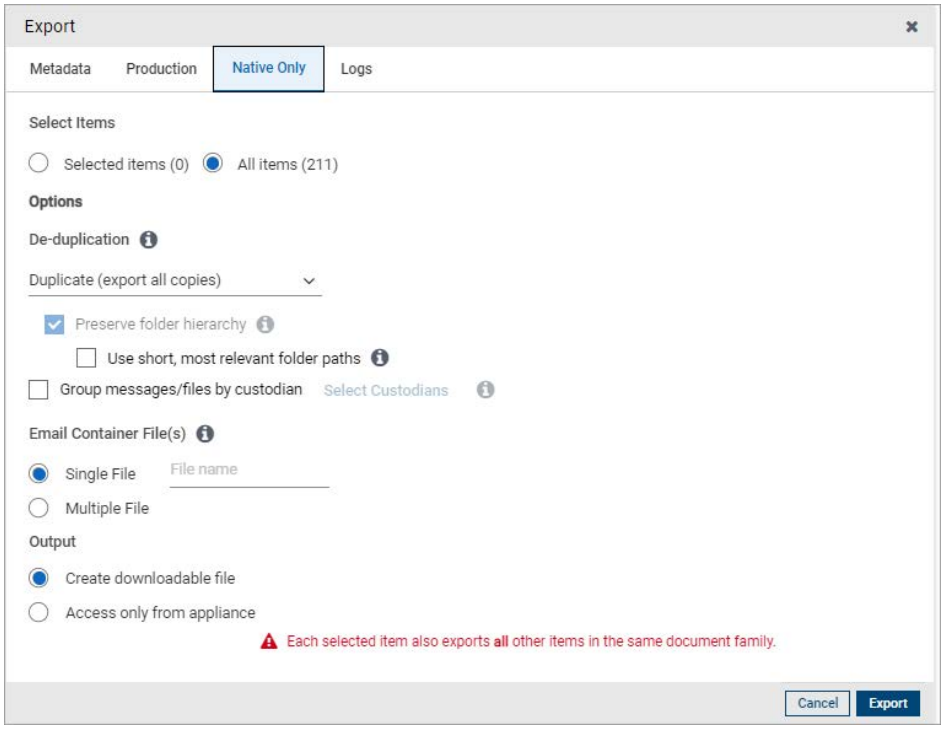
| Section/Field | Description |
|---|---|
| **Options** | |
| | Select any of the following options to apply to your export:<br>• **Include batching information**—Identification information about the batch of documents selected for export is included in the export file<br>• **Include item notes**—Item notes are included in the exported file<br>– **Include complete history**—Entire history for all item notes are included in the export file<br>• **Include discussion thread**—Information about the discussion thread to which the selected documents belong is included in the export<br>• **Include file flags**—Flags associated with files are included in the export file<br>– **Include one column per flag**—Each flag will be in a separate column<br>• **Include custodian & location info**—Include custodian and location information in the exported zip file<br>– **One row per custodian**—Each custodian will be in a separate row<br>To specify the custodians to include, click **Select Custodians** to open the selection window. You can search for custodians and then highlight entries to select them. Click **OK** to add your selections to the exported file.<br>– **Include email headers**—includes email header information for documents with search hits. Documents can have multiple headers but only headers with search hits will be exported.<br>**Note:** This option requires email criteria in your search and can significantly increase the job completion time.<br>• **Break out attachments as separate items**—All attachments will be treated separate from the other exported files.<br>**Note:** This option is not available for Production Export.<br>**–Break out embeddings as separate items—**All embedded content in attachment files will be treated separate from the other exported files |
| **Output** | |

**Table 3: Production Export Selections**

| Section/Field | Description |
|---|---|
| | Select one of the following options:<br>• **Create downloadable (zip) file**—Creates a zip file that you can download by clicking Jobs on the top of the screen.<br>• **Access from appliance only**—Creates a file. The locations drop-down menu displays the available physical export locations. Select the location and the file will be saved to the target export location. Export locations are determined by Access Group membership and the type of configured locations associated with an Access Group.<br>Here are the factors that determine target export locations:<br>If you are *not* a member of an Access Group configured for locations:<br>– The export file is written to the case home directory.<br>– If the external location is set using the property browser, then select the target location from the drop-down location menu. See *"Export to an External Drive" on page 49*.<br>If you are a member of an Access Group configured for locations:<br>– Use the locations from the drop-down menu to select the target export file. The available locations are based on the access level settings allowed by your Access Group. To add or modify the list of export locations go to **All Cases->Locations**. To change the association of Access Groups to location, go to **System > Users > Access Groups**.<br>**Note:** In the Jobs window, move your cursor over the ⓘ symbol to view the information needed to identify the file. Your eDiscovery administrator can use the job ID to download the files.<br>  |
| **WARNING: When exporting selected items, the whole family is exported as defined in the Production** | Actual export counts may be higher than what is shown.<br>Slip-sheet placeholders are added for each document family item that is not in the production. |

## Native Only Exports

Selecting **Export > Native Only** tab displays Native export options:




**Note:** Use the Native Only option only if you are required to export native files; otherwise Veritas recommends performing metadata exports as the preferred export type.

When you choose a native-only export, loose files are exported into a directory structure that mirrors the original directory structure from which the files were crawled, with some character substitutions when necessary. For example, if loose files are crawled from:

- `\\sierra\public\user\testfiles`
- `c:\documents`
- `settings\user\my documents`

then they will be exported as:

- `__sierra\public\user\testfiles`
- `c_\documents`
- `settings\user\my documents`

If loose files and messages are exported together, loose files and email (PST and NSF) files are included in the same zip file. The following table lists the selections available for Native Only exports.

**Note:** Native Only exports may contain empty folders if the end file has a path that exceeds 255 characters. In such cases, an exception folder is created (in addition to the original folder)

**Table 4: Native Only Export Selections**

| Field | Description |
|---|---|
| **Options** | |
| | Select one of the following de-duplication options:<br>• **Duplicate (export all copies)**—Exports all copies of emails and files in their original folder/directory structure, even duplicates<br>• **Deduplicate (export single copy)**—Eliminates duplicates<br>Select the **Preserve folder hierarchy** option to include the path for each folder.<br>–If you choose to preserve folder hierarchy with deduplication, and the document is found in multiple folders, then one of the valid folder paths is automatically selected. Select the **Use short, most relevant folder paths** option to eliminate the common root folder path from the export.<br>–For example, if the actual full folder path is: *\\Server\public\cases\companyName\caseName \custodian1 \laptop\memos*, then *\\Server\public\cases\companyName\caseName* would be suppressed and the folder path is listed as *custodian1\laptop\memos*. |
| | • **Group messages/files by custodian**—Group the exported messages and files according to custodian. Click **Select Custodians** to select and group the exported messages by custodian. |
| **Email Container Files** | Select one of the following container file options:<br>– **Single file**—Create a single email container file (PST format). using a folder structure to organize messages from different sources/custodians. Specify a file name (default is **Clearwell/Export**). Separate files will be created for Exchange and Notes messages if both are present.<br>• **Multiple files**—Create a separate container file for each custodian or mailbox/filename. If **Group messages/files by custodian** are checked, there will be one container per custodian, otherwise, there will be one container file per mailbox/filename. Separate files will be created for Exchange and Notes messages if both are present.<br>**Note:** Emails ingested as loose files are natively exported as loose files and will not be exported in email container files. |

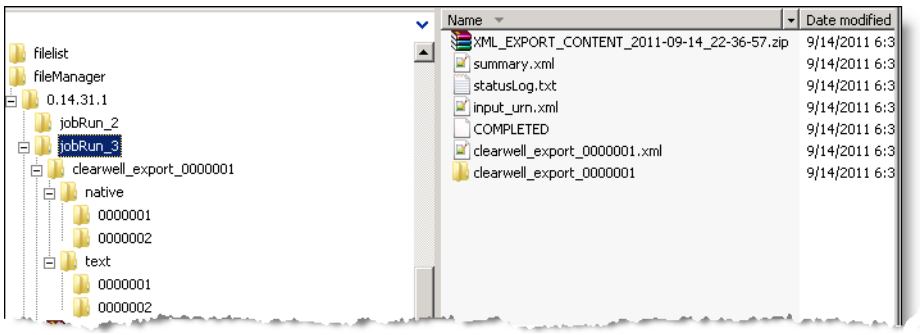
**Table 4: Native Only Export Selections**

| Field | Description |
|---|---|
| **Output** | |
| | Select one of the following options:<br>• **Create downloadable (zip) file**—Creates a zip file that you can download by clicking Jobs on the top of the screen.<br>• **Access from appliance only**—Creates a file. The locations drop-down menu displays the available physical export locations. Select the location and the file will be saved to the target export location. Export locations are determined by Access Group membership and the type of configured locations associated with an Access Group.<br>Here are the factors that determine target export locations:<br>If you are *not* a member of an Access Group configured for locations:<br>– The export file is written to the case home directory.<br>– If the external location is set using the property browser, then select the target location from the drop-down location menu. See *"Export to an External Drive" on page 49*.<br>If you are a member of an Access Group configured for locations:<br>– Use the locations from the drop-down menu to select the target export file. The available locations are based on the access level settings allowed by your Access Group. To add or modify the list of export locations go to **All Cases->Locations**. To change the association of Access Groups to location, go to **System > Users > Access Groups**.<br>**Note:** In the Jobs window, move your cursor over the ⓘ symbol to view the information needed to identify the file. Your eDiscovery administrator can use the job ID to download the files.<br> |
| **Each selected item also exports all other items in the same document family.** | Native Only exports do not support item level exports and will export *ALL* items in the document family. |

# Managing Large Exports

### File and Folder Structure for Metadata Output

Each batch folder contains subfolders for **native**, **text**, and **image** files, based on file type options selected for export.




Within each of the native, text, and image subfolders, batched folders are created, named by run number, such as 0000001, and 0000002. These batched folders are created using the property **esa.export.production.image.max_folder_size**, which rolls over folders based on the number of files the folder contains. (To modify the folder size, in **All Cases** view on the navigation bar, go to **System > Support Features**, and select **Property Browser**.)

## Using Load File Export Templates

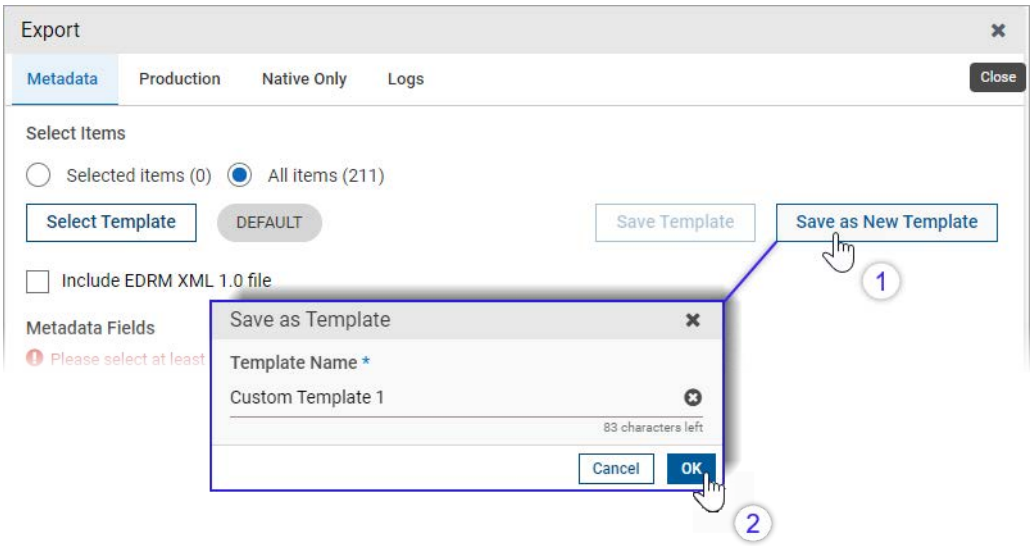
You can fully customize metadata and production export formats by creating and saving Load File Export templates. Export templates allow you to create standardized load file formats with unique specifications, and can be shared across multiple cases. After creating the template (in **System** view), it becomes available for use for the logged in user. This is useful if you will have multiple exports to perform using the same settings.

### Creating Templates

There are two places to create new templates. To create and assign a new template for multiple cases, system administrators use the **Load File Exports Templates** option under **All Processing** on the top navigation bar (as described in this section).

**Note:** You must have system administration privileges to create templates from the **All Cases** view, and assign/restrict access to selected cases.

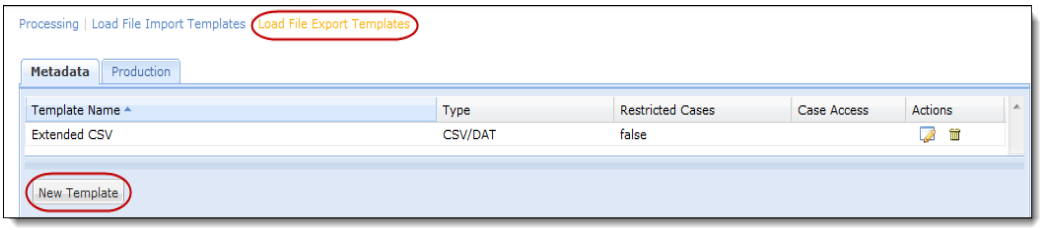
Within a single case, case administrators can save settings as new templates (based on "DEFAULT" template only) from the **Bulk actions menu** icon **> Export > Metadata** [or **Production**] tab in the **Analysis & Review** module.




See Table: *Metadata Export Selections*, or Table: *Production Export Selections*.

**To create a template (All Cases)**

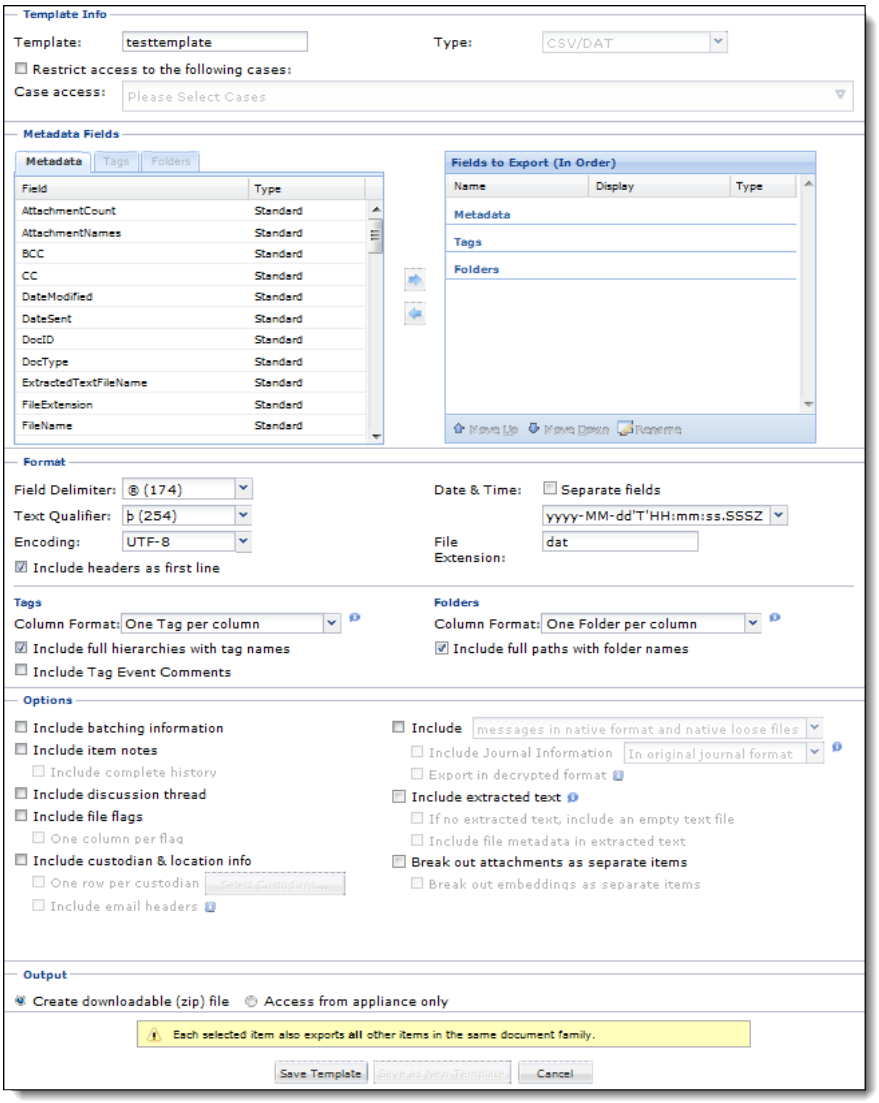
1. In the **All Cases** view, on the top navigation bar, click **All Processing > Load File Export Templates**. The template options display, open to the **Metadata** tab:




(Click the **Production** tab to create a Production load file export template.)

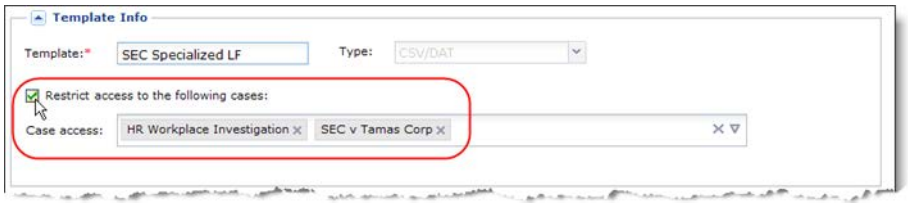
2. Click **New Template**.

   The Metadata template screen displays, similar to a regular Metadata export.




**Note:** The tags and folders that you can select for a Metadata export template are case-specific and not accessible from the **ALL PROCESSING** module -> create template workflow that system administrators use to create non-case specific templates.

A. To assign this template to selected cases only, select the **Restrict access to the following cases** option. A list of available cases appears in the Case access box.




Click the "X" on each case name to remove it from the list, restricting access to the remaining case(s).

3. To complete the remaining sections, for more information refer to the same options for your template type, as described in Table 2: *Metadata Export Selections*, or Table 3: *Production Export Selections*.

4. When finished, click **Save Template**. (To create additional templates with modified options based on this template, click **Save as New Template**.)

   A list of templates created for selected cases appears on the main Load File Export Templates screen, under the appropriate tab for your export type.

### Applying Custom Templates

Once a Load File Export Template is created, users can then select from available templates (or save modifications to the "DEFAULT" template as a new template) when creating a Metadata or Production export in the **Analysis & Production** module (as described in *Metadata Exports* and *Production Exports*).

### Modifying Non-System Templates

The product supports a number of different transforms that can be used to convert EDRM XML output into another format. Table 5 lists both the system transform template (EDRM XML 1.0) and a series of non-system templates.

Starting with release 7.1.3, you can modify or adapt any non-system export formats listed in the table below to suit your preferred way of working with downstream application requirements. This flexibility allows you to create more shareable export templates. It also ensures that you have transparency into the options and fields of existing non-system base templates as well as the changes that comprise your new template.

### To modify an existing template

1. Click the metadata or production drop-down (showing the templates) and select one of the available non-system load files or transforms as described in the Table 5.

2. Select any other metadata export options or fields (as described in Table 2 or 3, depending on your export type), and complete the steps.

3. When finished, click **Save as New Template** (this preserves the original template).

   The new template now appears on the main Load File Export Templates screen, under the appropriate tab for your export type.

### Applying Standard Load File Formats (Transforms)

For metadata exports, (particularly if you are using an older version that does not contain templates), you can choose to transform the XML exported data into another format based on your downstream application requirements. The following standard available load files are supported:

**Table 5: Load File Formats**

| Type | Description |
|---|---|
| **EDRM XML 1.0** | Electronic Discovery Reference Model (EDRM) XML. |
| **Simple CSV/ Simple CSV UTF** | Contains the platform's export date, Doc ID (in dot notation format), list of custodians, and list of tags. |
| **Standard CSV/ Standard CSV UTF** | Contains core metadata, fields, and tags (but not extended metadata such as comment properties of Microsoft Office documents). Entries are delimited with standard quote-and-comma delimiters. |
| **Standard DAT/ Standard DAT UTF** | Contains core metadata, fields, and tags (but not extended metadata). Entries are delimited with Concordance delimiters. |
| **Extended CSV/ Extended CSV UTF** | Contains extended metadata, fields, and tags. All Standard CSV fields are included. |
| **Extended DAT/ Extended DAT UTF** | Contains extended metadata, fields, and tags. All Standard DAT fields are included. |

### To apply a supported load file

1. Click the metadata drop-down (showing the template) and select one of the available load file (transforms) as described in the table.
2. Select any other metadata export options (as described in Table 2 or 3, depending on your export type), and complete the steps. See *Performing Exports*.

## Exporting with Nested Attachments

For metadata document exports, if you choose to include a separate copy of attachments, the system will do true nesting using the same convention that it uses for first-level attachments. In particular, if an email has a .msg attachment that includes a .doc and an .xls attachment, the system performs a full parent/child separation upon export.

For example, consider an email with an attached email that has two .zip attachments and a .msg attachment, and assume that the DocID is 0.7.1.1. Parent email 1 has the following parent/child structure:

```
Parent email 1
a.msg
    a.zip
        a.doc
        b.doc
    c.zip
        a1.doc
    b.msg
        z.doc
        a.doc
```

The system will export the following records in the EDRM XML load file:

**EDRM - XML**

```
0.7.1.1 Parent email 1
    0.7.1.1.1 a.msg
        0.7.1.1.1.1 a.doc (with a.zip reference in locator path)
        0.7.1.1.1.2 b.doc (with a.zip reference in locator path)
        0.7.1.1.1.3 a1.doc (with c.zip reference in locator path)
        0.7.1.1.1.4 b.msg

            0.7.1.1.1.4.1 z.doc

            0.7.1.1.1.4.2 a.doc
```

For all attachments (from a.msg to a.doc), the locator in the <Locations> record of the XML will contain the full path to the file, including all .msg/.eml and .zip/.rar containers. For example, the locator for the second a.doc (0.7.1.1.1.4.2) will be in the form c:\(source path)\email.pst\(MAPI ID)/a.msg/b.msg/a.doc, because a.doc was found within b.msg, which was found within a.msg.

If you choose to export email messages in HTML format, then this approach will apply to the parent emails as well as any nested .msg and .eml messages that are found attached to the parent. However, If you choose to export email messages in native format, then both the parent and the embedded emails will be exported in native format.

**Note:** In native-mode, .msg and .eml files do not have their attachments removed, so the attachment is effectively exported twice (once inside the parent, and once stand-alone). However, the extracted text only contains the extracted text of the parent. If this is undesired, you can use the HTML mode to produce message content in HTML format.

### Exporting Metadata

From a metadata perspective, .msg/.eml attachments are treated as e-mails during export. The file type of the document in the XML metadata is “email,” and all email-specific metadata (such as Subject, To, From, and Cc) are produced.

Any standard file attachments of .msgs/.emls have standard loose file metadata extracted as is appropriate for their file type.

There are some special considerations around the three Attachment fields in the metadata (#HasAttachments, #AttachmentCount, and #AttachmentNames). All of the nested attachments associated with a parent email are rolled up to the parent email (this parallels how the documents are presented to the user in the UI).

For the example in *"Exporting with Nested Attachments" on page 40*, the parent email document (0.7.1.1) will have the following values for those fields:

- #HasAttachments: true
- #AttachmentCount: 7 (the total number of attached documents for all levels, excluding any containers)
- #AttachmentNames: a.msg; a.doc; b.doc; a1.doc; b.msg; z.doc; a.doc

The child email attachments of the parent (a.msg and b.msg) will have the following values for the attachment fields:

- #HasAttachments: false
- #AttachmentCount: 0
- #AttachmentNames: <blank>

The information is presented this way to provide a single level parent/child hierarchy, or group, when exporting from Veritas's eDiscovery Platform into a downstream review platform.

Note that the full hierarchical information is still available in two places:

- The LocationURI of each document contains the full path to each child document, including all of its parents.
- The Document ID contains the full path to each child document, including all of its parents.

**Parent/Child Relationship Section**

The system's EDRM XML export includes a *Relationship* section that shows the document family relationship between parent and child documents.

For consistency and ease of integration with review platforms, the system does not produce a fully-nested relationship section, but instead produces one in which all of the nested attachments of the top-level parent email document are presented as single-level children of the parent. The full n-level nesting structure is present and embedded in the Document ID structure (*"Exporting with Nested Attachments" on page 40*) and the document locator string. However, for grouping purposes, users can see a single-level representation of a parent email document and all of its child attachments.

## Exporting Email Header Search Results (Locator Hits)

Starting with 7.1.3, the platform can export email header search results for further analysis or for use by other applications.

An export of email header field results requires the following:

1. A search for email header was run using Advanced Search and the search results were selected for export.
2. In the export dialog box, the metadata option **Include custodian & location info** is checked prior to selecting and running **Export**.

Export creates a .ZIP file of your email header search results. The email headers are grouped according to email header type, stored as CSV/DAT files and use the same load file import delimiters to ensure consistency. To assist in troubleshooting and problem identification, any email header locator errors are listed by column in the file.

**Email Header Export Files**

| Filename | Description |
|---|---|
| EmailHeaders_S_C | Groups Standard and Custom email header information |
| EmailHeaders_NNG_NS_P | Groups Non-General, Non-Standard and Proposed email header information |
| EmailHeaders_J | Groups any email headers that do not fit in the above categories |

### Understanding Email Header Types

There are many types of email header fields. To assist in identification, the system groups them into categories. For a list of the supported fields see *"List of Email Header Fields" on page 43*.

Here are the Email Header Field categories:

- Standard — Email headers that are currently part of RFC-2822 Internet Standard
- Custom — User-entered email header fields into the system
- Clearwell Custom—Pre-configured set of email headers
- Non-General —Email headers that are not generally seen as header in emails but are part of RFCs
- Non-Standard — Email headers that are not standardized but can be seen in headers
- Proposed — Email headers that are still being standardized via various RFCs
- Junk — Email headers that do not fall in any of the other categories

### Exporting Default and Customized Email Header Types

The platform provides a default set (such as Received, References, X-Originating-IP) of email header fields that you can select and export. Alternatively, if you have chosen to extend the set of default email header fields, the workflow is different and involves setting the email header field type (such as Standard, Non-General and so on) and associated field(s) in the property browser. See *"To export email header fields" on page 43*.

**Email Header Export Files**

| Email Header Type | Property Name |
|---|---|
| Standard | `esa.email.header.standard.fields` |
| Non-Standard | `esa.email.header.non.standard.fields` |
| Non-General | `esa.email.header.non.general.fields` |
| Proposed | `esa.email.header.proposed.fields` |
| Custom | `esa.email.header.custom.fields` |
| Clearwell Custom | `esa.email.header.cw.custom.fields` |

**To export email header fields**

This example enables a custom email header export property with the email header fields: `x-linkedin,dkim-signature`.

1. Go to **System > Support Features**, and select **Property Browser**.
2. Enter the name of the property: `esa.email.header.custom.fields`
3. In **New value**, enter the email header field (in this example it is from the Custom category) by setting it to: `field x-linkedin,dkim-signature`
4. Click **Submit** to save your setting.

**List of Email Header Fields**

**Standard, Non-Standard, & Non-General Email Header Fields**

| Standard | Non-Standard | Non-General |
|---|---|---|
| Return-Path | NNTP-Posting-Host | DL-Expansion-History |
| MIME-Version | Also-Control | Alternate-Recipient |
| bcc | Message-Context | Disclose-Recipients |
| cc | Apparently-To | Original-Encoded-Information-Types |
| Distribution | Approved | Content-Return |
| From | Approved-By | Generate-Delivery-Report |
| Sender | Fax | Prevent-NonDelivery-Report |
| To | Telefax | Obsoletes |
| Disposition-Notification-Options | For-Approval | Content-Identifier |
| Disposition-Notification-To | For-Comment | Delivery-Date |
| Original-Recipient | For-Handling | Expiry-Date |
| Reply-To | For-Handling | Reply-By |

**Standard, Non-Standard, & Non-General Email Header Fields (Continued)**

| Standard | Non-Standard | Non-General |
|---|---|---|
| Content-Base | Mail-System-Version | Incomplete-Copy |
| Content-ID | Mailer | Priority |
| Content-Location | Originating-Client | Language |
| In-Reply-To | X-Mailer | Conversion |
| Message-ID | X-Newsreader | Conversion-With-Loss |
| References | X-MimeOLE | Message-Type |
| Comments | User-Agent | Autoforwarded, |
| Content-Description | Newsgroups | Discarded-X400-IPMS-Extensions |
| Keywords | Originator | Discarded-X400-MTS-Extensions |
| Subject | Originator-Info | |
| Date | Phone | |
| Lines | X-Envelope-From | |
| Content-Transfer-Encoding | X-Envelope-To | |
| Content-Type | Envelope-To | |
| Encoding | X-Face | |
| Resent-Reply-To | X-RCPT-TO | |
| Resent-From | X-Sender | |
| Resent-Sender | X-X-Sender | |
| Resent-Date | Posted-To | |
| Resent-To | X-Admin | |
| Resent-cc | Errors-To | |
| Resent-bcc | Return-Receipt-To | |
| Resent-Message-ID | Read-Receipt-To | |
| List-Archive | X-Confirm-reading-to | |
| List-Help | Return-Receipt-Requested | |
| List-ID | Registered-Mail-Reply-Requested-By | |
| List-Owner | Followup-To | |
| List-Post | Mail-Followup-To | |
| List-Subscribe | Mail-Reply-To | |
| List-Unsubscribe | Abuse-Reports-To | |
| Received | X-Complaints-To | |
| | X-Report-Abuse-To | |

**Standard, Non-Standard, & Non-General Email Header Fields (Continued)**

| Standard | Non-Standard | Non-General |
|---|---|---|
| | Mail-Copies-To | |
| | X400-Content-Return | |
| | Article-Names | |
| | Article-Updates | |
| | Content-Alias | |
| | Delivered-To | |
| | X-Loop,Replaces | |
| | See-Also | |
| | Supersedes | |
| | Translated-By | |
| | Translation-Of | |
| | X-UIDL | |
| | X-URI | |
| | X-URL | |
| | X-IMAP | |
| | Organisation | |
| | X-OriginalArrivalTime | |
| | PICS-Label | |
| | Precedence | |
| | X-MSMail-Priority | |
| | X-Priority | |
| | Content-Length | |
| | Content-Alternative | |
| | Content-Conversion | |
| | Content-Class | |
| | Content-SGML-Entity | |
| | X-MIME-Autoconverted | |
| | Cancel-Lock | |
| | Cancel-Key | |
| | List-Digest | |
| | Mailing-List | |
| | X-Mailing-List | |
| | List-Software | |

**Standard, Non-Standard, & Non-General Email Header Fields (Continued)**

| Standard | Non-Standard | Non-General |
|---|---|---|
| | List-URL | |
| | X-Listserver | |
| | X-List-Host | |
| | Fcc | |
| | Speech-Act | |
| | Status | |
| | X-No-Archive | |
| | Organization | |
| | Summary | |
| | Expires | |
| | Xref | |
| | Path | |
| | Control | |

**Proposed & Veritas eDiscovery Platform Custom Email Header Fields**

| Proposed | Veritas eDiscovery Platform Custom |
|---|---|
| References | X-Originating-IP |
| Comments | |
| Content-Description | |
| Keywords | |
| Subject | |
| Date | |
| Lines | |
| Content-Transfer-Encoding | |
| Content-Type | |
| Encoding | |
| Resent-Reply-To | |
| Resent-From | |
| Resent-Sender | |
| Resent-Date | |
| Resent-To | |
| Resent-cc | |

**Proposed & Veritas eDiscovery Platform Custom Email Header Fields (Continued)**

| Proposed | Veritas eDiscovery Platform Custom |
|---|---|
| Content-Disposition | |
| Importance | |
| Sensitivity | |
| Content-Language | |
| Content-MD5 | |
| Content-Features | |
| Resent-bcc | |

## Generating logs

Starting with release 9.1, users can export an Excel-based metadata report of each item withheld or redacted in one or more production folders. For details on the privilege and redaction logs, see *"Logs" on page 93*.

# Viewing, Managing, Accessing and Printing Exported Files

Once you have begun the export, you can monitor progress from the Jobs window. The "Running" status is displayed while the job is in process. In the cases when the job is stopped, interrupted, or you need to pause the export before it completes, you can use one or more of the following methods to manage the process to maximize your time and job efficiency:


- *"View Results" on page 48*
- *"Export to an External Drive" on page 49*
- *"Pause/Resume an Export (for Metadata Exports)" on page 50*
- *"Retry or Finish the Export" on page 51*
- *"Use Auto-Retry" on page 52*


## View Results

When a job has completed successfully, you can access exported files either from an external location (if exported to external drive) or from the locations as directed in the information text bubble displayed next to the export job.

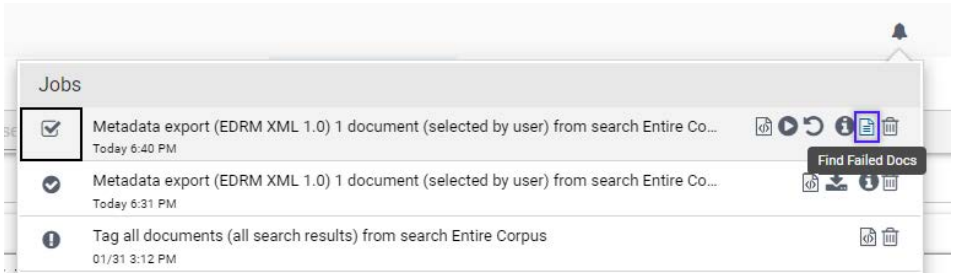
**To view the results**

1. Click **Jobs** at the top of the screen to view the status of the task. A check mark icon is displayed next to the **Jobs** link to indicate that the file is ready.

   **Note:** If a job fails, a warning icon is shown.

2. If settings change or new documents are added to the case while the export is in progress, you are alerted of this state in the jobs window.

3. If an error occurs during the export:
   - In the Jobs window, click **Find Failed Docs** icon to get the status of your production. Click the icon to view details for the errors that occurred to each document.




   - When you click the icon, the Export Errors filter appears in the Filter list, displaying the errors by type. This allows you to address the issues before re-running the production.

4. If the task completed successfully, click **Download** in the Jobs window to open or save the file. If some documents were not exported, a **Continue** link allows you to retry the export.

To delete a completed task, either from the **System > Jobs** screen or from Jobs window , click trash icon next to the task. To cancel a running task, click **Pause** icon. This will also allow metadata and production exports to be resumed. To resume, click **Resume** icon after the job has stopped.

Click **Jobs** to close the Jobs window.

## Export to an External Drive

To setup a, see *Configuring Job Output for Exports* in the *Distributed Architecture Deployment Guide*.

If you want to export a set of documents to a location off-appliance, such as to an external drive, using the Property Browser support feature can be useful when:

- The backup does not back up the large export.
- You want to avoid the windows file path limitation of 256 characters.
- The export "retry" option does not copy the export before retrying.

**Note:** There is no option to download the export zip file when an external location is specified.

**To configure exports off-appliance (external drive)**

1. In the **All Cases** view, click **System > Support Features**.
2. On the Support Features screen, select the **Property Browser** feature.
3. For *Name of property to change*, enter:
   **`esa.export.joboutput.external`**
4. For the *New value*, enter the path to the external drive. For example:

   **`\\mynas01\myexpdata\ExportOutputDir`**
5. Make any other selections, then confirm by selecting the check box **Confirm change. Are you sure?**
6. Click **Submit**.

**To verify external export setup in Property Browser**

Use the following procedure to verify if your eDiscovery server is configured for external exports.

1. Go to System > Support Features, and select Property Browser.
2. For Pattern to match, enter the property: esa.export.joboutput.external
3. Click Submit.
4. Evaluate the output:

A. **Local:** If the property has ever been set and removed, the property browser utility displays esa.export.joboutput.external = . The blank space means that exports are local.

B. **External**: If esa.export.joboutput.external = \\sharename\external\exportlocation than exports are stored external to the eDiscovery server.

**Optional configuration for external export location**

For environments where a remote location is used to store items from Export/Production run, this is an optional workflow which helps in making the Export/Production feature more reliable in situation when network fluctuations are being observed in the environment. When enabled using the below-mentioned property settings from **System** > **Support Features** > **Property Browser**, this solution uses the **Scratch** folder as the temporary location to store the collection of all items that are required to be exported/produced. At the end of export/production, these items will be moved together to the user-specified remote location.

**esa.export.xml.enable.tempstorage** = **true**

(the default value is false)

**esa.export.xml.disk.required.mb** = **10000**

(specify the value of your choice as per your requirement)

**esa.export.xml.disk.required.waitbetweenretries.minutes** = **1**

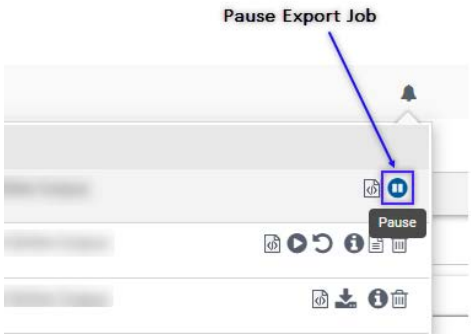
**esa.export.xml.disk.retry.count** = **3**

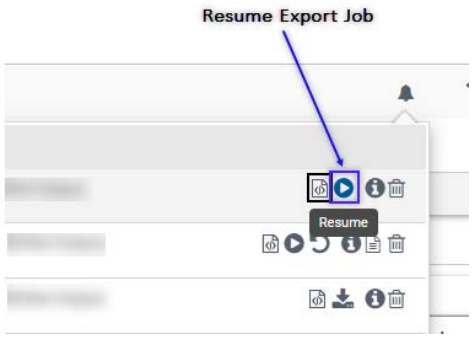
## Pause/Resume an Export (for Metadata Exports)

For XML or Production exports with large volumes of data, such as production export jobs, performing the export can typically take several hours or days to run.

**Note:** This feature applies to Metadata and Production exports only.

If the system is shut down or restarted for maintenance during a paused job, the export job will resume from the same point at which it was stopped. If you decide to pause a job, you must then resume the job later. Otherwise, paused jobs resume automatically (such as from a system shutdown, in which the job will resume automatically upon restart). See *Use Auto-Retry* or for on demand, see *Retry or Finish the Export*.



While an export job is running, from the Jobs window, click the Pause icon to pause the job. The status changes from “Running”, to “Stopping” to “Partially completed”. An InfoBubble icon appears alerting you that your job was paused or aborted. While a job is paused or only partially complete, the files are not yet available to be viewed.

**Note:** Do not attempt to view the files in their partially completed state with file management tools like Windows® Explorer, or file commander, as it may corrupt the export job and prevent it from completing successfully upon restart.

When you are ready to restart the job, click the Resume icon. Your export job will continue from the point at which it was stopped, displaying the status “Starting” then returns to “Running”. If no errors occur, the job completes successfully.

## Retry or Finish the Export

If the export was not able to complete successfully, the Jobs window displays a message indicating an error. Typically, this message describes that the export was Partially Completed. This indicates that some, or all, of the documents were unable to be exported.

At this point, icons are provided to Retry or Finish the export. Click Retry icon to attempt the export of the remaining documents again. If the failure was caused by a temporary problem (for example, intermittent access to the source data) and the problem has been corrected, selecting Retry may allow the export to complete successfully.

Click Finish icon to finish the export without attempting to export the remaining documents. Typically, Veritas suggests selecting Finish in order to provide the information needed to diagnose why the original export failed. (See *Diagnose a Failed Export* in the Troubleshooting section.)

## Use Auto-Retry

In cases when a job fails, due to an intermittent service or access issue for example, you can set the export job to retry automatically for any number of attempts to finish the job (the default is 2). To do this, you can use the *export.retry* property in the property browser in the platform's Support Features tool.

**To set system to auto-retry an export job**

1. In the **All Cases** view, click **System > Support Features**.
2. On the Support Features screen, for step 1, select the **Property Browser** feature.
3. For *Name of property to change*, enter:
   **`esa.common.export.retry`**
4. For the *New value*, enter the numeric value for the number of times you want the system to try exporting the job. For example: **`5`**
5. Make any other selections, then confirm by selecting the check box **Confirm change. Are you sure?**
6. Click **Submit**.

From the Jobs window, select the export job you want to run. Your export job will continue running, or attempt to restart where it left off if there is an intermittent interruption in service or access to the source.

## Printing Confidentiality Footer for PDF Reports

You can create a confidentiality footer for printed PDF reports. To create the confidentiality footer, navigate to the menu by selecting the **System** view from the top navigation bar, and then clicking the **Settings > Print** tab.

# Metadata Reference and Summary Information

After your metadata export is complete, refer to this section for information on extended metadata XML tags (used for the summary file generated for export and print tasks), export file formats, and a summary of all metadata exported in the platform for the various export and report options selected.


- *"Extended Metadata Reference" on page 53*
- *"XML Export Files" on page 53*
- *"XML Summary Files" on page 58*
- *"Extended Metadata Summary" on page 64*


## Extended Metadata Reference

This section provides a reference for exporting extended metadata.

All XML tags provided are inside **<Document>** sub-records that are inside the top-level **<Documents>** record, with the exception of folder information (the last row of the table). Project information is contained in the **<Folders>** record outside **<Documents>**).

The system checks the following categories of files for extended metadata based on their Outside In *strong* FileID:

- Word (all versions)
- Excel (all versions)
- PowerPoint (all versions)
- PDF (all versions)
- RTF

To extend the categories that are checked for in other file types, change the *esa.export.xml.fileids.office* property using the property editor.

## XML Export Files

Exported documents will be in one or more files, depending on the specified maximum XML file size (refer to *"Defining System Settings" in the -System Administration Guide*). If the native files are exported, they are renamed using the MD5 hash value of the file content, and included in a single folder. The *<LocationURI>* tags in the XML file map the MD5-encoded names to all occurrences of the original files in their original locations.

**Note:** EDRM XML is always generated. If you choose another format, the system generates that format as well.

**Table 6: XML Export File Formats**

| Tag Name | Description |
|---|---|
| <Root MajorVersion= MinorVersion= CaseId= Description= ><br></Root> | The general container for the exported documents.<br>• **MajorVersion="<*n*>"**. Major version of the export format.<br>• **MinorVersion="<*n*>"**. Minor version of the export format.<br>• **CaseId="<*name*>"**. Case name.<br>• **Description="<*text*>"**. Indicates, the case name, user name, and date and time of the export. The date and time format for all tags is *yyyy/mm/ddThh:mm:ss*.<br>For example:<br><Root MajorVersion="1" MinorVersion="0" CaseId="testCase1" Description="XML Export for testCase1 by superuser on 2008-01-25T14:37:59.400-08:00"> |
| <Batch name= ><br></Batch> | Indicates the job ID and file number.<br>• **name="Job <*id*>, batch <*n*>"**. The job identifier and file number. The file number is incremented for each XML file in the export.<br>For example:<br>`<Batch name="Job 0.5.6.45, batch 1">` |
| <Documents><br></Documents> | Contains one or more <Document> tags that identify each of the exported documents. |
| <Document DocID= DocType= MimeType=><br></Document> | Identifies an exported email or loose file and its associated header information, files, and locations (one <Document> record per exported email and loose file).<br>• **DocID="<*n*>"**. Document ID number.<br>• **DocType="<type>"**. The type of document. The value is **Message** for emails or **File** for loose files.<br>• **MimeType="<type>"**. Document MIME type, such as: **application/msword** for Exchange emails and **application/vnd.ms-outlook** for Word files.<br>For example:<br>`<Document DocID="0.7.10.24132" DocType="Message" MimeType="application/vnd.ms-outlook">` |

**Table 6: XML Export File Formats**

| Tag Name | Description |
|---|---|
| <Tags><br><Tag TagName=<br>TagDataType=<br>TagValue= /><br></Tags> | Specifies the header information for an exported message or loose file.<br>• **TagName="<*name*>"**. Name of the header field, such as **#From**, or **#To**.<br>• **TagDataType="<*type*>"**. Indicates the type of data in the **TagValue=** field.<br>• **TagValue="<*value*>"**. Value of the specified header field.<br>Message example:<br>`<Tag`<br>`TagName="#From"`<br>`TagDataType="Text" TagValue="Robb, Kathy`<br>`<krobb@hunton.com>" />`<br>`<Tag TagName="#To"`<br>`TagDataType="Text"`<br>`TagValue="nyiso_tech_exchange`<br>`<nyiso_tech_exchange@global2000.net>" />`<br>`<Tag TagName="#Subject"`<br>`TagDataType="Text"`<br>`TagValue="FW: ICAP WP post" />`<br>`<Tag TagName="#DateSent"`<br>`TagDataType="DateTime"`<br>`TagValue="2001-10-04T12:55:32.000-07:00" />`<br>`<Tag TagName="#HasAttachments"`<br>`TagDataType="Boolean"`<br>`TagValue="true" />`<br>`<Tag TagName="#AttachmentCount"`<br>`TagDataType="Integer"`<br>`TagValue="2" />`<br>`<Tag TagName="#AttachmentNames"`<br>`TagDataType="Text"`<br>`TagValue="1.ICAPWG Answers - Strategic`<br>`Energy.doc;image001.jpg"`<br>`/>`<br>Loose file example:<br>`<Tag`<br>`TagName="#FileName"`<br>`TagDataType="Text"`<br>`TagValue="Dortmund" />`<br>`<Tag TagName="#FileExtension"`<br>`TagDataType="Text" TagValue="doc" />`<br>`<Tag TagName="#FileSize"`<br>`TagDataType="LongInteger"`<br>`TagValue="35328" />`<br>`<Tag TagName="#DateModified" TagDataType="DateTime"`<br>`TagValue="2007-11-20T06:59:58.552-08:00"`<br>`/>`<br>Slip sheet indicator example:<br>`<Tag`<br>`TagName="#StartPage"`<br>`TagDataType="Text"`<br>`TagValue="P4-000001" />`<br>`<Tag TagName="#EndPage"`<br>`TagDataType="Text"`<br>`TagValue="P4-000001" />`<br>`<Tag TagName="#Slipsheet"`<br>`TagDataType="Boolean"`<br>`TagValue="true" />`<br>`<Tag TagName="#Language"`<br>`TagDataType="Text"`<br>`TagValue="en"`<br>`/>` |

**Table 6: XML Export File Formats**

| Tag Name | Description |
|---|---|
| <Files><br><File FileType=><br><ExternalFile ... /><br></File><br></Files> | Contains the following tags to identify all files exported. For example, if native files and extracted text options are included, entries for both the exported native files and exported text files are present:<br>• **FileType="type"**. Indicates the file type.<br>• **<ExternalFile>**.Contains the following tags to identify an exported file:<br>– **FilePath="path"**. The relative path to the exported native file. This is always **native** because native files are exported to the **native** subdirectory.<br>– **FileName="<DocID>.<ext>"**. Indicates the name of the exported file in the **native** subdirectory. The name consists of the document ID and the file extension. Note that an email with one or more attachments is exported as a single **.msg** file.<br>– **FileSize="<n>"**. Number of bytes in the file.<br>– **Hash="<hex>"**. The MD5-encoded name of the file.<br>For example:<br>`<Files>`<br>`<File FileType="Native">`<br>`<ExternalFile FilePath="\clearwell_export_0000001"`<br>`FileName="0.7.15.1414.msg" FileSize="401408"`<br>`Hash="0665cf0fd4b3c63c0ec3aec47d7853ed" />`<br>`</File>`<br>`<File FileType="Text">`<br>`<ExternalFile FilePath="\clearwell_export_0000001"`<br>`FileName="0.7.15.1414.txt" FileSize="2396"`<br>`Hash="8fe7f5f0fd2b07b3c0fd9dcc47d785ed" />`<br>`</File>`<br>`</Files>`<br>**Note:** If the export is a production export, there may also be an "Image" file type, if the Image export option is selected and included with the export. |

**Table 6: XML Export File Formats**

| Tag Name | Description |
|---|---|
| <Reviews><br><Review><br><Tag ... /><br></Review><br></Reviews> | Contains a <Tag> record for the latest value of each active tag, and for each independent note. This section is included only when tags and notes are exported.<br>• **TagName="<*name*>"**. Name of the tag or **#ReviewComment** for a note. A tag associated with a folder is followed by the folder name in parentheses.<br>• **TagDataType="<*type*>"**. Indicates whether the data is text or a check box tag.<br>• **TagValue="<*value*>"**. Indicates the tag value or note text. Note text associated with a specific folder starts with **(Folder: <name>) (Tag comment)**. Independent notes do not include a folder name.<br>• **ModifiedOn="<*time*>"**. Indicates the Date and time the tag was set.<br>• **ModifiedBy="<*user*>"**. Indicates the platform's user who entered the tag.<br>For example:<br>`<Reviews>`<br>`<Review>`<br>`<Tag TagName="Reviewed By (FERC Investigation)" TagDataType="Text" TagValue="Smith" ModifiedOn="2008-02-03T22:03:02.000-08:00" ModifiedBy="superuser" />`<br>`<Tag TagName="#ReviewComment" TagDataType="Text" TagValue="(Project: FERC Investigation) (Tag comment) Not relevant" ModifiedOn="2008-02-03T22:03:02.000-08:00" ModifiedBy="superuser" />`<br>`</Review>`<br>`</Reviews>` |
| <Locations><br></Locations> | Contains one or more <Location> tags that identify the locations where the document was found. |
| <Location><br><Custodian "<name>"<br></Custodian><br><LocationURI><br></LocationURI><br><LocationID><br></Location> | Contains the following tags to identify a document custodian and location:<br>• **<Custodian "<name>"</Custodian>**. Name of the custodian for the document/location combination, if any.<br>• **<LocationURI>**. Path used by the system to access the document.<br>• **<LocationID>**. Uniquely identifies the location of the custodian document.<br>For example:<br>`<Locations>`<br>`<Location>`<br>`<Custodian />`<br>`<LocationURI>esa:file/*:LooseFiles1:C%3a\BUILDS\DATADIR\DOCFILES:C%3a\builds\dataDir\DocFiles\prodmgmt\Corbett\PRD\~$D_Corbett_2006_07_10_R4.doc</LocationURI>`<br>`</Location>`<br>`</Locations>` |

## XML Summary Files

The following table describes the XML tags, including load file statistics for the Detailed Statistics tag, used for the summary file generated for export and print tasks. On print tasks, the summary file is not included in the Jobs window unless an error occurs.

**Table 7: XML Summary File Formats**

| Tag Name | Description |
|---|---|
| <summary><br></summary> | The general container for the summary. |
| **XML Export Task** | |
| <XML .../> | Can contain any of the following tags to identify XML export tasks:<br>• **JobOutputDirectory="<*path*>"**<br>• **TagAndNotes="<#>"**<br>• **IncludeNativeFiles="true \| false"**<br>• **SeparateAttachments="<#>"**<br>• **ExportLocations="true \| false"**<br>• **IncludeDiscussion="true \| false"**<br>• **IncludeExtendedMetaddata="true \| false"**<br>• **IncludeExtractedText="true \| false"**<br>• **ExcludeMetaData="true \| false"**<br>• **IncludeTiff="true \| false"**<br>• **IncludePDF="true \| false"**<br>• **OutputFormat="Configurable Template <#>" \| <*standard format*>**<br>• **RemoveEDRMXML="true \| false"**<br>• **ProductionLabel="<*name*>"**<br>• **ProjectName="<*name*>"**<br>• **Production="<*name*>"**<br>• **LoadFileType="Configurable Template <#>" \| <*standard format*>**<br>• **LoadFileFields="<*field*>"**<br>• **LoadFileDateFormat="<*date format* >"**<br>• **LoadFileTimeFormat="<time format>"**<br>• **LoadFileSeparateDateAndTime="true \| false"**<br>• **LoadFileDelimiter="<*delimiter type*>"**<br>• **LoadFileTextQualifier="<*qualifier type*>"**<br>• **LoadFileSeparateCustodianAsRows="true \| false"**<br>• **LoadFileSeparateTagsAsColumns="true \| false"**<br>• **LoadFileIncludeFieldNames="true \| false"**<br>• **LoadFileEncoding="UTF-8 \| ISO-8859-1"**<br>• **LoadFileIncludeBatchID="true \| false"**<br>• **LoadFileIncludeProjects="true \| false"**<br>• **LoadFileIncludeOpticon="true \| false"** |

**Table 7: XML Summary File Formats**

| Tag Name | Description |
|---|---|
| | • **LoadFileIncludeOpticon="true \| false"**<br>• **SeparateEmbeddings="true \| false"**<br>• **MaxFileSize="<#>"**<br>• **Description="<*text*>"**. (Number of documents selected and the search criteria used to find them.)<br>• **summaryFile="<*name*>"**. (Always named: ***summary.xml***).<br>For example:<br>`<XML`<br>`JobOutputDirectory="C:\dev\data\ExportOutputDir"`<br>`summaryFile="summary.xml"`<br>`IncludeTagsAndComments="true"`<br>`IncludeNativeFiles="true"`<br>`Description="4 documents (selected by user) from search Entire Corpus"`<br>`/>` |
| <SummaryStats .../> | Contains the following summary statistics:<br>• **TotalMsgsSelectedForExport="n"**. Number of documents selected for export.<br>• **TotalMsgsWithLocatorsExpanded="n"**. Number of documents selected for export, including duplicates.<br>• **TotalErrors="n"**. Number of documents that were not included (see the file **recoverable_urn.xml** for details).<br>For example:<br>`<SummaryStats`<br>`TotalMsgsSelectedForExport="4"`<br>`TotalMsgsWithLocatorsExpanded="213"`<br>`TotalErrors="208"`<br>`/>` |
| **Native Export Task** | |
| <Native .../> | Contains the following tags to identify a Native export task:<br>• **JobOutputDirectory="<*path*>"**. Directory on the appliance that contains the output for the task.<br>• **recoveryFile="<*name*>"**. Name of the file that describes any errors that occurred (always **recoverable_urn.xml**).<br>• **summaryFile="<*name*>"**. Name of the summary file (always **summary.xml**).<br>• **OutputFile="<*text*>"**. Indicates whether a separate PST file is generated for each mailbox.<br>• **PreserveFolders="true \| false"**. Indicates whether mailbox folder structure is preserved.<br>• **PreserveIfFlatten="true \| false"**.<br>• **SuppressFullSourceFPath="true \| false"**.<br>• **DeDupByCustodian="true \| false"**. Indicates whether duplicate documents are excluded by custodian, rather than across the entire export.<br>• **Password-Protect-Files="true \| false"**. Indicates whether a password is required to open the exported files. |

**Table 7: XML Summary File Formats**

| Tag Name | Description |
|---|---|
| | • **Format="<*format type*>"**.<br>• **ProductionLabel="<*name*>"**.<br>• **ProjectName="<*name*>"**.<br>• **Description="<*text*>"**. Indicates the number of documents selected and the search criteria used to find them.<br>For example:<br><Native<br>JobOutputDirectory="C:\dev\data\jsmith\ExportOutputDir"<br>recoveryFile="recoverable_urn.xml"<br>summaryFile="summary.xml"<br>OutputFile="One PST for all mailboxes"<br>PreserveFolders="true"<br>PreserveIfFlatten="true"<br>SuppressFullSourcePath="false"<br>DeDupByCustodian="false"<br>Password-Protect-Files="false"<br>Format="OUTLOOK2003/2007"<br>ProductionLabel="clearwell_export"<br>ProjectName="Prod1"<br>Description="All documents (selected by user) from search ([Productions / Prod1])"<br>/> |
| <DetailedStats .../> | Contains the following detailed statistics:<br>• **MsgUniqueTotal="n"**. Number of non-NSF emails selected for export.<br>• **MsgUniqueErrTotal="n"**. Number of non-NSF emails that were not included.<br>• **MsgUnavailableTotal="n"**. Number of non-NSF emails that were not available.<br>• **MsgExtractionErrTotal="n"**. Number of non-NSF emails that were not extracted.<br>• **NSFUniqueTotal="n"**. Number of NSF emails selected for export.<br>• **NSFUniqueErrTotal="n"**. Number of NSF emails that were not included.<br>• **NSFUnavailableTotal="n"**. Number of NSF emails that were not available.<br>• **NSFExtractionErrTotal="n"**.Number of NSF emails that were not extracted<br>• **LooseFilesUniqueTotal="n"**. Number of loose files selected for export.<br>• **LooseFilesUniqueErrTotal="n"**. Number of loose files that were not included.<br>• **LooseFilesUnavailableTotal="n"**. Number of loose files that were not available.<br>• **LooseFilesExtractionErrTotal="n"**. Number of loose files that were not extracted.<br>• **AttachmentTotal="n"**. Number of attachments selected for export.<br>• **AttachmentFailErrTotal="n"**. Number of attachments that were not included.<br>• **AttachmentExtractionErrTotal="n"**. Number of attachments that were not extracted.<br>• **PSTUniqueTotal="n"**. Number of emails selected for export to PST file(s).<br>• **PSTDuplicateTotal="n"**. Number of duplicates selected for export to PST file(s).<br>• **PSTUniqueErrTotal="n"**. Number of emails that were not included.<br>• **PSTDuplicateErrTotal="n"**. Number of copies that were not included, although at least one copy was exported to PST file(s).<br>• **PSTUnavailableTotal="n"**. Number of emails that were not available. |

**Table 7: XML Summary File Formats**

| Tag Name | Description |
|---|---|
| | • **ServerUniqueTotal="n"**. Number of documents selected for export to the server.<br>• **ServerDuplicateTotal="n"**. Number of duplicates exported to the server.<br>• **ServerUniqueErrTotal="n"**. Number of documents that were not included for export to the server.<br>• **ServerDuplicateErrTotal="n"**. Number of copies that were not included, although at least one copy was exported to the server.<br>• **EmailFileUniqueTotal="n"**. Number of emails selected for export.<br>• **EmailFileDuplicateTotal="n"**. Number of duplicates selected for export.<br>• **EmailFileUniqueErrTotal="n"**. Number of emails that were not included.<br>• **EmailFileDuplicateErrTotal="n"**. Number of copies that were not included, although at least one copy was exported.<br>• **EmailFileUnavailableTotal="n"**. Number of emails that were not available.<br>• **NSFUniqueTotal="n"**. Number of emails selected for export to NSF.<br>• **NSFDuplicateTotal="n"**. Number of duplicates selected for export to NSF.<br>• **NSFUniqueErrTotal="n"**. Number of emails that were not included.<br>• **NSFDuplicateErrTotal="n"**. Number of copies that were not included, although at least one copy was exported to NSF.<br>• **NSFUnavailableTotal="n"**. Number of emails that were not available.<br>• **LooseFilesUniqueTotal="n"**. Number of loose files selected for export.<br>• **LooseFilesDuplicateTotal="n"**. Number of duplicate loose files selected for export.<br>• **LooseFilesUniqueErrTotal="n"**. Number of loose files that were not included.<br>• **LooseFilesDuplicateErrTotal="n"**. Number of copies that were not included, although at least one copy was exported.<br>• **LooseFilesUnavailableTotal="n"**. Number of loose files that were not available.<br>• **MsgUniqueTotal="n"**. Number of emails selected for printing.<br>• **MsgUniqueErrTotal="n"**. Number of emails that were not included.<br>• **LooseFilesUniqueTotal="n"**. Number of loose files selected for printing.<br>• **LooseFilesUniqueErrTotal="n"**. Number of loose files that were not included.<br>• **AttachmentTotal="n"**. Number of attachments selected for printing.<br>• **AttachmentFailErrTotal="n"**. Number of attachments that were not included.<br>The following statistics apply specifically to data imported from load files:<br>• L**oadFileMsgNativeUnavailableTotal="n"**. Total number of unavailable documents in native form.<br>• **LoadFileAttachmentNativeUnavailableTotal="n"**. Total number of unavailable native attachments in native form.<br>• **LoadFileLooseFileNativeUnavailableTotal="n"**. Total number of unavailable loose files in native form. Specific to the documents imported using load files.<br>• **LoadFileMsgTextUnavailableTotal="n".** Total number of unavailable documents in text form.<br>• **LoadFileAttachmentTextUnavailableTota**l**="n".** Total number of unavailable attachments in text form.<br>• **LoadFileLooseFileTextUnavailableTotal="n".** Total number of unavailable loose files in text form. |

**Table 7: XML Summary File Formats**

| Tag Name | Description |
|---|---|
| | For example:<br><DetailedStats<br>MsgUniqueTotal="259"<br>MsgUniqueErrTotal="0"<br>MsgUnavailableTotal="0"<br>MsgExtractionErrTotal="0"<br>NSFUniqueTotal="0"<br>NSFUniqueErrTotal="0"<br>NSFUnavailableTotal="0"<br>NSFExtractionErrTotal="0"<br>LooseFilesUniqueTotal="3"<br>LooseFilesUniqueErrTotal="0"<br>LooseFilesUnavailableTotal="0"<br>LooseFilesExtractionErrTotal="0"<br>AttachmentTotal="0"<br>AttachmentFailErrTotal="0"<br>AttachmentExtractionErrTotal="0"<br>PSTUniqueTotal="70"<br>PSTDuplicateTotal="132"<br>PSTUniqueErrTotal="70"<br>PSTDuplicateErrTotal="132"<br>PSTUnavailableTotal="0"<br>ServerUniqueTotal="0"<br>ServerDuplicateTotal="0"<br>ServerUniqueErrTotal="0"<br>ServerDuplicateErrTotal="0"<br>EmailFileUniqueTotal="0"<br>EmailFileDuplicateTotal="0"<br>EmailFileUniqueErrTotal="0"<br>EmailFileDuplicateErrTotal="0"<br>EmailFileUnavailableTotal="0"<br>NSFUniqueTotal="6"<br>NSFDuplicateTotal="0"<br>NSFUniqueErrTotal="6"<br>NSFDuplicateErrTotal="0"<br>NSFUnavailableTotal="0"<br>LooseFilesUniqueTotal="5"<br>LooseFilesDuplicateTotal="0" LooseFilesUniqueErrTotal="0"<br>LooseFilesDuplicateErrTotal="0"<br>LooseFilesUnavailableTotal="0"<br>MsgUniqueTotal="10"<br>MsgUniqueErrTotal="2"<br>LooseFilesUniqueTotal="0"<br>LooseFilesUniqueErrTotal="0"<br>AttachmentTotal="0"<br>AttachmentFailErrTotal="0"<br>LoadFileMsgNativeUnavailableTotal="0"<br>LoadFileAttachmentNativeUnavailableTotal="0"<br>LoadFileLooseFileNativeUnavailableTotal="0"<br>LoadFileMsgTextUnavailableTotal="0"<br>LoadFileAttachmentTextUnavailableTotal="0"<br>LoadFileLooseFileTextUnavailableTotal="0"<br>/> |

**Table 7: XML Summary File Formats**

| Tag Name | Description |
|---|---|
| **Print Task** | |
| <Print .../> | Contains the following tags to identify a print task:<br>• **JobOutputDirectory="<*path*>"**. Directory on the appliance that contains the output for the task.<br>• **recoveryFile="<*name*>"**. Name of the file that describes any errors that occurred (always **recoverable_urn.xml**).<br>• **summaryFile="<*name*>"**. Name of the summary file (always **summary.xml**).<br>• **IncludeTagsAndComments="y \| n"**. Indicates whether tags and comments are included.<br>• **IncludeFilesAndAttachments="y \| n"**. Indicates whether native files are included.<br>• **IncludeDocumentIDs="y \| n"**. Indicates whether document identification numbers are included.<br>• **IncludeLocations="y \| n"**. Indicates whether file locations are included.<br>• **ProductionLabel="<*text*>"**. Name of production to be included.<br>• **ProjectName="<*text*>"**. Name of the project.<br>• **Description="<*text*>"**. Indicates the number of documents selected and the search criteria used to find them.<br>For example:<br>`<PDF`<br>`JobOutputDirectory="C:\dev\data\jsmith\ExportOutputDir"`<br>`recoveryFile="recoverable_urn.xml"`<br>`summaryFile="summary.xml"`<br>`IncludeTagsAndComments="y" IncludeFilesAndAttachments="n"`<br>`IncludeDocumentIDs="y"`<br>`IncludeLocations="n"`<br>`ProductionLabel="clearwell_export"`<br>`ProjectName="Prod1"`<br>`Description="All documents (all search results) from search Entire Corpus"`<br>`/>` |

## Extended Metadata Summary

The following table provides a consolidated view of all metadata exported from the platform for the various report and export options.

The Metadata Field Summary table includes the following information:

- Field—Type of metadata
- Source—How the metadata is generated
- Description—Description of the item
- **XML Location**— Location in the XML file where the field can be found. For example, "Document/@DocID" means that the value can be found in the <Document> record with the name "DocID" (for example, <Document DocID="0.7.1.94983">).

  You can use the syntax directly in an XML transform to return the desired field value. For example, to include the subject metadata field in a transform: `("Tags/Tag[@TagName="#Subject"]/@TagValue" in the table)` from the context of a <Document> record, in your transform file, you would include the expression: `<xsl:value-of select="(Tags/Tag[@TagName='#Subject']/@TagValue)"/>`
- **Metadata Field: XML (standard) or XML (extended)**—Whether field is included in XML exports: Standard metadata field (included in all XML exports) or an Extended metadata field (included only in XML exports where **Include extended metadata** is selected).
- **Document Log**—Whether the field is included in the Document log (generated from the **Print** reporting menu option rather than the **Export** option). (Sometimes preferred over using XML export to generate metadata output).

**Table 8: Metadata Field Summary**

| Field | Description | |
|---|---|---|
| **Doc ID** | System-generated. The unique document ID that the system assigns to each document, in "dot-notation" format | |
| | **XML Location:** | Document/@DocID |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | Yes ("Document ID" column) |
| **Doc Type** | System-generated. Classification of the document as either "Message" or "File" (note that in some cases, as with multipart MIME, .msg, or .eml files, the system may classify email files as File, not Message). | |
| | **XML Location:** | Document/@DocID |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Language** | System-generated (No).The primary language of the document, in ISO 639-1 format (e.g. "en" for English) | |
| | **XML Location:** | Tags/Tag[@TagName="#Language"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Mime Type** | System-generated. For Outlook messages, the system uses "application/vnd.ms-outlook", and for Lotus Notes messages the system uses "application/vnd.lotus-notes". For files, the system uses Stellent classification of the MIME type of the document. | |
| | **XML Location:** | Document/@DocID |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Subject** | From email content or file content. If email, This is the subject line of the document. If file, field is populated with the Subject metadata extracted from Microsoft Office files. | |
| | **XML Location:** | Tags/Tag[@TagName="#Subject"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | Yes |
| **From** | From email content. The sender of the document, if it is an email. For files, this is left blank. | |
| | **XML Location:** | Tags/Tag[@TagName="#Subject"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | Yes |

**Table 8: Metadata Field Summary**

| Field | Description | |
|---|---|---|
| **To** | From email content. The recipient(s) of the document, if it is an email. If it is a file, this is left blank. | |
| | **XML Location:** | Tags/Tag[@TagName="#To"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | Yes |
| **CC** | From email content. The cc'ed recipients of the document, if it is an email. If it is a file, this is left blank. | |
| | **XML Location:** | Tags/Tag[@TagName="#CC"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | Yes |
| **BCC** | From email content. The bcc'ed recipients of the document, if it is an email. If it is a file, this is left blank. | |
| | **XML Location:** | Tags/Tag[@TagName="#BCC"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | Yes |
| **Date Sent** | From email content. The sent date of the email. If it is a file, this is left blank. | |
| | **XML Location:** | Tags/Tag[@TagName="#DateSent"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | Yes ("Date" column) |
| **Has Attachments?** | From email content, "true" if the email has attachments, else "false". If it's a file, this is left blank. | |
| | **XML Location:** | Tags/Tag[@TagName="#HasAttachments"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Attachment Count** | From email content. The number of atttachments if HasAttachments is "true", else blank. | |
| | **XML Location:** | Tags/Tag[@TagName="#AttachmentCount"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Attachment Names** | From email content. A semicolon-delimited list of attachment names if HasAttachments is "true", else blank. | |
| | **XML Location:** | Tags/Tag[@TagName="#AttachmentNames"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | Yes ("Attachments" column) |

**Table 8: Metadata Field Summary**

| Field | Description | |
|---|---|---|
| **Date Received** | From email content. The date the email was received. | |
| | **XML Location:** | Tags/Tag[@TagName="#DateReceived"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Flags** | From file content. Whether the document contains content that was embedded, hidden, a comment, or processed with Optical Character Recognition (OCR) software. | |
| | **XML Location:** | CustomDocumentInfo/Flags/Flag |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| | **Values:** | **`EmbeddedObjects, HiddenContent, Comments, HiddenCells, NoIndexedText`**, etc. |
| **Read Flag** | From email content. Whether the email was read or not. | |
| | **XML Location:** | Tags/Tag[@TagName="#ReadFlag"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Importance Flag** | From email content. Whether or not the message was sent with high importance (if not normal). | |
| | **XML Location:** | Tags/Tag[@TagName="#ImportanceFlag"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Message Class** | From email content. The class of the message (currently, "Message", "Contact", or "Calendar"). | |
| | **XML Location:** | Tags/Tag[@TagName="#MessageClass"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Flag Status** | From email content. The flag status of the message. Valid values are "NoFlag" or "FlagMarked." | |
| | **XML Location:** | Tags/Tag[@TagName="#FlagStatus"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |

**Table 8: Metadata Field Summary**

| Field | Description | |
|---|---|---|
| **Priority** | From email content. The priority of the message. Valid values are "Normal", "Urgent", and "Nonurgent." | |
| | **XML Location:** | Tags/Tag[@TagName="Priority"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Sensitivity** | From email content. The sensitivity of the message. Valid values are "None", "Personal", "Private", and "Company Confidential." | |
| | **XML Location:** | Tags/Tag[@TagName="Sensitivity"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Read Receipt** | From email content. Whether or not a read receipt was requested. | |
| | **XML Location:** | Tags/Tag[@TagName="ReadReceipt"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Mood** | From email content. The mood of the message (Lotus Notes only). Valid values are "Normal", "Personal", "Private", "Confidential", "Thank You!", "Flame", "Good Job", "Joke", "FYI", "Question", and "Reminder." | |
| | **XML Location:** | Tags/Tag[@TagName="Mood"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **File Name** | From file system. The name of the file if the document is a file, without extension. If it is an email, this is left blank. | |
| | **XML Location:** | Tags/Tag[@TagName="#FileName"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | Yes ("Subject" column, includes extension) |
| **File Extension** | From file system. The extension of the file if the document is a file. If it is an email, this is left blank. | |
| | **XML Location:** | Tags/Tag[@TagName="#FileExtension"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |

**Table 8: Metadata Field Summary**

| Field | Description | |
|---|---|---|
| **File Size** | From file system<br>The size of the file if the document is a file. If it is an email, this is left blank. | |
| | **XML Location:** | Tags/Tag[@TagName="#FileSize"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Date Created** | From file system.<br>The creation date of the file if the document is a file. If it is an email, this is left blank.<br>For loose files, this should always be populated with an accurate value reflecting the creation date of the file as it exists at the document source when the system performs the export.<br>For attachments, the platform attempts to get the value through MAPI. Note that in some cases a creation date is not available for an attachment; in this situation it will be either blank or alternatively set to 1601-01-01T00:00:00 GMT. | |
| | **XML Location:** | Tags/Tag[@TagName="#DateCreated"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Date Accessed** | From file system. The last accessed date of the file if the document is a file. If it is an email or attachment, this is left blank (attachments don't have a DateAccessed MAPI property stored). | |
| | **XML Location:** | Tags/Tag[@TagName="#DateAccessed"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Date Modified** | From file system.<br>The last modified date of the file if the document is a file. If it is an email, this is left blank.<br>For loose files, this should always be populated with an accurate value reflecting the last modified date of the file as it exists at the document source when the system performs the export.<br>For attachments, the system attempts to get the value through MAPI. Note that in some cases a last modified date is not available for an attachment; in this situation it will be either blank or alternatively set to 1601-01-01T00:00:00 GMT. | |
| | **XML Location:** | Tags/Tag[@TagName="#DateModified"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | Yes ("Date" column) |

**Table 8: Metadata Field Summary**

| Field | Description | |
|---|---|---|
| **Date Printed** | From file content. The last print date of the file if the document is a file. If it ian email, this is left blank. | |
| | **XML Location:** | Tags/Tag[@TagName="#DatePrinted"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |
| **Title** | From file content. The title of the document (MS Office docs only). | |
| | **XML Location:** | Tags/Tag[@TagName="#Title"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |
| **Subject** | From file content. The subject of the document (MS Office docs only). | |
| | **XML Location:** | Tags/Tag[@TagName="#Subject"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |
| **Author** | From file content. The author of the document (MS Office docs only). | |
| | **XML Location:** | Tags/Tag[@TagName="#Author"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |
| **Company** | From file content. Company (MS Office docs only). | |
| | **XML Location:** | Tags/Tag[@TagName="#Company"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |
| **Category** | From file content. Category (MS Office docs only). | |
| | **XML Location:** | Tags/Tag[@TagName="#Category"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |
| **Keywords** | From file content. Keywords (MS Office docs only). | |
| | **XML Location:** | Tags/Tag[@TagName="#Keywords"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |
| **Comments** | From file content. Comments (MS Office docs only). | |
| | **XML Location:** | Tags/Tag[@TagName="#Comments"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |

**Table 8: Metadata Field Summary**

| Field | Description | |
|---|---|---|
| **Creation Date** | From file content.<br>The create date of the file from the internal file metadata (MS Office docs only). This is the same date that is visible as "creation date" in the trailing metadata section of the platform's (Outside In) HTML view if that property is enabled. It may or may not match with the file system creation date (#DateCreated). | |
| | **XML Location:** | Tags/Tag[@TagName="CreationDate"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |
| **Last Save Date** | From file content.<br>The last save date of the file from the internal file metadata (MS Office docs only). This is the same date that is visible as "Last Saved Date" (generally) in the trailing metadata section of the system (Outside In) HTML view if that property is enabled. It may or may not match with the file system creation date (#DateModified). | |
| | **XML Location:** | Tags/Tag[@TagName="LastSaveDate"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |
| **Last Saved By** | From file content. Who last saved the file (MS Office docs only). | |
| | **XML Location:** | Tags/Tag[@TagName="LastSavedBy"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |
| **Source** | From file content. The document source (MS Office docs only). Usually the name of the application, such as "Microsoft Office Word." | |
| | **XML Location:** | Tags/Tag[@TagName="#Source"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |
| **Page Count** | From file content (MS Office docs only). | |
| | **XML Location:** | Tags/Tag[@TagName="PageCount"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |
| **Word Count** | From file content. Word count (MS Office docs only). | |
| | **XML Location:** | Tags/Tag[@TagName="WordCount"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |

**Table 8: Metadata Field Summary**

| Field | Description | |
|---|---|---|
| **Character Count** | From file content. Number of characters in the document (MS Office docs only). | |
| | **XML Location:** | Tags/Tag[@TagName="CharCount"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |
| **Revision Number** | From file content. Revision number (MS Office docs only). | |
| | **XML Location:** | Tags/Tag[@TagName="RevisionNumber"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |
| **Edit Minutes** | From file content. Total minutes spent editing the file (MS Office docs only). | |
| | **XML Location:** | Tags/Tag[@TagName="EditMinutes"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |
| **Slide Count** | From file content. Total number of slides (MS PowerPoint only). | |
| | **XML Location:** | Tags/Tag[@TagName="SlideCount"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |
| **Hidden Slide Count** | From file content. Number of hidden slides (MS PowerPoint docs only). | |
| | **XML Location:** | Tags/Tag[@TagName="HiddenSlideCount"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |
| **Multimedia Clip Count** | From file content. Number of multimedia clips (MS PowerPoint docs only). | |
| | **XML Location:** | Tags/Tag[@TagName="MultimediaClipCount"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |
| **Slide Note Count** | From file content. Number of slides with notes (MS PowerPoint docs only). | |
| | **XML Location:** | Tags/Tag[@TagName="SlideNoteCount"]/@TagValue |
| | **Metadata Field:** | XML Extended |
| | **Document Log:** | No |

**Table 8: Metadata Field Summary**

| Field | Description | |
|---|---|---|
| **Native Export File Path** | System-generated. The path of the file (in the format "<DocID>.<File extension>"), if native files were included in the export. | |
| | **XML Location:** | Files/File[@FileType="Native"]/ExternalFile/@FilePath |
| | **Metadata Field:** | XML Standard |
| | **CSV Report:** | No |
| **Native Export File Name** | System-generated. The name of the file (in the format "<DocID>.<File extension>"), if native files were included in the export. | |
| | **XML Location:** | Files/File[@FileType="Native"]/ExternalFile/@FileName |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Native Export File Size** | System-generated. The size of the exported file, if native files were included in the export. | |
| | **XML Location:** | Files/File[@FileType="Native"]/ExternalFile/@FileSize |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Native File Export Hash** | System-generated. The calculated MD5 hash of the exported file, if native files were included in the export. | |
| | **XML Location:** | Files/File[@FileType="Native"]/ExternalFile/@Hash |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Extracted Text File Path/Name/Size/ Hash** | System-generated. Parallels the native file information, the path, name, size, and hash of the extract text file if included in the export. | |
| | **XML Location:** | Files/File[@FileType="Text"]/ExternalFile/ {@FilePath,@FileNane,@FileSize,@Hash} |
| | **Metadata Field:** | XML Standard (if user chooses to include extracted text) |
| | **Document Log:** | No |
| **Redacted File Path/Name/Size/ Hash** | System-generated. Parallels the native file information (the path, name, size, and hash of the produced file if it was redacted and images were included in the production export in TIFF or PDF format). | |
| | **XML Location:** | Files/File[@FileType='Redacted']/ExternalFile/ {@FilePath,@FileNane,@FileSize,@Hash} |
| | **Metadata Field:** | XML Standard (if user chooses to include images) |
| | **Document Log:** | No |

**Table 8: Metadata Field Summary**

| Field | Description | |
|---|---|---|
| **Image File Path/ Name/Size/Hash** | System-generated. Parallels the native file information (the path, name, size, and hash for a produced file if it was not redacted and images were included in the production export in TIFF format). | |
| | **XML Location:** | Files/File[@FileType='Image']/ExternalFile/ {@FilePath,@FileNane,@FileSize,@Hash} |
| | **Metadata Field:** | XML Standard (if user chooses to include images) |
| | **Document Log:** | No |
| **PDF File Path/ Name/Size/Hash** | System-generated. Parallels the native file information (the path, name, size, and hash for a produced file if it was not redacted and images were included in the production export in PDF format). | |
| | **XML Location:** | Files/File[@FileType='PDF']/ExternalFile/ {@FilePath,@FileNane,@FileSize,@Hash} |
| | **Metadata Field:** | XML Standard (if user chooses to include images) |
| | **Document Log:** | No |
| **Custodians** | User-generated. The custodian(s) associated with the document. | |
| | **XML Location:** | Locations/Location/Custodian |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | Yes ("Custodian 1...<n>" columns; max <n> set by property) |
| **Location(s)** | System-generated. The original location(s) where the document was found. | |
| | **XML Location:** | Locations/Location/LocationURI |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | Yes ("Document Source 1...<n>" columns; max <n> set by property) |

**Table 8: Metadata Field Summary**

| Field | Description | |
|---|---|---|
| **Tags** | User-generated. The user-supplied tag(s) associated with the document (including tag comments and document notes). | |
| | **XML Locations:** | Checkbox tags:<br>• TagName should start with [TagSetName] and continue down the tree adding [Label:TagValueName] for each level in the tree, separated by the colon delimiter ":"<br>• TagValue = "yes"<br>• TagDataType = Boolean<br>Radio Buttons and drop-down tags:<br>• TagName should start with [TagSetName] and continue down the tree adding [Label:TagValueName] for each level in the tree, separated by the colon delimiter ":"<br>• TagValue = the final [TagValueName] in the tree<br>• TagDataType = Text<br>Comments:<br>• TagName should start with [TagSetName] and continue down the tree adding [Label:TagValueName] for each level in the tree, separated by the colon delimiter ":"<br>• TagValue = comment text<br>• TagDataType = LongText |
| | **Metadata Field:** | XML Standard (if user chooses to include tags) |
| | **Document Log:** | Yes (individual columns named by tag name, "Tagged" used for boolean to indicate it's tagged) |
| **Projects** | User-generated. The user-supplied folder(s) associated with the document. These are actually stored in the XML in the reverse manner -- the set of documents that are in a given folder. | |
| | **XML Location:** | Folders/Folder/@FolderName (Documents contained inside the <Folder> record) |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | Yes (individual columns named "Project: <folder_name>") |
| **Discussion Thread ID** | System-generated. The discussion thread ID of the email. This is always blank for loose files and for emails that were not part of a discussion thread. | |
| | **XML Location:** | CustomDocumentInfo/ThreadID |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |

**Table 8: Metadata Field Summary**

| Field | Description | |
|---|---|---|
| **Error** | System-generated. Reason for processing error. | |
| | **XML Location:** | CustomDocumentInfo/Error/Reason |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| | **Values:** | **`Encrypted Message`**, etc |
| **Batch ID(s)** | System- and user-generated. The batch ID(s) of any processing or production batches this document has been associated with (not including the export which created the XML file, since the batch is only formally created on official completion of the export). | |
| | **XML Location:** | CustomDocumentInfo/Batches/BatchId |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Strict checksum** | System-generated. The "strict checksum" that the system used to help determine whether the document was a duplicate.<br>CLEARWELL SUPPORT USE ONLY. | |
| | **XML Location:** | CustomDocumentInfo/StrictChecksum |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Relaxed checksum** | System-generated. The "relaxed checksum" that the system used to help determine if the document was a duplicate while determining whether the document was a part of a conversation thread.<br>CLEARWELL SUPPORT USE ONLY. | |
| | **XML Location:** | CustomDocumentInfo/RelaxedChecksum |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **Crawler checksum** | System-generated. The checksum that the system crawler computed when initially processing the document.<br>CLEARWELL SUPPORT USE ONLY. | |
| | **XML Location:** | CustomDocumentInfo/CrawlerChecksum |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |

**Table 8: Metadata Field Summary**

| Field | Description | |
|---|---|---|
| **Start page** | *Production Export Only*<br>System-generated (No). The starting page of the produced version of the document. | |
| | **XML Location:** | Tags/Tag[@TagName="#StartPage"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |
| **End page** | *Production Export Only*<br>System-generated (No). The ending page of the produced version of the document (if native production, then same as start page). | |
| | **XML Location:** | Tags/Tag[@TagName="#EndPage"]/@TagValue |
| | **Metadata Field:** | XML Standard |
| | **Document Log:** | No |

# Running Productions

This section describes how to prepare for and successfully run productions of documents.

**Note:** You must have the appropriate user role, and have a licensed Review, Redaction, and Production module to create and run productions on your appliance. For more information on user roles and their associated privileges, see "*Case Administration Guide: Case Administration Overview*".

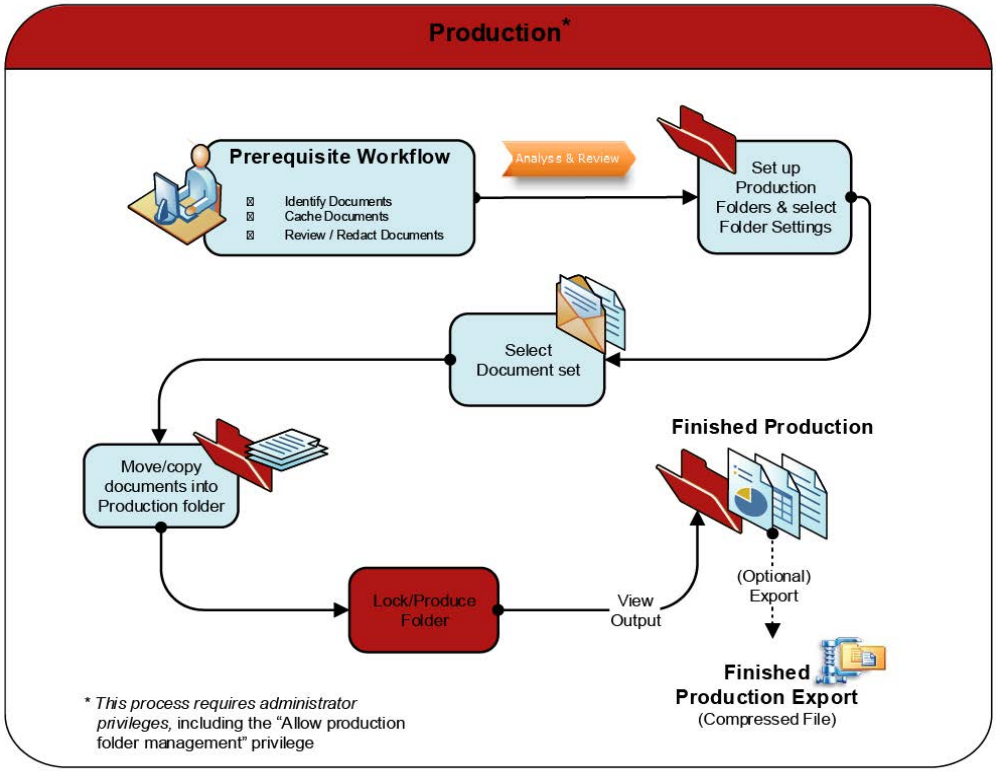
Refer to the following topics in this section:


- *"Production Overview" in the next section*
  - *"Production Process Workflow" on page 80*
- *"Production Best Practices" on page 81*
- *"Production Considerations" on page 81*
- *"Production Stages" on page 83*
  - *"Running a Production" on page 84*
  - *"Considerations" on page 84*
  - *"Reviewing a Production" on page 86*
  - *"Unlock and Unproduce a Production Folder (Optional)" on page 87*
- *"Performing Production Exports" on page 88*

# Production Overview

Production is the stage in the eDiscovery process in which documents are prepared for delivery to a requesting party. Typically, it occurs after documents have been preserved, collected, processed and reviewed. The goal is to prepare and produce documents in a usable format that complies with agreed upon production requirements.

## Production Process Workflow




**Prerequisite Workflow**

Before you start the Production process, make sure you perform the following tasks on your data set:

- Identify documents of interest
- Cache documents (for quicker results)
- Review and redact documents based on your output requirements

**To produce documents**

The system's document production occurs in the following stages:

1. Create a Production Folder
   A. Select documents that you want to produce
   B. Choose folder options
2. Copy or move documents the Production Folder

   **Note:** You can move or copy documents in two ways: (1) Using the Action menu in Review mode or (2) Using the bulk tagging window (refer to *"Bulk Tagging Reviewable Items" in the Veritas eDiscovery PlatformVeritas eDiscovery Platform User's GuideUser Guide*).
3. Verify Production Options
4. Run the production by choosing **Lock/Produce** on the folder
5. Monitor Progress by clicking the production folder's Refresh button or tracking the production job progress in the Jobs window or Jobs page.
6. Review the production in Review mode (Refer to *"Linear Review Tools in Review Mode" in the User Guide*.)
7. If necessary, preview, fix problems and re-produce
8. Export the produced documents from Review mode. For more information, see *"Export Process Workflow" on page 14*.

## Production Best Practices

When you prepare a set of documents for production, consider the following "checklist" items to help you select the appropriate options and ensure your production job will be successful:

- Check the content of your document set.
- Check your output requirements for items. One area to evaluate and consider is how to handle potential problem files (such as delegated messages, or attachments) and image files. For more information, see *"Viewing Production Slip Sheet Reports" on page 102*.
- Check production export requirements. See *"Performing Production Exports" on page 88*.

## Production Considerations

- When generating a production document, the system automatically scales down the original page. This allows the specified header and footer to be displayed without encroaching on the original document content. This is the case for all document types, including TIFFs.

For example, if you have processed an already-numbered TIFF into the system, both the original TIFF production number and the system-generated production number are shown. The system -generated production number is located at the top of the page and the original TIFF production number is displayed in the TIFF region of the page.

- Slipsheet Report search filter is unavailable for locked production folders. When a production folder is unlocked *after* the case is upgraded and the **Break out embeddings as separate items** option is not selected, then the production folder is locked again. The slipsheet report is generated when the production folder is locked. To generate this information after the case is upgraded, unlock and re-lock the production.

# Production Stages

Production prepares documents for delivery to a requesting party.

Document production occurs in the following stages:

1. **Folder creation**

   To produce a set of documents, the documents must be copied into a production folder. (To set up production folders, refer to "Setting Up Production Folders" in the Case Administration Guide.)

2. **Document selection**

   Select the documents that you want to produce and copy or move them to a production folder. You can move or copy documents in either of the following ways:

   - Use the Action menu in Review mode, as described in *"Using the Document Review Screen" in the User Guide*.
   - Use the tagging window, as described in *"Bulk Tagging Reviewable Items" in the Veritas eDiscovery PlatformVeritas eDiscovery Platform User's GuideUser Guide*.

3. **Production**

   - Decide what kind of production you want to run: Images, Native, and Mixed Mode.
   - To produce the set of documents, follow the steps outlined in *"Running a Production" in the next section*.

4. **Production Review**

   Review the production in Review mode, as described in *"Using the Document Review Screen" in the User Guide*.

5. **Production Export**

   Export the produced documents from Review mode, as described in *"Performing Production Exports" on page 88*.

## Running a Production

There are three options for production: Images, Native, and Mixed-mode.

When Image production is chosen, all documents are imaged which can then be delivered to the requesting party. Each page in the document that is imaged will have a unique bates number. For Native productions, documents are produced in their Native format as opposed to getting imaged. There is one bates number generated per document (as opposed to each page within the document).

Mixed-mode productions enable you to choose the file types that you want produced as images and those you want produced in their native format. Mixed-mode productions become useful under the following conditions:

1. A majority of files need to be produced as TIFFs (images)
2. Preference to produce Excel spreadsheets and PowerPoint slides natively because they are fairly complex to render as TIFFs. Another noteworthy consideration is that slides that contain notes or excel formulas would not otherwise be captured.

You can run multiple production jobs simultaneously. These production jobs run until they complete enabling you to start a production job and run it overnight without needing to monitor the jobs status. If the job fails, it is restarted.

**Note:** The following options on the Mixed and Images type production folders created before in pre-10.0 releases are not available:

- Unlock/Unproduce locked production folders
- Lock/Produce unlocked production folders
- Edit locked/unlocked production folder

Production folders of type Images and Mixed are only affected in Imaging Tool Upgrade. For Native type production folders, all operations are available before, during and after the Imaging Tool Upgrade is performed. For details, see the Imaging Tool Upgrade Guide.

## Considerations

### Reports

Depending on production requirements, you may want to add a confidentiality footer for printed reports.

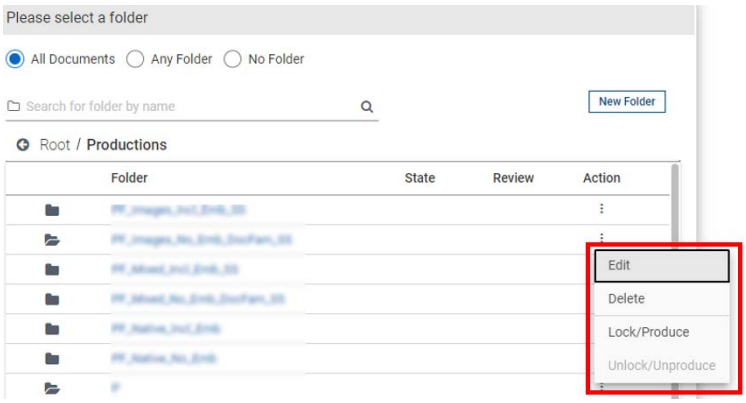
#### To configure the confidentiality footer for printed reports

1. From the **All Cases** view, click the **System > Settings > Export/Print** tab.
2. Type the new confidentiality footer text in the field provided.

**To run a production**

1. On the top navigation bar, within a selected case, click **Case Home > Folders**.
2. Select the production in the **Production** folder and click **Edit** from the Actions menu.
3. Verify the production folder settings are set correctly.

   For information about production settings, see *"Setting Up Folders" in the Case Administration Guide*.
4. Click **Lock/Produce.**




*Selecting and Running a Production Folder*

This produces the documents and locks the folder so that no more documents can be added to the folder.

5. After the production is finished running, the document is available for viewing in Review mode prior to export. From Review mode, click **Productions** and select the name of the production folder.

## Reviewing a Production

After you create a production, review the documents to verify everything displays accurately:

### To view production statistics

1. On the left navigation bar of Analysis& Review page, click **Folders**.
2. Click **Folder actions** icon associated with the populated production folder and then click **Edit**.
3. In the **Edit Production Folder** window, click the **Results** tab to view the current production statistics.

### To review a production

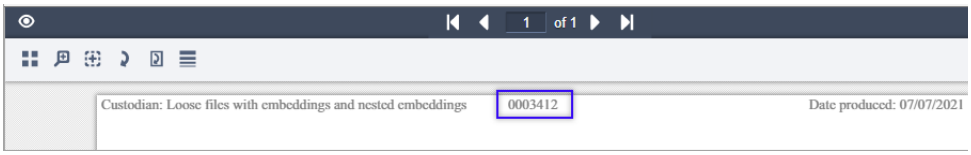
1. From the **Analysis & Review** module, click the **Folder option** icon, select the production folder to review and click the Search icon. The produced documents display in Snippet View with their production numbers.

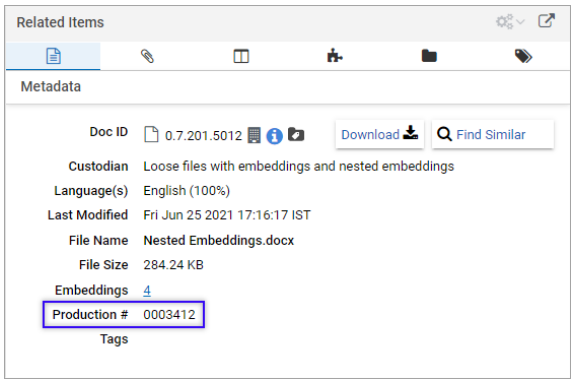
   **Note:** You can sort documents based on their production numbers.

2. Click the **Review Mode** icon to go to Review Mode.
3. From the View menu, click **Production** and select the production folder you want to review.

   The documents display.

4. Verify the following:
   - Headers and footers display the correct information and are positioned appropriately.
   - Redactions display properly.
   - Production numbering is accurate. By default, production numbers for documents and their attachments display in the header.



## Unlock and Unproduce a Production Folder (Optional)

Production folders can be unlocked and unproduced after the produced folder has been exported. This enables you to remove privileged documents that were inadvertently included in the original production, and then produce a new set of documents using the original production numbers.

**Note:** Use caution when unlocking a Production folder after export. Doing so may be problematic since each document in the production set already has an assigned individual production number from when it was originally locked and produced.

You can unlock and unproduce a production when:

- You have permission to unproduce an exported production.
- The production is not running or pending.

**To unlock and unproduce a production**

1. From the **Analysis & Review** module, click the **Folder option** icon.

   The folder window appears.

2. Click **Folder Actions** icon associated with the productions folder that you want to unlock and select **Unlock/Unproduce**.

3. Confirm that you want to unproduce the folder and remove all production information.

4. If this production has been exported and is being stored on disk, delete the production export manually.

   Deleting the export prevents two documents branded with the same production numbers made available as exports.

# Performing Production Exports

Production export is run to generate images (PDF, TIFF format) for documents locked in a production folder, which can then be delivered to a requesting party.

After a production is created, you can export the production using the Export action.

**To export a production**

1. Select **Production** as the type of export. (For a complete list of Production Export options, refer to Table 3: *"Production Export Selections" on page 25*.)
2. Choose the production and the documents to export. Note that the platform will only export documents that have a produced version, even if you choose to export all documents.
3. Select how you want your document filenames to appear.
4. If you select **Production Number**, then all documents (native, extracted text, and image) are named according to their production number. For natives, extracted text, and multi-page TIFFS, the files are named according to the production number of the first page in the set.
5. If you select **Clearwell Document ID,** then all documents (both native, extracted text, and image) are named according to their system Document ID. (Single-page TIFFs each have their own production number, and named by this number.)

The following apply to redacted documents and production exports:

- If a document is redacted, it should not impact the metadata that is generated in the EDRM XML file.
- If a document is redacted, however, no native copies of the redacted file are exported.
- When doing a production export, The system includes the starting and ending page numbers for each document in the EDRM XML *#StartPage* and *#EndPage* metadata tags. The Start and End page numbers, as well as attachment start/end identifiers are available in the configurable templates as *BegDoc*/*EndDoc* and *BegAttach*/*EndAttach*. For more information, see *"Using Load File Export Templates" on page 35*.

# Reporting

The Veritas eDiscovery Platform provides reports that include metadata and analysis from Export and Production. These reports can help identify content, location and other valuable metadata information. The reports are saved in comma separated values (CSV) and in Excel Worksheet (XLSX) files. For easy sorting, analysis and summarizing, you may prefer to view the CSV reports in Microsoft Excel.

Refer to the following topics in this section:


- *"Production" in the next section*
  - *"Production Membership Report" in the next section*
  - *"Understanding the Production Membership Report" on page 90*
  - *"To create Production Membership report:" on page 90*
- *"Export" on page 91*
  - *"Export Audit" on page 91*
  - *"Understanding the Export Audit Report" on page 91*
  - *"Comparing counts" on page 92*
- *"Logs" on page 93*
  - *"Privilege Log" on page 93*
  - *"Redaction Log" on page 94*
  - *"Error log" on page 95*
  - *"Generating Privilege and Redaction Logs" on page 95*
    - › *"Recommended workflow for Privilege and Redaction logs" on page 96*


# Production

## Production Membership Report

The Production Membership report is useful for tracing and mapping a document to all the export production folders that it belongs to — this mapping may be especially valuable for validation and audit purposes for data that must adhere to strict regulatory or case requirements. The document-to-production folder mapping is achieved with column headings of the production folders and row entries for each of the documents. The tabular layout allows you to quickly see which documents are present in which production folders.

## Understanding the Production Membership Report

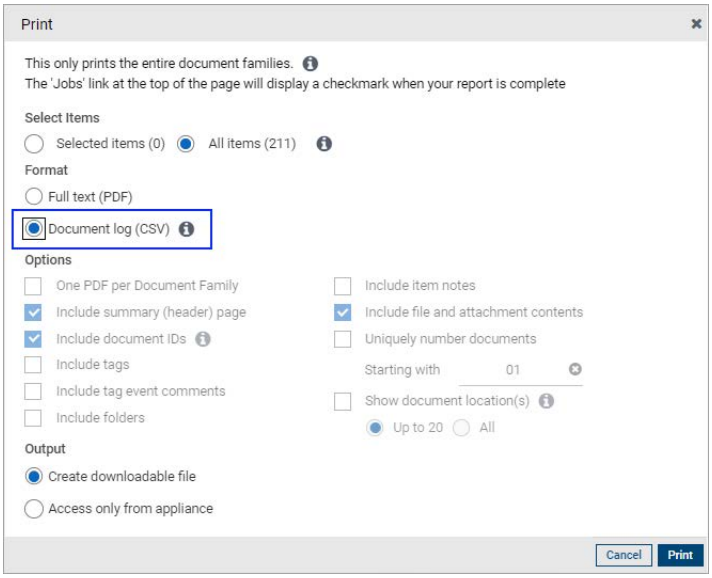
The Production Membership report is saved as a CSV file. The report is a standard report template with pre-defined columns. You generate the report by using the PRINT CSV option. For PRINT CSV, the resulting CSV file contains information about the top level document and also all children items for a given document family. It will also print the Document ID for items, which are part of any and all locked and produced production folder.

**To create Production Membership report:**

**Note:** It is assumed that you have already created production folders and populated them with documents.

1. From the **Analysis & Review** menu, search and select the documents that you would like to track.
2. Select **Print** from the **Bulk action menu** icon.
3. From the **Print** menu, make selections and be sure to choose **Document log (CSV)** under the **Format:** subsection.

   **Note:** For a different format, you can select **Full text (PDF)**.




   Once you click "Print", a job starts. You can monitor this from the Jobs window. When ready, you can click to view the report in CSV format or open it from Excel.

4. Analyze and view the results.

   A column for each production folder with a "YES" or" No" value makes it easy to determine if the document belongs to the production folder or not.

   In this example, Document ID 0.7.14.7153 is in two production folders: **TestFolder1** and **TestFolder2**. The document is not in production **TestFolder3**.

   **Note:** In order to highlight the document-to-production folder mapping, not all of the report columns are shown.

| Document ID | Date | Subject | Attachme | Item Note | Folder: TestFolder1 | Productio | Productio | Folder: TestFolder2 | Folder: TestFolder3 | My Tag Se |
|---|---|---|---|---|---|---|---|---|---|---|
| 0.7.14.7153 | Fri Feb 01 | Creative contracts | | | Yes | 15 | 15 | Yes | No | Tagged |
| 0.7.14.7154 | Fri Feb 01 | Cocktails? | | | Yes | 14 | 14 | Yes | No | Tagged |
| 0.7.14.7151 | Fri Feb 01 | RE: Consulting Agreement | | | Yes | 11 | 13 | No | No | |
| 0.7.14.7152 | Fri Feb 01 | Your message... | | | Yes | 10 | 10 | Yes | No | |
| 0.7.14.5215 | Thu Jan 24 | Formal Re | SEC v. Tamas.doc | | Yes | 6 | 6 | Yes | No | Tagged |
| 0.7.14.5215-000001 | | SEC v. Tamas.doc | | | Yes | 7 | 9 | Yes | No | Tagged |

# Export

## Export Audit

Export audit reports summarize the export options and provide detailed statistics on the export including successfully exported and failed documents. It is a good idea to check the audit reports for errors after your export job completes. You can view export count information for Metadata, Production, and Print to PDF/CSV jobs. The reports are in a common format (XLSX) and, in the case of Metadata and Production, facilitate cross-checking and correlation of actual export item counts with Search result counts.

**Note:** The export audit reports provide an informative and easy-to-read series of worksheets that complement the existing XML summary file (`summary.xml`). For more information on the XML summary file, see *"XML Summary Files" on page 58*.

Standard audit report is available for the following exports:

- Metadata (Export Summary, and Export Options worksheets)
- Production (Export Summary, Export Options, and Failed Images worksheets)
- Print to PDF/CSV Jobs (Export Summary, and Export Options worksheets)

**Note:** The export audit report is not available for native only exports.

## Understanding the Export Audit Report

An Export Audit Report is divided into Export Summary and Export Option worksheets. The Export Audit Production report contains an additional worksheet with Failed Images information. These worksheets are in a standard report template with pre-defined columns.

To view the explanation of a column, hover over the column heading until the info-bubble text appears.

### Export Summary Worksheet

The Export Summary contains sections and fields that organize, categorize and summarize export results. The counts vary according to the type of export. The reports range in complexity from detailed counts of success and errors from Metadata and Production exports to more basic export result data for Print to PDF/CSV jobs.

### Export Options Worksheet

A list all of the selected export options for Metadata, Production and Print to PDF/CSV jobs. The production Export Options worksheet can be compared with the options listed in the XML summary file.

### Failed Images Worksheet (Production Export only)

A list of the documents that failed imaging during production export. It contains the following fields: Document ID, Starting and Ending Bates Number and Slip Sheets.

**Note:** This worksheet is blank if none of the documents failed imaging.

### Top Level Error Worksheet

A list of the top level documents that failed to be exported and the reason for the failure.

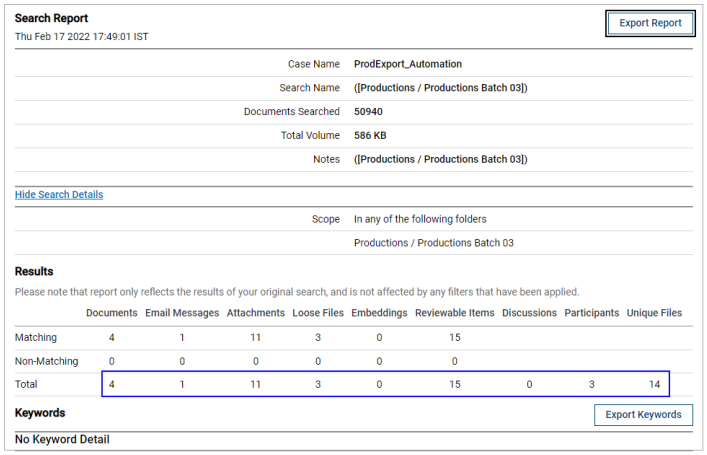
### Item Level Error Worksheet

A list of any errors associated with an item and includes a searchable DOCID. Errors in this item level category are not the type that would cause an entire document family to fail (such as an error with text extraction or metadata extraction).

## Comparing counts

By comparing actual export counts contained in the Export Summary page of the Metadata audit report with those in the Search Report, you can quickly verify or note discrepancies. It is a good way to check on the tallies between the two ways of counting results in the Search Report and the Export Audit Report.

### Sample Comparison View of Search and Export Audit Report Metadata Counts



**Search Report**
Thu Feb 17 2022 17:49:01 IST

Export Report

| | |
|---|---|
| Case Name | ProdExport_Automation |
| Search Name | ([Productions / Productions Batch 03]) |
| Documents Searched | 50940 |
| Total Volume | 586 KB |
| Notes | ([Productions / Productions Batch 03]) |

Hide Search Details

| | |
|---|---|
| Scope | In any of the following folders |
| | Productions / Productions Batch 03 |

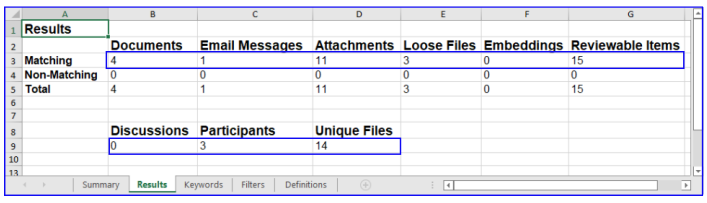
**Results**

Please note that report only reflects the results of your original search, and is not affected by any filters that have been applied.

| | Documents | Email Messages | Attachments | Loose Files | Embeddings | Reviewable Items | Discussions | Participants | Unique Files |
|---|---|---|---|---|---|---|---|---|---|
| Matching | 4 | 1 | 11 | 3 | 0 | 15 | | | |
| Non-Matching | 0 | 0 | 0 | 0 | 0 | 0 | | | |
| Total | 4 | 1 | 11 | 3 | 0 | 15 | 0 | 3 | 14 |

**Keywords** Export Keywords

No Keyword Detail



| | A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|---|
| 1 | **Results** | | | | | | |
| 2 | | **Documents** | **Email Messages** | **Attachments** | **Loose Files** | **Embeddings** | **Reviewable Items** |
| 3 | **Matching** | 4 | 1 | 11 | 3 | 0 | 15 |
| 4 | **Non-Matching** | 0 | 0 | 0 | 0 | 0 | 0 |
| 5 | **Total** | 4 | 1 | 11 | 3 | 0 | 15 |
| 6 | | | | | | | |
| 7 | | | | | | | |
| 8 | | **Discussions** | **Participants** | **Unique Files** | | | |
| 9 | | 0 | 3 | 14 | | | |
| 10 | | | | | | | |
| 13 | | | | | | | |

Summary | Results | Keywords | Filters | Definitions

# Logs

Release 9.1 contains new reports where you can export an Excel-based metadata report of each item withheld or redacted in a production folder with the reason for withheld or redaction. You can select the production folder(s) and tags you wish to include in the Privilege/Redaction logs. You can also export tag values and tag-specific comments. However, you cannot export the complete tag hierarchy, item notes, and tag event comments.

Note that the Privilege/Redaction logs are different than the Production Membership report (Document log). The Document log contains information about the top level document and all the children items for a given document family, whereas the Privilege/Redaction log is an item-level report.

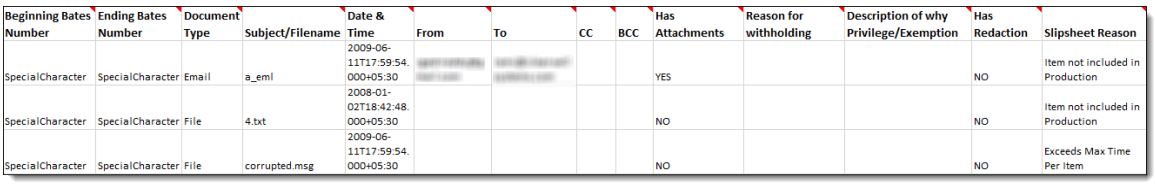
## Privilege Log

In a business requirement where you need to withhold data from the disclosure due to privileges, you might need to provide a log of all documents you are not disclosing and the reason for withholding information. Privilege log provides information on documents that are withheld in the a locked production folder.
You can generate the Privilege logs for all types of productions (Native/Image/Mixed mode).

Fields included in the Privilege log report:

- Emails: From, To, Cc, Bcc, Subject, Date Sent, and Has Attachments
- Loose Files: Filename and Date Modified
- Document type
- Beginning Bates Number
- Ending Bates Number
- Has Redactions
- Slip-Sheet Reason
- Reason for withholding (a comma-separated list of all tag values applied to the item)
- Description of why Privilege/Exemption applied (List of Tag-specific comments associated with the tags applied on the item)

Example of a Privilege log:



| Beginning Bates Number | Ending Bates Number | Document Type | Subject/Filename | Date & Time | From | To | CC | BCC | Has Attachments | Reason for withholding | Description of why Privilege/Exemption | Has Redaction | Slipsheet Reason |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| SpecialCharacter | SpecialCharacter | Email | a_eml | 2009-06-11T17:59:54.000+05:30 | | | | | YES | | | NO | Item not included in Production |
| SpecialCharacter | SpecialCharacter | File | 4.txt | 2008-01-02T18:42:48.000+05:30 | | | | | NO | | | NO | Item not included in Production |
| SpecialCharacter | SpecialCharacter | File | corrupted.msg | 2009-06-11T17:59:54.000+05:30 | | | | | NO | | | NO | Exceeds Max Time Per Item |

## Redaction Log

In case you have applied redactions to the data to be disclosed, you might need to provide a log of all documents that contain redaction, and the reasons for those redaction.

**Note:** Redaction log describes only those items that contain redactions and/or annotations within a locked production folder of type Images and Mixed only. Items that are neither redacted nor annotated are marked as skipped. The items which are only annotated and not redacted are included in the Redaction log with the Redacted page count as zero (0).

Redaction log can be generated on the Image and Mixed mode productions only.

Meta-data fields included in Redaction logs:

- Emails: From, To, Cc, Bcc, Subject, Date Sent, and Has Attachments
- Loose Files: Filename and Date Modified
- Document type
- Beginning Bates Number
- Ending Bates Number
- Reason for withholding (a comma-separated list of all tag values applied to the item)
- Redaction Reasons
- Redacted Page Count
- Description of why Privilege/Exemption applied (List of Tag-specific comments associated with the tags applied on the item)

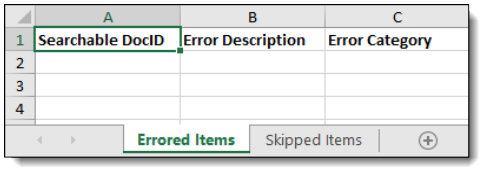
Example of a Redaction log:

| Beginning Bates Number | Ending Bates Number | Document Type | Subject/Filename | Date & Time | From | To | CC | BCC | Has Attachment | Reason for withholding | Description of why Privilege/Exemption applied | Redaction Reason | Pages Redacted |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| WoDocFamilyOption | WoDocFamilyOption | Email | a_eml | 2009-06-11T17:59:54.000+05:30 | [redacted] | [redacted] | | | YES | | | RC3,RC5,RC6 | 1 |
| WoDocFamilyOption1 | WoDocFamilyOption1 | File | 24.txt | 2008-01-02T18:21:48.000+05:30 | | | | | NO | | | RC2,RC3,RC5 | 3 |
| WoDocFamilyOption2 | WoDocFamilyOption2 | File | 4.txt | 2008-01-02T18:42:48.000+05:30 | | | | | NO | | | RC2,RC3,RC4 | 4 |

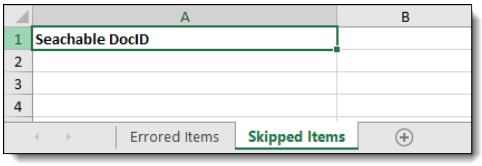
## Error log

In addition to the Privilege and Redaction logs, an Error report is also generated to list the following:

- **Errored Items**: the items which failed to extract all information.
  If an item is part of multiple production folders and if the Privilege/Redaction log fails to extract the metadata of this item for any one of the folders, then this item will be listed in the Errored Items list. The item will not be partially listed in Privilege/Redaction log report at all..




- **Skipped Items**: the items that are skipped during export




## Generating Privilege and Redaction Logs

Before you generate Privilege and Redaction logs, consider the following:

- The production folders must be locked before you start the Privilege/Redaction log job. Production Folders cannot be unlocked while the Privilege/Redaction logs job is in progress.
- By default, you can select a maximum of five production folders. You can increase this limit on number of production folders by setting the "***esa.prlog.max.production.folder.count***" property using **System** > **Support Features** > **Property Browser**.
- The Privilege/Redaction logs are item-level reports. The log will include one row for each item. If an item is part of multiple production folders, then a separate row for that item for each production folder gets added in the log.
- For each item, a maximum of 50 recipients can be included in each of the To, CC, and Bcc columns. If you wish to get more recipients in such items, you should contact Veritas Customer Support.
- A single Privilege/Redaction log report can have a maximum of 5,00,000 rows. When number of rows in a single report exceeds 5,00,000, the log file is rolled over and a new report gets generated for each set of 5,00,000 rows.

**Recommended workflow for Privilege and Redaction logs**

Privilege Logs:

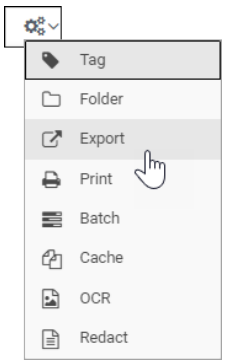
1. Identify the privileged items (to be withheld completely from the disclosure) and copy them to a new production folder, say "Privileged" with the production type as "Native".
2. Lock the "Privileged" production folder. See the steps outlined in *"Running a Production" on page 84*.
3. Search for all items in the "Privileged" production folder.
4. Select the "Privileged" production folder on the Privilege Log UI and then submit a Privilege logs job on all the items in the search results. See the steps outlined in *"To generate Privilege and Redaction logs:" in the next section*.

Redaction Logs:

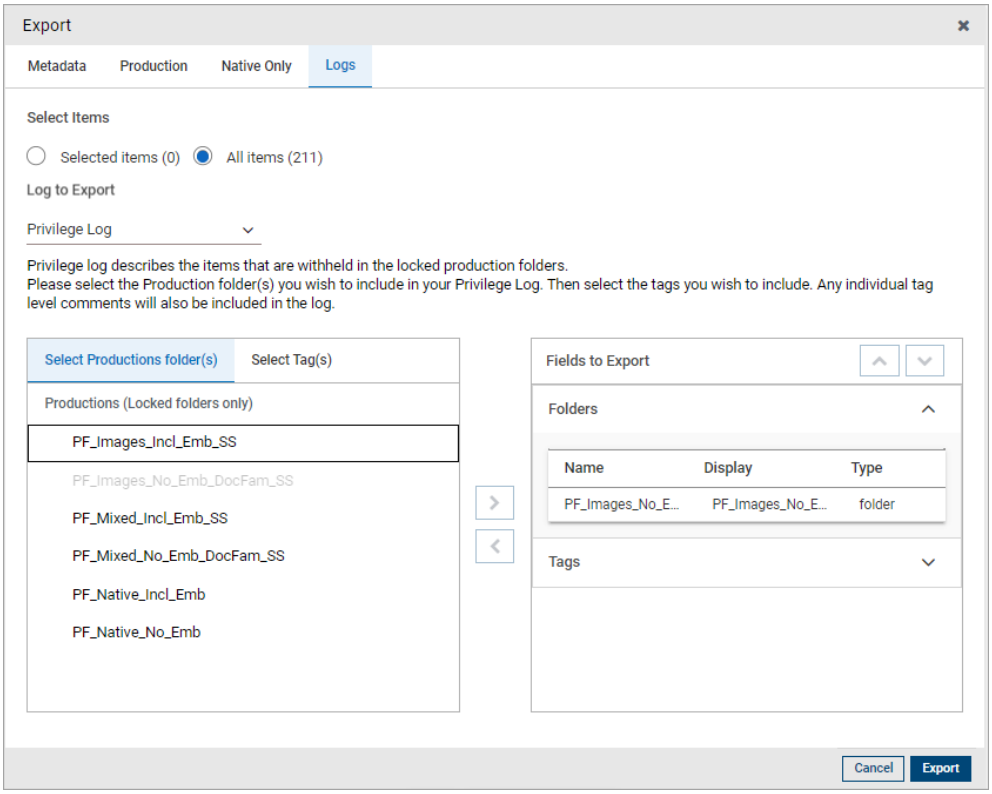
1. Identify the partially redacted items and copy them to a new production folder, say "Partially Redacted" with the production type as "Mixed".
2. Lock the "Partially Redacted" production folder. See the steps outlined in *"Running a Production" on page 84*.
3. Search for all items in the "Partially Redacted" production folder.
4. Select the "Partially Redacted" production folder on the Redaction Log UI and then submit a Redaction logs job on all the items in the search results. See the steps outlined in *"To generate Privilege and Redaction logs:" in the next section*.

**To generate Privilege and Redaction logs:**

1. Submit a search to find the documents you want to export (as described in *"Performing Searches" in the Veritas eDiscovery Platform User's Guide*).
2. On any screen that shows a list of documents, click **Bulk actions menu** icon and select **Export**.



3. The export options window appears. Click the **Logs** tab.




4. From the **Log to Export** drop-down menu, select the type of log you wish to generate. You can select either Privilege Log or Redaction Log.

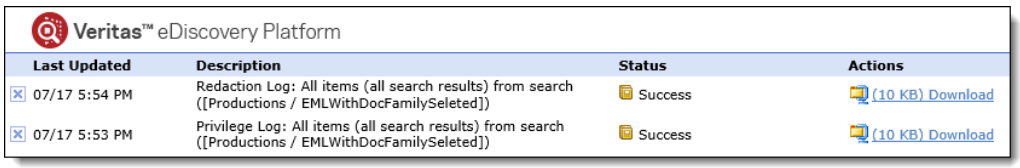
5. Click the **Select Productions folder(s)** tab and then select the production folders you wish to include in your log. Move these selected folders to the **Fields to Export Folders** list.

6. Click the **Select Tag(s)** tab and then select the tags you wish to include in the log. Move these selected tags to the **Fields to Export Tags** list.

7. Select the items from the items list to include in the log (if you wish to generate the log only for selected items).

8. Click **Selected Items** (to generate the log for selected items) or **All Items** (to generate the log for all items).

9. View report results in the **Jobs** window. In the **Actions** column, click the link to download the report.



# Troubleshooting Exports and Productions

This section describes the techniques you may want to use to troubleshoot failed or export and production jobs with errors.

- *"Troubleshooting Export Issues" in the next section*
- *"Troubleshooting Production Issues" on page 102*

# Troubleshooting Export Issues

Although rare, document exports from the Veritas eDiscovery Platform may not always complete successfully. This section provides the following troubleshooting tips and techniques to investigate and correct issues related to document exports.

If you need further assistance after attempting all applicable troubleshooting methods in this section, see *"Technical Support" on page 8*.

## Diagnose a Failed Export

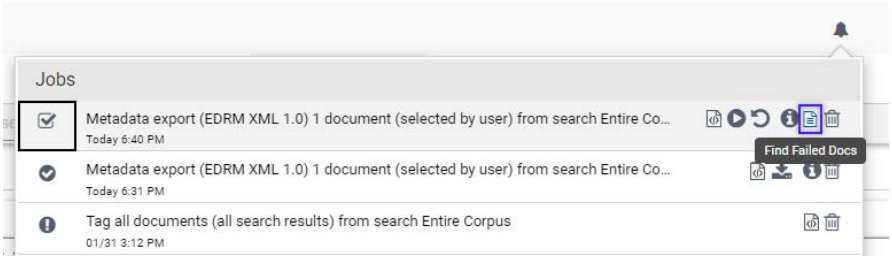
If your export job completed unsuccessfully, you have a few options: (1) Diagnose the failure by examining failed documents, or (2) Re-run the export job using slip sheets.

### Examine Failed Documents

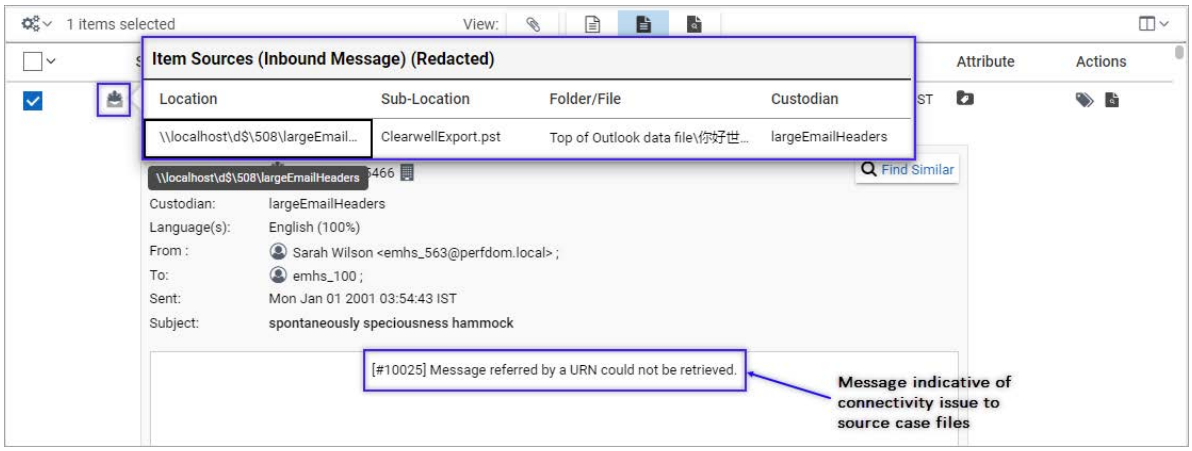
The system provides a filter that contains all documents which did not successfully export, identified by the problem causing the failure. When you click a link from the Jobs window, the Export Errors filter appears in the Filter list, displaying the errors by type. This allows you to address the issues before re-running the production.

**To view failed documents**

1. When your export job finishes, in the Jobs window, click the **Find Failed Docs** icon to view the Export Errors filter.




2. Apply your filters, then from Advanced Search, click **Search**.
3. When your search results return, click **View** to open the problem documents.
   A. If the document content displays properly, the platform has connectivity to the source case files. A Retry of the export job should work.
   B. If a "`Message referred by a URN could not be retrieved.`" message displays, the system cannot retrieve the document. Look at the document locators to determine what type of document it is and where the sources are located.




   – **Loose files**
   Verify that you can access the document from its source location. If the document is there, check permissions and confirm that you have access to the file.
   Check the *server.log* under the **System > Logs > View Logs** tab for error messages surrounding the file(s) being retrieved.

- **Documents from a PST file**
  **Warning:** Before continuing, verify that you are NOT accessing the source location from any other window (for example, Explorer). Then, try restarting the *EsaPstRetrieverService* on the appliance. After the restart, re-run the search and see if the document is retrievable.

- **Documents from an NSF file**
  **Warning:** Before continuing, verify that you are NOT accessing the source location from any other window (for example, Explorer). Then, try restarting the *EsaNsfRetrieverService* on the appliance. After the restart, re-run the search and see if the document is retrievable.

# Troubleshooting Production Issues

Use the following troubleshooting tips and techniques to investigate and correct issues related to production:


- *"How the Platform Uses Slip Sheets" in the next section*
- *"Viewing Production Slip Sheet Reports" on page 102*
  - *"Viewing Production Slip Sheet Reasons in Filter Search Results" on page 103*
  - *"Add Slip sheet to a Production Export" on page 104*


If you need further assistance after attempting all applicable troubleshooting methods in this section, see *"Technical Support" on page 8*.

## How the Platform Uses Slip Sheets

The platform inserts "slip sheets" or identifier pages as placeholders during production for single page or multi-page documents that failed to image. Putting a slip sheet in place of a production exception helps avoid conversion failures that may occur when an export job is running.

Slip sheets are also inserted for image files (TIFF or PDF) at the time of export. If any document fails to convert to TIFF or PDF upon export, a single .tiff or .pdf file is automatically inserted as a slip sheet representing all the bates numbers (numeric identifiers) in that document. Preserving this numeric continuity not only helps safeguard these image file types against export failure, but helps to accurately identify the failed document(s) for further troubleshooting and diagnosis, if necessary.

## Viewing Production Slip Sheet Reports

As a best practice, Veritas recommends reviewing Production slip sheet reports to identify withheld or problematic documents during a production job. The report columns contain useful information and also contain a searchable DocID for tracking purposes. You can view the slip sheet report from the **Analysis & Review** module.

**To view production slip sheet report**

1. From the **Analysis & Review** module, on the left navigation bar, click **Folders**.
2. Select the Productions folder, click **Folder actions** ⋮ icon associated with the folder and select **Edit**. The **Edit Production Folder** dialog box displays.
3. On the top-right corner, click **Slipsheet Report** Slipsheet Report to launch creation of the report (zip file).
4. From the jobs window, select the report zip file to download and review.

A brief description of slip sheet error types is provided below:

**Table 9: Slip Sheet Exceptions**

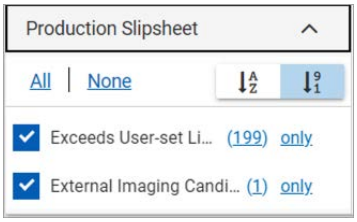
| Errors | Description |
|---|---|
| EXCEEDS USER-SET LIMITS | A production folder can be created with certain parameters (page count, timeout, size). This category distinguishes items where a slip sheet was created instead of an image due to user-specified criteria. |
| EXTERNAL | The file is a type which cannot be imaged by PrizmDoc but can possibly be imaged by another piece of software and imported in, such as Microsoft One Note. |
| FULLY REDACTED | This item was fully redacted. The slip sheet is expected. |
| INVALID | The file is a type which cannot be imaged, such as an executable (EXE). |
| ZERO BYTES | The file is zero bytes and has no data to be imaged. A slip sheet is automatically generated. |
| **Failed to Image Errors** | **Description** |
| FATAL | There is a problem with PrizmDoc and it is likely that all imaging will fail. |
| INDEXER | A problem with this document was discovered at the time it was indexed, and it cannot be produced. |
| NO IMAGE | This item has failed to image but does not fall under any of the other categories of non-imageable files. This may be because there is a problem with the document, or perhaps the document is a type that cannot be imaged. |
| TIMEOUT | The file took longer than expected to convert and has timed out. Retry the export and the issue may resolve itself. |
| RETRIEVAL | The system failed to retrieve the file. This may be an intermittent error, in which case you should attempt to retry the conversion, or it may be a more permanent error, in which case you will have to troubleshoot retrieval. |

### Viewing Production Slip Sheet Reasons in Filter Search Results

Production slip sheet failures are also viewable in the Filter Search Results pane under the Review and Analysis module. To see the production slip sheet filter options, run the search on a production folder.

**To view production slip sheet reasons in filter search results**

1. From the **Analysis & Review** module, click the **Folder option** icon, select the production folder to review and click the **Search** icon.
2. The produced documents display in List view with their production number displayed.
3. The filter search results include production slip sheet failures which are sorted into various error categories (a few of these failures are displayed below).




**Add Slip sheet to a Production Export**

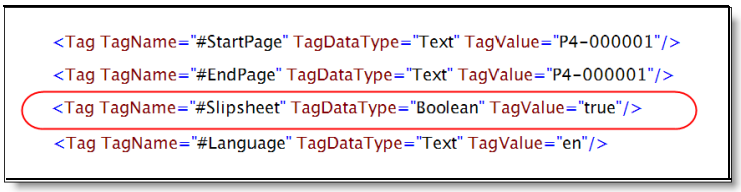
You can create a production folder that contains slip sheets with the property browser.

**To export slip sheets**

1. Go to **System > Support Features**, and select **Property Browser**.
2. Enter the name of the property: `property esa.production.exportSlipsheetMode`
3. Set the value to true.
4. Click **Submit** to save your setting.
5. Select **Lock/Produce** to lock the folder and run the production.
6. After production completes, select **Bulk action menu** icon **> Export** and select the **Production** tab.

   Make sure you select the right production.
7. Select a template. Select the other options (if desired/required), then export the production

For any email, attachment, or loose file that has had slip sheets applied during a production, the export EDRM XML file will contain a tag named “Slipsheet” to indicate that one has been applied. This information can be used in transforms as needed.



# Appendix A: Deprecated and Removed Features

## Deprecation List

**Table 1: Deprecated and Removed Features**

| Release Version | Deprecated Feature | Recommended Migration |
|---|---|---|
| **7.1.3** | **Apply Production Premediation**<br><br>If you anticipate a lengthy, or potential error-prone production due to certain document types and attachments which tend to cause errors, you can apply the "Production Pre-mediation" support feature to help address these issues during production. | Replaced with Image Remediation feature which is more comprehensive and better integrated with the product. For image tag and other feature details, see *"Image Remediation" in the Case Administration Guide*. |

# Appendix B: Product Documentation

The table below lists the administrator and end-user documentation that is available for the Veritas eDiscovery Platform product.

*Veritas eDiscovery Platform Documentation*

| Document | Comments |
|---|---|
| **Installation and Configuration** | |
| Installation Guide | Describes prerequisites, and how to perform a full install of the Veritas eDiscovery Platform application |
| Upgrade Overview Guide | Provides critical upgrade information, by version, useful prior to upgrading an appliance to the current product release |
| Upgrade Guide | Describes prerequisites and upgrade information for the current customers with a previous version of the software application |
| Utility Node Guide | For customers using utility nodes, describes how to install and configure appliances as utility nodes for use with an existing software setup |
| Distributed Architecture Deployment Guide | Provides installation and configuration information for the Review and Processing Scalability feature in a distributed architecture deployment |
| **Getting Started** | |
| Navigation Reference Card | Provides a mapping of review changes from 10.x compared to 9.x, 8.x compared to 7.x and 7.x compared to 6.x |
| Administrator's QuickStart Guide | Describes basic appliance and case configuration |
| Reviewer's QuickStart Guide | A reviewer's reference to using the Analysis & Review module |
| Tagging Reference Card | Describes how tag sets and filter type impact filter counts |
| **User and Administration** | |
| Legal Hold User Guide | Describes how to set up and configure appliance for Legal Holds, and use the Legal Hold module as an administrator |
| Identification and Collection Guide | Describes how to prepare and collect data for processing, using the Identification and Collection module |
| Case Administration Guide | Describes case setup, processing, and management, plus pre-processing navigation, tips, and recommendations. Includes processing exceptions reference and associated reports, plus file handling information for multiple languages, and supported file types and file type mapping |
| System Administration Guide | Includes system backup, restore, and support features, configuration, and anti-virus scanning guidelines for use with Veritas eDiscovery Platform |
| Load File Import Guide | Describes how to import load file sources into Veritas eDiscovery Platform |
| User Guide | Describes how to perform searches, analysis, and review, including detailed information and syntax examples for performing advanced searches |

*Veritas eDiscovery Platform Documentation*

| Document | Comments |
|---|---|
| Imaging Tool Upgrade Guide | Provides details about the Imaging Tool Upgrade feature and how to perform Imaging Tool Upgrade after the eDiscovery Platform appliance is upgraded to version 10.0, workflows affected when the cases are upgraded or not upgraded, and frequently asked questions (FAQs). |
| Export and Production Guide | Describes how to use and produce exports, productions, and logs (privilege and redaction logs) |
| Transparent Predictive Coding User Guide | Describes how to use the Transparent Predictive Coding feature to train the system to predict results from control data and tag settings |
| Audio Search Guide | Describes how to use the Audio Search feature to process, analyze, search and export search media content |
| **Reference and Support** | |
| Audio Processing | A quick reference card for processing multimedia sources |
| Audio Search | A quick reference card for performing multimedia search tasks |
| Legal Hold | A quick reference card of how to create and manage holds and notifications |
| Collection | A quick reference card of how to collect data |
| OnSite Collection | A quick reference for performing OnSite collection tasks |
| Review and Redaction | Reviewer's reference card of all redaction functions |
| Keyboard Shortcuts | A quick reference card listing all supported shortcuts |
| Production | Administrator's reference card for production exports |
| User Rights Management | A quick reference card for managing user accounts |
| **Online Help** | |
| Includes all the above documentation (excluding Installation and Configuration) to enable search across all topics. To access this information from within the user interface, click **Help**. | |
| **Release** | |
| Release Notes | Provides latest updated information specific to the current product release |