Production Sets

ABOUT PRODUCTION SETS

When you create a production set, you include all of the evidence to which you have applied a given label.

Once you've created an production set you cannot add documents to that set even if you use the same labels used previously. You can label additional documents and then create a new set using the same label.

Users need Create Production Set rights to create production sets.

CREATING PRODUCTION SETS

1. Before you create a production set, be sure you have applied at least one label to evidence files that you want to filter into the export set.

2. Click the **Project Review** button next to the project in the *Project List* panel.

3. In the *Case Explorer*, select the **Explore** tab, right-click the **Production Sets** folder, and select **Create Production Set**.

4. Fill out the options in the *General Options* screen and click **Next**.

5. Select the options that you want in the *Files to Include* screen and click **Next**.

6. In the *Columns to Include*, click the right arrow to add a column to the production set and the left arrow to remove a column from the production set. You can rearrange the order of the columns by clicking the up and down arrows.

7. Click **Next**.

8. Select the options that you want in the *Volume Document Options* screen and click **Next**.

9. Select the options that you want in the *Image Branding Options* screen and click **Next**.

10. In the Summary screen, review the options that you have selected for the production set.
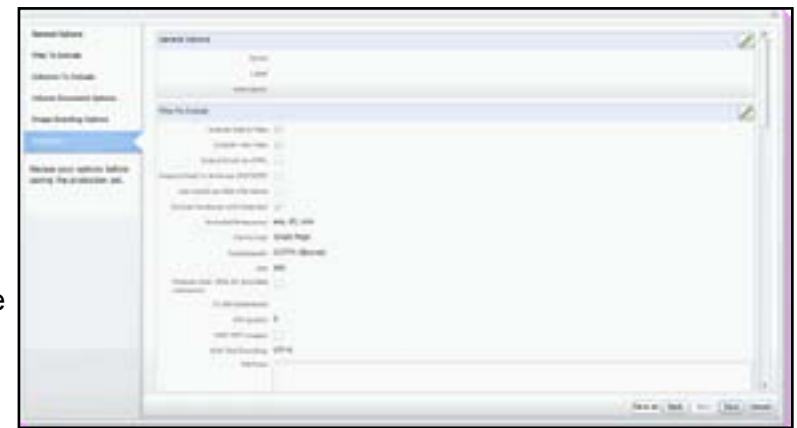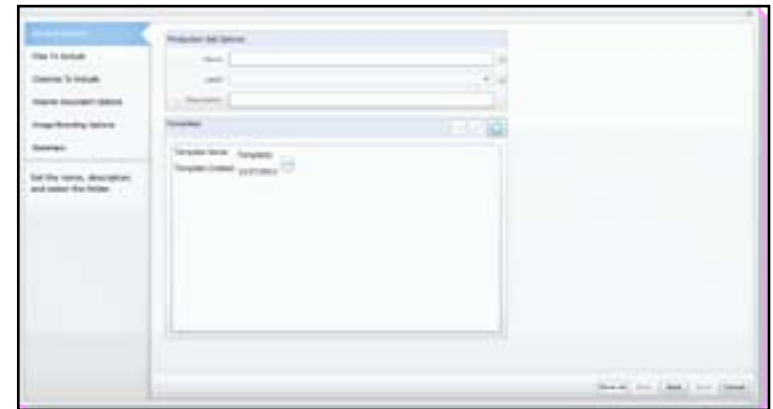
11. Click **Save**.

After your production set is created, it will appear in the *Export* tab of the *Home* page and under the *Production Sets* folder in the *Case Explorer* of the *Project Review*.

3 EXPORTING A PRODUCTION SET

After you create a production set, you can export it containing only the files needed for presentation to a law firm or corporate security professional.

1. On the *Home* Page, select a project and click the **Export** tab.

2. Select the **Production Set History** tab.

3. Next to the production set that you want to export, click **Export**.

4. Enter or browse to the path where you want to save the export.

5. Enter a name for the *Load File*.

6. Select a format that you want to use for the export. The following formats are available:

   - **CaseVantage** - Generates a DII file specifically formatted for use with the AD Summation CaseVantage program.

   - **Concordance** - Generates a DAT file that can be used in Concordance.

   - **EDRM** - Generates an XML file that meets the EDRM v1.2 standard.

   - **Generic** - Generates a standard delimited text file.

   - **iCONECT** - Generates an xml file formatted for use with the iConect program.

   - **Introspect** (idx file) - Generates an idx file specifically formatted for use with the Introspect program.

   - **Relativity** - Generates a DAT file that can be used in Relativity.

   - **Ringtail** (MDB) - Generates a delimited text file that can be converted to be used in Ringtail.

   - **Summation eDII** - Generates a DII file specifically formatted for use with the AD Summation IBlaze or Enterprise programs.

7. Select an option for Load File Encoding. The following options are available:

   - **ANSI** - Encodes load files using ANSI (for text written in the Latin script). ANSI-encoded load files process faster and save more space than a Unicode file.

   - **UTF-8** - (Default) Encodes load files using UTF-8. Most commonly used for text written in Chinese, Japanese, and Korean.

   - **UTF-16** - Encodes load files using UTF-16. Used for text written in Chinese, Japanese, and Korean.

8. Select a *Field Mapping* character. This delimiter is the character that is placed between the columns of data. The default delimiters are recommended by the program to which the load file was intended.

9. Select a **Text Identifier** character. This delimiter is the character that is placed on either side of the value within each of the columns. All of the text that follows the character and precedes the next occurrence of the same character is imported as one value.

10. Select a *Newline* character. This is a replacement character for any newline (carriage return/line feed) character. The default delimiters are recommended by the program to which the load file was intended.

11. Select the *Available Fields* of metadata to be included in the load file and click the right arrow to add the field.

12. Some load file applications require that certain fields be in the load file. In such projects, you can click the *Custom* plus button to add a custom field entry that is not already listed in the *Available Fields* list.

13. Click **Export**.