

Productions

Getting Started



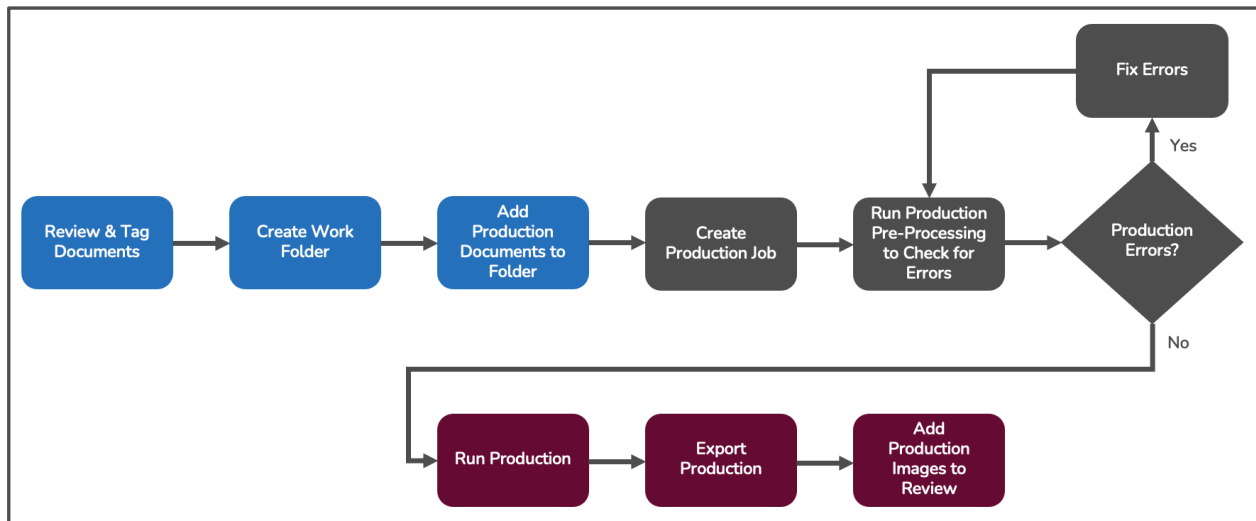
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Production Workflow Overview

Reveal's production workflow includes organizing the documents to be produced, running quality control against the production set to resolve any errors prior to production, and assembling the production assets to be delivered to a third party.

Production Workflow



Organize Production Set

Prior to running a production, you will need to determine which documents to include in the actual production set.

1. Login into Reveal.
2. Select your project from the project list.
3. Identify the production set based on a specific review tag and choice. You can create a **Saved Search** to locate your tagged documents that will be produced.
4. Create a Work Folder for your production. You can create a standard naming convention for your production Work Folders. For example, if your production is

going to be the first of several productions for Matter ABC, then you could use the following name convention where 001 is the production number and the date is the scheduled delivery date of the production: Matter ABC_03232022_001.

Create Production


When your production set has been identified and the documents have been placed into a Work Folder, you're ready to create the Production Job. Follow the steps below.

Create Production Job

1. Click on the hamburger menu in the upper left-hand corner of the page.
2. Click on **Project Admin**.
3. Click on the **Productions** tab.
4. Reveal will display the **Production Jobs** tab by default.

Production Jobs Tab

+ Add														Show Hidden Jobs Export 1-2 of 2	
Status	Job	Name	Type	Range	Total Document	Pages (Complete/Total)	Preprocessed (Complete/Errors)	Imaged (Complete/Errors)	Produced (Complete/Errors)	Privileged	Excluded	Slipsheet Text Errors	Created By	Start Time	End Time
✓	6	PROD000001	Public	000001 - 000230	26	0/230	26/0	0/0	0/0	0	1	0	cduff@revealdat	12/22/2021 8:30 PM	12/22/2021 8:31 PM
✓	3	PROD 001	Public	000001 - 001385	5	0/1,385	5/0	0/0	0/0	1	1	0	cduff@revealdat	12/02/2021 5:54 PM	12/02/2021 5:55 PM

Field Name	Field Description
Status	Production Job Status  = Job has been created ✓ = Job has been created
Job	Job ID – each job is assigned a unique identifier
Name	Job Name – this is the name you enter when you create the job
Range	This is the range of document identifiers for the production job
Total Document	Total number of documents included in the production
Pages	Total pages included in the production (for single page images)

Field Name	Field Description
Preprocessed	Total documents pre-processed vs number of pre-processing errors identified
Imaged	Total documents imaged vs number of document imaging errors
Produced	Total documents produced vs number of document production errors
Privileged	Number of documents tagged privileged that were included in the production job
Excluded	Total documents excluded
Slipsheet Text Errors	Total document slipsheet errors
Created By	User that created the production job
Start Time / End Time	The start and end time of the production job

5. To create Production Job, click on the + **Add** button above the list of Production Jobs
6. Enter the **Job Name** for Production Job.
7. Specify **Priority Level** for job (this will determine when the job runs vs other jobs that have been queued).
8. Specify the **Production Type** which indicates whether the Production Job will be accessible only by you (Private) or all users who have access to the Production function (Public).
9. Select the **Work Folder** that contains the subset of documents to be produced. You can select multiple folders.

Image Documents

10. Click on the Imaging tab and select whether the documents will be produced only in their native format or if the documents must also be produced in image format. To produce documents just in their native format, select the **None – Natives Only** option. If you need to also produce images for each document, select the **Existing** option.
11. If you select **None-Natives Only**, you can skip to Step # X below. If you select **Existing**, continue with this step.

Here is a list of the Image settings along with a description of each option.

- A. **Image Set** - If there are multiple image sets, choose which you prefer to use as the basis for producing images; the default is **Original**.
- B. **Preserve Image Format for Existing** – If a document in the production set already contains an image, Reveal will not attempt to re-image and will produce the existing image.
- C. **Imaging Template** –
- D. **Redactions**
 - Burned In – Fully masks the redacted text (default setting)
 - See Through – shows any transparent redactions
 - None – produces images without redactions
- E. **Always Image Redacted Docs** – creates a new image of the document with the redactions burned in.
- F. **Include Annotations** – all highlights, free-hand annotations, text annotations, and stick notes will be included in the image
- G. **Produce Document Image Files as the Image** – when the native document type is an image-based file, this option will produce that file in its original image format. If unchecked, Reveal will re-image the file.
- H. **If color is detected** – the remaining settings specify how natives with color will be imaged based upon the color settings provided. Typically, you will use the default settings provided.
- I. **Luminance Cutoff** – used to determine if a document has color or not. The higher the value, the brighter the images must appear to be detected as color.

Numbering

Use this tab to specify the settings for bates numbering the documents within the production.

12. **Sort Order** – Choose how you would like the document population sorted. Sorting by BEGDOC ascending is the default.
13. **Numbering** – This is the numbering sequence for the documents within the production. You have the following options:
 - **New Sequence** – allows you to assign numbers to each document beginning with 1. This setting is typically used for the first production for a project.
 - **Next Numbers** – allows you to continue the sequence where the previous production left off.
 - **Use Existing Numbers** – allows you to use the existing BEGDOC numbers as the production bates numbers regardless of whether they are sequential

Stamping

Use this tab to specify the production image endorsements.

14. Choose the location where you want the bates numbering to appear on the image. The most common location is the lower right-hand corner.
15. Select whether you want any field information or free text to also appear in any of the locations provided. Example of this would be the word “Confidential.”

Notifications

Use this tab to specify which users to notify when the production job completes.

Slipsheets

Use this tab to specify which documents should be excluded from production and slipsheeted.

- 16. **Text Location** – determines where the slipsheet message will appear
- 17. **Template** – Slipsheets can be saved as standard templates and used on any production for a project.
- 18. **Conditions** – these are rules used to specify which documents to exclude from production. Excluded documents will be slipsheeted. You can use fields such as the file type or tag choices to create rules that will exclude documents.

Save Production Job

- 19. Once all the production settings have been updated, you can click **Add** to save the new Production Job.

Run Production Pre-Processing

Once a Production Job is created, you will then need to run the Pre-Processing function to get the total document count for the production, total pages and, most importantly, detailed information regarding any production errors. Information regarding privileged documents and excluded documents discovered in preprocessing are also provided in this step.

Run Production Pre-Processing

1. Log in to Reveal.
2. Click on the hamburger menu in the upper left-hand corner of the screen.
3. Click on **Project Admin**.
4. Click on the **Productions** tab.
5. Click on the **Production Jobs** tab.
6. Locate your job within the list.
7. Click on the down arrow within the **Status** column for your job.
8. Click on **Start Pre-Processing – New Documents Only**.
9. You will be asked to confirm your selection.

10. If this is a large document production, it could take some time to complete the Pre-Processing step. Use the refresh button in the upper left-hand corner to refresh the screen.
11. Once the Pre-Processing step is complete, the columns within the Job list will get populated (see page 4 for definition of each column).
12. If errors are reported in the Preprocessed column, proceed to the **Manage Pre-Processing Errors** section below. If there are no errors or once errors are resolved, proceed to **Run Production** section below.

Manage Pre-Processing Errors

Common errors that can error in the pre-processing phase are listed below:

- Broken links to native files
- Corrupt native files
- Issues with Conditions

Follow these steps to resolve:

1. To resolve these issues, make sure your native file paths are correct and accessible.
2. For Corrupt native files, make sure you create a Condition to slipsheet these documents.
3. For Condition issues, review each Condition and verify the correct population is being identified.
4. Re-run the pre-processing step by selecting **Start-Preprocessing – New and Error Documents Only**.

Run Production

Once your errors have been addressed, you're now ready to run the full production. Follow these steps to launch the full production process.

1. To run the full production process, click on the down arrow within the **Status** column next to your Production Job and select **Start Full Processing – Imaging and Stamping**.

2. Once the job completes, a green check mark will appear in the **Status** column.
3. You can view the production Summary Report for the completed job by clicking on the down arrow in the **Status** column and selecting **Summary Report**.

Summary Report

Summary Report
 ×

[Refresh](#)
[Save Layout](#)
[Reset Layout](#)
[Export](#) 1-19 of 19

Begin Number	Status	Image Count	Privileged	Excluded	Begin Prod Number	End Prod Number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ENE0000039	Success	1	No	No	AK_00000001	AK_00000001
ENE0000055	Success	1	No	No	AK_00000002	AK_00000002
ENE0000064	Success	16	No	No	AK_00000003	AK_00000018
ENE0000072	Success	27	No	No	AK_00000019	AK_00000045
ENE0000086	Success	1	No	Yes	AK_00000046	AK_00000046
ENE0000095	Success	1	No	No	AK_00000047	AK_00000047
ENE0000097	Success	5	No	No	AK_00000048	AK_00000052

<
>

Total: 73

First:
AK_00000001
 Last:
AK_00000073

⏮
⏪
1
⏩
⏭

1 of 1

25 per page ▼

CLOSE

Export Production

Once the full production process completes, you can now export the production for delivery. Follow these steps to export your production.

1. Log in to Reveal.
2. Click on the hamburger menu in the upper left-hand corner of the screen.
3. Click on **Project Admin**.
4. Click on the **Productions** tab.
5. Click on the **Production Export** tab.
6. Click on the +Add button.

Productions

7. Enter a Job name for your Export.
8. Select your **Export Type**. Decide whether you want the Export job to be Public (available to all) or Private (available only to you).
9. Select the Production Job to include in the Export.

Files

10. Click on the **Files** tab and specify the following settings:
 - A. **Image Files to Include** – specify the image types to be exported. None is also an option.
 - B. **Image File Orientation** – only available when exporting PDFs.
 - C. **Image Load File** – specify the load file format
 - D. **Native Files to Include** – specify the natives to be included in the export. None is also an option.
 - E. **Text/OCR File to Include** – specify the text and OCR text to be included in the export.
 - F. **Document Text Set Order** – determine the order in which text sets will be evaluated for inclusion in the export.
 - G. **File Encoding** – specify the file encoding (UTF-8 is the default).
 - H. **Data Load File Specifications** – Concordance DAT file is default. You can customize.
 - I. **Native File Names** – specify the naming convention for native files. Production numbers are commonly used.
 - J. **Text File & Image File Names** – production numbers are also commonly used to name the text and image exported files.

Fields, Volume, & Notifications

11. Click on the Fields tab and select the metadata fields to include in the Export.

12. Select each field by checking the box in each field row.
13. You can change the order of the fields by clicking dragging the fields.
14. You can also double-click a row to change the export field name.
15. Click on the Volume tab to specify how want to organize the Export on the network.
16. You can apply a **Prefix** to the folders created along with a **Start** number sequence for the folders.
17. You can also apply a padding to the folder number sequence using the **Number of Digits** setting.
18. You can specify the maximum number of documents and files per folder/volume.
19. Once you have updated the Export settings, you're ready to run the Export.

Run Export

20. Click on the down arrow in the **Status** column next to the Export Job you want to run.
21. Click on **Start** to launch the Export Job.
22. You will be asked to confirm your action.
23. While the Export Job is running, a green gear icon will appear in the Status column. Once the job completes, a green check mark will appear in the Status column.
24. To download the Export Job, click on the down arrow in the Status column.
25. Click on **Download**.

Production Database Update

Once the production has been exported, you can now add the produced images to the Reveal project so that you have the option of viewing these images within the Document Review screen. Follow these steps to add the produced images to the database.

1. Log in to Reveal.
2. Click on the hamburger menu in the upper left-hand corner of the screen.
3. Click on **Project Admin**.
4. Click on the **Productions** tab.

5. Click on the **Database Update** tab.
6. Click on the + Add button.
7. Enter a Job Name.
8. Select the Production Job you want to use for the database update.
9. Specify the settings for the database update:
 - A. **Add Production(s) to Image View** – this will add the production image to the View options within the Document Review screen.
 - B. **Image Set** – specify which images should be added to the view.
 - C. **Mark Documents as Produced** – indicate to the user within the Document Review screen that these documents have been produced
 - D. **Add Page Count** – updates the page count for each document produced.
 - E. Set the Production Number fields using the available fields from the production.