

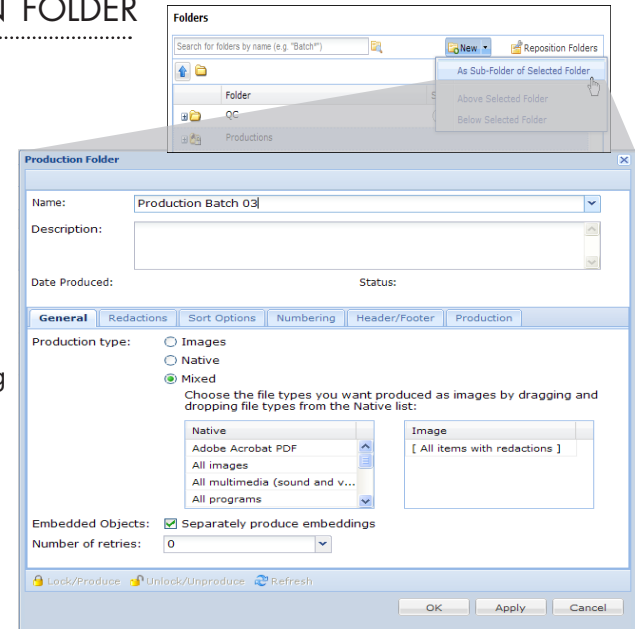
Production Tasks

GETTING STARTED

1. Create a production folder.
2. Copy documents to the production folder.
3. Cache the production folder for quicker results.
4. Verify production options.
5. Lock and produce the folder.
6. Review the production.
7. Export.

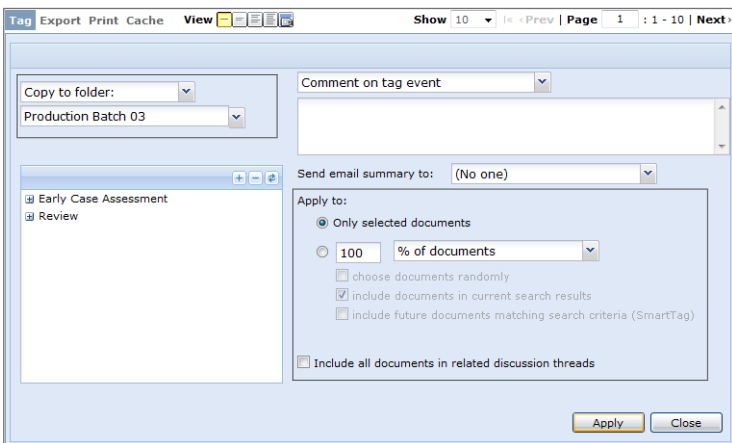
1. CREATE A PRODUCTION FOLDER

1. From the Case menu, click **Folders**.
2. From the Folders page, highlight the **Productions** folder.
3. Click **New**.
4. Select **As Sub-folder of Selected Folder**.
5. From the Production Folder dialog box, name the production folder.
6. Set the production options.
7. Click **OK**.



2. COPY DOCUMENTS TO THE PRODUCTION FOLDER

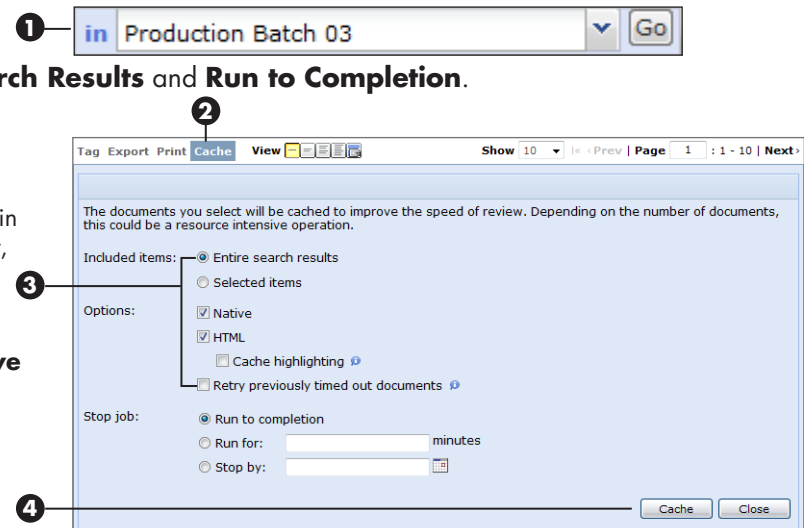
Using the Tag menu, copy the documents you want to produce to the production folder created in Step 1.



3. CACHE THE PRODUCTION FOLDER

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

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



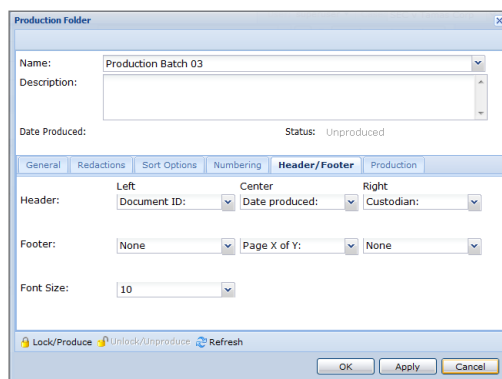
Production Tasks

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4. VERIFY PRODUCTION OPTIONS

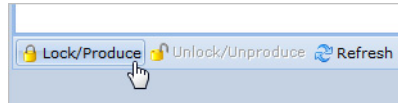
1. From the Folders menu, select **Manage Folders**.
2. Select the populated, cached production folder.
3. From the Production folder window, verify that the production options are set correctly.

Review the options under each tab to verify they are set accurately.



5. LOCK AND PRODUCE

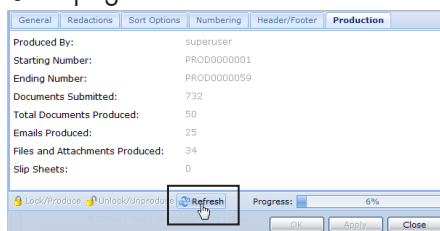
After you've verified the production options, lock and produce the folder.



6. MONITOR PROGRESS

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

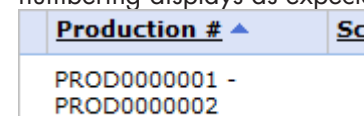
You can also track the production job progress in the pickup window or the Jobs page.



7. REVIEW THE PRODUCTION

1. View the Production Slipsheet Report. To generate a report, click **Home > Support Features** from the **Case Management** tab.
2. Use the Advanced Search to find production issues.
3. Review documents in the production folder. From the folder menu, select the production folder and click **Go**.

- In List view, verify the Production numbering displays as expected.



- From Review Mode, verify everything displays correctly. Check headers, footers, and redactions.
 - A. From the View menu, click **Production**.
 - B. Select the name of the production folder.
 - C. Documents display in the same format in which they are exported.

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

The most common errors found during production involve:

- Timeouts
- Content retrieval errors
- Native file rendering issues

Clearwell provides the ability to preview potential problem documents selected for export, estimate export time, and flag items which are likely to cause problems.

9. EXPORT

1. Select the production folder from the Folder menu and click **Go**.
2. Click **Export**.
3. Select Type: **Production**.
4. Select the production folder.
5. Set the remaining production options as desired.

Note: For any documents that may have failed during export, check the Export Errors filter for the production to view and identify the cause; repeat steps 8 and 9 as necessary.

