

## Producing and Exporting

### *Summation Express/Pro*

- About Production Sets
  1. Users need Create Production Set permissions to create production sets.
  2. When creating a production set, all evidence included will have an applied label.
  3. Once the production set is created, it is not possible to add documents to that set.
- Creating Production Sets
  1. Apply least one label to evidence files which will be the filter for the export set.
  2. Open Case Review for the case.
  3. In Case Explorer choose Explore tab, right click Production Sets folder, and select Create Production Set.
  4. Fill out options in General Options screen.
  5. Select options for Files to Include.
  6. Choose fields in Columns to Include.
  7. Select options in Volume Document Options.
  8. Select Options in Image Branding Options.
  9. Review options in Summary.
  10. Created production set will appear in Export tab of the Home page and under Production Sets folder in the Case Explorer of the Case Review.
- Exporting a Production Set
  1. On Home Page select case and click Export tab.
  2. Click Export on desired production set.
  3. Enter Export Path Location.
  4. Enter Load File Name.
  5. Select export format (Summation EDII, Case Vantage, Concordance, Edrm, Generic, IConnect, Instrospect, Relativity, RingTail)
  6. Select Load File Encoding (ANSI, UTF-16, UTF8)
  7. Select Field Mapping character, Text Identifier, and Newline if format requires.
  8. Some load file applications require certain fields. In Selected Mapping use Custom to add these fields if not already listed in Available Fields.

### *Summation iBlaze*

- Create Production Sets
- Create Production Briefcase
- Exporting Production through Create DII from Briefcase script, Export Summaries and Export OCR Control List.
- Create Browser Briefcase.
- Create DII and OCR Control List with ParseBBC script does everything in one step.