# Everlaw

Productions Deep Dive

Introduction

With Everlaw's productions feature, hit your important production deadlines. Create protocols and productions—of any size or scope—directly within the platform, on demand and without the need for intermediaries.

Thanks to the tight integration with the rest of the review platform, easily perform real-time quality assurance on completed productions directly within Everlaw, ensuring everything is in order before sending them out the door.

Having an automated, user-facing production tool at your fingertips will help expedite a pre-production review. Run productions on your schedule, day or night.
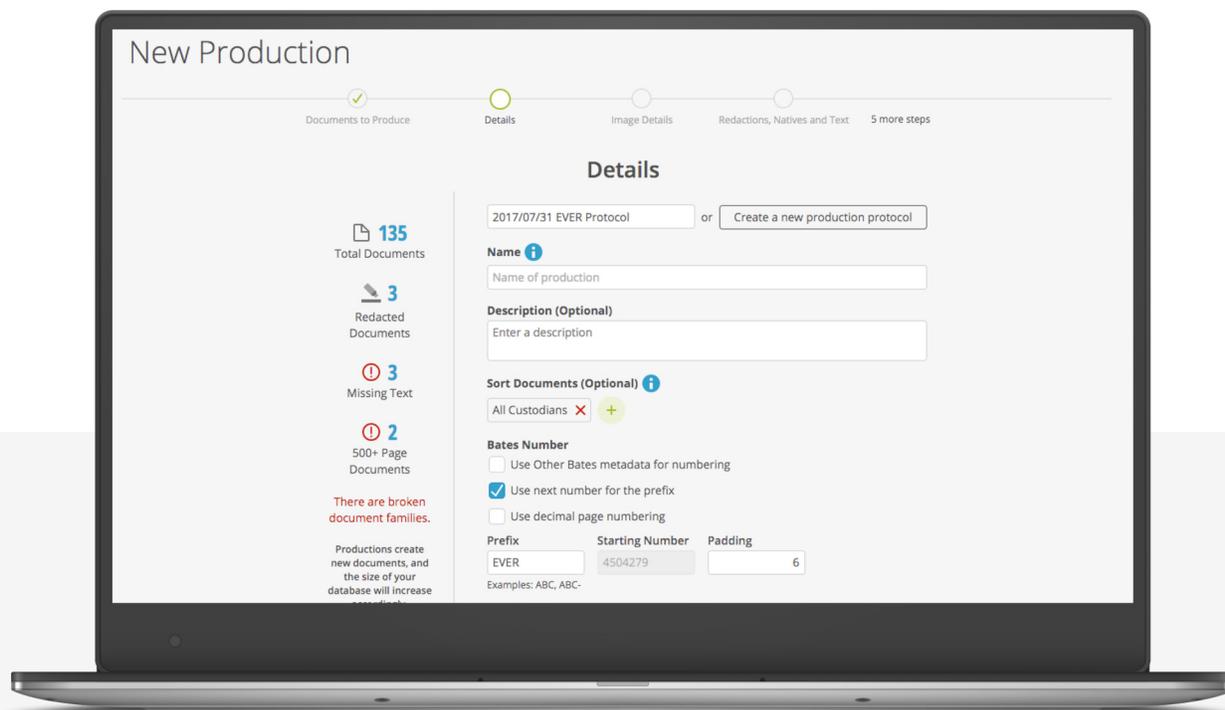
Customizable Protocols

Protocols are often negotiated with opposing counsel early in a case and specify the form that productions must take. Once a protocol is negotiated, the requirements must be translated into rules that a system can use to produce documents according to specification.

Depending on how many parties are involved in a matter, you may need to produce documents under a number of different protocols. In Everlaw, you can create and save an unlimited number of production protocols in your case, and specify which protocol to use for a particular production.
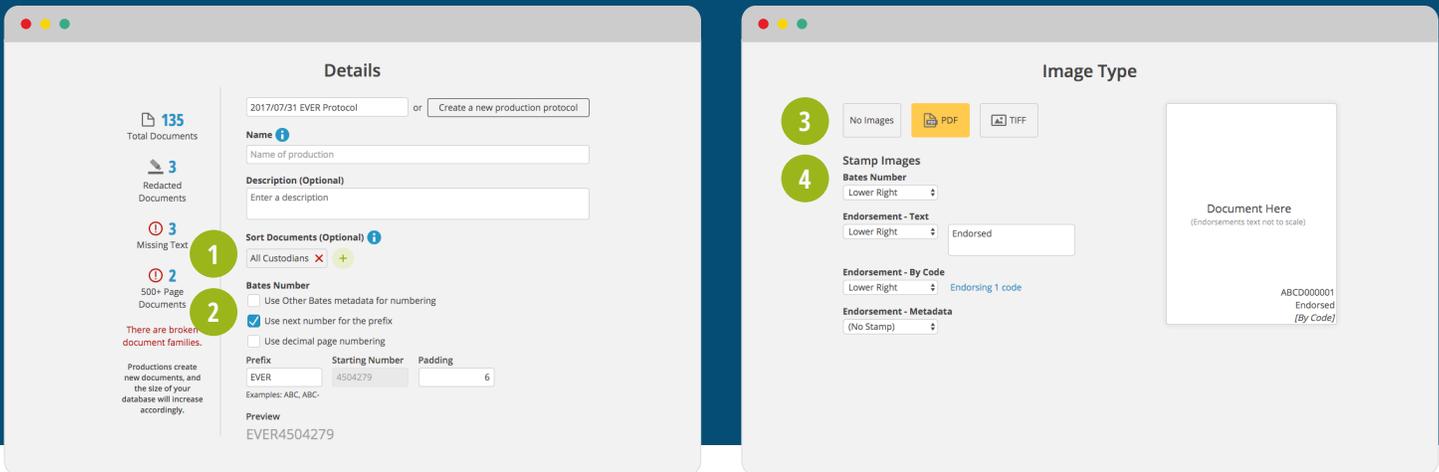
Let's walk through the available protocol options:

1 SORT
Documents can be sorted for production by multiple metadata fields. Otherwise, your documents will be sorted by file path, keeping family members together.
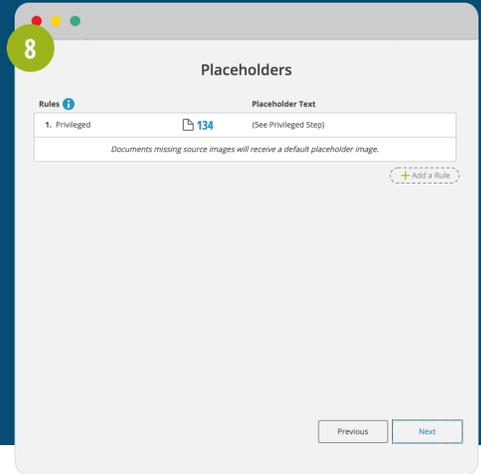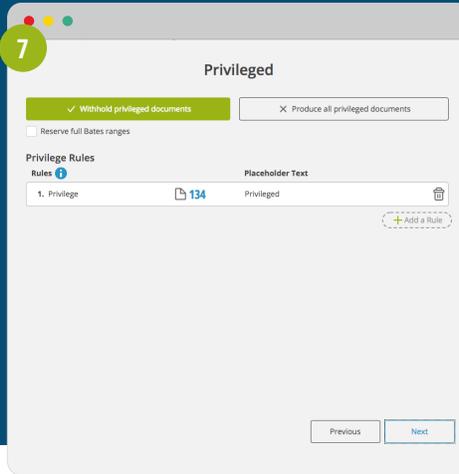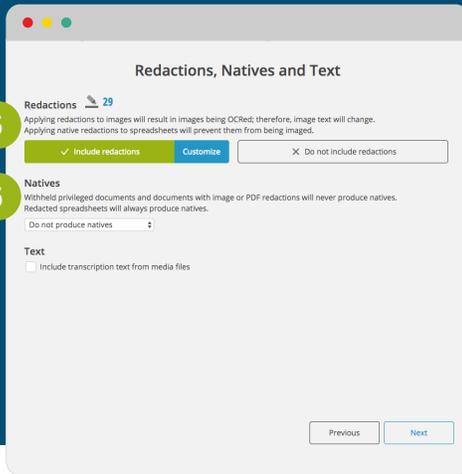
2 BATES
The Bates number is the unique identifier for documents in a production. There are two primary settings that can be modified within Bates numbers.

The Bates Prefix: You can create a new prefix or select from the automatically stored list of previously used prefixes.

The Starting Bates Number: The starting Bates number is the number that will be applied to the first document in a given production. This will affect the numbering of subsequent documents/document pages in a production. Everlaw will remember the numbering that has already been applied for a given prefix, and will automatically select the next appropriate starting Bates number if a prefix is reused. You can override this default behavior and choose the starting number, if desired. You can also choose to Bates stamp all your documents in a production set using decimal numbers.

3 IMAGE FORMAT
Generally, productions include images of the documents. Images are essentially digital snapshots equivalent to what the documents would look like if they were printed out. With Everlaw, you can choose to (i) produce no images, (ii) produce images as PDFs, or (iii) produce images as TIFFs with optional color JPGs. Document images can be modified during production in certain ways. For example, some documents might need additional text stamping to convey important information, and other documents might need redactions.

4 TEXT AND ENDORSEMENT STAMPING
Along with Bates numbers, images can also be stamped with endorsements of any text you'd like to add. For both Bates and text stamping, you can choose which corner of the image you would like the stamping to appear in. You can also associate text stamping with particular review codes. For example, you might want documents that were coded "Confidential - Work Product" during review to be stamped with the text "Redacted for Confidentiality - Work Product". This can help your opposing counsel understand why a document has redactions. The ability to tie text stamping to review codes provides a flexible system that allows you to stamp documents in the same production with different endorsement text.

5

Redactions, Natives and Text

Redactions ✏ 29
Applying redactions to images will result in images being OCRed; therefore, image text will change.
Applying native redactions to spreadsheets will prevent them from being imaged.

✓ Include redactions | Customize | ✗ Do not include redactions

Natives
Withheld privileged documents and documents with image or PDF redactions will never produce natives.
Redacted spreadsheets will always produce natives.

Do not produce natives

Text
☐ Include transcription text from media files

Previous | Next

7

Privileged

✓ Withhold privileged documents | ✗ Produce all privileged documents
☐ Reserve full Bates ranges

Privilege Rules

Rules ⓘ		Placeholder Text	
1. Privilege	📄 134	Privileged	🗑

+ Add a Rule

Previous | Next

8

Placeholders

Rules ⓘ		Placeholder Text
1. Privileged	📄 134	(See Privileged Step)

Documents missing source images will receive a default placeholder image.

+ Add a Rule

Previous | Next

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5 REDACTIONS

By default, Everlaw will "burn in" redactions during production. During pre-production review, any applied redactions will be transparent so that you can see the content you are redacting. Redactions on produced documents will have solid black or white boxes. In addition, the text of the documents will be re-OCRed such that the redacted text will not appear the document's associated text file. Everlaw gives you the further option to add text stamping on top of redaction boxes.

6 NATIVE DOCUMENTS

Besides the image view of documents, some protocols will require you to also produce the native copies. Native documents are those in the format of their originating application (ex. .docx, .xlsx). Everlaw gives you the option to produce (i) no natives, (ii) natives for all documents in a production, or (iii) natives for a subset of documents. The system is also smart enough to always exclude natives for redacted and privileged documents —excluding spreadsheets, which can be redacted natively and so will always be produced as natives.

7 PRIVILEGED DOCUMENTS

Privileged documents, such as those protected by attorney-client privilege, are not turned over in a production. Instead, a placeholder document will be added to the production in place of the actual document. In Everlaw, you can customize the criteria by which privileged documents are identified, as well as the text that is stamped on the placeholder.

8 IMAGE PLACEHOLDERS

Certain file types, such as spreadsheets, videos, and audio files, either are impossible to image or do not image well. As a result, these files are often only produced natively. In this case, you can request that specific placeholder images are produced in place of the actual file images. For example, in Everlaw, you can create a rule requiring that images for produced multimedia files should be a PDF that says "File produced natively."
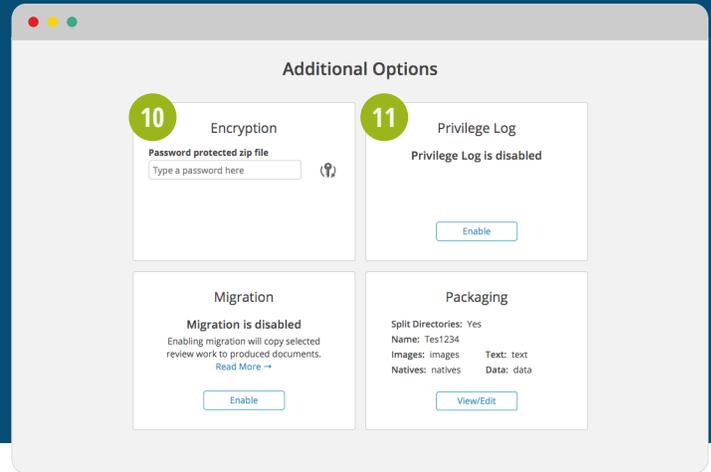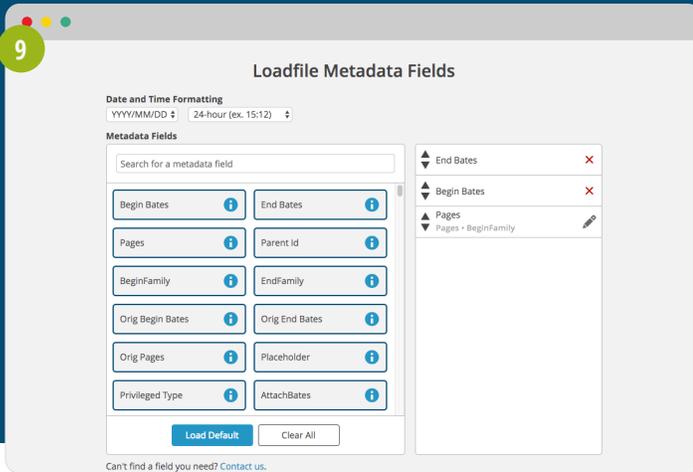
9 METADATA

Everlaw allows you to choose which metadata fields you want to produce. You can combine and rename files, or even use special custom fields, in order to conform to a protocol. You can also format the date metadata field for your produced documents to adhere to regional or other specifications.

10 PASSWORD PROTECTION

In order to ensure that only the appropriate parties can access a document production, you can password protect productions. Password-protected productions are also encrypted using either the AES-256 or ZipCrypto standard.

11 PRIVILEGE LOG

With Everlaw, create privilege logs automatically within the production wizard. If you've created any privilege placeholders within your production, you will see an option to create a privilege log.

Generating Productions

Generating productions is as easy as identifying the set of documents you want to produce and indicating which protocol you would to produce the documents under. Once a production is initiated, you can see a progress bar which can help you gauge when a production will finish. Completed production status cards will provide quick links to access the produced documents by particular criteria (endorsed, redacted, privileged, withheld, placeholders), allowing you to quickly perform and verify produced documents before sending them out the door.

In the event you do inadvertently produce privileged documents, with Everlaw's production modification tools, you can re-run a production from the production card if changes have been made to the documents (such as changing a document's privilege status) or the configuration. You can even claw back documents that were initially produced but need to be removed from the production due to their privilege status.

Productions will be packaged as a zip file that can be shared with opposing counsel directly, or via a provided link. We automatically generate load files in the following three formats for each production: .DAT, .OPT, and .LPT. This ensures compatibility with whatever ediscovery platform your opposing counsel might be using.