



## Do It Yourself Archive

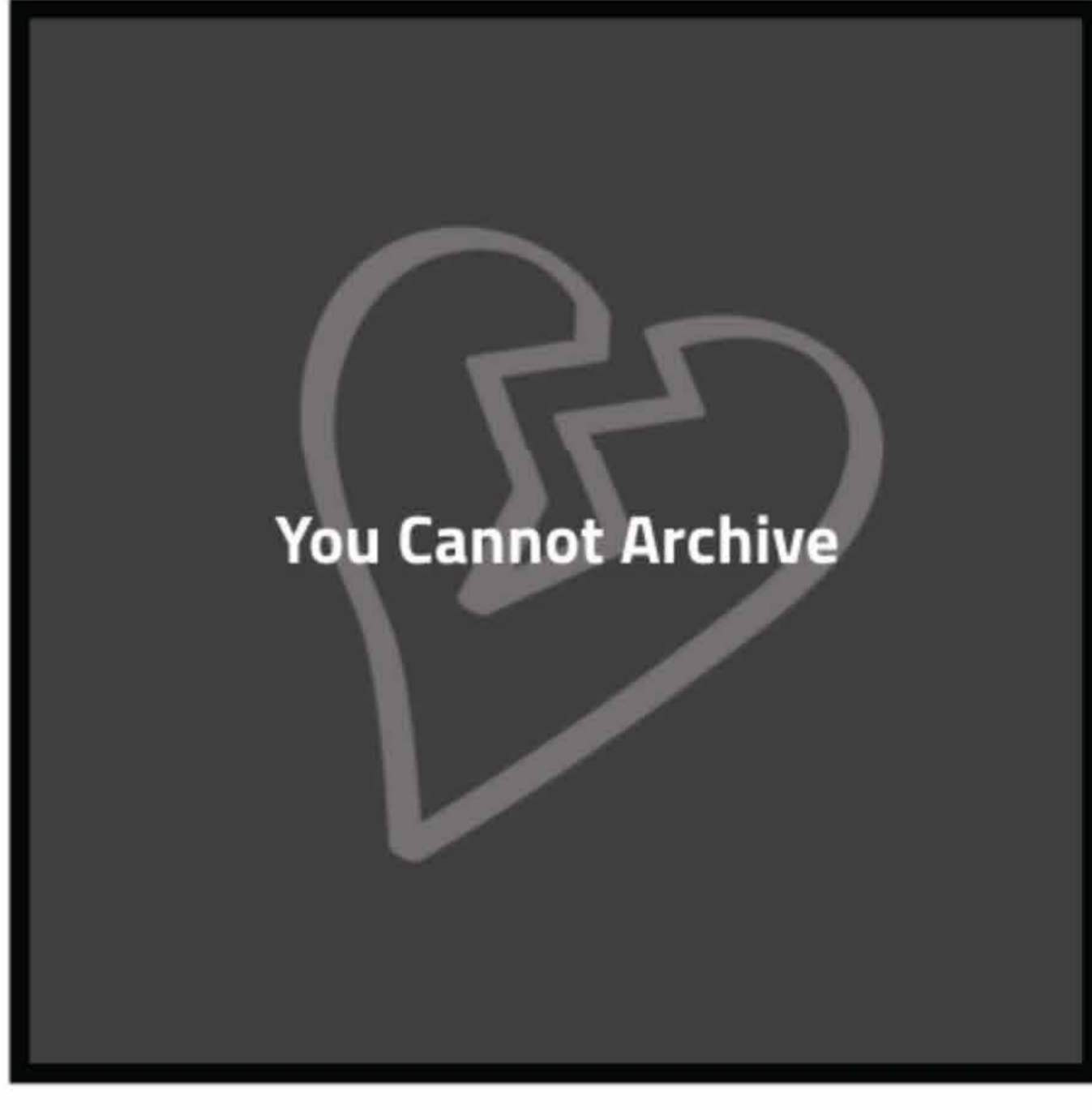
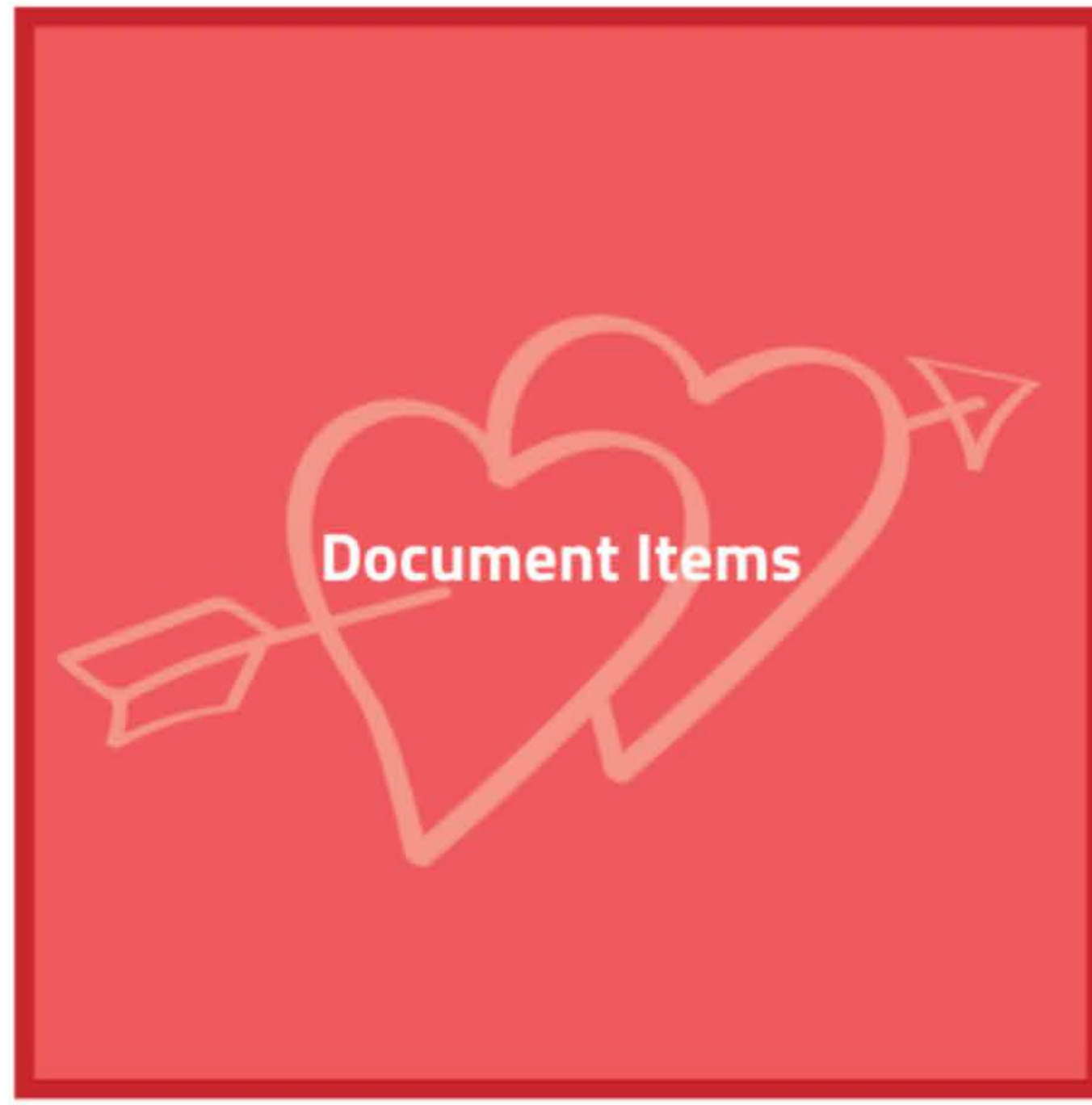
If you're contemplating doing your own archive. We recommend walking through these four threats...er, I mean 'steps'.

- #1. It's not too late, **think of vaulting**. There's no way to preserve every last inch of your documents, metadata, work product, & audit history without vaulting.
- #2. Clicking delete without downloading a **complete archive** will make you want to repeatedly hit yourself in the face with a frying pan.
- #3. **Archiving can be a bit tricky**, so we recommend making a U turn, picking up the phone, and contacting DISCO Professional Services, so they can help you with the process.
- #4. We'll, if you've gotten all the way here to #4 and haven't been scared off yet, that means you've decided to cowgirl up and do it your own self. So, let's dive in and see how it's done.



## Can You Archive It?

Flip the cards to see what you can and can't archive.



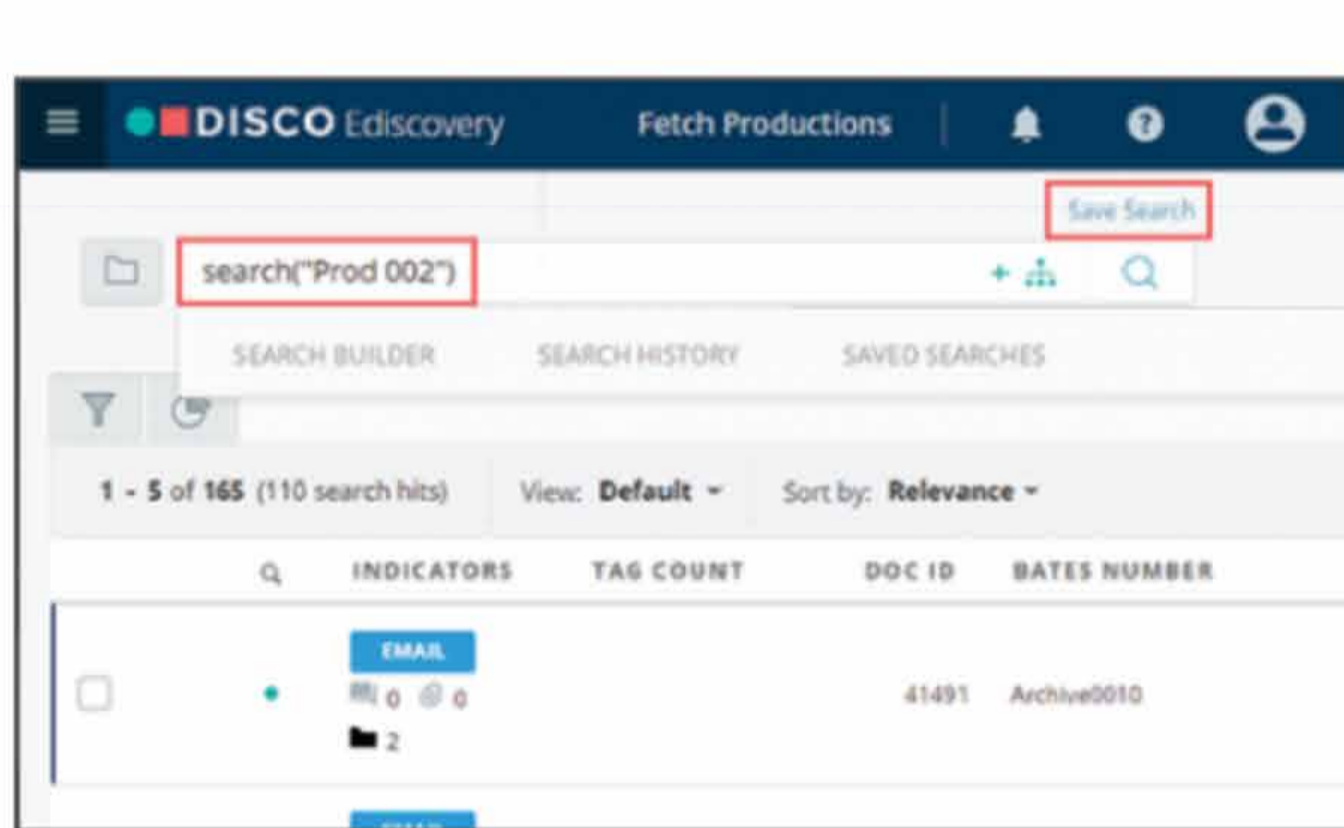
On this page, we're going to give you a basic outline of what archiving entails.

For the full list of detailed instructions, see [Step-by-step - DIY Archiving](#) on the next page.

## 1. Create a Saved Search

First, run a search for the docs you want to archive (*make sure you turn on family inclusion*). Save that search. We'll use it a number of times during the process.

(And, don't worry. You get super detailed instructions, in the Step-by-step, on the next page.)



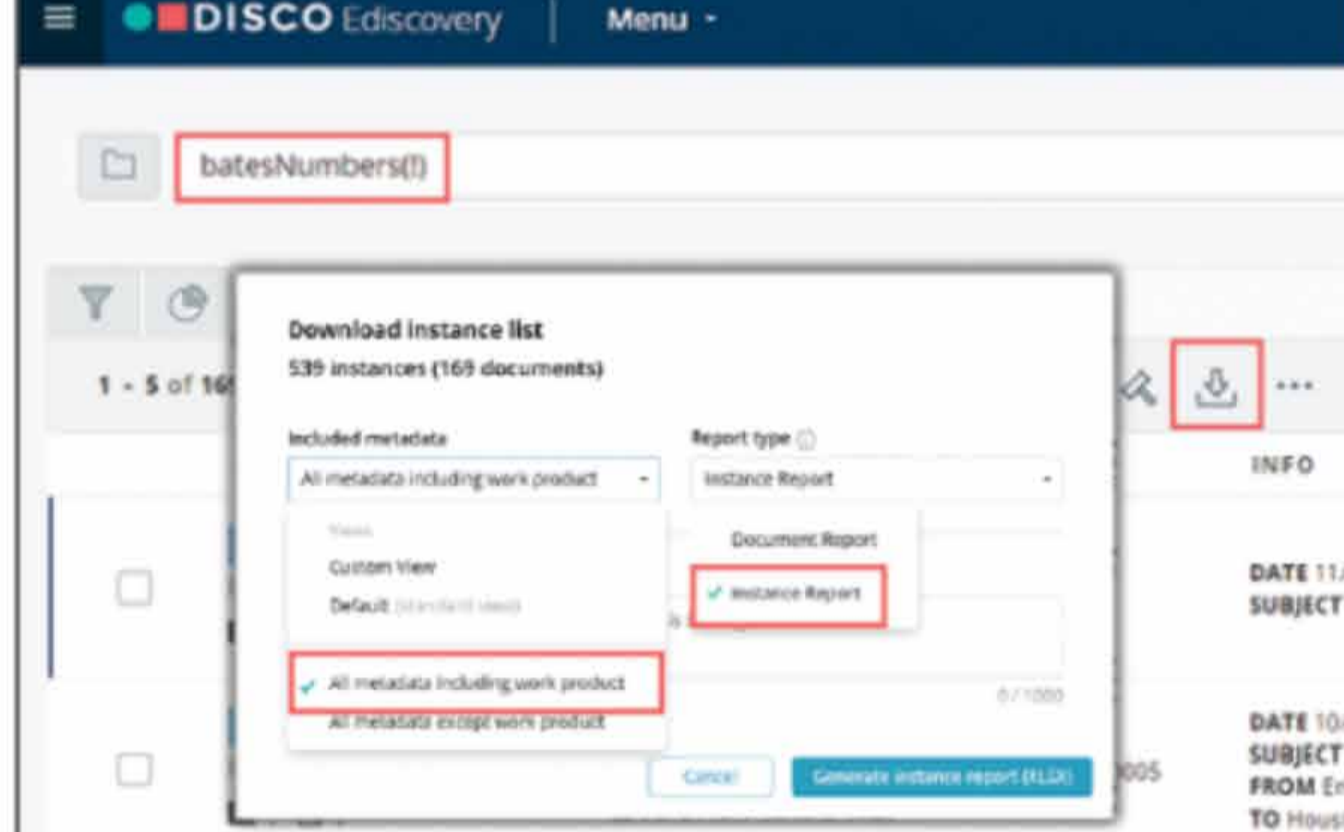
## 2. Move Bates Numbers

*Optional*

But, before you create this production, you might want to move your Bates numbers. Bates numbers are not included in an archive by default. You'll need to move them into a custom field if you want to retain them.

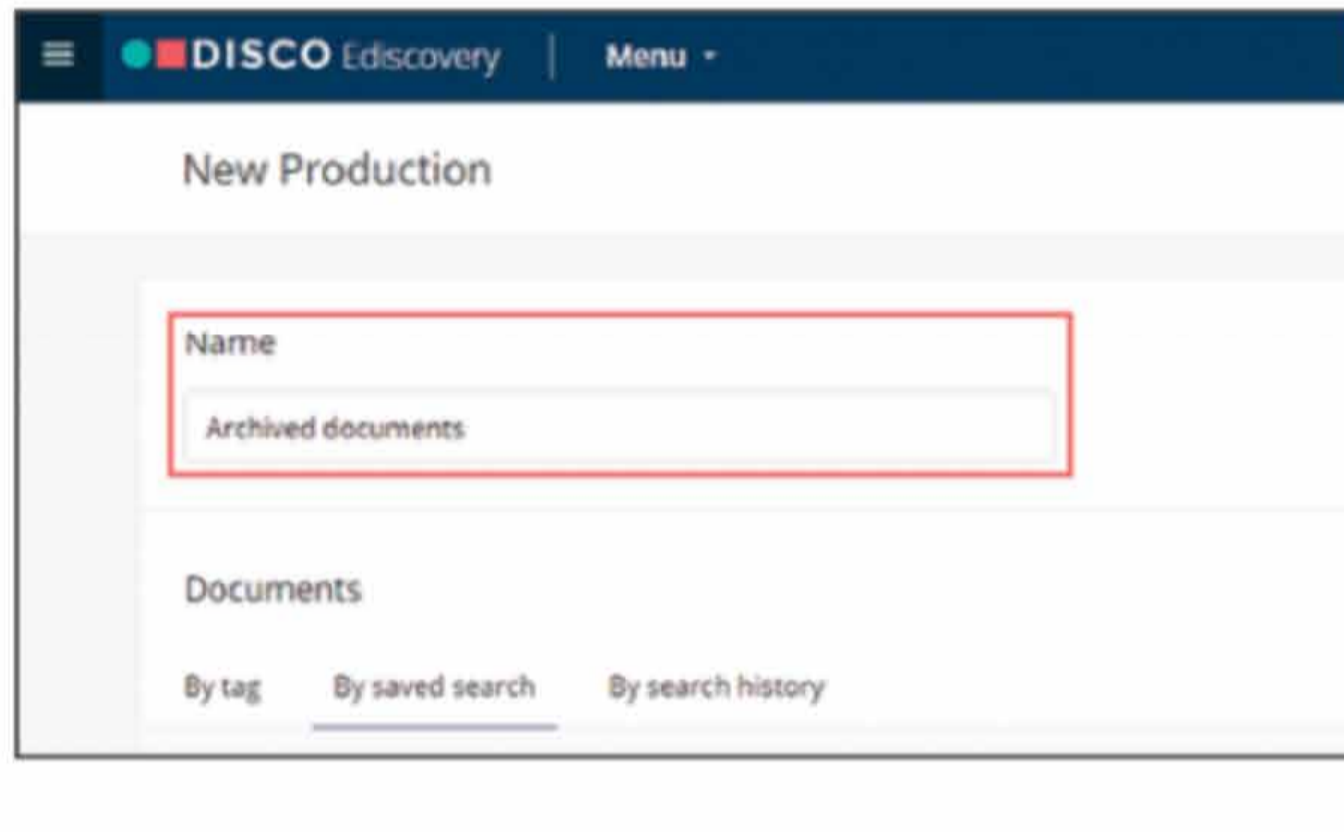
This basically involves running a Doc List Report to get all your Bates numbers, then using an Overlay to add them to custom fields in the appropriate documents.

This is an optional but highly recommended step.



## 3. Create A Production

Now before you take all of your matter's clothes and dump them on the front lawn, use that search you saved in step #1 and run a production. An archive is essentially just a production exported as a load file. So, if you're familiar with that process this step should be easy.

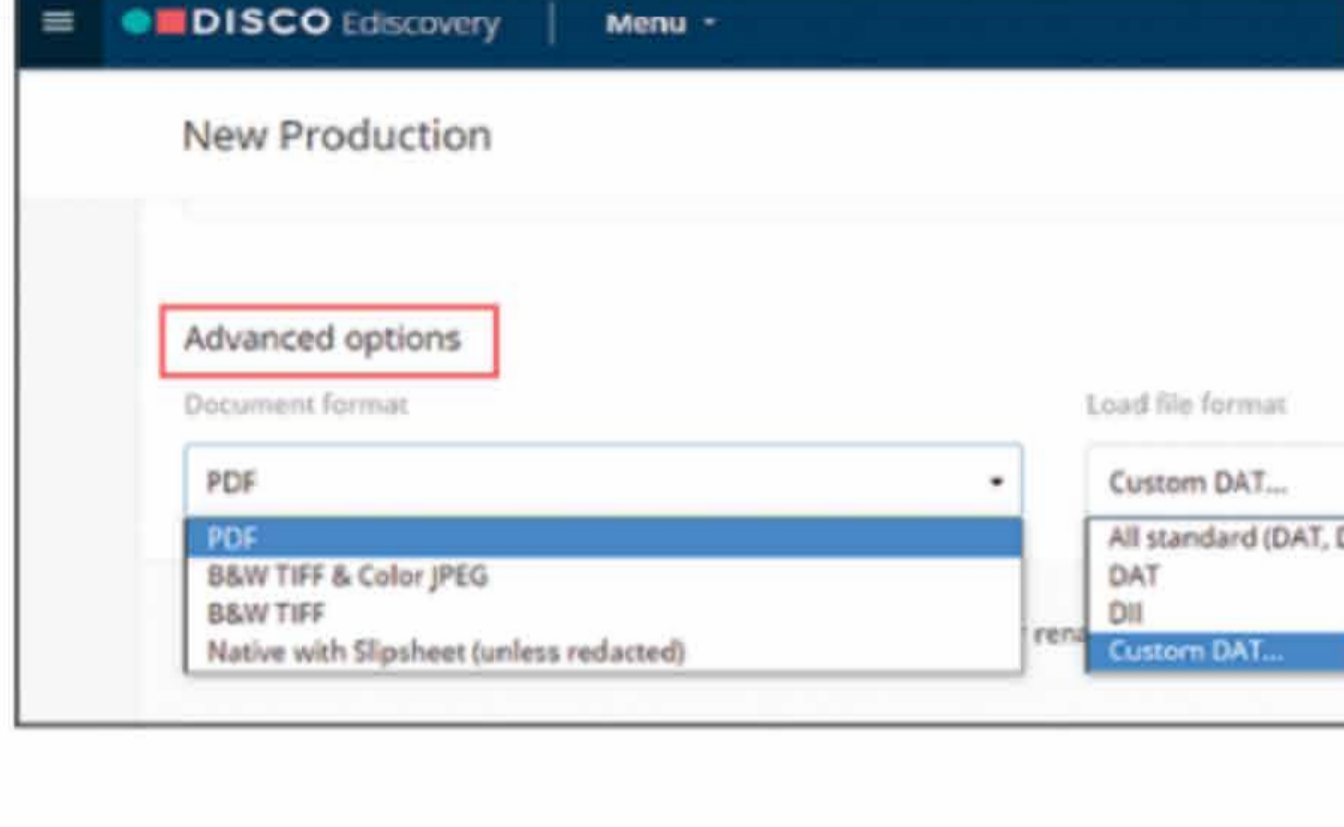


## 4. Select Advanced Options

There are a few important differences about this production. There are a few things you'll want to select in the Advanced Options section.

1. Metadata: Do yourself a favor, just click "Select all fields"
2. Redactions: You probably don't want those (yet!). Select Omit document and metadata redactions
3. Natives: Click 'Yes' and make sure you get your natives into that production

Now, you can run your archive and download it. That is unless it's over 100GB.



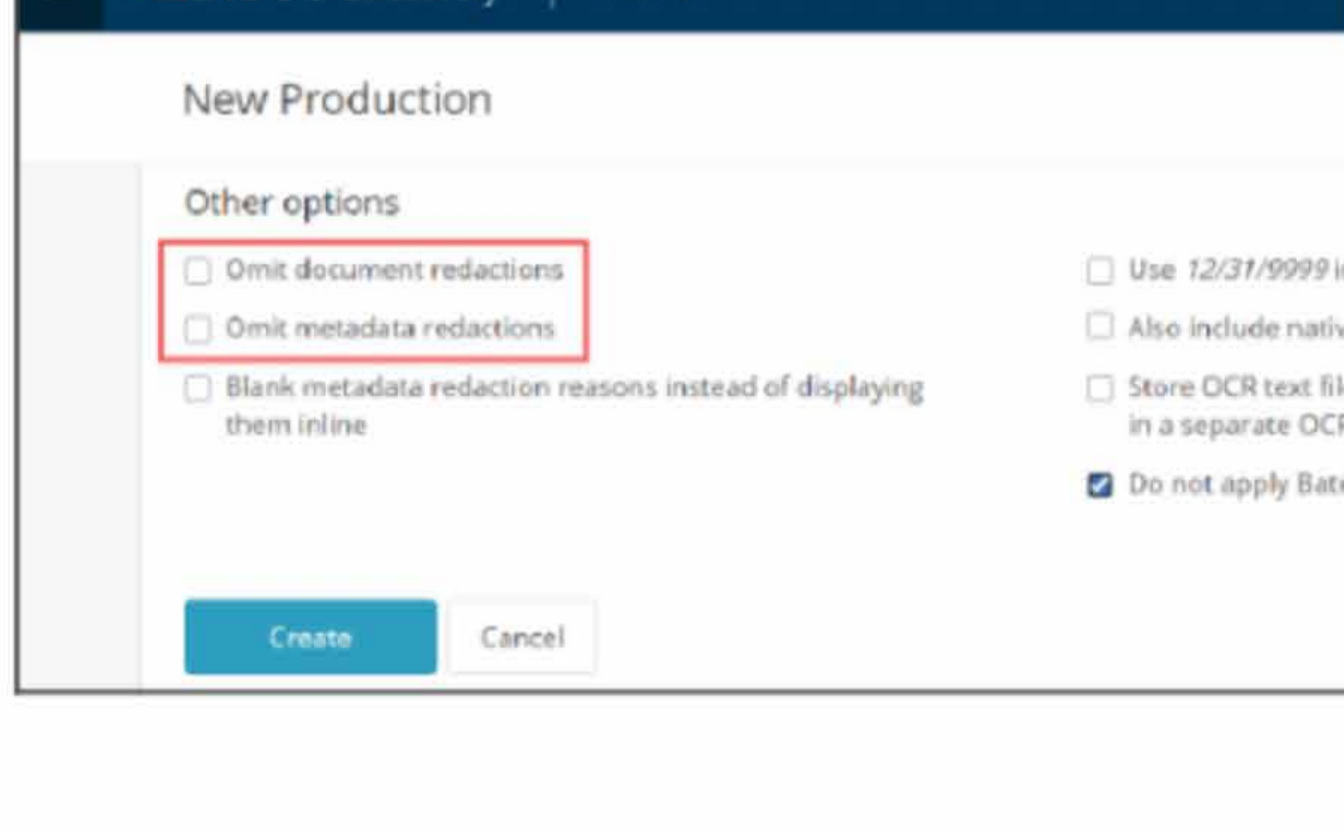
## 5. Redacted Docs

Now, since you've removed all your redactions in that first production, you'll probably want to run another one. This time so you can have a copy of your redacted docs with redactions intact.

For this production narrow your saved search to just docs with redactions.

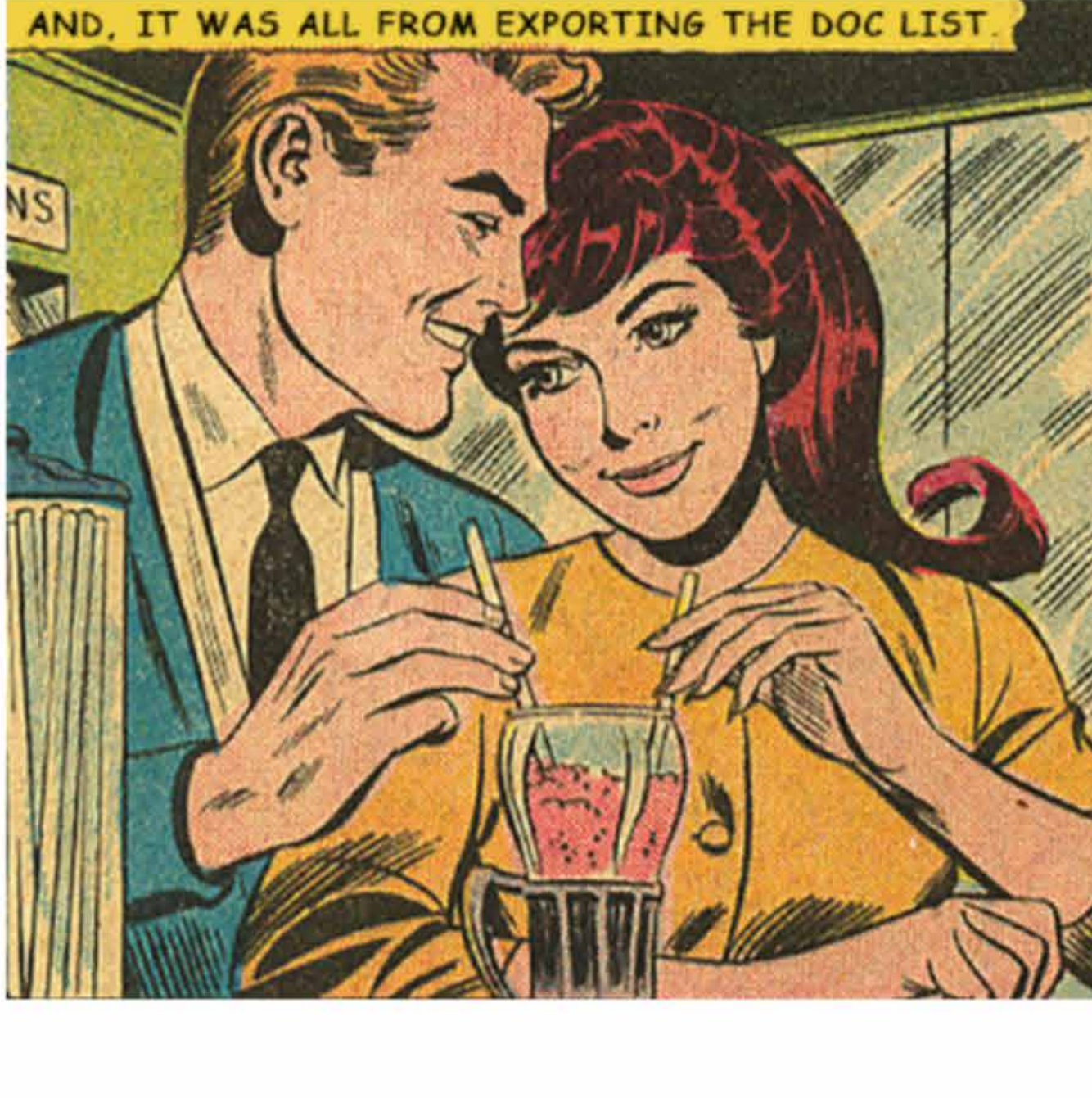
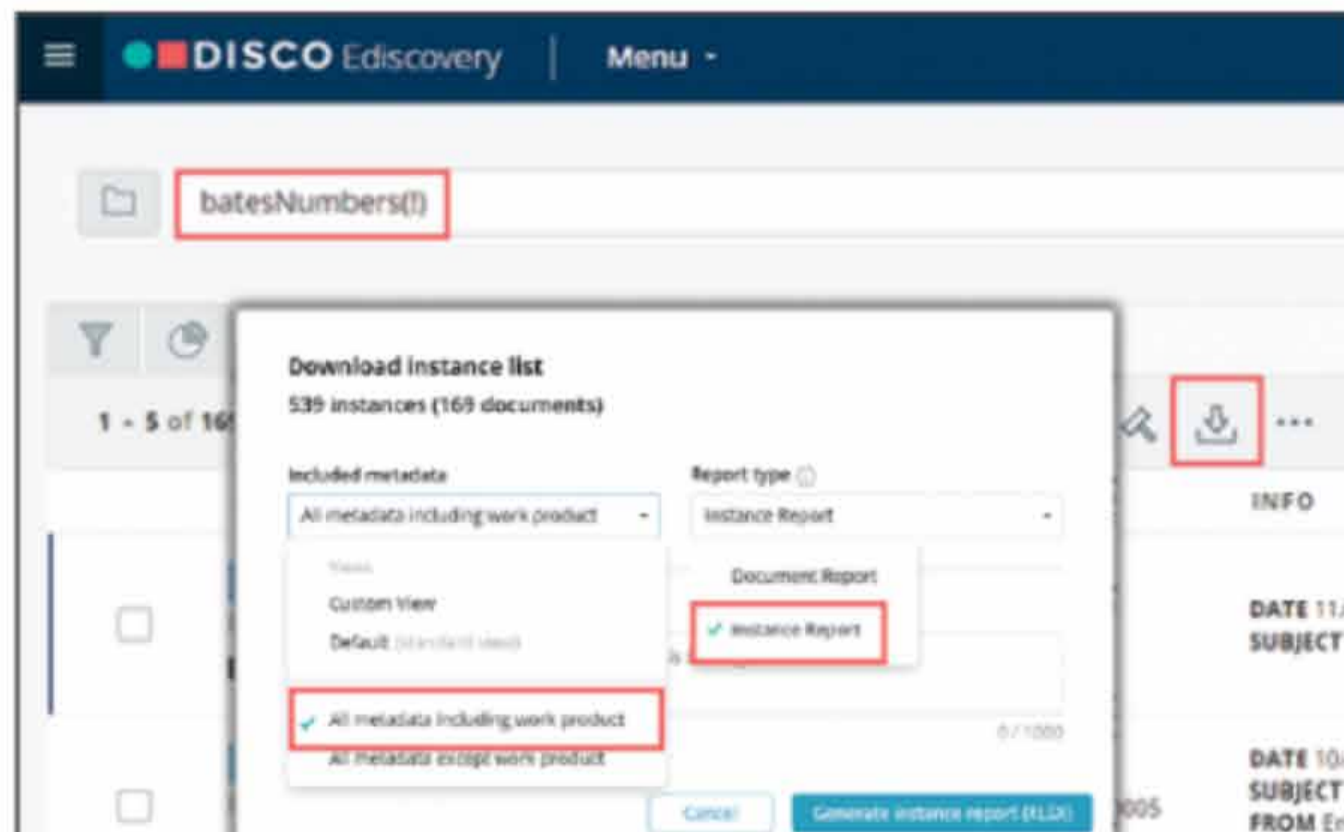
**hasRedaction(yes)**

Then run it, but this time make sure you **don't** select Omit document and metadata redactions.



## 6. Generate a Doc List Report

The Doc List Report can give you much more metadata than a production can (things like billing size, image size, processing status, processing details, & ingest type). Again use your saved search to run the report, and make sure you select "Include all metadata including work product". See the next page for detailed instructions.



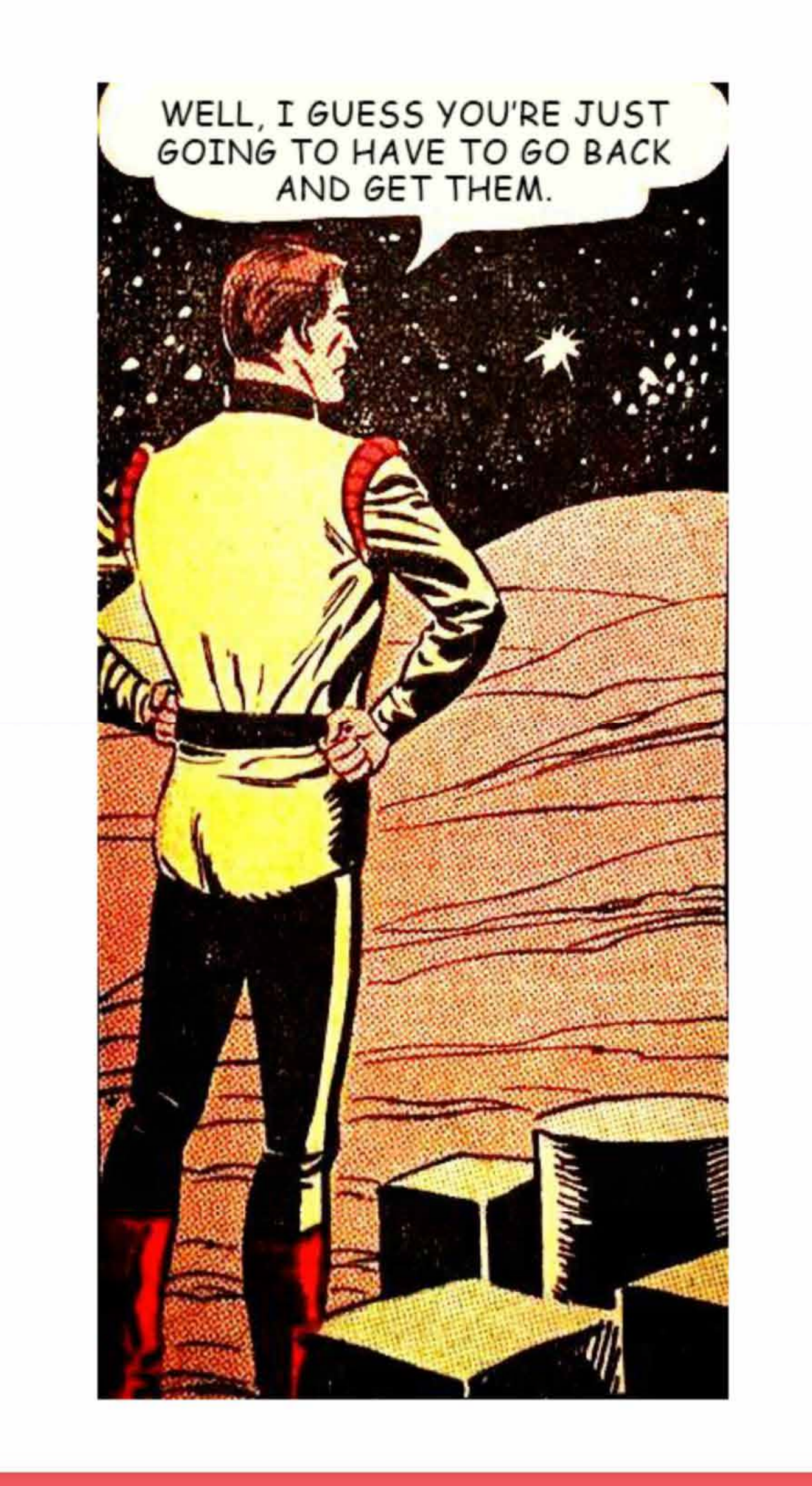
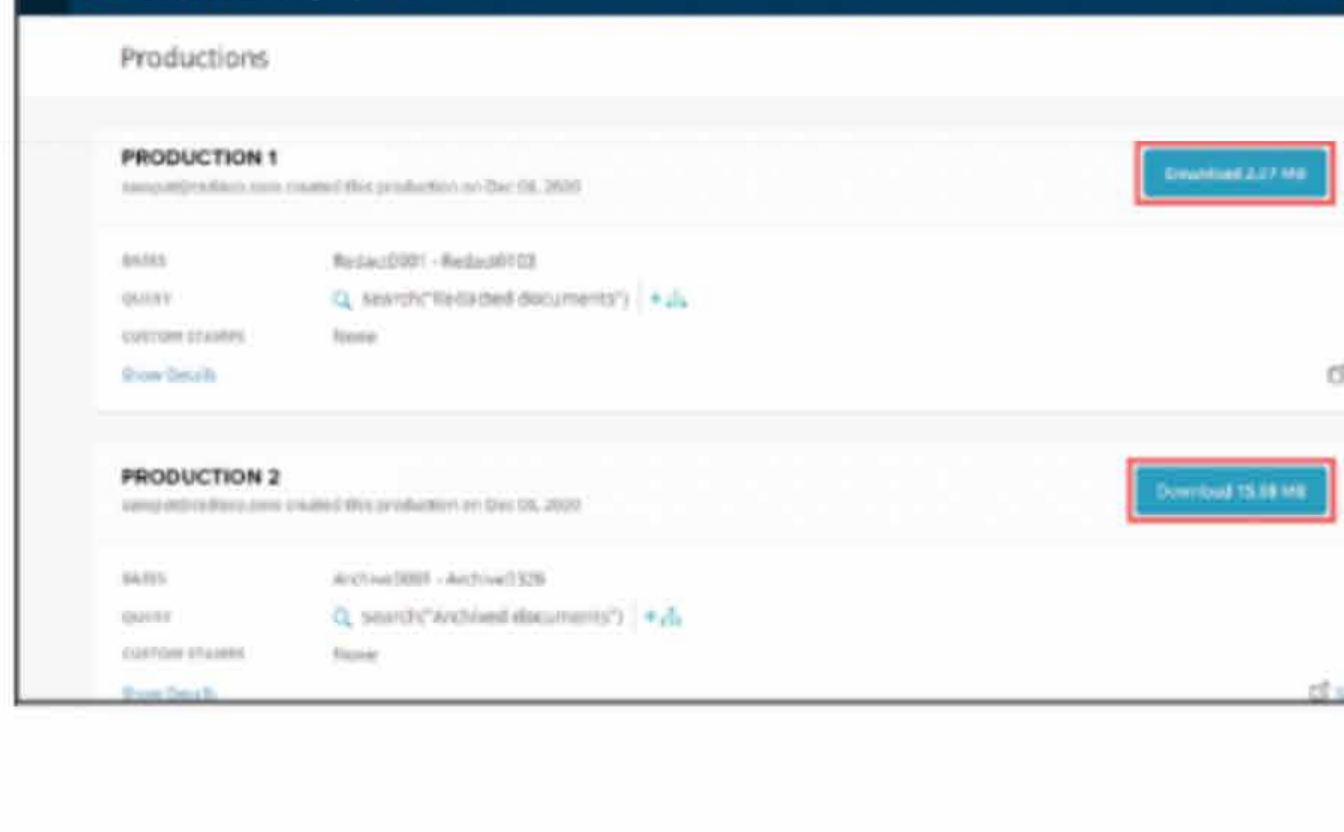
## 7. Download All Other Productions

*Optional*

Before you give those keys back, don't forget to take your productions with you. Even though you've already archived every possible doc with every possible bit of metadata, you'll probably want your productions with their beautifully formatted Bates numbers intact.

Just take a stroll back to Productions, and download a copy of each of them.

When, and that is it. Now, you have your archive. And, whenever when you're ready, we'll be here for you.



## Step To It!

Put these archiving steps in order. Click on an item, then select which place it goes in.

- 1 Select Advanced Options
- 2 Run a Redacted Documents Production
- 3 Generate a Doc List Report
- 4 Move Bates numbers
- 5 Create a Production
- 6 Create a Saved Search
- 7 Download All Other Productions

10 attempts remaining

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