



The Four Keys to Generating a Successful Load File Export

Load file exports are by far the most complex export format to configure and require intense quality checks. When you add in placeholders, redactions, and custom branding to an export, this further complicates matters. Beyond the items which will be included in the export, there are four key factors that will path the way to successfully generate a load file export.

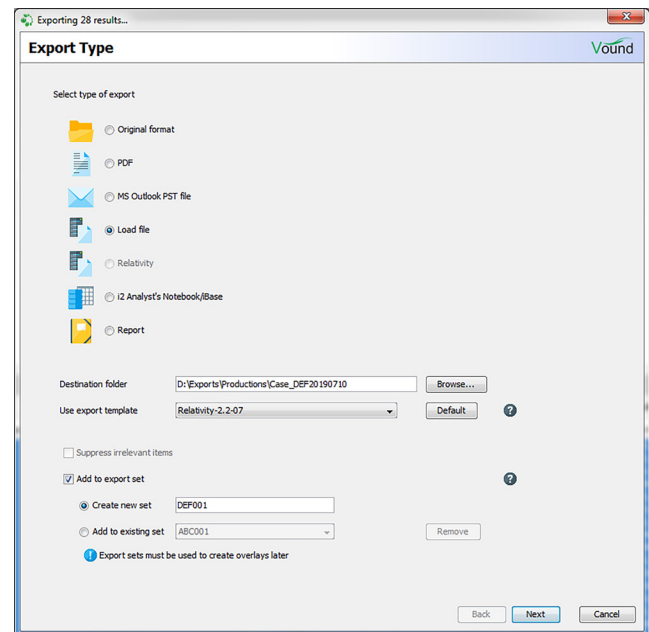
Key #1: Understanding the ESI Protocol

The first key to successfully generating a load file export is understanding the ESI protocols. Each matter may have different specifications, and it is important to understand these requirements and output ESI in the correct format.

For larger exports, it is recommended to perform a dry run on a sample dataset to test and configure output options. Once the export settings have been configured successfully, they can be added to an export template in Intella® and used when it is time to do the main production(s). Testing and configuring the export settings ahead of time can save the time and cost of having to regenerate an entire export due to an incorrect configuration.

Key #2: Knowledge of Intella®'s Export Process

As with any software application, a user must have sufficient knowledge of how to use the tool in order to successfully complete a task; Intella® products are no different. For a user to successfully generate a load file export, they must first have the skills necessary to get to the export stage in the case life cycle. Data needs to be collected, indexed in Intella® and then a review process needs to take place. The review process can be as simple as a few keyword searches, or a full-fledged linear review within Intella® Connect; but the goal is always to get down



Export Type Window

to the most relevant items that will be included in an export.

Once items have been identified for production, a load file export can then be configured. A user must have a good understanding of the export options in Intella® to generate the export based on the ESI protocol. There are many resources available to learn the export options including Intella® training courses, the Knowledge Base website and the product user guides. It is recommended that users

take the information obtained from these resources and practice generating exports in a test case. This will give the user practical experience configuring the various export settings and make them more prepared when a real-world export needs to be generated.

Key #3: Thorough Quality Control Processes

The third key to success is having a thorough quality control process to ensure all items are exported correctly. This is especially important when redactions are included in the export.

Pre-export checks should be made to ensure only relevant items are tagged for export and that items with privilege material have been excluded. Furthermore, checks should be made to confirm that redactions have been successfully applied and covers all sensitive information.

After an export has been generated, quality control steps should be taken. Users should confirm that the export matches the requirements stated in the ESI protocol and that all items have been exported in the correct format. For example, if requirements state spreadsheets and PowerPoint presentations should be exported in native format then checks should be made to ensure these filetypes were exported as natives and have corresponding image placeholders.

Another highly important post-export quality control step is to check the redacted items. When redactions are included, extra steps need to be made to verify that redactions were applied to the images and to ensure natives and text were suppressed. Suppression of text is often overlooked, which can lead to accidental disclosure of sensitive material. Without text suppression, the text under the redaction will be available to the receiving party.

It is recommended that organizations create an export quality control checklist that users can go through to verify that a load file export has completed successfully. This checklist should contain a list of questions that must be answered correctly

before the export is sent to the receiving party. These questions should be generic so they can be applied to all exports regardless of ESI protocol but detailed enough to cover all bases. The questions should come in pairs, where the first question would be answered from the ESI protocol or information from Intella®, and the second would be answered using the export.

For example:

1. What Export format is listed in the ESI Protocol?
 - Native
 - PDF
 - Load file
2. What Export format was generated?
3. How many items were tagged for export?
4. How many items were included in the export?

This quality control checklist will enable users to identify any issues or errors prior to sending the load file export to the receiving party.

Key #4: Time

The final key to success is time. Load file exports, due to their multiple components (Images, natives, text, load file) and their complex nature, can take time to generate. If images are required for the export, Intella® must convert all items to an image format and can take hours or even days depending on how many items are included. Managing the time expectation to generate this export format is key. If the export deadline is Friday at 4pm and there are 5000 items to export, then the export process should be executed on Wednesday afternoon. This will give Intella® time to generate the export, time for a user to perform a thorough quality control, and enough time to re-export/ correct any issues that were identified during the quality control process.

There are many factors that affect the time it takes to complete the full export process including the hardware Intella® is utilizing, the number of items in



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the export, export settings, quality control process, etc... A common mistake is waiting until the last minute to submit the export, which is a problem when it either does not complete in time or it has issues that cannot be addressed before the deadline. When a deadline is looming, export settings can be overlooked, and mistakes are frequently made. Allowing for extra time will make the whole process more successful and less stressful on the user.

With so many time factors, there is no magic number that could suit every organization; however, as you start to generate load file exports frequently, you can get a sense of how long it will take Intella® to generate this export format and how long the quality control process will take. As a rule of thumb, the export process should be executed at least two days before the deadline.

Conclusion

Load file exports can be very daunting for those users who have limited experience with this type of export format; however, if you follow the four keys mentioned in this article, you can be more successful. A good understanding of the export requirements specified in the ESI protocol and the skills learned from the available educational resources will enable you to configure and test the export settings. Once the load file export has completed, having a good quality control process including a checklist will help identify any errors before sending it out. Do not wait until the last minute to start the export process. Always allow ample time to complete the export in case issues are identified and time is needed to re-generate/correct the export before the deadline.

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