


# Important Migration Concepts

## Family Groupings

**Begin Family** and **Family** are special fields in Everlaw that, when populated, are used to group documents by families.

### ▼ Attachment grouping

Attachments 

✕ Begin Family

✕ Family

The **Begin Family** field is a Bates-type metadata field used to group documents by their families. All members of the family, including both parent and child documents, should be populated with the same Bates number, typically the parent document's Begin Bates number. If a field value does not qualify as a Bates type, but it is consistent across all family members, it can be mapped to the Family text-type field instead to group the documents together. Please ensure all documents in a family have the same value before mapping to one of these two special fields.

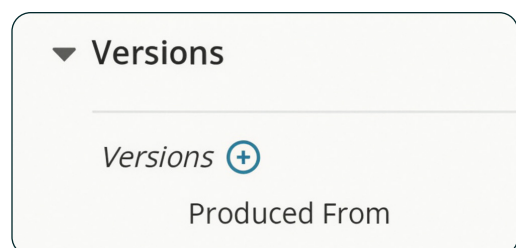
## Versioning

### What Is Versioning?

Versioning creates a relationship between a review document and its produced counterpart that allows them to be treated as related documents in Everlaw. This step is useful because, in Everlaw, review versions and produced versions are treated as separate, standalone documents. By versioning, reviewers can group these documents together in a results table, or toggle between versions to view content beneath potential redactions.

## Relevant Metadata Fields for Versioning

By default, **Produced From** is a special field in Everlaw used to establish version relationships. Additional metadata fields can be created and then added to the Versioning section of the Project Settings → Metadata page. Some examples of other metadata fields historically used to group by versions are **Redacted From** and **Translated From**.



In order to version documents, the intended metadata field (for example, **Produced From**) should be populated on the produced document.

## How Do I Format a Versioning Overlay?

/ Upload the primary document first.

The primary review documents must be uploaded before the secondary produced documents. This ensures that the documents will sort in the correct order when grouping a results table by versions.

*Note: If the primary document is ingested second, Everlaw will display the primary in the secondary position in the results table, and this sort order cannot be changed.*

/ Upload the secondary produced document, and add a **Produced From** field.

Once the primary review document has been ingested, you have two options for linking the secondary produced documents:

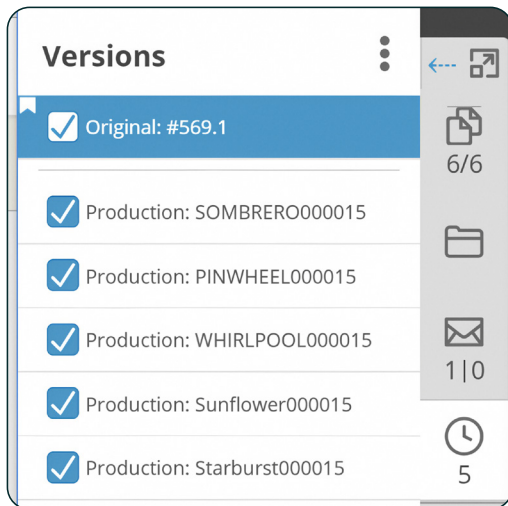
- Option 1. Add a **Produced From** field to the load file for the secondary documents during ingestion. The **Produced From** metadata will be included as the produced documents are created during ingestion.
- Option 2. Perform a metadata overlay of the **Produced From** field after ingesting the secondary produced documents. If you are using the overlay method, the overlay file must contain the following fields.
  - **Begin Bates** field:
    - This field must contain the Begin Bates numbers of the produced documents.
  - **Produced From** field:
    - This field must contain the Bates/Control #'s of the already-ingested primary review documents from which the secondary documents were produced.

- Ensure that the padding, case, spacing, suffixing, and special characters of the primary document’s Bates/Control # are replicated exactly. For example, “ABC00001” and “ABC0001” will not link, because the numbers do not match exactly.

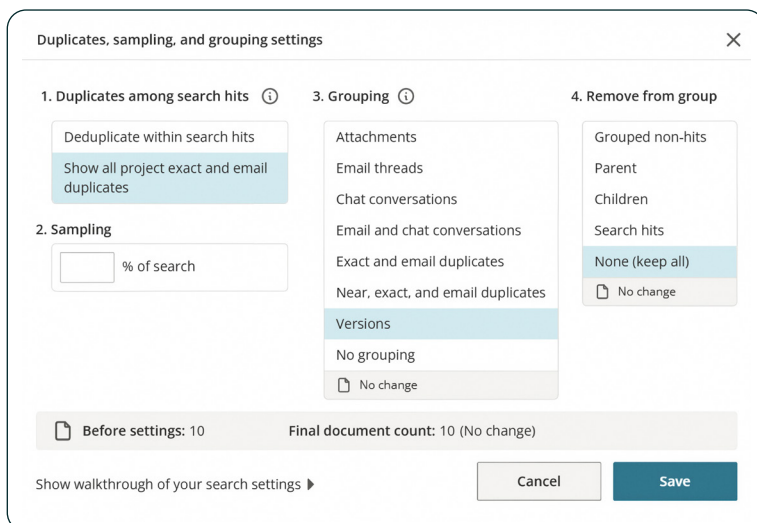
## How Can I View Versioning on Everlaw?

There are three ways to see versions of your documents on Everlaw.

- / Context panel: The clock icon in the context panel will display the available versions.



- / Results table: From the Settings icon in the results table, you can group by versions.



- / Search: When you create a search, you can include versions.

