

Concordance®

Administrator's Guide

Concordance 10.25.0.90



Concordance Administrator's Guide

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Concordance® 10.25.0.90

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Concordance

Administrator's Guide

Concordance

Chapter

1

Concordance

Concordance® is an electronic discovery, document management, and litigation support tool. Concordance makes it easy to identify, organize, and analyze case-critical information to aid in collaboration across your firm or around the world.

Concordance gives you the most effective, cost-efficient way to manage large volumes of documents - scanned paper, email, and other e-documents - generated during litigation.

Here are some of the key benefits and features that Concordance offers:

- Holds documents of all types
- Contains a fast and efficient search engine
- Categorizes records with folders, tags, and issues
- Secures confidential data at various administrative levels
- Integrates with other litigation technology
- Offers remote access while traveling or in the court room

Concordance Administration

Supporting Reviewers

As an administrator, your job is to support the document review team by providing the best database structure and maintaining that structure for easy review. The more you can learn and understand the reviewer's perspective, the easier your job becomes in providing proper support.

Searching

Administrators should understand basic search concepts used in Concordance, including how to differentiate between full-text and relational clauses, and how to use search operators and wildcards. Understanding these concepts helps you troubleshoot questions or problems reviewers may have when learning to use Concordance.

Searching Overview:

- Full-text searching uses the .dct and .ivt files
- Full-text searching is very fast, highlights hits in red, searches multiple fields
- Relational searching searches the entire database each time
- Relational searching uses different operators, searches one field, runs slower, and does not provide keyword highlights

Tips to Increase Search Processing Speed:

- Reviewers can speed up relational searching by placing a full-text search clause before the relational clause to cull down the amount of data Concordance must relationally search
- Check the Key box on fields to improve relational search processing speed
- Locate empty or not empty paragraph fields (empty: fieldname = "", not empty: fieldname = *)
- Search for punctuation with relational searching (OCR co %) or globally replace punctuation with a%a, then reindex and run a full-text search

Tips for Assisting Reviewers:

- Verify that users are not running relational searches on paragraph fields
- Verify that reviewers are placing a full-text search clause before the relational clause to cut down search processing time
- Verify that search syntax is correct
- Verify the search terms are included in the dictionary

- Verify that the field is indexed for full-text searching
- Reindex the database to ensure all updates are available to reviewers

Saving Queries

Reviewers can save their search history by saving a query file from a current Concordance session. By doing so, they can later restore those same searches to create new complex searches and/or capture query results on database updates. Saved query files can also be executed on different databases if the field names used in the searches match. Please note that restored query files will update internal search number references in the Review view.

As an administrator you may need to help reviewers save or modify query files, and clear their search history from the database. Searches are saved in a .qry file and are editable text files containing only the search string.

Search Query Options:

- Use the Save all Queries command on the Search menu to save all searches in the current query session to a .qry query file.
- Use the Execute Saved Queries command on the Search menu to relaunch a previous query saved to a .qry file, and capture any new and/or edited data since the initial search was run.
- Use the Clear Search History command on the Search menu to delete the search history when you index, reindex, or pack the database.

Modifying Query Files

Query files are text files that contain only the search string. These files can be opened and edited in any text editor program. Reviewers may want to modify a saved query file to write new complex search queries and then run the edited query file on a database. However, as an administrator, you will typically review these files in order to delete unnecessary queries that you do not need to store or rerun later.

Saving Search Results

In the Review View, you can print your search results or save them to an ASCII text file by selecting a search, right-clicking, and choosing **Save**. The resulting text file contains the data that is displayed in the Review View. This can be a helpful report in case a reviewer needs to prove what search criteria was used during e-discovery.

Clearing Searches

Clearing reviewers' search history allows you to erase all searches from a current Concordance session without reopening a database, and it allows users to start the new search session without looking at the results of previous searches.

To clear search history, on the **Search** menu select **Clear Search History**. The search results in the Review View will be cleared except for the All query used to locate all records in the database. It is recommended to save the searches to a .qry file before clearing them since there is no Undo function after clearing your search history.

Sorting Records

The results of any search are sorted in the order in which documents are added to the database, and typical sorting only affects current search results. Administrators, however, have the means to permanently apply a sort order to a database.

Reviewers may want to have documents permanently sorted in a database chronologically, or by author, type, or other field, to help speed up their review. We recommend that you only accommodate this request under special circumstances due to the time involved in managing these extra files and databases.

Sorting Overview:

- The default sort order of all queries is the record creation or load order of the documents when they were added to the database (accession number)
- Sorting can be done on up to 16 fields at one time with a maximum character limit of 1,000

- Sorting of paragraph fields is done on the first 60 characters only and uses the longest value in the field up to 60
- Sort order is temporary and only applies to the current query
- Speed up sorting by selecting the Key check box for database fields in the Modify dialog box.

To Permanently Sort a Database:

1. Back up the original database.
2. In Concordance, open the database you want to permanently sort.
3. Sort the database.
4. Either:
 - Export the database by going to **Documents > Export > As a Concordance database** and using the Export Wizard.
 - Replicate the database by going to **Tools > Replication > Create a replica**.
5. Use the exported or replicated database.



Exporting a database does not export the database's security settings. Replicating a database preserves the database's security settings.

Indexing Databases

A Concordance database must be indexed prior to searching. When you index your database for the first time, you are actually creating and populating the Concordance dictionary and index files. How your database records are indexed ultimately affects how reviewers search for information:

- Full-text searching works only on indexed fields
- Relational searching is for non-indexed fields or keyed fields

- Paragraph fields are indexed by default

You can index just about anything in your database depending on how you create the database structure. When you are building your database, you want to plan which fields to include in the dictionary and index. The smaller the dictionary and index, the faster your searching and indexing speeds will be.

Indexing and reindexing databases is important for keeping your database updated with current review information, free of unnecessary and obsolete files, and efficient for processing full-text searches. Indexing large datasets is time consuming, but is a standard process and part of database maintenance.

When Concordance databases are built, the index and dictionary are generated from the document contents. The dictionary contains a list of every word or string of characters in the database's record collection. The index contains directions to every word or string of characters in the database.

Please consider the following before you index a database and create the dictionary:

- Avoid indexing serial and Bates numbers (these are unique value fields)
- Punctuation needs to be set only once and only pertains to indexed fields
- Punctuation is indexed only if embedded between alphanumeric characters. All leading and trailing punctuation is trimmed.
- Update the database's stopwords list to exclude additional words that you want ignored during indexing and searching
- A well-defined stopwords list keeps your dictionary and index lean



If indexing or reindexing speeds seem slow, you may want to increase your computer's RAM and check your cache settings on the Indexing tab in Preferences.

Index Files

Indexing scans the database and notes where each word occurs. These occurrences are stored in two files created during the indexing process, the dictionary file (.dct) and the inverted text file (.ivt). When you perform a search, Concordance looks in these two files for your words, not in the actual text of the database. Due to the structure of these files, the search is performed very rapidly, much faster than searching each document one-by-one for every word.

The dictionary file is stored in the database directory folder and contains all dictionary words and their hit and document counts. The inverted text file file contains a path to all words, along with the applicable number for each record, field, line, and word for each word in the .dct file. Both the dictionary file and inverted text file contain a B-tree data structure, and the size of each file is important. When full-text searches are performed, the search only uses these two files.



Building the initial index for these records can take many hours. Reindexing a day's worth of new documents could take a few hours, so it is better to reindex after entering a few records in order to have new content searchable in a timely manner.

Indexing Process

Concordance follows several rules when indexing the database. Words must begin with an alphabetic or numeric character. Once the beginning of a word is found, Concordance scans until it finds the first non-alphanumeric character. This character is compared against the list of embedded punctuation characters. If the character is found in the punctuation list and the following character is alphanumeric, then that punctuation is included in the word. Otherwise, the first non-alphanumeric character will mark the end of the word.

Embedded Punctuation

User definable embedded punctuation is provided so that hyphenated words, dates, decimal numbers, and contractions are not split into two or more words. By default Concordance uses ' . , / characters for embedded punctuation. Note that the hyphen is not included in the default set. You may want to include them, but it is

recommended that you leave them out. Proper names, such as *Mary Smith-Jones*, would only be searchable under the Smith prefix if hyphens were used as embedded punctuation. Use the Punctuation field in the Modify dialog to change the default characters.

Case Sensitivity

Concordance is not case sensitive. All words are converted to upper case letters when placed into the dictionary. All searches are likewise converted to upper case before being processed. This upper case conversion does not affect the original text that exists in your documents.

Word Length

A word can be any length of characters, but only the first 64 are considered significant. Longer words are truncated to 64 characters when they are stored in the dictionary. When you search for a word longer than 64 characters, your search word is truncated before being looked up in the dictionary. The source text is not affected.

Stopwords

Words that occur frequently, such as *the*, *and*, and *or*, have little search value. Such words are commonly referred to as noise words. Concordance stores these types words in a stopwords list. Words that occur in the stopwords list are not stored in the dictionary. Excluding them from the dictionary saves time in the indexing process and significant disk space on your computer without impairing the database's ability to retrieve data. The list of stopwords is user defined and can be printed or changed. If you have not specified any stopwords for your database, Concordance uses the default list in the `concordance_<version>.stp` stopwords file.

The stopwords dictionary is used during the indexing process. Adding or deleting words from the stopwords dictionary does not affect the existing database dictionary. Editing the stopwords dictionary requires a complete index of the database for the changes to take effect.

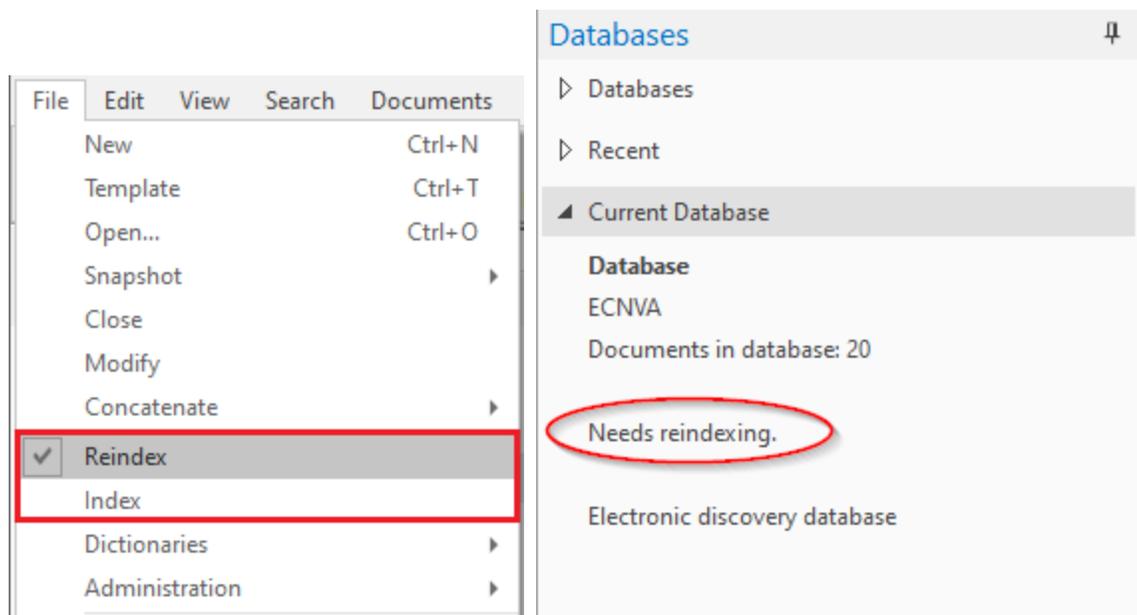
Indexing and Reindexing

Actively used databases need frequent updating to keep the index and dictionary entries current. In Concordance, we refer to creating the database index as a full index, and refer to an index update as a reindex, which simply updates the database dictionary and its corresponding index.

Indexing versus Reindexing:

- Indexing is performed when the initial database is built, and needs to be performed after every database modification, including changes in fields, punctuation or the stopwords list. Indexing is an exclusive process.
- Reindexing is performed when new records are added to the database or when there are new annotations and modifications to record content. Reindexing appends new information to both the index and dictionary files.

Reviewers are typically not given indexing or reindexing privileges because of the sensitivity involved in running these processes. Concordance administrators must ensure that all data is reviewed and proper back-ups are made before indexing or reindexing the database.



Indexing Databases

There will be times when you need to perform full index updates to include modifications to the dictionary, stopwords list, and punctuation settings. This is an exclusive process and only the administrator can access the database at this time.

When performing a full index, please consider the following:

- Perform a full index when all reviewers are logged out of Concordance, processing can take hours and impacts access to the system and work activity
- When possible, plan to perform full indexes when it doesn't impact regular work hours
- Alert all reviewers of when indexing will occur and the timeframe for when the system may be available again
- Verify that all reviewers are logged out of the system before you run this process
- Consider performing full indexes for individual databases on separate machines

To index a database, select **Index** on the **File** menu.

Reindexing Databases

You can determine whether a database needs reindexing on the File menu and the Databases task pane. A database needs reindexing whenever the database dictionary is not current with the additions or changes that have been made to the database since the database was last indexed or reindexed. On the **File** menu, Concordance adds a check mark next to the **Reindex** command. In the **Databases** Panel of the Navigation panel, *Needs Reindexing* is displayed for the **Current Database**.

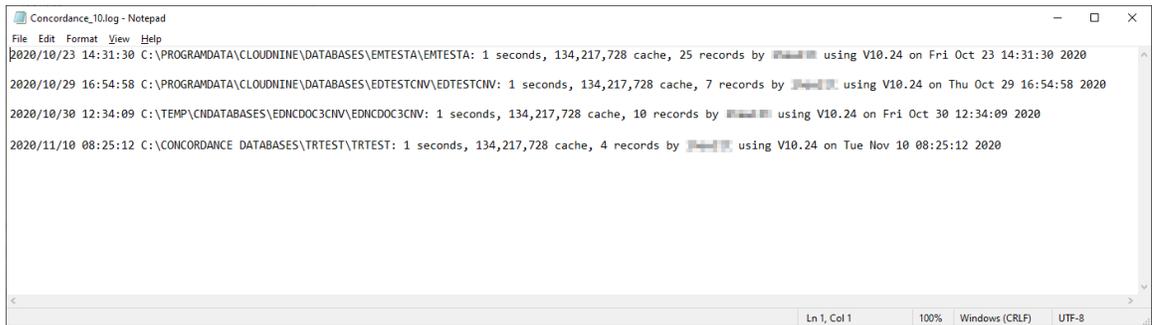
When performing a reindex, please consider the following:

- Run a query on edited records or those marked for deletion. To do this, on the Search menu, click Search for edited documents.
- Select the Allow exclusive indexing check box on the Indexing tab in the Preferences dialog box to prevent reviewers from searching during a reindex.

To reindex a database, select **Reindex** on the **File** menu.

Database Indexing Time

Knowing the indexing time for databases can help you plan your indexing schedules. Concordance logs the time it takes to index in the Concordance_<version>.log file located in C:\ProgramData\CloudNine\Concordance 10.



```
Concordance_10.log - Notepad
File Edit Format View Help
2020/10/23 14:31:30 C:\PROGRAMDATA\CLOUDNINE\DATABASES\EMTESTA\EMTESTA: 1 seconds, 134,217,728 cache, 25 records by [REDACTED] using V10.24 on Fri Oct 23 14:31:30 2020
2020/10/29 16:54:58 C:\PROGRAMDATA\CLOUDNINE\DATABASES\EDTESTCIV\EDTESTCIV: 1 seconds, 134,217,728 cache, 7 records by [REDACTED] using V10.24 on Thu Oct 29 16:54:58 2020
2020/10/30 12:34:09 C:\TEMP\CNDATABASES\EDNCDOC3CIV\EDNCDOC3CIV: 1 seconds, 134,217,728 cache, 10 records by [REDACTED] using V10.24 on Fri Oct 30 12:34:09 2020
2020/11/10 08:25:12 C:\CONCORDANCE DATABASES\TRTEST\TRTEST: 1 seconds, 134,217,728 cache, 4 records by [REDACTED] using V10.24 on Tue Nov 10 08:25:12 2020
Ln 1, Col 1 100% Windows (CRLF) UTF-8
```

This example log file shows indexing in seconds, but realistically, your database is probably going to index in hours, not seconds.

Stopwords

Stopwords are common words in the English language (and, the, but, etc.). Stopwords are not words that are usually search for by reviewers. Eliminating stopwords from the index ensures that searches run much faster and efficiently. Stopwords are stored in the Concordance_<version>.stp file. Concordance automatically creates a list of 141 stopwords in the stopwords file.

You may receive requests from reviewers to add a specific word that is common to the case review documentation and needs to be avoided during searches. Administrators can modify the Stopwords list for your review team when necessary.

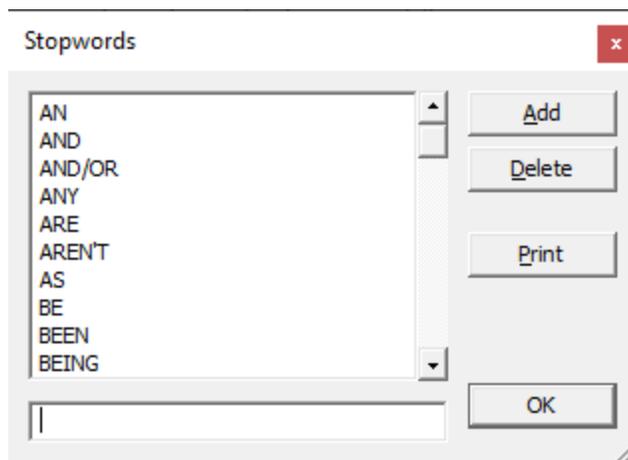
The Stopword list is only used during the indexing process. Adding or deleting words from the Stopword list does not affect the existing database dictionary until the database is indexed.



Editing the Stopword list requires a full index of the database for the changes to take effect.

Updating the Stopwords List

1. On the **File** menu, select **Dictionaries**, and then click **Stopword list**. The **Stopwords** dialog displays.



2. To add a word to the Stopword list, type the word you want to add in the field below the stopword list, and click **Add**. Wildcards can be used with stopwords to eliminate large groups of words. For example, adding 9* to the stopwords list eliminates every word or number beginning with the character 9 from the database dictionary.
3. To search for a stopword, type all or part of the word in the field below the Stopword list. As you type, the list scrolls to the word closest to the word you are typing.
4. To delete a word from the stopword list, select the word in the list, and click **Delete**.
5. To print the Stopword list, click **Print**.
6. Click **OK** to save your changes.
7. Index the database to make sure your stopword edits are effective.



For searching purposes, it is recommended that only Latin based characters are used in the Stopword list.

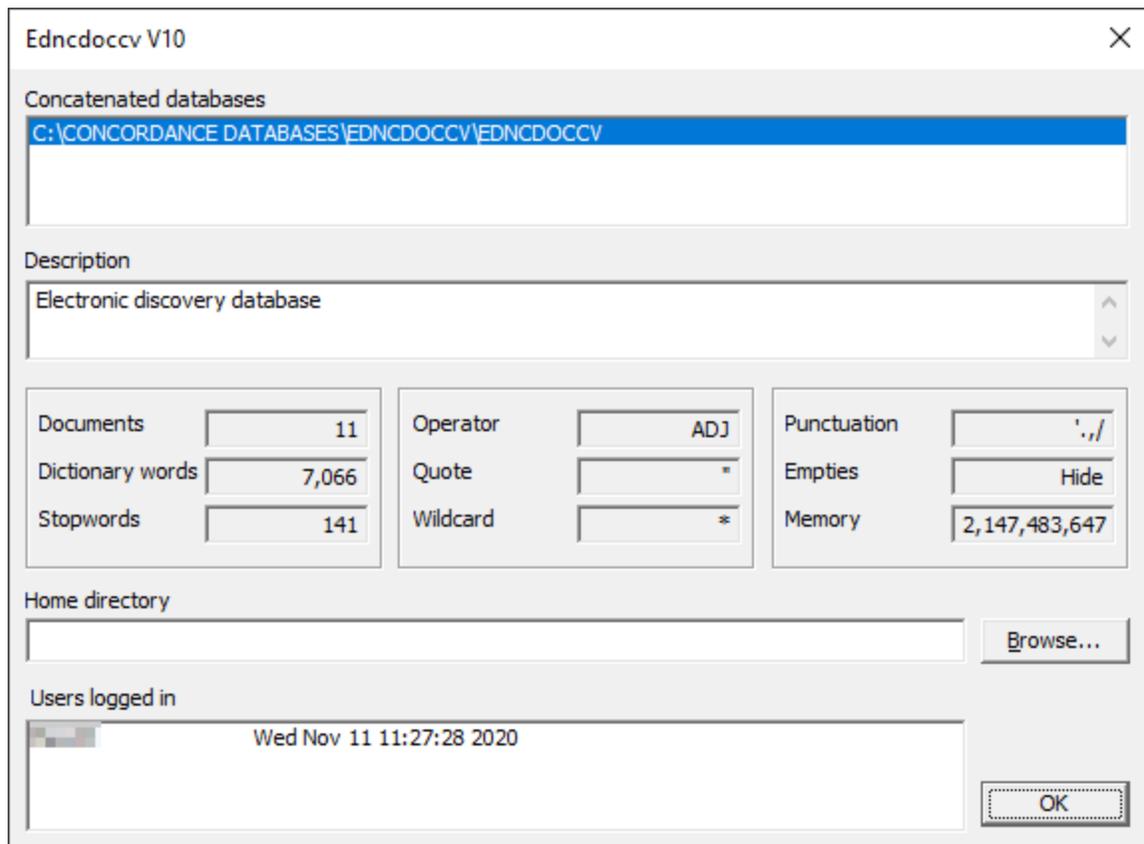
Punctuation

For full-text searching, punctuation is not indexed. Concordance treats punctuation as spaces. All punctuation is ignored, such as periods or quotations, as well as currency and percentage symbols.

There are two exceptions to this rule, and both exceptions must be true:

- Punctuation is defined in the database properties (accessed via **File > Properties**)
- Punctuation is embedded in a string of characters

By default, Concordance includes the apostrophe, period, comma, and forward slash. You may want to add symbols like the ampersand and the at sign for e-mail databases.



Embedded Punctuation Examples

- Apple.com – Allows you to search on these terms because the entries relate to websites.
- D’Arcangelo – The apostrophe is embedded because of the surname spelling. People mentioned in case records may have possessive apostrophes embedded in their names and may be added to the list because the name is searched often.
- john.smith@organization.com – The period and at sign are both examples of embedded punctuation within an e-mail address.

Adjusting Punctuation Settings

1. On the **File** menu, click **Modify**. The **Modify** dialog displays.

Field Name	Type	Length
DOCID	Paragraph	
TITLE	Paragraph	
SUBJECT	Paragraph	
AUTHOR	Paragraph	
COMPANY	Paragraph	
CATEGORY	Paragraph	
KEYWORDS	Paragraph	
PRODUCER	Paragraph	
CREATOR	Paragraph	
COMMENTS	Paragraph	
METADATA	Paragraph	
FILEPATH	Paragraph	
DATE	Date	MMDDYYYY
MODDATE	Date	MMDDYYYY
CREATIONDATE	Date	MMDDYYYY
PRINTDATE	Date	MMDDYYYY
TEXT01	Paragraph	
TEXT02	Paragraph	
TEXT03	Paragraph	
TEXT04	Paragraph	
TEXT05	Paragraph	
DOC1	Paragraph	

Status

Documents	11
Fields	23

Punctuation: ./

Name: DOCID

Type: Paragraph

Length:

Places:

Format:

Image Key Accession

System Indexed

New Insert Delete Save To File Append Equivio Fields OK Cancel

2. In the **Punctuation** field, add or delete the applicable punctuation.
3. Click **OK** to save your changes.
4. Run a full index to update the database dictionary with the punctuation changes.

Dictionary

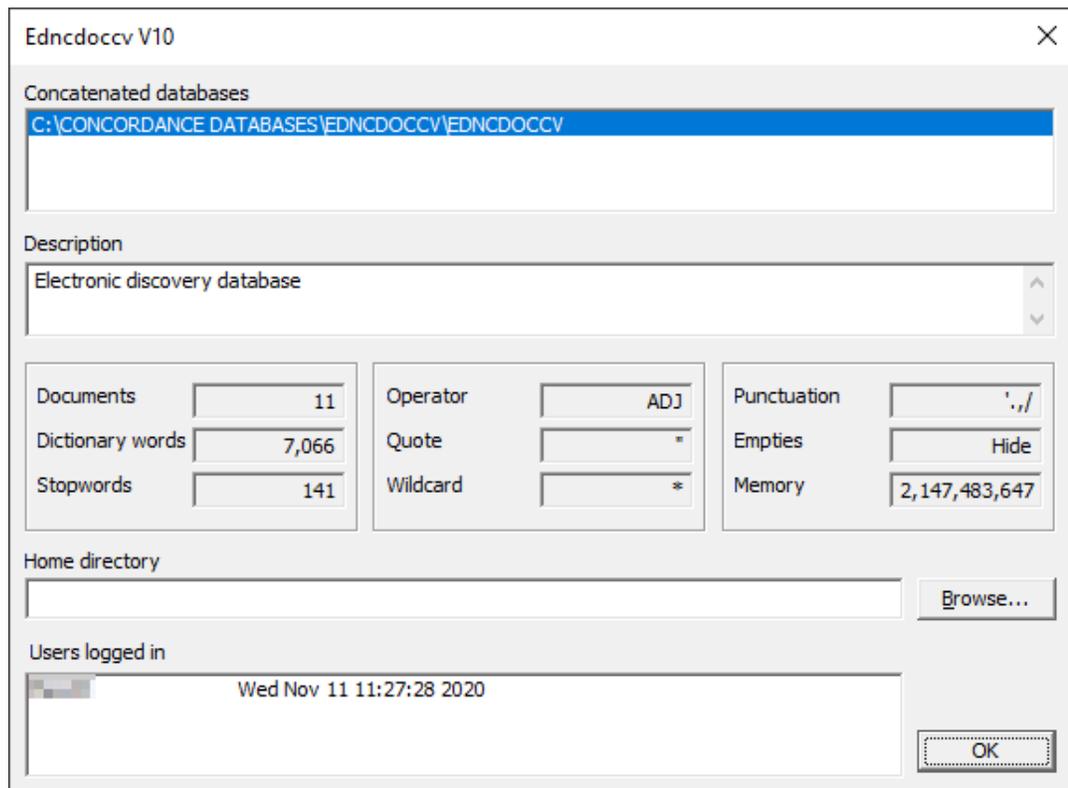
In Concordance, a word is any string of characters. A word can be a series of numbers or a combination of letters, numbers and even punctuation or symbols. Familiarize yourself with your database dictionary by reviewing or printing the entries.



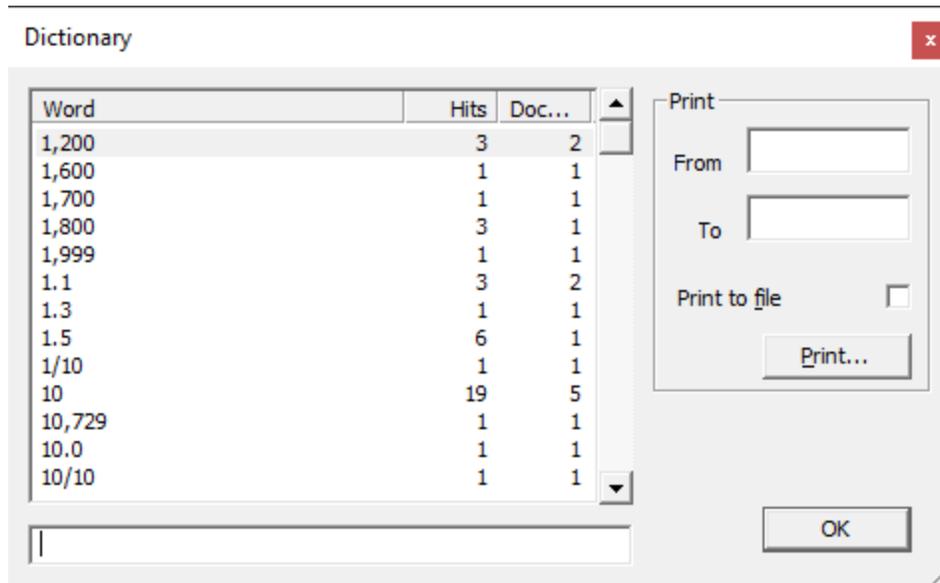
The maximum length of a dictionary word is 64 characters. When a word exceeds 64 characters, only the first 64 characters of the word are included in the dictionary. Since the full word is not listed in the dictionary, the word may not be found in the database.

You can review dictionary entries from two different dialogs:

- From **File > Properties** - this dialog displays the number of words included in your dictionary and the punctuation that is indexed.



- From **File > Dictionaries > Database Dictionary** (or alternately by selecting **Display the database dictionary** in the Search Panel of the Navigation pane) - this dialog provides a complete listing of all the words included in the dictionary, the number of documents each word appears in, and how many word hits there are for each word in the dictionary.

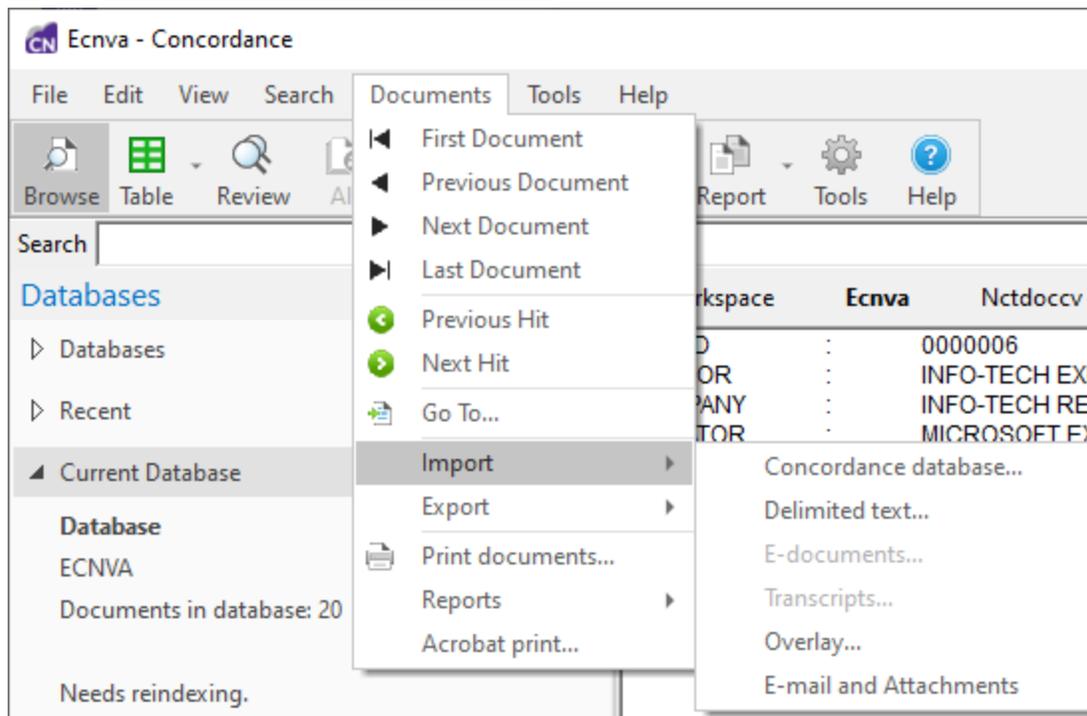


You can print your dictionary words to a printer or file from the **Dictionary** dialog by selecting **Print**.

Importing Files

Once you have created a database, you can start importing load files to populate the database with records. Your initial database files can be PST files, electronic documents, or delimited text files prepared by a vendor (or other party) so that you can import them directly into Concordance. Concordance provides the Import Wizard to help you import your documents.

Most files are imported into Concordance using **Import** on the **Documents** menu.



After importing your files, it is best practice to check for inconsistencies between the database imagekeys and entries in the Concordance Image .dir file and for duplicates and gaps in the database.

When importing new or additional data, consider the following:

- Run a test load by importing new data into an exported database structure.
- Note the last record number on the status bar prior to importing the new data.
- Reindex the database prior to loading the new data. After the data is loaded, on the Search menu, click Search for Edited Documents, to query only the records that you just loaded for verification of the number of records that needed to be loaded or to isolate the records that need to be deleted if loaded improperly.
- Decide whether to load data into a secondary database structure and then concatenate it with the primary database.

Concordance integrates with many e-discovery products so you can import and export data to and from other prominent industry software applications.

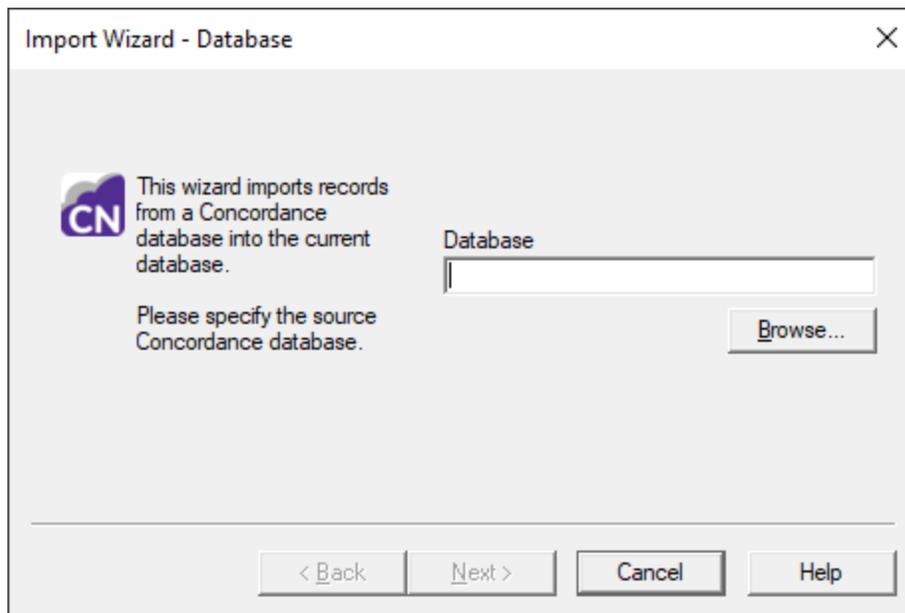
- CloudNine™ LAW extracts text content and metadata from electronic files in native file format, and scans and exports data directly into databases.
- EnCase® by Guidance Software is an enterprise forensic data collection application used to gather data from LANs and individual, custodian hard drives, and can export collected data directly into databases.
- IPRO Image by IPRO Tech, Inc. can create Concordance Image load files.

Concordance Database

The Import Wizard for Concordance databases guides you through the process of importing records from one Concordance database to another database. You can import and append the records, or import and update existing records. You can select which fields are imported, and indicate whether attachments should be copied.

Import a Concordance Database

1. In Concordance, open the database you want to add another database to.
2. On the **Documents** menu, select **Import**, and click **Concordance database**. The **Import Wizard - Database** dialog displays.

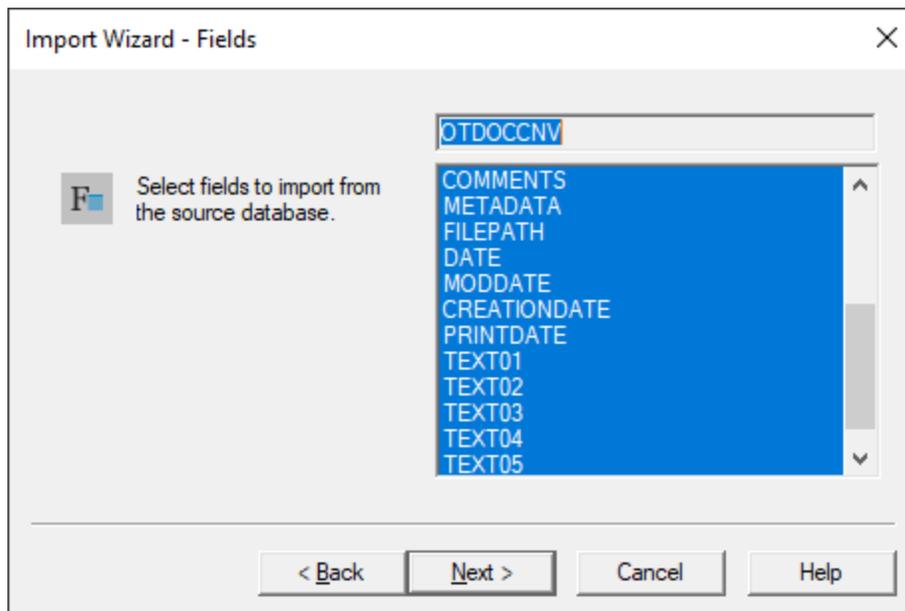


3. Click the **Browse** button to open the **Select database to merge** dialog.
4. Navigate to and open the .dcb or .fyi file for the database you want to add to the current database. During the import, every record in the selected database is imported into the current database. If you only want to import some of the database records into the database, then you need to open the database you are importing, run a search to locate the records you want to add to the current database, and export the records to the current database.

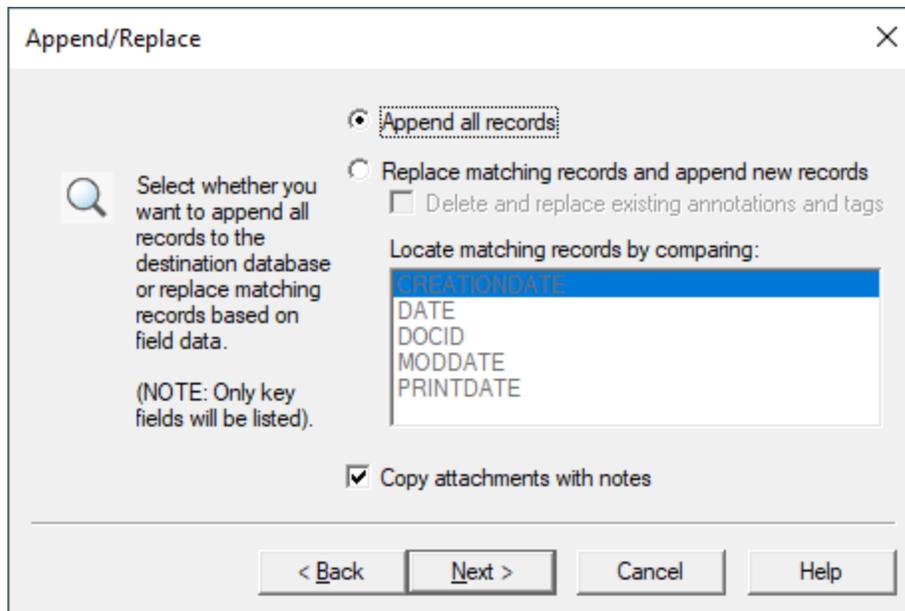


When importing records into a concatenated database, records are updated when the fields of an imported record match an existing record. When the fields do not match, the imported record is appended to the main database, which is the first database in the concatenated set.

5. Click **Next**. The **Import Wizard - Fields** dialog displays.

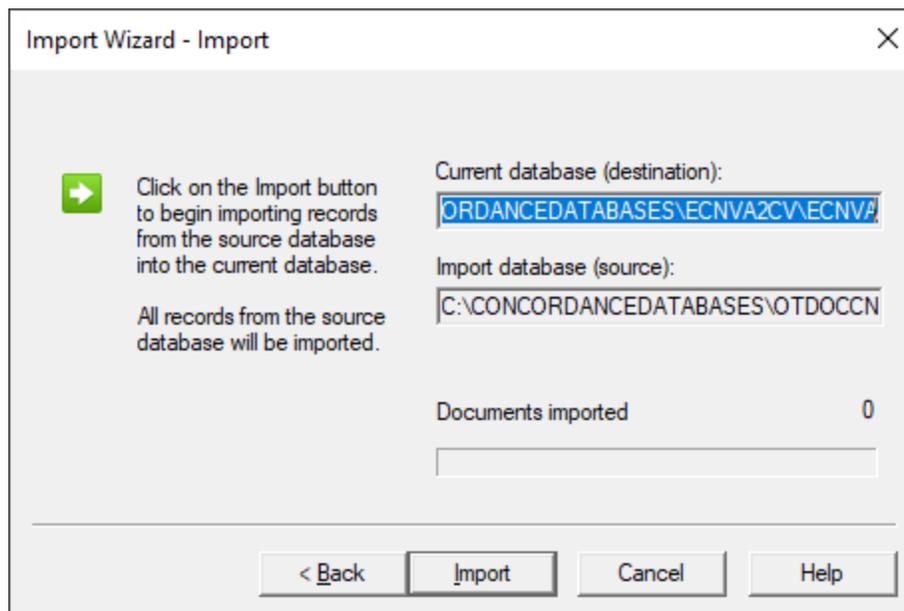


6. Select the fields you want to include in the import. Data from the fields you select are only imported if the selected fields exist in both databases.
7. Click **Next**. The **Append/Replace** dialog displays.

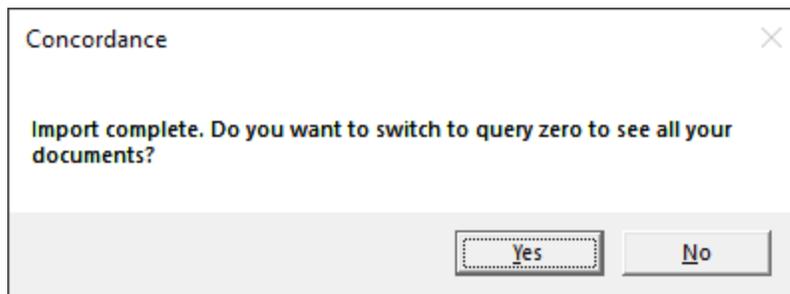


8. To have the import append all records, select the **Append all records** option. When you select this option, the import adds all imported records as new records after the last record in the current database.

9. To have the import replace all matching records and append all new records, select the **Replace matching records and append new records** option.
 - The **Delete and replace existing annotations and tags** check box determines how annotations are copied when an existing record is updated. If selected, any annotations from the matching imported record are added to the record. By default, the check box is not selected.
 - In the **Locate matching records by comparing** list, select the field to compare to determine whether records match. Only key fields are listed in this list. You can select multiple fields. Full-text paragraph fields are considered a match if the first sixty characters, or the first line, whichever is less, match, regardless of the remaining contents of the field.
10. Select **Copy attachments with notes** if you want a record's attachments with notes copied during the import.
11. Click **Next**. The Import Wizard - Import dialog displays.



12. Click the **Import** button to start the import.
13. When the import finishes, the following message displays.



14. Click **Yes** to run a Zero Query in the newly combined database so that you can view all the database records.

Delimited Text

Load files or delimited text files typically have extensions ending in .dat, .csv, or .txt. Each file contains record metadata, but some may also include body text. We recommend having your OCR separated into individual text files and imported separately using a CPL script.

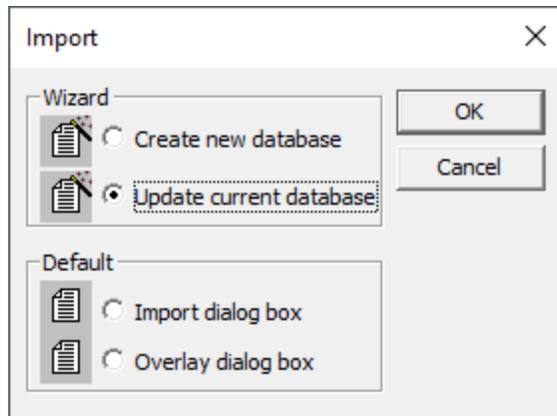
As an administrator, you should always make a practice of opening and reviewing your delimited text files when you receive them, as the files are not always prepared perfectly and may need to be modified. See [Reviewing Load Files](#) for more information.



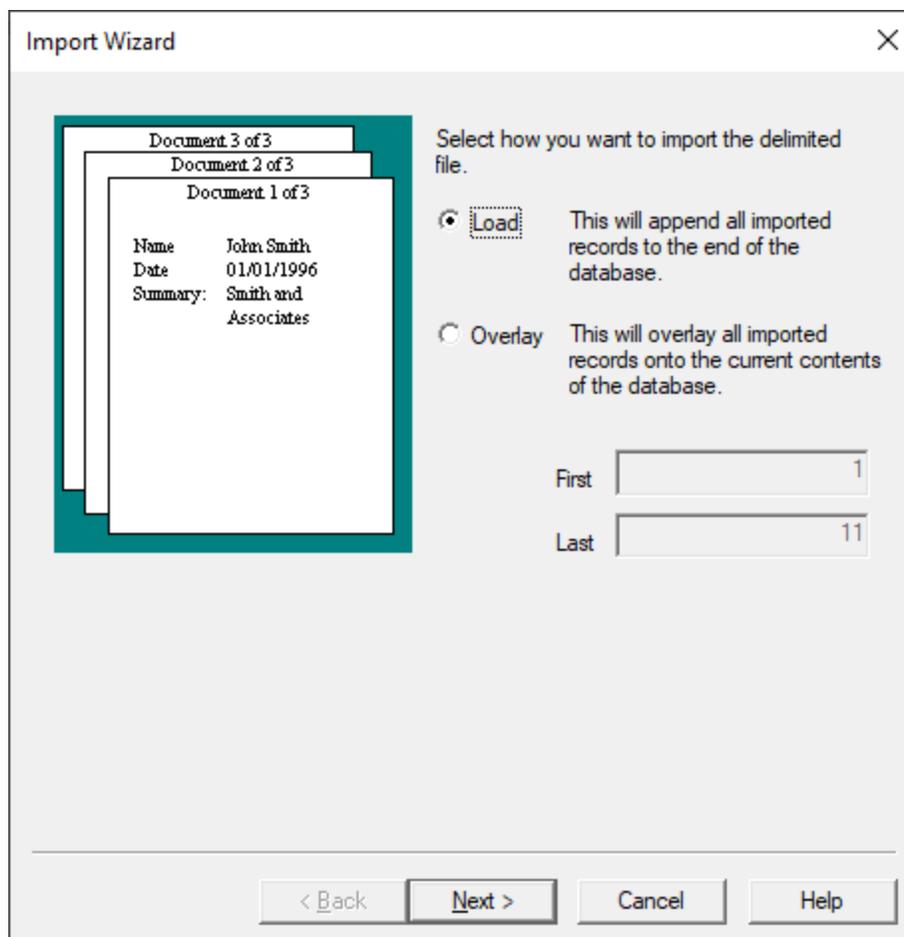
When importing records into a concatenated database, records are updated when the fields of an imported record match an existing record. When importing a delimited text file using the Load option, records with mismatched fields are appended as new documents to the main database, which is the first database in the concatenated set. However, when using the Overlay option, importing records with mismatched fields can cause a loss of data.

Updating the Current Database with Delimited Text

1. On the **Documents** menu, select **Import**, and then click **Delimited text**. The **Import** dialog displays. Select **Update current database**.

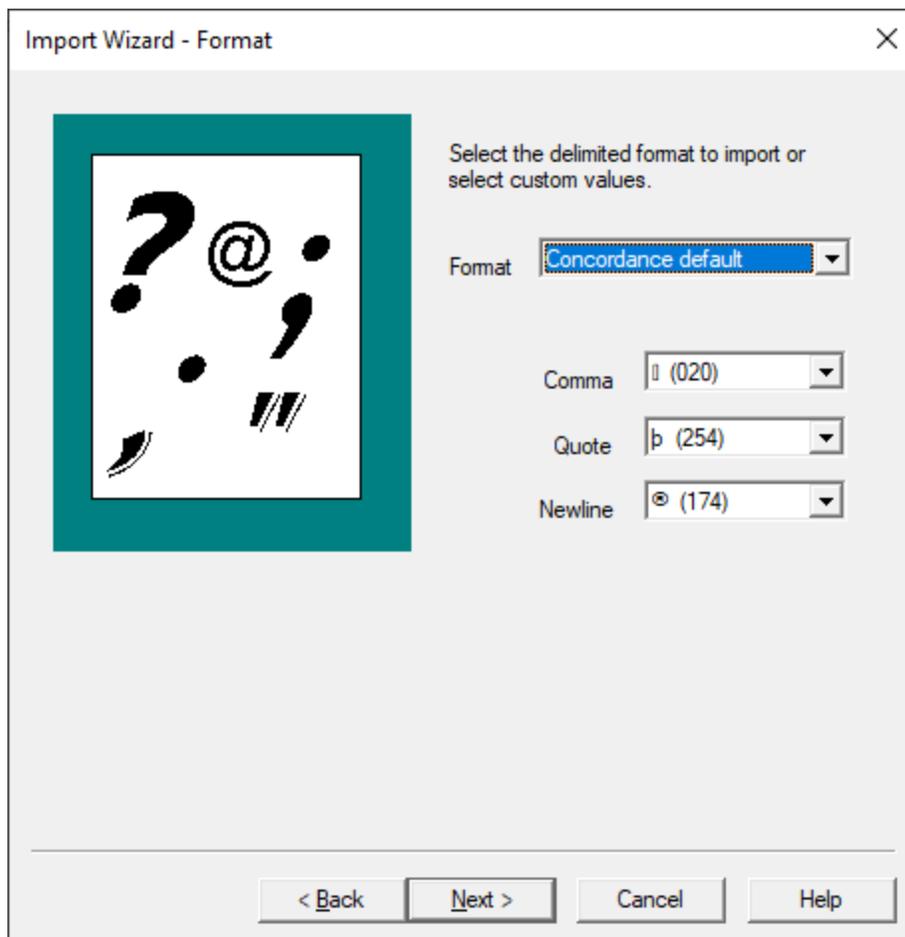


2. Click OK. The **Import Wizard** dialog displays.

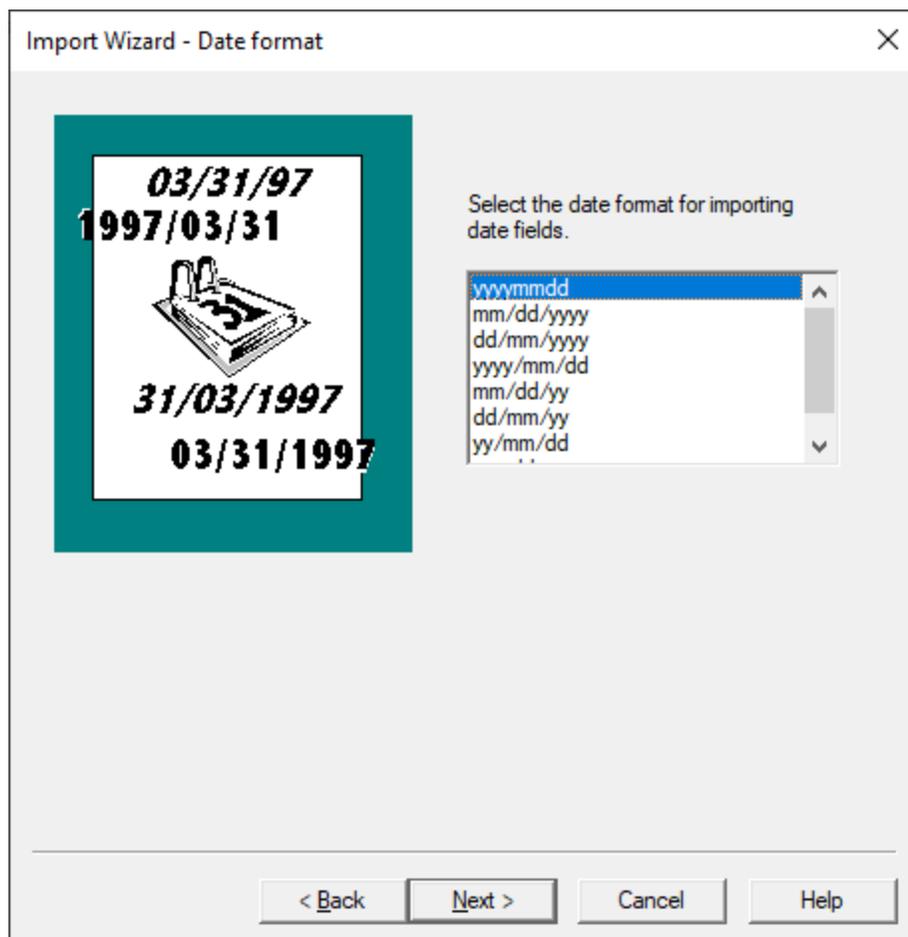


3. Do one of the following:

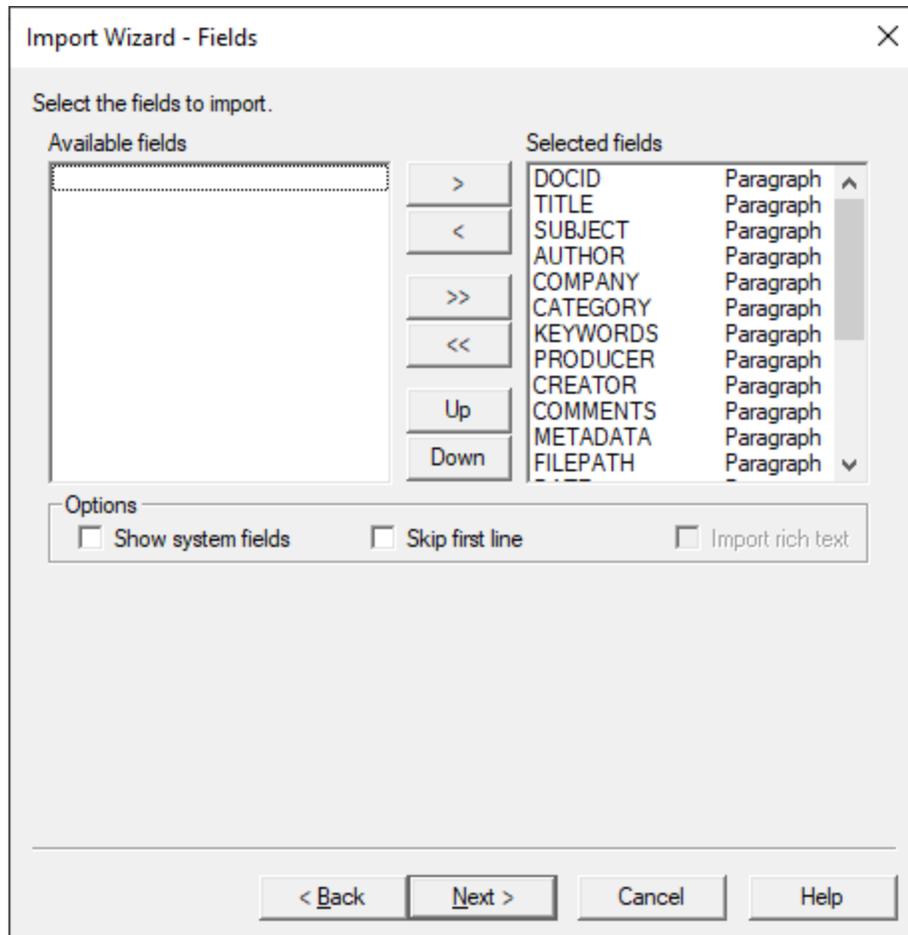
- To append all imported records to the end of the existing database records, select **Load**.
 - To replace existing records in the database with the imported records, select **Overlay**. **Overlay** allows you to specify a range of records for overlaying. All of the data in the delimited text file is loaded into the documents in the current query. Documents can be overlaid in sorted order too. Just sort the query before importing. If you want to replace specific records by matching field values, then you should import a Concordance database instead. If you select **Overlay**, and the delimited text file contains more records than the query, the additional records are appended to the database as new documents.
 - In the **First** field, type the first document number in the query to overlay.
 - In the **Last** field, type the last document number in the query to overlay.
4. Click **Next**. The **Import Wizard - Format** dialog displays.



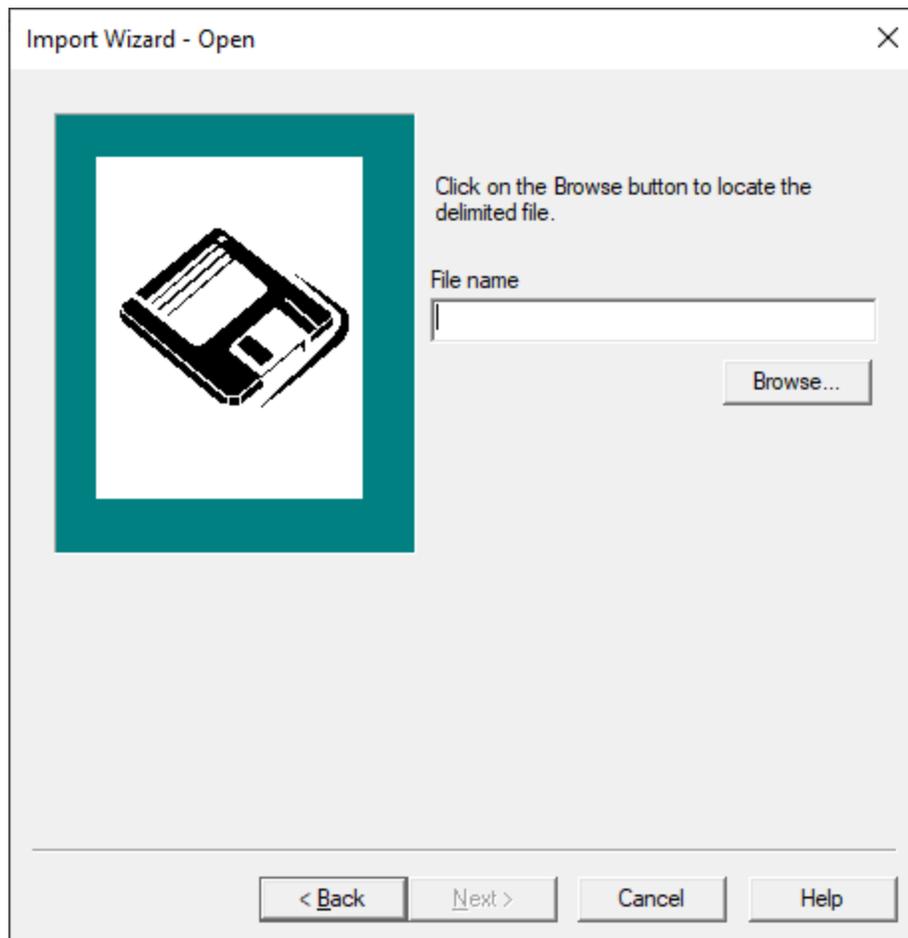
5. Specify the **Format** for the delimiters in the data you are loading:
 - **Concordance default** - use this option if you are importing/exporting documents within Concordance.
 - **Comma delimited (CSV)** - use this option if the data you are loading is a standard comma delimited file.
 - **Tab delimited** - use this option if the fields in your data are separated by tabs.
 - **Custom** - use this option to specify each delimiter value.
6. Modify the individual **Comma**, **Quote**, and **Newline** characters after selecting a **Format** only if you are using these characters in the text of your delimited file.
7. Click **Next**. The **Import Wizard - Date format** dialog displays.



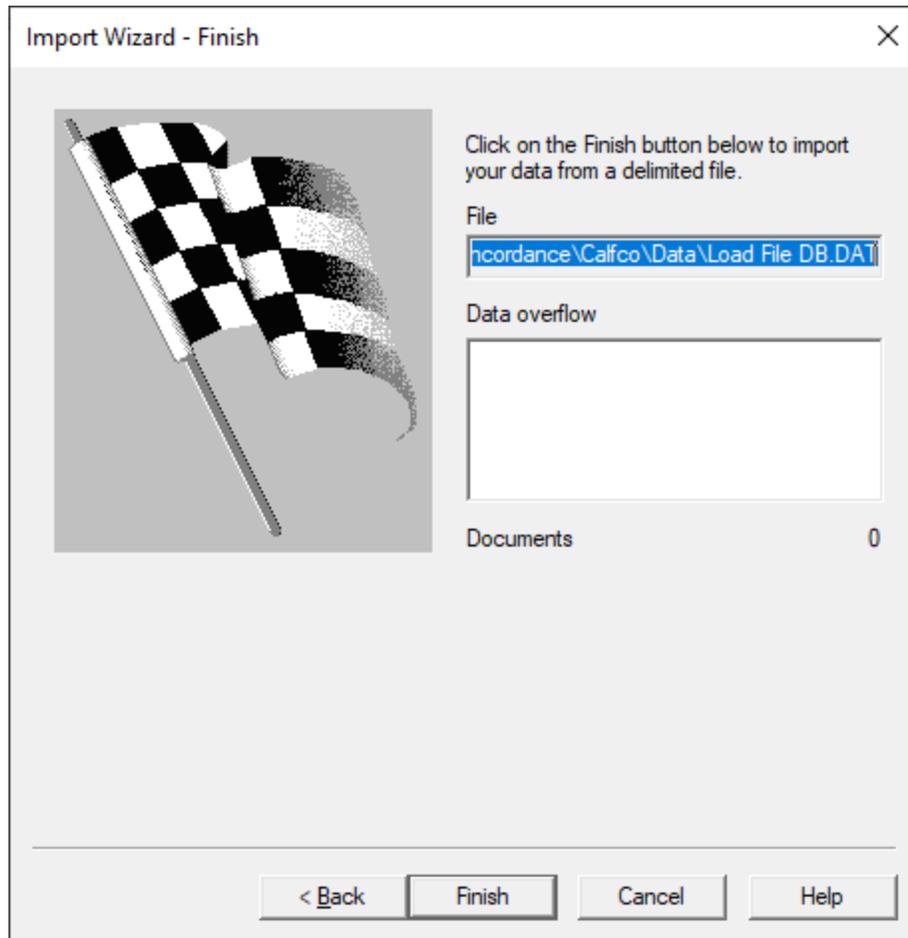
8. Select the date format that matches the data in your delimited text file. Click Next. The **Import Wizard - Fields** dialog displays.



9. By default, all the database fields are added to the **Selected fields** list. Adjust the fields to import based on your needs by moving fields in or out of the **Selected fields** list using the buttons in the center. You should also make sure the order of the fields matches the delimited text file you are loading. If the **Selected fields** does not match the field structure of your delimited text file, the data will not import properly.
10. The **Skip first line** check box tells Concordance that the first row of your delimited text file contains field names rather than field data.
11. Once you have the fields configured to match your delimited text file, click **Next**. The **Import Wizard - Open** dialog displays.



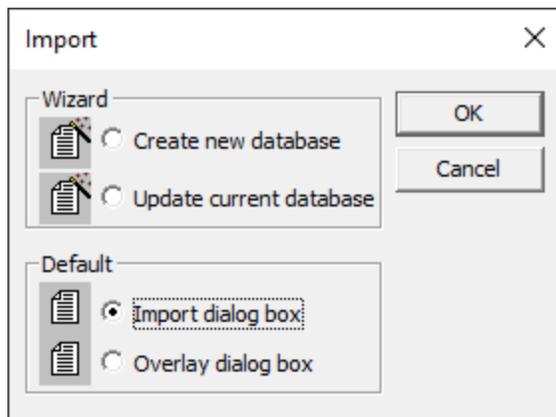
12. Click the **Browse** button, navigate to and open the delimited text file you want to import into the database.
13. Click **Next** to open the **Import Wizard – Finish** dialog.



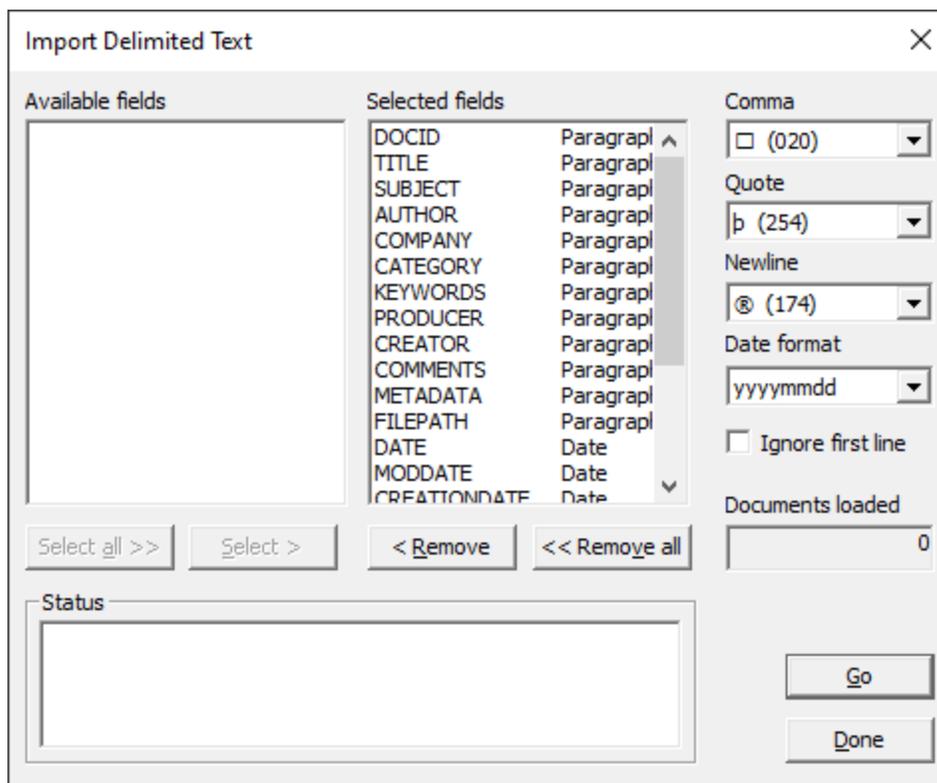
14. Click **Finish** to load or overlay the delimited text file.
15. If any data overflow issues occur they will display in the **Data overflow** list. The **Documents** number updates to show the number of successfully loaded documents.
16. Close the wizard using the **X** in the upper right corner.

Using Import Dialog with Delimited Text

1. On the **Documents** menu, select **Import**, and then click **Delimited text**. The **Import** dialog displays. Select **Import dialog box**.



2. Click OK. The **Import Delimited Text** dialog displays.

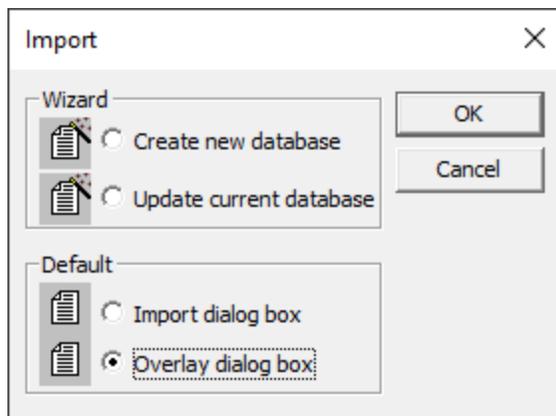


3. By default, all the database fields are added to the **Selected fields** list. Adjust the fields to import based on your needs by moving fields in or out of the **Selected fields** list using the buttons below the **Available fields** and **Selected fields**. You should also make sure the order of the fields matches the delimited text file you are loading. If the **Selected fields** does not match the field structure of your delimited text file, the data will not import properly.

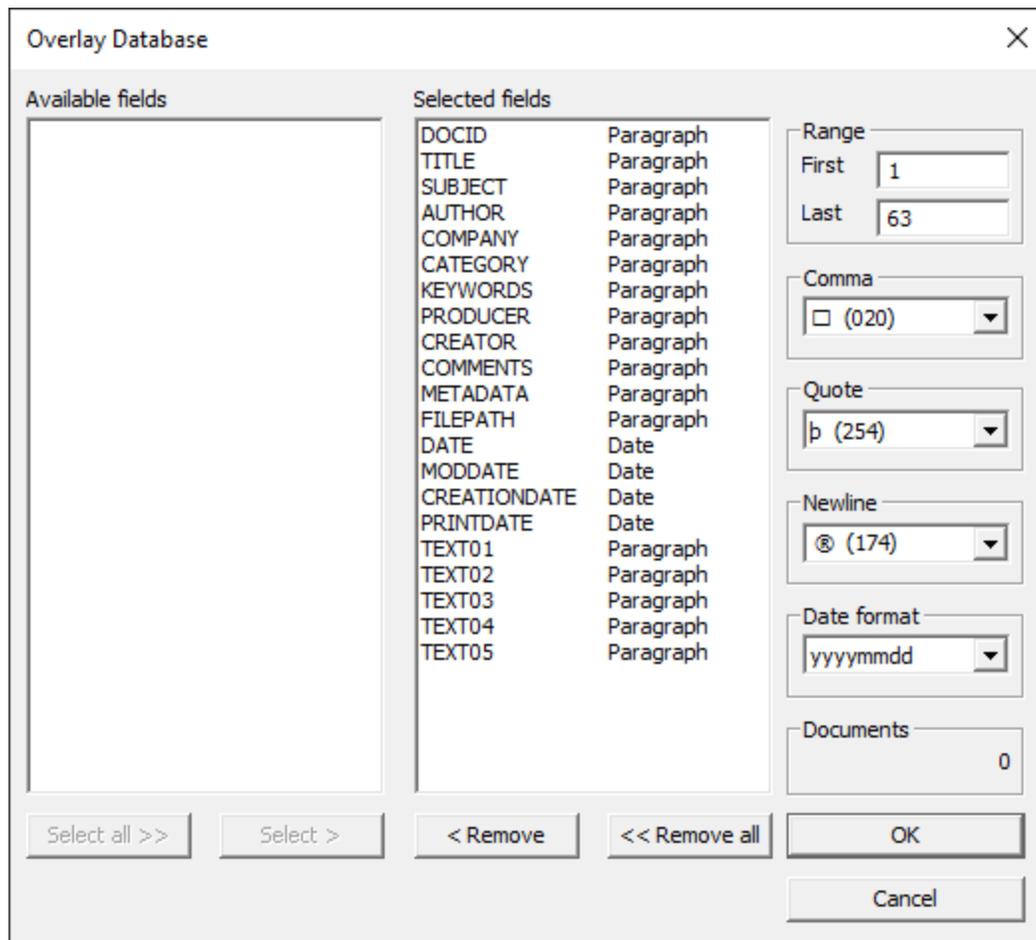
4. The **Ignore first line** check box tells Concordance that the first row of your delimited text file contains field names rather than field data.
5. Modify the individual **Comma**, **Quote**, and **Newline** characters only if you are using these characters in the text inside your delimited text file.
6. Select the **Date format** that matches the data in your delimited text file.
7. Click the **Go** button to display the **Load delimited file** dialog. Browse to and select the delimited text file you want to import. Click Open.
8. If any data overflow issues occur they will display in the **Status** list. The **Documents loaded** number updates to show the number of successfully loaded documents.
8. Click **Done** to close the **Import Delimited Text** dialog box.

Using Overlay Dialog with Delimited Text

1. On the **Documents** menu, select **Import**, and then click **Delimited text**. The **Import** dialog displays. Select **Overlay dialog box**.



2. Click OK. The **Overlay Database** dialog displays.



You can go directly to the Overlay Database dialog by selecting **Import>Overlay** on the **Documents** menu.

3. By default, all the database fields are added to the **Selected fields** list. Adjust the fields to import based on your needs by moving fields in or out of the **Selected fields** list using the buttons below the **Available fields** and **Selected fields**. You should also make sure the order of the fields matches the delimited text file you are loading. If the **Selected fields** does not match the field structure of your delimited text file, the data will not import properly.
4. In the **First** field, type the first document number in the query to overlay. In the **Last** field, type the last document number in the query to overlay. By default, all documents in the current query are overlaid.

5. Modify the individual **Comma**, **Quote**, and **Newline** characters only if you are using these characters in the text inside your delimited text file.
6. Select the **Date format** that matches the data in your delimited text file.
7. Click the OK button to display the **Overlay delimited file** dialog. Browse to and select the delimited text file you want to import. Click **Open**.

Verify the Metadata

After importing a delimited text file, verify your imported delimited text files in Concordance. If you are importing a delimited text file into a new database, you will also need to index the database. If you are importing or overlaying a delimited text file into an existing database, you will also need to reindex the database.

To verify your imported delimited text files:

1. On the Toolbar, click **Table** to open the **Table** view.
2. Verify the imported records are in the record listing. If you imported records into an existing database, the new records are added after the last existing record in the database.
3. On the Toolbar, click **Browse** to open the **Browse** view.
4. On the **Tools** menu, click **Empties**. The Empties command determines whether empty fields are displayed in the Browse view. By default, Concordance does not display or print empty fields. With **Empties** enabled you can verify the field data you imported or overlayed is populated with the correct data.
5. If you imported or overlayed the delimited text file into an existing database, reindex the database. If you imported or overlayed the delimited text file into a new database, index the database.

The following columns represent available delimiter characters. For each delimiter, the displayed symbol is on the left and the decimal equivalent is in parenthesis on the right. If the source program you are importing from uses a different font, it can change the symbolic representation of the delimiters. If this happens, match the delimiter characters with the decimal equivalents instead of relying on the displayed symbol. Using the decimal equivalents will always result in a correct delimiter match.

ƒ (001)	- (045)	˙ (180)	Ú (218)
ƒ (002)	. (046)	μ (181)	Û (219)
ƒ (003)	/ (047)	¶ (182)	Ü (220)
ƒ (004)	: (058)	· (183)	Ý (221)
ƒ (005)	; (059)	˘ (184)	ƒ (222)
ƒ (006)	< (060)	ı (185)	β (223)
• (007)	= (061)	◦ (186)	à (224)
◻ (008)	> (062)	» (187)	á (225)
(009) Horizontal Tab	? (063)	¼ (188)	â (226)
(010) Line Feed	@ (064)	½ (189)	ã (227)
(011) Vertical Tab	[(091)	¾ (190)	ä (228)
(012) Form Feed	\ (092)	¿ (191)	å (229)
(013) Carriage Return] (093)	À (192)	æ (230)
(014) SO	^ (094)	Á (193)	ç (231)
ø (015)	_ (095)	Â (194)	è (232)
† (016)	˘ (096)	Ã (195)	é (233)
◀ (017)	{ (123)	Ä (196)	ê (234)
↓ (018)	(124)	Å (197)	ë (235)
!! (019)	} (125)	Æ (198)	ì (236)
¶ (020)	~ (126)	Ç (199)	í (237)
± (021)	ı (161)	È (200)	î (238)
ƒ (022)	φ (162)	É (201)	ï (239)
ƒ (023)	£ (163)	Ê (202)	ä (240)
↑ (024)	¤ (164)	Ë (203)	ñ (241)
ƒ (025)	¥ (165)	Ì (204)	ò (242)
→ (026)	¦ (166)	Í (205)	ó (243)
← (027)	§ (167)	Î (206)	ô (244)
! (033)	¨ (168)	Ï (207)	õ (245)
" (034)	© (169)	Ð (208)	ö (246)
# (035)	ª (170)	Ñ (209)	+ (247)
\$ (036)	« (171)	Ò (210)	ø (248)
% (037)	¬ (172)	Ó (211)	ù (249)
& (038)	- (173)	Ô (212)	ú (250)
' (039)	® (174)	Õ (213)	û (251)
((040)	¯ (175)	Ö (214)	ü (252)
) (041)	° (176)	× (215)	ý (253)
* (042)	± (177)	Ø (216)	ƒ (254)
+ (043)	² (178)	Ù (217)	ÿ (255)
, (044)	³ (179)		

E-Documents

Adding documents to an existing E-Documents database is made easy using a simple file drag-and-drop operation. Concordance automatically processing the documents, assigning document IDs, reading document metadata, extracting text, and appending the records to the database.

Any file or electronic document format not supported will be added to the database as an excluded file, and the contents will not be imported. You'll need to adhere to any forensic data processes as outlined by your organization or recommended for e-discovery processing.



The E-Documents import wizard is not available for a Concordance Workstation installation.

Adding Documents to an Existing E-Documents Database

1. In Concordance, open the database you want to add additional records.
2. Using File Explorer, open the folder that contains the documents you want to add and select and drag the file(s) to the Concordance workspace.
3. When prompted to confirm adding the documents, click **Yes**.
4. Concordance imports the document(s). In the **Browse** view, verify that the E-documents you added are now in the database.
5. If you have already indexed the database, reindex the database. Otherwise, run a full index.

Supported File Types

Concordance supports the following E-Document file types for import to an E-Documents database:

File Type	Description
*.tif, *.tiff	Tagged Image File
*.jpg, *.jpeg	Joint Photographic Experts Group
*.gif	Graphic Image File
*.bmp	Bitmap
*.asc	ASCII text
*.pcx	PC Paintbrush bitmap
*.csv	Comma-Separated Values
*.cal, *.cals	Facsimile
*.pdf	Adobe Portable Document Format

File Type	Description
*.doc, *.dot, *.docx	Microsoft Word
*.ppt, *.pps, *.pptx, *.pptm	Microsoft PowerPoint®
*.xls, *.xlsx, *.xlw, *.xlt	Microsoft Excel®
*.msg	Microsoft Outlook 2010 Message File <div data-bbox="518 1331 889 1806" style="background-color: #ffff00; padding: 10px;"> Attachments associated with a .msg file will not be extracted when the .msg is imported.</div>

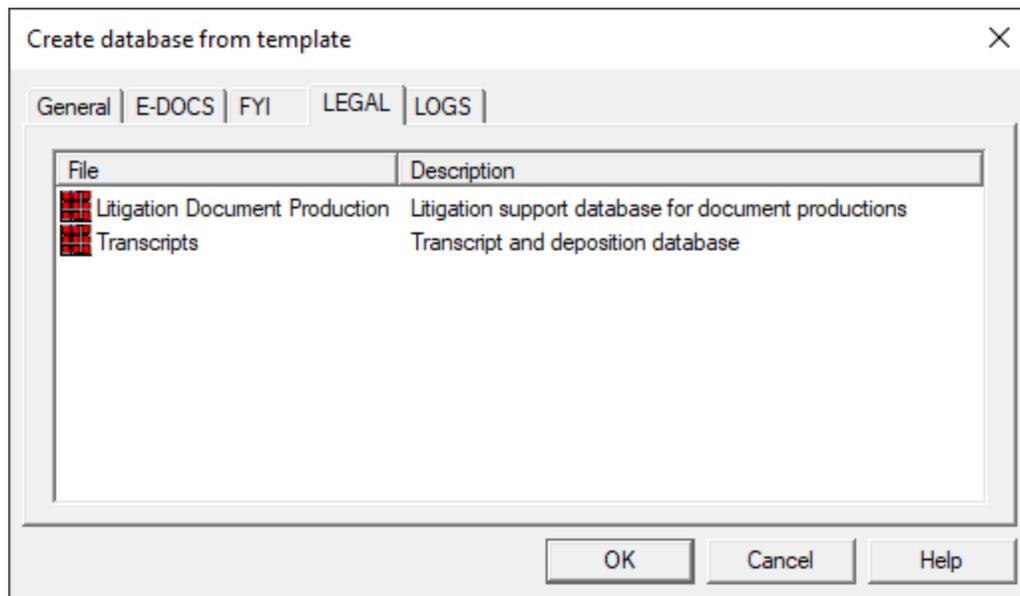
File Type	Description
*.txt	ASCII Text
*.rtf	Rich Text Format
*.html, *.htm	Web/HTML — Only supported in E-Document databases.
*.pab	Microsoft Outlook Personal Address Book
*.wps	Microsoft Works

Transcripts

Transcripts are the easiest files to load into a Concordance database, but you must load the files into a database created from the Transcript database template. The template is hard-coded with a CPL script that enables line numbering and does the work for you. You can import plain text transcripts, depositions, and West LiveNote portable transcript and portable case format files. The maximum size for an imported transcript file is 11 MB.

Create a Transcript Database

1. On the **File** menu, click **Template**. The **Create database from template** dialog displays.
2. Select the **Legal** tab.



3. Click **Transcripts**, then **OK**.
4. Browse to the folder for the new transcript database, enter a **File name** for the database, and click **Open**.
5. Your newly created empty transcript database is displayed in Concordance. You now need to import the transcript documents.

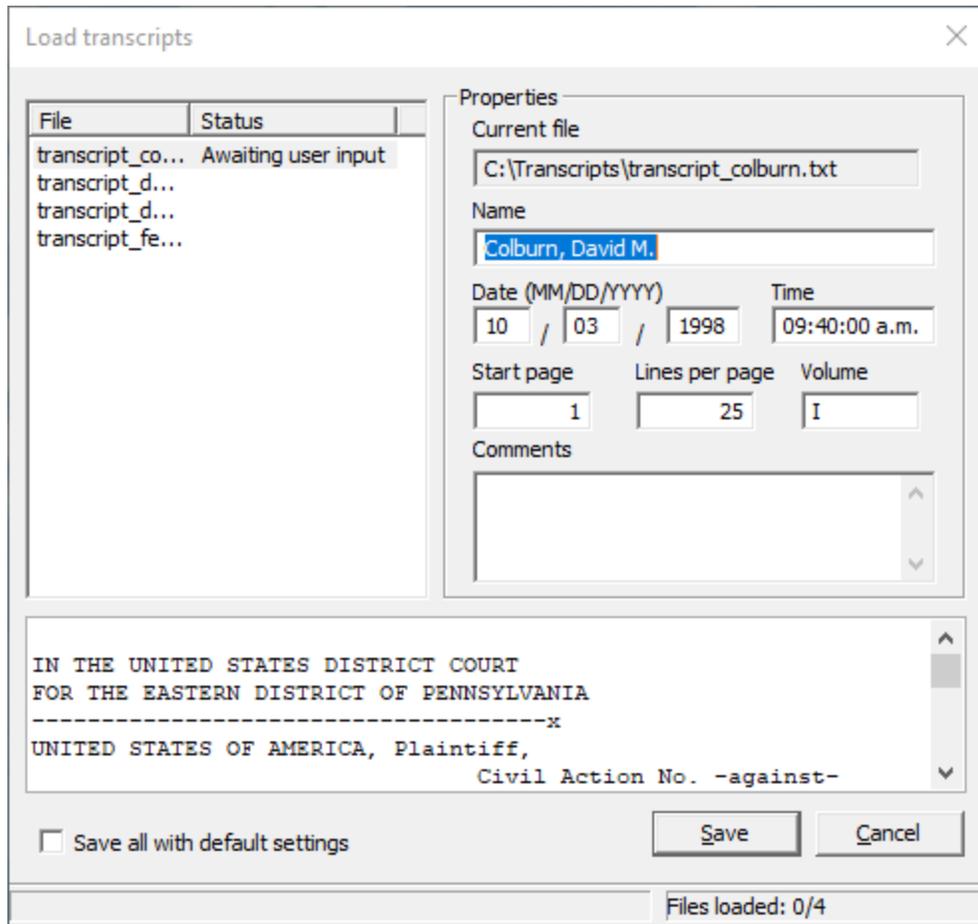
Import Transcript Files

1. On the **Documents** menu, select **Import**, and click **Transcripts**. The **Load transcripts** dialog displays.



The Transcripts menu command is only enabled when the current database was created using the Transcripts template.

2. Browse to and select one or more .txt and/or .ptf transcript files to import. Click **Open**. The **Load transcripts** dialog displays.



3. The dialog highlights the first file to load in the list at the upper left. The associated **Properties** for this file are displayed on the right. If needed, edit the displayed properties then click **Save** to move to the next file.
4. If you do not want to review the extracted transcript properties for each file, select **Save all with default settings** and click Save.
5. After each file has been saved, the Load transcripts dialog updates to display a Load button. To import additional transcript files, click Load.
6. Once all your files have been loaded, click **Done**.
7. In the **Browse** view, verify your transcript files have been imported.
8. If you have already indexed the database, reindex the database. Otherwise, run a full index.



Since .pcf transcript files contain multiple transcripts, you will not be prompted to edit and save individual transcripts.

Email and Attachments

When importing emails and attachments into Concordance, it's best to create an Email database for these files because they contain unique coding for the author and recipients, include a parent and child structure that needs to be preserved, and attachments that need to be retained. All of these components are critical metadata that can easily be altered, spoliating original records and damaging critical information regarding who knew what and when. Once damaged, this information is nearly impossible to restore and is irretrievable after the import process.

Concordance is able to import .pst formatted files that are associated with a Microsoft Outlook profile on your machine. You need to have Outlook installed with a mail profile set up for each custodian, so you can associate each .pst file to an Outlook profile. This should be done before using the Import e-mail wizard in Concordance.

Concordance provides an Email database creation wizard, which includes typical metadata fields from Outlook and takes care of the field mapping for you. The wizard also allows you to create and modify fields as needed. See [Creating an Email and Attachments Database](#) for more information.

You may also want to consider how you are using Concordance in terms of production so that the content can be reviewed and redacted. If your organization is using:

- **Concordance Native Viewer** - the View e-mails in Concordance Native Viewer option must be selected in the Import e-mail - Attachments dialog box to ensure the Concordance Imagebase (CIB) file is created (for new records only).
- **Concordance Image** - e-mails need to be processed into images with a corresponding .dat and image load file.

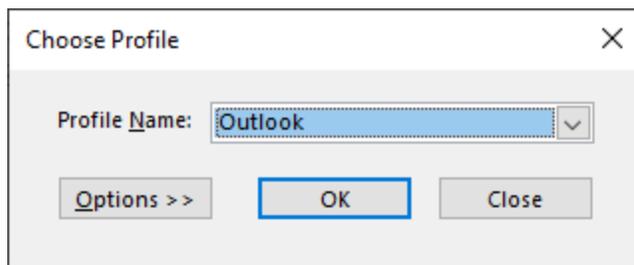
Import E-mail and Attachments

Email is imported into Concordance using the Import email wizard. The Import e-mail wizard automatically establishes parent-child relationships with the e-mail messages and their attachments. This provides efficient and comprehensive searching and saves time in document loading.

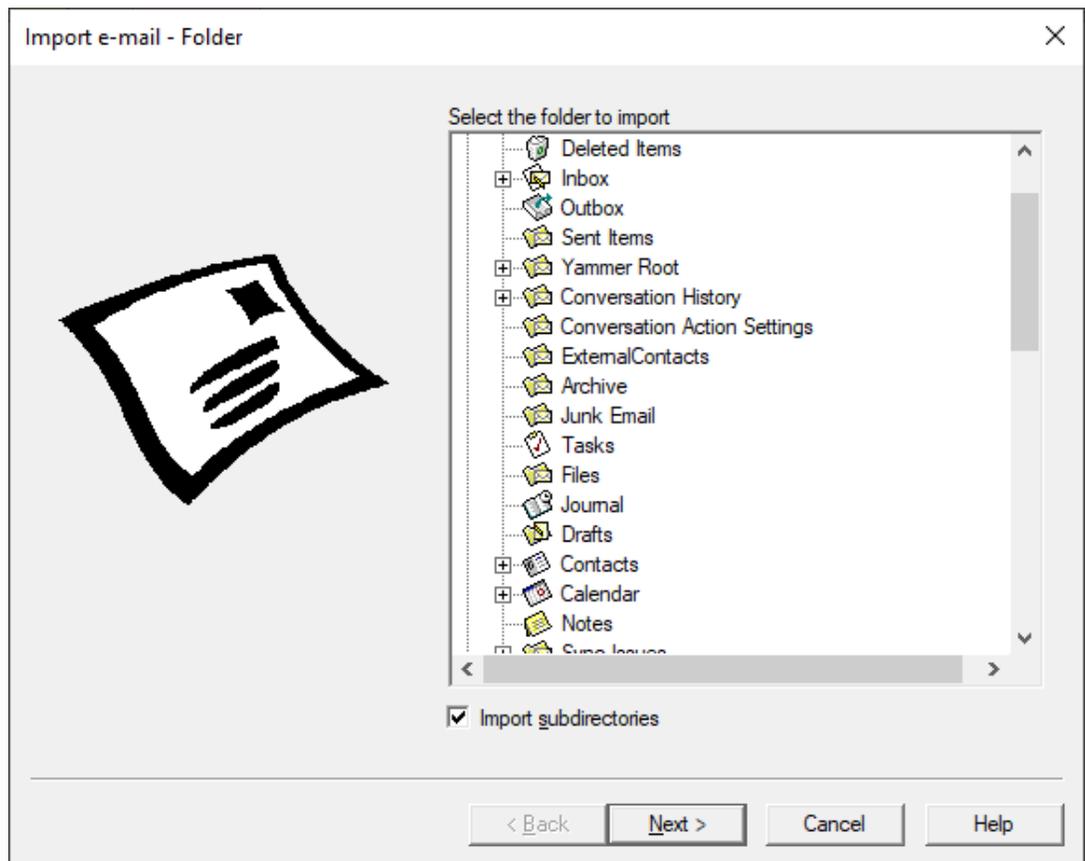


When importing emails into a concatenated database, e-mails are updated when the fields of an imported e-mail match an existing email. When the fields do not match, the imported email is appended to the main database, which is the first database in the concatenated set.

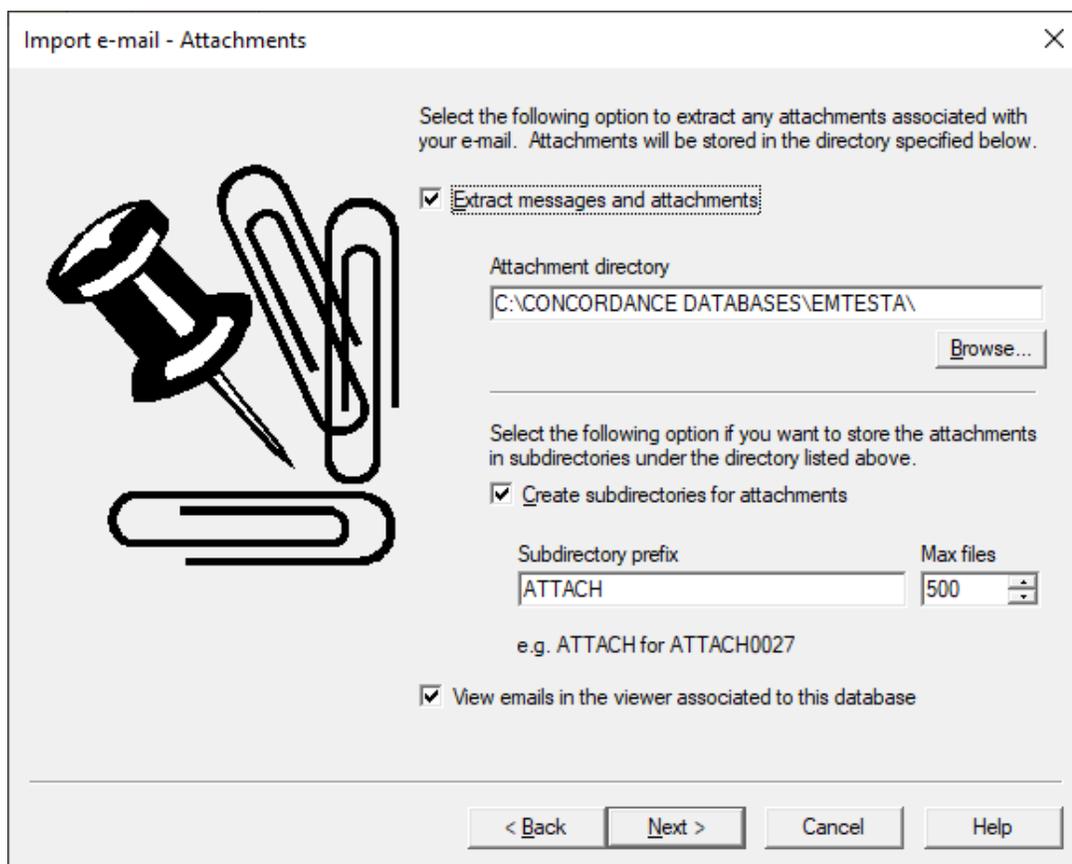
1. In Concordance, open the Email database you want to import additional documents.
2. On the **Documents** menu, select **Import**, and click **E-mail and Attachments**. The **Choose Profile** dialog displays.



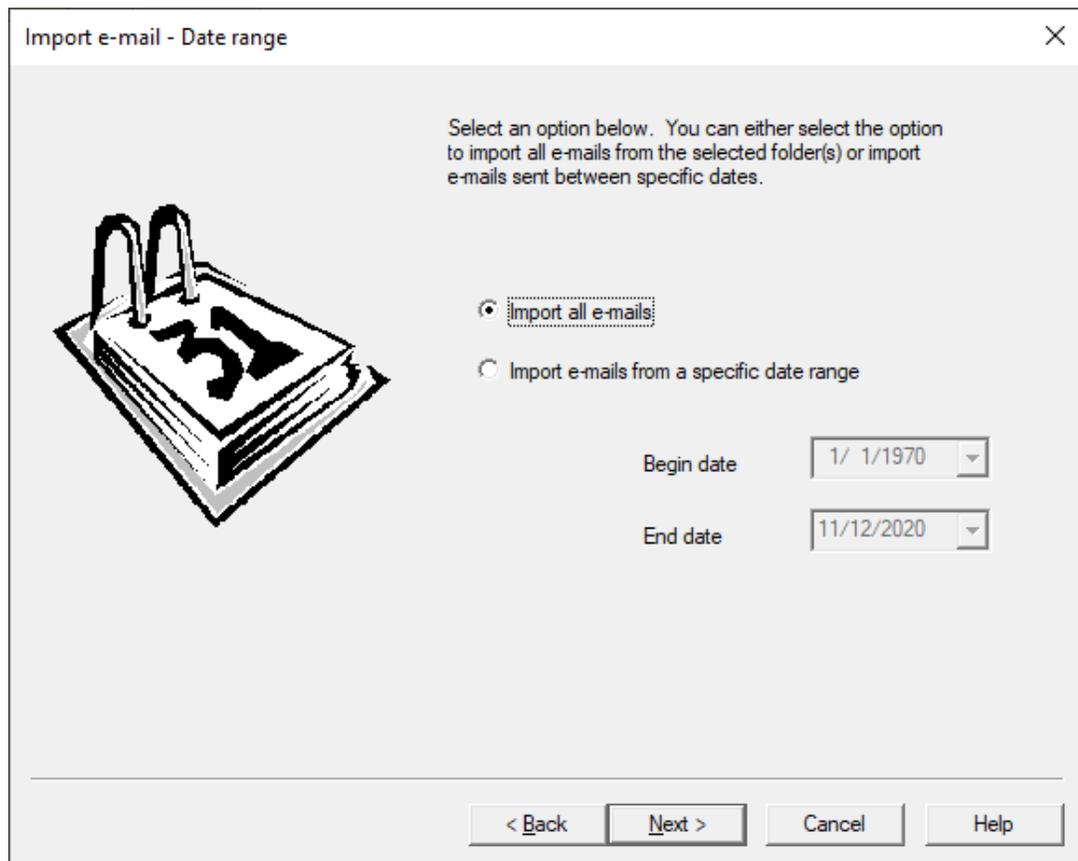
3. From the **Profile Name** list, select the name of the e-mail profile you want to use (Outlook is the local machine's default e-mail). Click **OK**. The **Import e-mail - Folder** dialog displays.



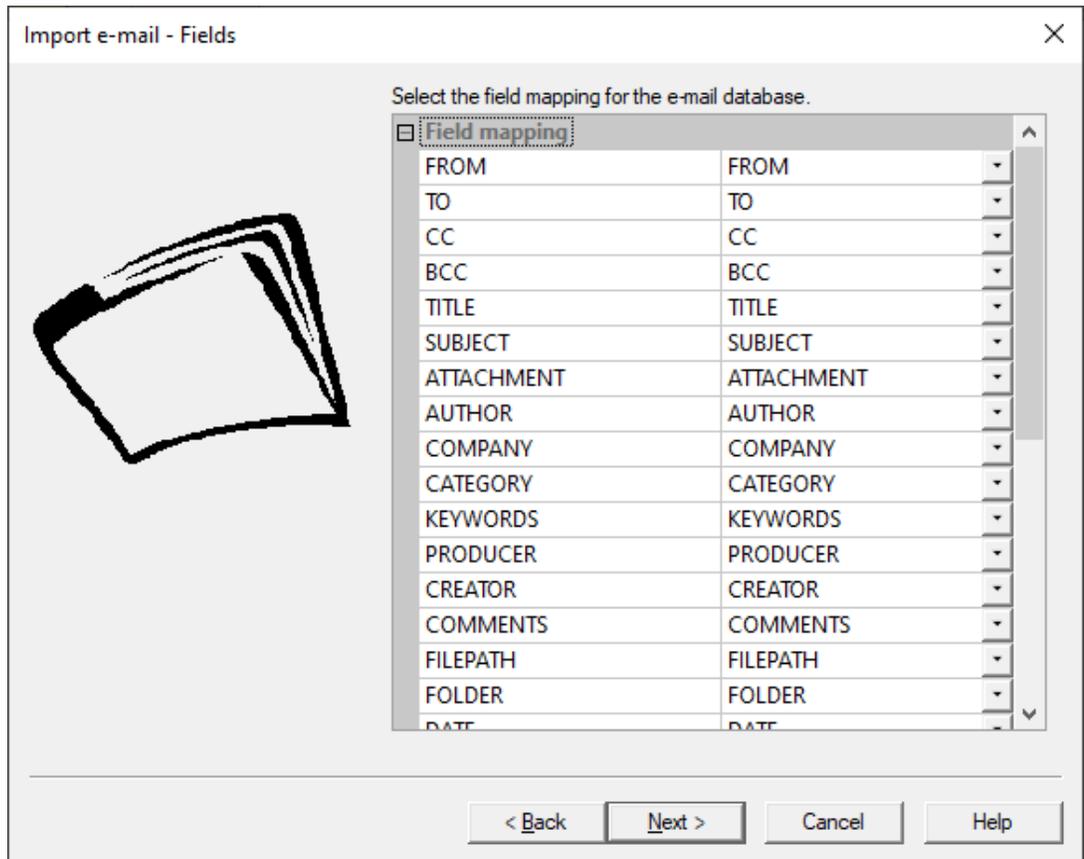
4. Select the folder or subfolder containing email messages that you want to import.
5. To include subdirectories underneath the selected folder, make sure that the **Import subdirectories** check box is selected.
6. Click **Next**. The **Import e-mail - Attachments** dialog displays.



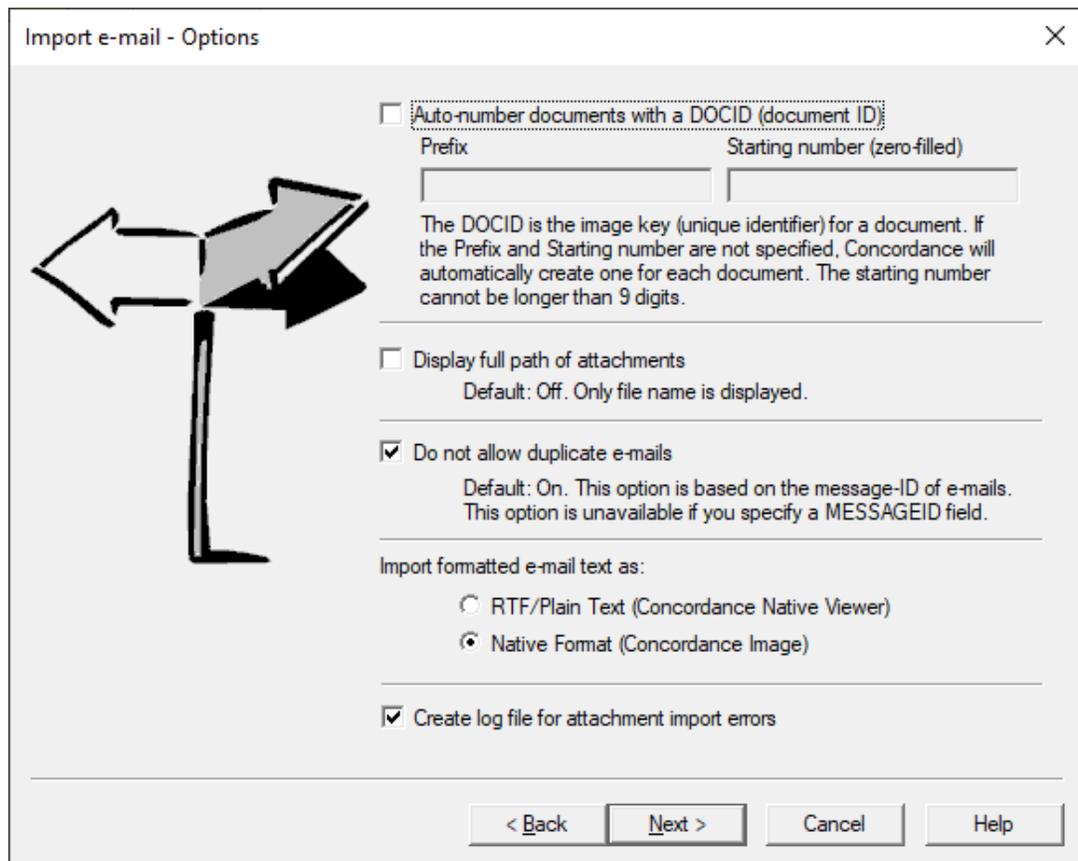
7. To extract attachments, make sure that **Extract messages and attachments** is selected, then **Browse** to the directory where you want to store the extracted email files and attachments. The **Attachment directory** defaults to the email database's directory.
8. It is best practice to store attachments in subdirectories by selecting **Create subdirectories for attachments**, especially when you are managing large numbers of attachments. When selected, specify a **Subdirectory prefix** and the **Max files** allowed in each subdirectory. Subdirectories are named using the prefix you specify followed by a number.
9. Select **View emails in the viewer associated to this database** if you will be using the viewer for review. Selecting this option creates the Concordance Imagebase (CIB) file that is needed to link email files with the corresponding record in Concordance. The database must have a unique image key field.
10. Click Next. The **Import e-mail - Date range** dialog displays.



11. Select **Import all e-mails** to import everything in the previously selected folder, or select **Import e-mails from a specific date range** to limit the import to emails dated between **Begin date** and **End date**.
12. Click Next. The **Import e-mail - Fields** dialog displays.

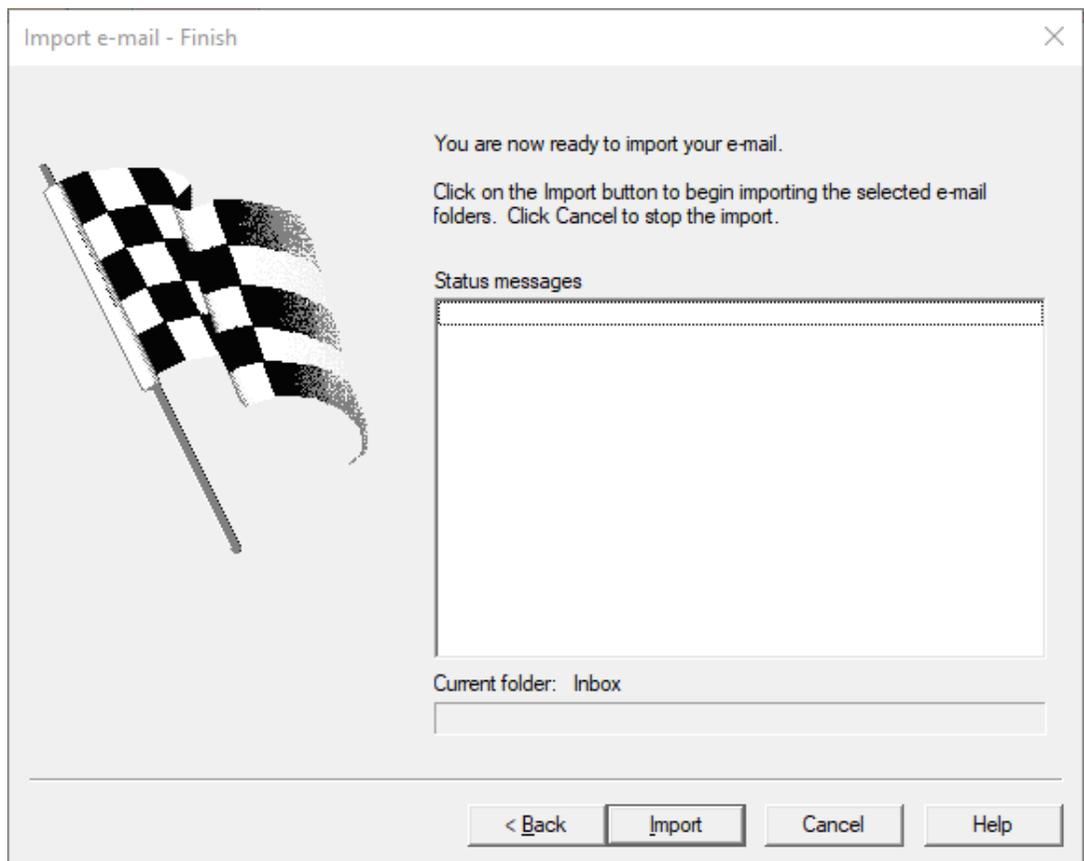


13. The left column displays email message fields, and the right column displays the database fields. Verify that the fields are mapped correctly, and make any adjustments needed by selecting the correct database field using the drop down arrow on the right.
10. Click **Next**. The **Import e-mail - Options** dialog displays.



11. Select the **Auto-number documents with a DOCID (documentID)** to auto number the imported email messages, and then specify the **Prefix** and **Starting number (zero-filled)** to use. This option must be selected if you are using Concordance Native Viewer.
12. Select **Display full path of attachments** to display the full path to attachments.
13. Select **Do not allow duplicate e-mails** if you do not want to import duplicate emails. Most emails have a unique message identifier called the message-id, which is stored in the MESSAGEID field. Before importing a message, the import wizard checks to see if any previously imported emails have the same message-id. If the wizard finds another record with this message-id, it does not import the message.
14. Select the option you want under **Import HTML formatted e-mail text as**.
15. Select **Create log file for attachment import errors** if you want the import to create an import error log.

12. Click **Next**. The **Import e-mail - Finish** dialog displays.



13. Click **Import**. The import runs and the **Status messages** field updates to provide information about the import.

14. Click **Done** to exit the wizard.

15. In the **Browse** view, verify your email messages have been imported.

16. If you have already indexed the database, reindex the database. Otherwise, run a full index.

OCR Files

It is best practice to store the body text of your records, also called OCR, in a separate text file from your field metadata. When your OCR is placed into individual document-level text files, you can import the text into each corresponding record. The text file name must match the image key field (the BEGNO field or its equivalent).

If the body text contains more than 12 million characters (the capacity of a paragraph field), Concordance automatically overflows the text into the next available field. If you import your OCR from a delimited text file and there are more than 12 million characters in a record, then you need to separate the text in the delimited text file into multiple fields to avoid truncation during import.

After your metadata is imported into your Concordance database, it's time to import your record content into the body text fields. If you have already created your database, you can use a CPL script (ReadOCR<version>.cpl) to quickly import OCR text files into your database field structure by linking them with the image key field and ensuring that the correct file path is designated. Your record content from OCR files usually populates the OCR1 and OCR2 fields or their equivalents. The OCR fields are where the bulk of full-text searching is done in Concordance.

If your OCR files aren't importing properly when using the CPL, check the following:

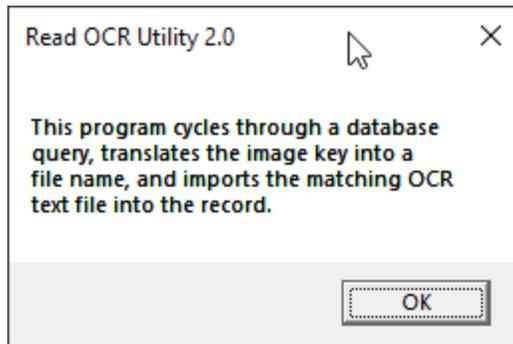
- Verify file names and extensions - OCR text file names should match the associated image key, and have a .txt file extension
- Check your .LOG file to verify whether each OCR file successfully loaded



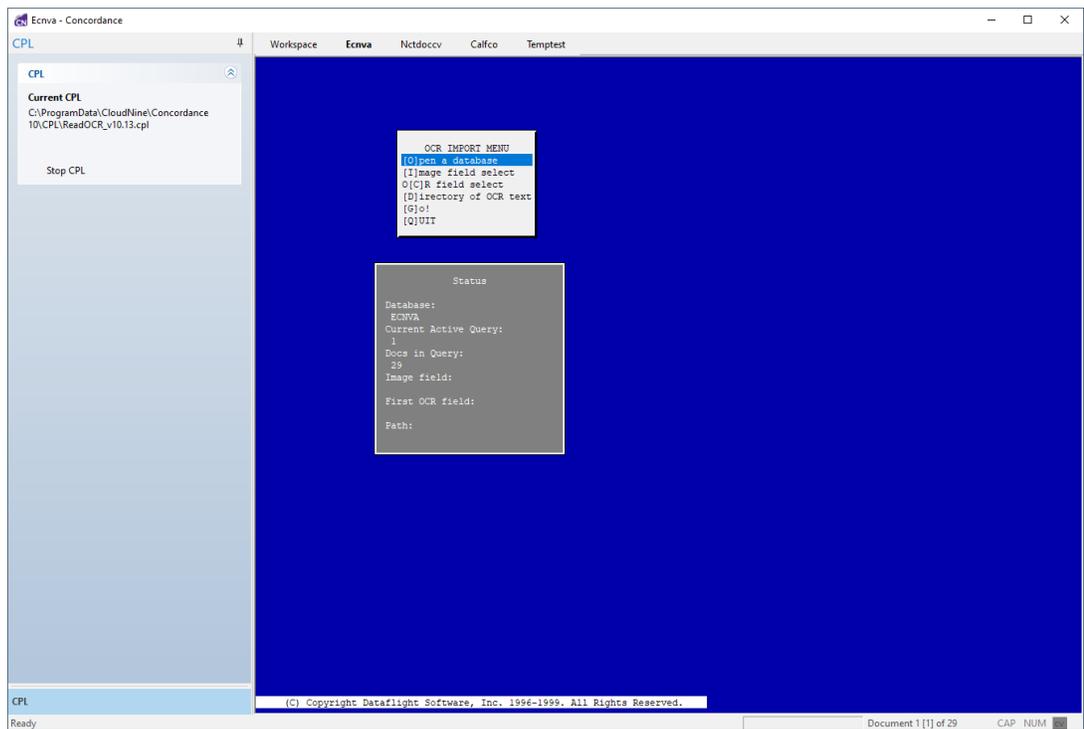
Your OCR text files can reside in the same directory as the image files. They do not need to be separated. You will need to import your OCR for each volume where it resides.

Using ReadOCR.CPL

1. In Concordance, on the **File** menu, click **Begin Program**.
2. In the **Open** box, navigate to your CPL folder, select the **ReadOCR<version>.cpl** file, then click **Open**. By default, CPLs are installed in C:\ProgramData\CloudNine\Concordance 10\CPL.
3. A dialog displays confirming you are running the **Read OCR Utility**. Click **OK**.



- In Concordance, the Workspace pane background is now blue, an indication that you are running a CPL script. The **OCR IMPORT MENU** and **Status** details display. The **Current CPL** displays in the Navigation pane.



- CPLs work off of current queries in Concordance. The number of documents in your current query is displayed in the Status Bar at the bottom.
- On the **OCR IMPORT MENU**, click **[I]image field select**.
- An additional window displays a list of fields and their associated types. Select **BEGNO** or its equivalent. The **Status** window updates to show **BEGNO** as the **Image field**.

8. On the **OCR IMPORT MENU**, select **O[C]R field select**.
9. An additional window displays a list of fields and their associated types. Select **OCR1** or whatever field you want to use as the first OCR field. The **Status** window updates to show **OCR1** as the **First OCR field**.
10. On the **OCR IMPORT MENU**, click **[D]irectory of OCR text**.
11. A browse dialog is displayed. Navigate to the folder containing your OCR files, select the first OCR file, and click **Open**. The **Status** window updates to show the **Path** to your OCR files to import.
12. In the **OCR IMPORT MENU**, select **[G]o!**.
13. A browse dialog is displayed. Navigate to a location for the OCR import log file, enter a **File name** for the log and click **Open**.
14. The OCR import runs. Review the log file to see if the import ran successfully.
15. On the **OCR IMPORT MENU**, click **[Q]uit** to exit the CPL script.

Verify the Imported OCR Text

Once you have imported your OCR files, it is best practice to verify the imported text. After verifying, you will need to reindex or index the database.

1. In Concordance, open the **Browse** view.
2. Verify that the data you just imported populated the OCR field correctly in your database records.
3. Scroll to the bottom of a record to verify the administrative fields.
 - Notice that the **CREATEDATE** field displays the import load date of the document. The **EDITTRAIL** field is populated with the record modification date, session and accession numbers, and the user ID of the person who last updated the file. The **ACCESSID** field displays the load order number of the document.

- If you have corresponding OCR for every record and need to verify whether all text was loaded into the OCR1 fields, then use a relational search to ensure that every field was populated.
4. Run an empty OCR field search. To do this, type `OCR1 = ""`. The search provides query results on all OCR1 empty fields. You should receive the, "No documents found in current query" message if all documents loaded properly.
 5. Run a populated OCR field search. To locate specific paragraph fields that are populated, you can also run the relational search of `[fieldname] = *`. You should receive query results for all documents that have this field populated with any value.

Managing Databases

Ongoing maintenance of your Concordance database is standard practice as an administrator. Some database management tasks require that all other users are logged out of the database when they are performed. The administrator is the only user allowed in the database when the following processes are occurring:

- Index
- Pack
- Zap
- Security
- Modify
- Replication/Synchronization
- Converting or upgrading to a current version



- To see users currently logged in, on the **Help** menu, click **About Concordance**.
- To disconnect users: contact them directly, or reboot the database home drive.

Database Properties

For a summary of general database settings and information select **Properties** from the **File** menu. In this dialog you can:

- Review concatenated databases and directory paths.
- Enter or review database descriptions.
- Review dictionary and punctuation information for full-text searching.
- Change the database home directory (defaults to the location of the .dcb file), which is helpful when saving reports, queries, snapshots, etc.
- View users currently logged in to the database.

The screenshot shows the 'Edncdoccv V10' dialog box with the following sections:

- Concatenated databases:** A list box containing the path 'C:\CONCORDANCE DATABASES\EDNCDOCCV\EDNCDOCCV'.
- Description:** A text box containing 'Electronic discovery database'.
- Documents:** 11
- Dictionary words:** 7,066
- Stopwords:** 141
- Operator:** ADJ
- Quote:** *
- Wildcard:** *
- Punctuation:** ',/'
- Empties:** Hide
- Memory:** 2,147,483,647
- Home directory:** An empty text box with a 'Browse...' button.
- Users logged in:** A list box showing a user icon and the timestamp 'Wed Nov 11 11:27:28 2020'.

An 'OK' button is located at the bottom right of the dialog.

Backup and Archive

See Concordance Database Files for more details about the various files used by Concordance.

Database Backup

There are a couple of options for backing up your Concordance databases. Before backing up your Concordance database, you need to determine how long the backup process may take, given the size of the database files. The backup process could take many hours, so having a solid estimate helps you plan backup maintenance schedules.

Research the network's automatic server backups and how it may impact Concordance database files. Database files automatically backed up in this manner often take longer to restore, therefore, they are probably not a practical method to rely on as your sole source for database copies.



Do not perform live backups if you are using backup software that locks files, even briefly. This has been known to cause read/write functions to the database files to fail, and can cause file synchronization or corruption issues. Check with your IT group and/or backup solution provider to verify that no file locking occurs before scheduling any backups on Concordance, Concordance Image, and FYI files that are in use.

Be aware that anti-virus, firewall, and backup software can often interfere with network traffic and the locking of files, and in effect, could cause Concordance, Concordance viewers, and FYI Server software to crash.

Verify that you are not backing up your databases while they are in use. Any locking of files while users are updating those same files can produce erroneous results. Using snapshots on your data storage devices can reduce these effects because they do not lock the files.

To create a backup of a Concordance database, use the Export Wizard provided in Concordance. Exported databases do not include security or tag history. To retain security in your back up, you can also replicate the database.

When backing up databases, you should also consider the following:

- Replication of your database files within Concordance has a longer processing time, but this method retains security settings.
- If security is applied, back up the .sec files.
- Back up tags using the TagSaver<version>.cpl and TagHistoryandStoreIt<version>.cpl.
- Do not forget to copy over your list files, queries, exported security, and .gat files, etc.
- Verify that your antivirus does not scan any of the following file types: .trk, .key, .dct, .dir, .fzy, .layout, .sec



Backing up tags may take days for some databases, and loss of tagging information can jeopardize a case review. Please make time to research and test this process so you understand how to best schedule this task regularly.

Database Archive

Archiving of databases is standard practice for corporate environments, and you will want to adhere to those guidelines with Concordance databases. You may want to make additional archives for maintenance reasons too, ensuring that you have adequate archive files for case history and research. Reviewers are known to come back, even years later, and want to research a case history if they are working on a similar one. Many vendors offer vault storage and web repository environments for data retrieval in the event of a disaster, or merely to restore data from an archive library.

You can create a database archive using Concordance. Because the storage capacity for records is vast, an archive library may work well for your organization in researching old records and case history data.

Archiving Guidelines:

- Run the Tag To Field command in the Tag and Issue Management dialog box, and the TagHistoryandStoreIt<version>.cpl to track and manage tags in a field.
- There are three minimum files needed to archive a database: .dcb, .ndx, .tex.
- Remember to turn off security so the file is accessible by others.
- Export to a delimited text file because it is a universal archive format that is retrievable in years to come.
- Ask yourself whether you really need to archive images; these files are huge and require adequate media storage.
- Move files to a long-term, archive-quality media.
- Schedule data destruction per corporate policies; determine how long do you need to keep the copies.
- Keep an updated list of archive files for you or another administrator to reference.

Modifying Databases

When you make a modification to a database, it usually means that you are modifying fields in the database. When you modify a database, you need to be careful. Concordance has no restrictions for database modifications, but we do offer recommendations on what you should and should not do so you are less likely to corrupt your database.

Always back up a database's files before you make any changes to the database. Some modifications are more dangerous than others. Database modifications always require a full index update immediately after the modifications. Most modify functions rebuild the database and erase the dictionary, requiring you to index the database from scratch. We recommend that you plan ahead to allocate

time for database modification since it requires exclusive access to the database and time to run a full index.

Changes that do **not** require a database rebuild:

- Changing a date field's display type
- Changing only one field's name
- Adding or deleting key fields

When making changes, follow the 3 Change Rule. We recommend that you not make more than three changes to a database before indexing. After making three changes using the Modify dialog, save your changes, and then index the database.

If you have applied security, you must also give users access to any new or renamed fields before they are visible in the database. New and renamed fields are not visible in the Table view until they are added to the layout structure.



Modifications made to a database is a common reason for corruption. Please use caution when making changes and always back up your database files before doing so. Also it is a good practice to close other databases while making database modifications.



If you are modifying the database structure and using an active sorting layout or table layout, you must delete .sortinglayout and .layout files. The files will be rebuilt to accommodate the new database structure the next time you open the database.



If Concordance security is enabled, the Modify dialog can only be accessed by a user that has full read/write access to all fields.

R i s k	Activity
L e s s D a n g e r o u s	Adding/removing punctuation
	Changing a field's length
	Changing field properties (index or key)
	Changing data types (text to paragraph)
	Adding a new field at the end of the list
	Inserting a new field in the middle of the list

R i s k	Activity
	Renaming a field – A common cause of database corruption!
	Delete or insert a field elsewhere – common cause of database corruption.
M o r e D a n g e r o u s	Making more than one change to the same field, at the same time

 If you need to change a field name, make a new field first and run the AppendOneFieldToAnother_<version>.cpl, then hide the other field from users in the Security dialog box. Do not delete it!

Modify a Database

1. Make a back-up copy of the database you are modifying. See [Backup and Archive](#)^[62] for more information. Do not proceed to step 2 until you have completed this procedure.
2. Once your database backup copy is secure, open the database you want to modify and close all other databases.
3. On the **File** menu, click **Modify**. The **Modify** dialog displays.

Field Name	Type	Length
DOCID	Paragraph	
TITLE	Paragraph	
SUBJECT	Paragraph	
AUTHOR	Paragraph	
COMPANY	Paragraph	
CATEGORY	Paragraph	
KEYWORDS	Paragraph	
PRODUCER	Paragraph	
CREATOR	Paragraph	
COMMENTS	Paragraph	
METADATA	Paragraph	
FILEPATH	Paragraph	
DATE	Date	MMDDYYYY
MODDATE	Date	MMDDYYYY
CREATIONDATE	Date	MMDDYYYY
PRINTDATE	Date	MMDDYYYY
TEXT01	Paragraph	
TEXT02	Paragraph	
TEXT03	Paragraph	
TEXT04	Paragraph	
TEXT05	Paragraph	
OCR1	Paragraph	

Status

Documents	11
Fields	23

Punctuation: ',./'

Name: DOCID

Type: Paragraph

Length:

Places:

Format:

Image Key Accession

System Indexed

New Insert Delete Save To File Append Equivio Fields OK Cancel

4. Make the necessary changes.
5. Click **OK** to save your changes and close the **Modify** dialog.
6. Run a full index.



Whenever you add or rename a field in the database, it is added to the database without field access rights. In the Security dialog box, the No rights check box is automatically selected for the field. You

will need to set the field privileges for the new or renamed field for users already entered in the Security dialog box.

For more information about field access rights, see [Setting Up Security](#) .

Replicating Databases

With Concordance, you can create a copy of your database records and images so reviewers can work offline, and then synchronize any edits and changes back into the primary database to update to the document collection. The synchronization process helps merge the most recent updates with other user updates, and provides a listing of any collisions so you can resolve any field and/or note discrepancies between the original and replicated databases.

Replication versus Synchronization:

- Replication is creating an exact copy of your database while tracking the replicated copy.
- Synchronizing databases is merging the replica database to the primary database, and reconciling any updates or edits.

When replicating and synchronizing databases, we recommend that you follow the directions in all dialog boxes and use all fields, if possible. For concatenated databases, you must replicate each database individually.

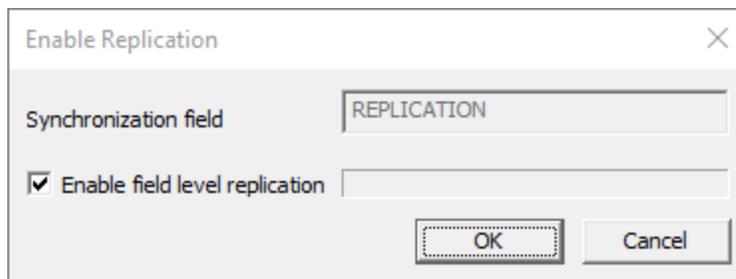


When replicating a database, be aware that the .dir, .vol and .cib files are not replicated and the replicated database will not be able access Concordance Viewer, Concordance Native Viewer or Concordance Image.

Enable Replication

The first step in replicating a database is to enable replication. You can replicate a database without enabling replication, but you will not be able to synchronize back to the publishing database. If replication is enabled, you can replicate both ways.

1. Back up the database you want to replicate. It is essential that you create a backup copy of your database before enabling replication. You can cancel the process before it is half-way complete. After the half-way mark, the Cancel button is disabled and the process must complete. If you want to cancel the process after the half-way mark, you will have to restore your database from backup.
2. In Concordance, open the database you want to replicate.
3. On the **Tools** menu, select **Replication**, and click **Enable replication**. The **Enable Replication** dialog displays.



4. **Synchronization field** is a read-only. When you enable replication in a database, Concordance creates the REPLICATION field in the database. The REPLICATION field is system field that tracks your replicated database and is administered by Concordance. If you need to change the REPLICATION field name, you can modify the field in the Modify dialog box.
5. **Enable field level replication** enables field-level replication. Concordance can track changes on a field-by-field basis. If two people edit the same record and then synchronize, Concordance will detect if the edits were to different fields and merge the edits without signaling a collision. Without field-level replication, Concordance cannot arbitrate the edits and it will flag a collision. Enabling this feature adds entries to the database tracking file, called [database name].trk, for each edit. The tracking file adds overhead to the system in terms of file storage space and the computer time needed to manage it. The overhead is generally low and you should enable this feature. You can disable it later if you find that it is unnecessary.

6. Click **OK** to enable replication and close the **Enable Replication** dialog.

Replicate the Database

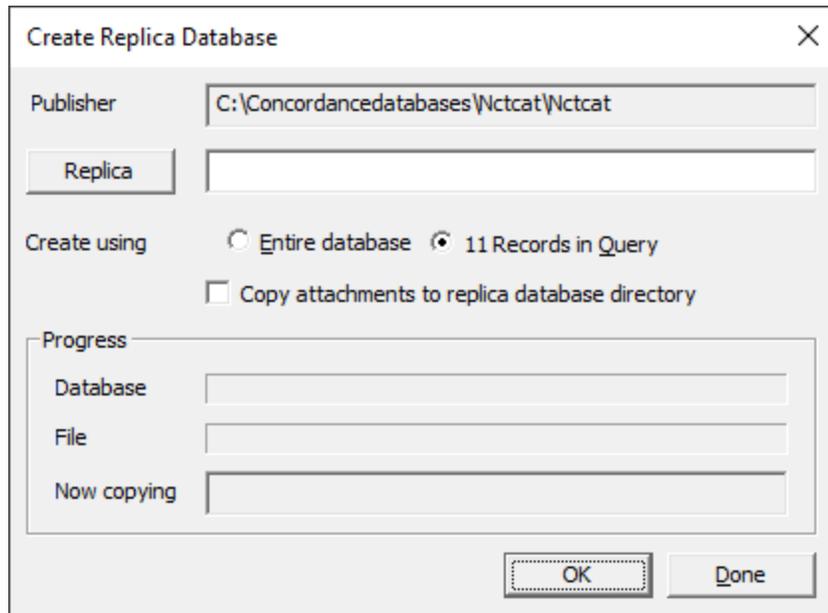
When you replicate a database, the replica database contains all security settings from the original database. You can create a replica database that only contains the records in the current query, in sorted order, or all the records in database.

 Concatenated databases cannot be replicated.

 When replicating redlines databases, it is important to save the replica in the same directory folder as the main database replica and also name it the same to keep track of your files.

 If you want your database permanently sorted, you should sort the database and then create a replica by using the [#] Records in Query option. The replica database will be permanently sorted.

1. Make sure that the database you want to replicate is backed up.
2. Run a search query to locate the records you want to include in the replica database.
3. On the **Tools** menu, select **Replication**, and click **Create a replica**. The **Create Replica Database** dialog displays.



4. **Publisher** displays the name and path of the current database. Click **Replica**.
5. Browse to the location for the replica database, provide a replica .dcb **File name**, and click **Open**.
6. For **Create Using** select the **Entire database** to replicate all database records or **<#> Records in Query** to replicate the records from the current query.
7. When a database is replicated, the database's notes database is replicated along with the main database. Concordance can copy any external files attached to those notes to the replica database's destination directory. This is useful for laptops that will not be connected to the network, but still need to access the attachments. Select **Copy attachments to replica database directory** to copy the note attachments.
8. Click **OK**. The Progress section updates to show information while the replica is being created.
9. When the replication process is complete, click the **Done** button.



The new replica database will not be indexed.

Synchronize the Databases and Resolve Collisions

After edits are made to the original and/or replica database, you need to synchronize the databases to update them.

Synchronization copies any changes between the databases. The synchronization options allow you to fine tune the replication process. You can set your database to publish data but not receive any updates, a read-only publishing scenario. You can set the options so that you are receiving changes, but not delivering them, or you can enable full replication with complete synchronization between the two databases.

The Replication dialog box is used to define the synchronization options and run the synchronization. The default options in the Replication dialog box are set for full symmetric, bi-directional synchronization.

1. In Concordance, open the original or replica database.
2. On the **Tools** menu, select **Replication**, and then **Synchronize databases**. The **Replication** dialog box displays.

Replication

Publisher: C:\Concordancedatabases\Nctcat\Nctcat

Subscriber: [Empty]

Tag for Collisions: [Empty]

Synchronization

- Synchronize Databases
- Subscriber Overwrites Publisher
- Publisher Overwrites Subscriber
- Copy attachments with notes

Deletions

- Mark for Deletion
- Tag Deleted Records [Empty]
- Append/Restore Deleted Records

Fields

- Use All Publisher Fields
- Use Selected Publisher Fields

New Records

- Append records to Publisher
- Append records to Subscriber

Progress

Replicating	0
Collisions	0
Deletions	0
Tags	0
Replicated	0

Buttons: Save Settings, Advanced, Synchronize, Done

3. **Publisher** displays the database name and path for the database you opened.

4. Click **Subscriber**. Navigate to and select the database you want to synchronize with the **Publisher** database. Click **Open**.
5. If you want to use a Tag to tag records that have collisions between the **Publisher** and **Subscriber** databases, type that tag name in **Tag for Collisions**.
6. Based on which database is most current, in the **Synchronization** section select one of the following:
 - **Synchronize Databases** - fully synchronizes both databases. All changes from the **Subscriber** database are copied to the **Publisher** database, and all changes from the **Publisher** database are copied to the **Subscriber** database.
 - **Subscriber Overwrites Publisher** - during the synchronization, only the changes in the **Subscriber** database are added to the **Publisher** database. Data in the **Subscriber** database overwrites the data in the **Publisher** database.
 - **Publisher Overwrites Subscriber** - during the synchronization, only the changes in the **Publisher** database are added to the **Subscriber** database. Data in the **Publisher** database overwrites the data in the **Subscriber** database.
7. Select **Copy attachments with notes** to copy the attachments associated with the records from one database to another.
8. In the **Fields** section, select one of the following:
 - **Use All Publisher Fields** - select this option if you want Concordance to run a full bi-directional synchronization.
 - **Use Selected Publisher Fields** - select this option if you only want to update specific fields during the synchronization. If you select this option, the **Select Fields** dialog will display allowing you to specify the fields to synchronize.



If you select the **Use Selected Publisher Fields**, records will not be marked as synchronized during the synchronization. The

database records remain out-of-synch until a full synchronization takes place and ALL fields are synchronized via the **Use All Publisher Fields** option.

9. In the **New Records** section:

- If you are running a full synchronization between the two databases, select both **Append records to Publisher** and **Append records to Subscriber**.
- To add new records from the **Publisher** database to the **Subscriber** database, select **Append records to Publisher** and clear **Append records to Subscriber**.
- To add new records from the **Subscriber** database to the **Publisher** database, clear **Append records to Publisher** and select **Append records to Subscriber**.



If you created a replica database from a query and you want to keep only the records from the query in the replica database, clear both **Append records to Publisher** and **Append records to Subscriber**, otherwise the full database will be appended.

10. In the **Deletions** section:

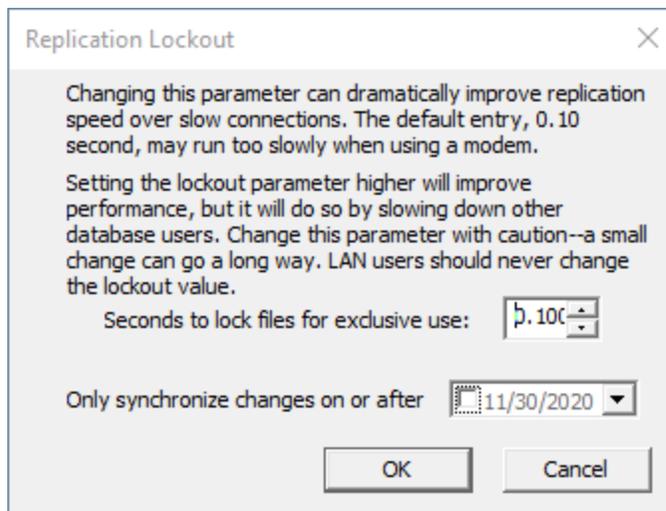
- If you are running a full synchronization between the two databases and you want Concordance to mark deleted records from one database for deletion in the other database, select **Mark for Deletion**. Remember, marking a record for deletion does not delete the record from the database. A record marked for deletion is not deleted from a database until the database is packed.
- To tag records that have been marked for deletion, select **Tag Deleted Records** and type the tag name you want to use in the corresponding field.
- Select **Append/Restore Deleted Records** to have Concordance copy a deleted record back to the database it was deleted from, effectively

restoring the record. This can only take place if it was not marked for deletion and packed from both databases. The record must still exist in one of the databases to restore it.



When you synchronize databases with **Append/Restore Deleted Records** selected, the deleted records are restored, but the restored records are not displayed in the database until the database is reindexed.

11. Click **Advanced** to update Replication Lockout parameters:



- Replication lockout is the time that replication holds the <database>.key file open for exclusive use. No other network user can access the file when it is in exclusive use. The **Seconds to lock files for exclusive use** value defaults to 0.10 seconds, which balances performance with file sharing. However, some wide area network (WAN) connections perform file and record locking very slowly. The default lockout parameter may be too small for reasonable synchronization performance.
- To set a specific date for synchronization, select the **Only synchronize changes on or after** drop down and pick the date you want to use.

12. You can click **Save Settings** to save all the options you have selected as the default settings each time you display the **Replication** dialog.

13. Click **Synchronize** to start synchronizing the databases. If any collisions are found a message will be displayed asking if you want to resolve them.



New notes added after replication to either the original or replica databases will not cause a collision during synchronization. Only notes created in the replication process, that are then edited, will cause a collision when synchronizing.



Collisions do not need to be resolved during the synchronization process. You can resolve collisions later or choose to enter additional text in the primary database field to note the differing entries, and notify reviewers of the discrepancy to verify whose annotations are correct. To resolve collisions after synchronization, see the [Resolve Collisions after Synchronizing the Databases](#)⁷⁸ section below.

14. Click **Yes** to resolve the collisions during the process:

- If Concordance finds field collisions, the first record containing a collision in both databases will be opened in Edit view. The fields containing data collisions are displayed in red text. The Status bar at the bottom of the screen displays the number of records containing field collisions found during the synchronization. Select either:
 - **Resolve all collisions with publisher**
 - **Resolve all collisions with subscriber**
- If Concordance finds only note collisions, clicking **Yes** opens the **Resolve note collisions** dialog. The number of note collisions found during the synchronization is displayed at the bottom of the screen. Do one of the following:
 - If you want the data in the publisher database's record to overwrite the data in the subscriber database's record, click **Publisher overwrites**.

- If you want the data in the subscriber database's record to overwrite the data in the publisher database's record, click **Subscriber overwrites**.
- If Concordance finds both field and note collisions during synchronization, Concordance displays all field collisions first and then displays the note collisions.



If you exit the field collisions view by clicking on another view, closing the database, or exiting Concordance before all field collisions are resolved, the **Resolve note collisions** dialog will not appear.

15. When you are finished resolving all collisions you will see a message stating *All collisions have been resolved*.
16. Click **OK**.
17. If changes were applied to either databases during the synchronization they will need to be reindexed.

Resolve Collisions after Synchronizing the Databases (Optional)

During the database synchronization process, if Concordance finds collisions between the records in the publisher database and the subscriber database, you have the option of resolving the collisions during or after the synchronization process.

Collisions do not need to be resolved during the synchronization process. You can resolve collisions later or choose to enter additional text in the primary database field to note the differing entries, and notify reviewers of the discrepancy to verify whose annotations are correct.

You have two options for resolving collisions after synchronizing the databases:

1. **Rerun the synchronization.** If you need to work with your associates to resolve the collisions found during the synchronization, once you have the information you need to resolve the collisions, you can rerun the synchronization and resolve the collisions during the synchronization process. Before rerunning the synchronization, reindex the databases. If you do not reindex the databases, you will not be prompted to resolve collisions when you rerun the synchronization.
1. **Query the collision tag in both databases.** If you need to work with your associates to resolve the collisions found during the synchronization, once you have the information you need to resolve the collisions, you can query both databases for the collision tag you created during the synchronization process and manually resolve the collisions between the two databases.

Resolving Collisions Using the Collision Tag:

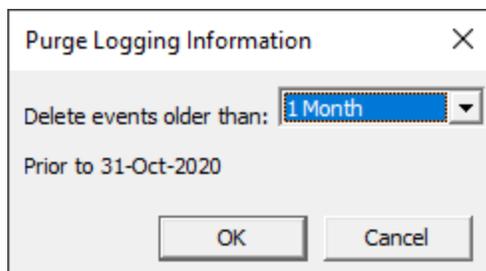
1. In Concordance, open the original database and the replica database.
2. Run a query for the collision tag in both databases. The collision tag is created in the Tag for Collisions field in the Replication dialog box and applied during the synchronization process. When Concordance finds a collision during the synchronization process, Concordance applies the collision tag to the record in both databases.
3. Compare the records tagged with the collision tag, and locate the field data and/or note collisions between the same record in each database.
4. For field collisions, in the **Edit** view, make the necessary edits to resolve the collisions, and click the **Edit** view button or move to another record to save your changes.
5. For note collisions, click the note in the **Browse** view or right-click the note in the **Notes** task pane to open the **Notes** dialog box, make the necessary edits to resolve the collisions, and click **OK** to save your changes.
6. After resolving the database collisions, reindex the modified databases.

Purge Old Events

Replication makes use of a database tracking file, <database>.trk, to log edits, deletions, and other modifications for each database in a replication set. Many of the entries in the file are no longer needed when all replica databases have been synchronized. Unfortunately, Concordance has no way of knowing if all replica databases have been synchronized or even how many replica databases exist, so it cannot automatically purge old entries from the tracking file.

It is best practice for Concordance database administrators to purge old events from time to time as the databases are synchronized.

1. On the **Tools** menu, select **Replication**, and click **Purge Events**. The **Purge Logging Information** dialog displays.



2. For **Delete events older than**, select the starting timeframe to purge events from the file. You can select from one month ago up to a year ago. Concordance purges data older than the timeframe selected. After making your selection, the Purge Logging Information dialog box displays the specific date Concordance uses to delete events from the file.
3. Click **OK** to purge the events.
4. After the events are purged from the .trk file, the **Purge Logging Information** dialog box displays the number of events that were deleted.
5. Click **Cancel** to close the **Purge Logging Information** dialog box.

Replicating Databases for Working Offline

You can make a copy of your images and existing redlines for a user to work offline. In order to create a copy of your images and existing redlines for working offline, you need to create:

- A replica of the <database>.dcb database file
- A copy of your images
- A replica of your <database>-redlines.dcb

To create a copy of the images, you need to create a production. When you create a production, an imagebase is created. You will want to name the imagebase's .dir file the same as your replicated database name and save it in the same directory folder.

When you replicate a redlines database, you will have a copy of the existing marks on the images and can create new ones.

Concatenated Databases

When large databases are split into multiple databases and concatenated for ease of maintenance, all databases can be created with the same structure (see Sample 1 below). As the administrator, this database design serves both you and the reviewer. The generic naming of the primary database prevents confusion for the reviewers because they can simply launch the primary database without having to be concerned about multiple databases. The design also benefits you because databases are similarly named and the structure allows for ease of maintenance when indexing or reindexing is needed.

This database structure allows you to index individual databases without having to take the all databases offline. Reviewers can continue working in other databases while you perform the maintenance. Simply notify the review team when records with Bates numbers x through y will be offline.

Concatenated Databases Sample 1

Data base File	Description
Columbia.dcb	Primary database with no records to associate with a .cat file.
Columbia1.dcb	Import first set of load files and link any images. Index and place database on network to begin review by concatenating to the primary database, Columbia.dcb.
Columbia2.dcb	Create a copy of the Columbia1 structure and load additional documents that were received. Index and concatenate to the primary database.
Columbia3.dcb	Repeat

Alternate concatenated database designs can be used. As an example, Transcripts must be organized in a separate database because of the template structure required to import these files. If your database includes Transcripts, you may want to design a concatenated database based on document type (see Sample 2 below)

Concatenated Databases Sample 2

Data base File	Description
Hunter.dcb	Primary database with no records to associate with a .cat file.
Hunter Edoc.dcb	Database containing electronic documents.
Hunter Email.dcb	Database containing emails and attachments.
Hunter Transcripts.dcb	Database containing transcripts.
Hunter.cat	.cat file linking individual databases with the empty database, allowing viewers to launch them individually or as a concatenated set.

When various database types are concatenated and saved in a .cat file, all databases in the set automatically launch when the primary database is accessed in

Concordance – as long as the .cat file has the same name as the primary database and is saved in the same directory folder as the primary database. This concept is useful when separating documents by source or custodian as well. Users can then choose to only view certain documents by custodian or document type by launching the individual database or review all records together by launching the primary database that has the associated .cat file.

The concatenated text file (.cat) is used to keep track of concatenated databases. The file contains the list of database names and their file paths for the databases in the concatenated database set. If you open a database and Concordance finds a database .cat file by the same name in the same directory as the .dcb file, the databases in the list are automatically opened and concatenated. Since the Reindex function updates all actively concatenated databases, you can search, edit, and use the group as if they were one.

When managing concatenated databases, be aware of the following:

- Index databases individually
- Reindexing is done on all the databases in the concatenated set in turn
- Pack databases individually
- Data imports only append to primary database
- Exports only use a selected database's field structure from a concatenated set
- Security is applied to databases individually
- Only run productions on individual databases
- Only replicate individual databases



You can export from a concatenated set of databases as long as the field names are the same; however, the field type is inherited from only one selected database. Data may be truncated if the field size and data size of one of the concatenated databases exceeds the field size of the selected database structure.

Concatenated databases have the following limitations:

- You can join databases with differing structures and they can be edited, sorted, and printed. However, the structures must be identical to use certain options such as Overlay and Export.
- You cannot replicate or create a production from a concatenated database.
- When using the Ditto feature, only documents in the primary database can be used for copying data.
- When exporting concatenated databases, only the data in fields that are identically named and formatted in the concatenated set will be exported.
- When importing records into a concatenated database, records are updated when the fields of an imported record match an existing record. When the fields do not match, the imported record is appended to the main database, which is the first database in the concatenated set. However, when using the Overlay option, importing records with mismatched fields can cause a loss of data.
- Records cannot be packed from the concatenated database. They can only be packed from the original, unconcatenated database.
- Concordance displays an appropriate error message if you try to use one of the restricted options. Some options, such as Modify, operate only on the primary database in the concatenated list.



Only files with the same file type can be concatenated together. DCB files can be concatenated with DCB files, but not FYI files.

Security for concatenated databases includes the following guidelines:

- Security settings need to be set up in each database. Setting security in a concatenated database set only affects the primary database.
- The user name and password must be the same for all databases in the concatenated set when security is enabled.
- When the user name and password in the primary database does not exist in a secondary database, and security is enabled, the concatenated database will

not open. The user receives a message that they do not have access rights to the specific database.

- When a secondary database has security enabled and the primary database does not have security enabled, the user is prompted for the user name and password when using the secondary database. The user name and password entered becomes the user name and password for the concatenated database set.

Reviewing Concatenated Databases

When reviewing concatenated databases, it can sometimes be difficult to distinguish data from each individual database. When you are searching data on multiple databases, the query results from a same name field intermingle in the Table view. You can use one or more of these methods to help:

- Reference the Concordance title bar for an individual record's database and document name
- Reference field names for each database displayed in the Table view
- Change the font color and size for each database in the Table View using table layouts

You can also adjust your Table Layouts if field names are similar to sort across the joined databases. Copy the .LAYOUT file from one database to other concatenated databases to use the same table layouts in Table View. Each concatenated database will be listed in the Table Layout dialog with public/private layouts that have been created. If necessary, you will need to manually rearrange fields to have them display in the same columns for sorting purposes.

Applying tags to concatenated databases is as simple as applying tags to individual databases. You can even add tags from one database to another database in a concatenated set. When databases are concatenated, all tags from both databases are displayed in the Tags Panel. If a reviewer applies a tag from one database to a document residing in another database, the tag is then added to the database where it never existed before.

Searching Concatenated Databases

When searching concatenated databases, Concordance searches across all concatenated databases - searching each dictionary file one by one.

Saving queries executed on concatenated databases is the same process as saving them when reviewing one database at a time. All searches from all databases in the concatenated set are saved. Query files are stored in a .qry file, and can be restored on a concatenated set as you would a single database. You just need the databases to be joined when you save the query and when you re-run the query. Re-running the queries on a concatenated database set searches any updates made since the last time any database was reindexed.

Bulk Field Format Reset

If rich text formatting has been applied to field data, you may need to change the rich text formatting in a field to plain text to save space or remove certain text formatting that affects the precision of hit highlighting when searching in Concordance.

If you need to remove rich text formatting from a field in multiple records in the database, administrators can use the Bulk Field Format Reset feature. Using this feature removes all rich text formatting in the selected field and changes the text in the field to plain text in all records in the database.

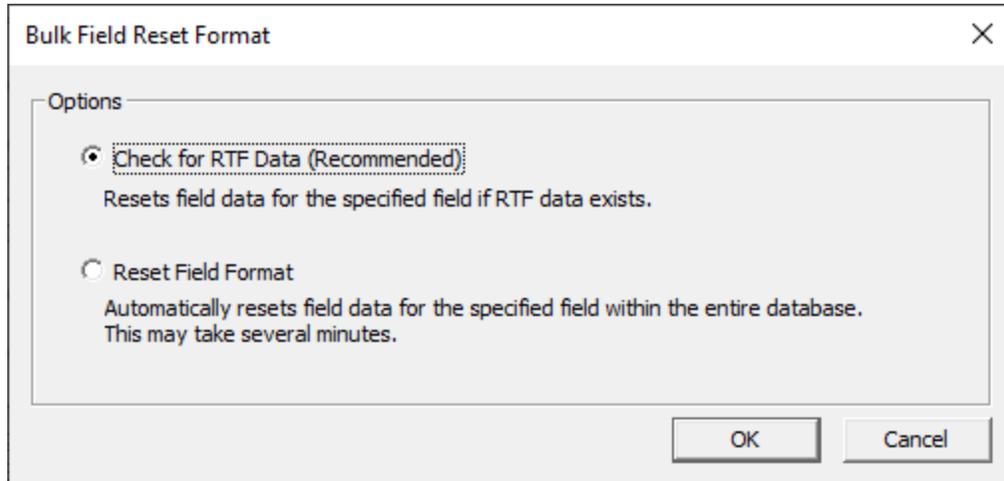
If you only need to remove rich text formatting from a field in individual records, you can use the Reset Field Formatting function in the Edit view. For more information about removing rich text formatting in the Edit view, see Formatting Field Text.



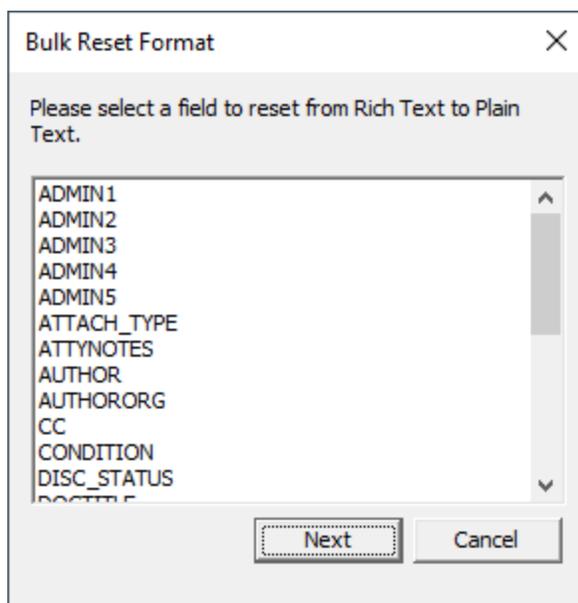
Make sure no other users are in the database before using the Bulk Field Format Reset.

Reset Rich Text to Plain Text for Multiple Records

1. On the **File** menu, select **Administration**, and click **Bulk Field Format Reset**. If prompted, enter your Administrator user name and password. The **Bulk Field Reset Format** dialog displays.



2. Select one of the two options:
 - Check for RTF Data (Recommended) - to reset field data only if Rich Text Format data exists.
 - Reset Field Format - resets field data regardless of whether Rich Text Format data exists.
3. Click OK. The Bulk Reset Format dialog displays.



4. In the displayed list, select the specific field that needs to be reset from Rich Text to Plain Text. Click **Next**.
5. A confirmation dialog displays. Click **OK** to proceed.

After running Bulk Field Format Reset, the changes are immediately viewable in Concordance. You need to index/reindex your database to see the search hit highlighting again.

Deleting Records

You may need to delete records if there are duplicate records or opposing counsel unintentionally produced privileged documents. Reviewers can flag records for deletion, but they are not permanently removed from the database until the database is packed.

Once records are flagged for deletion, you can run a query to review those flagged documents and create a back-up of those records. This is your only fail-proof means of restoring a record after it is removed from the database. If you find that you later need to restore the deleted records, the only way to restore a record permanently deleted from a database is to import the deleted records back into the database.

Packing a database permanently deletes the records from the database, and there is no undo function for this process, therefore it should only be available to administrators.

Deleting Records Overview:

- Mark records for deletion
- Review the records marked for deletion
- Back-up records marked for deletion by exporting them to another Concordance database
- Remove tags from the records marked for deletion
- Pack the database

You can also permanently delete all records in the current database using the Zap menu command on the Administration menu. When you zap a database, all documents and search files are erased and free space is returned to Concordance.

Mark Records for Deletion

See [Deleting Records](#) for more information about marking records for deletion.

Search for Deleted Records

1. On the **Search** menu, click **Search for documents marked for deletion**.
2. A query is run for the records currently marked for deletion in the database.
3. Using the Browse or Table view, review the records in the query results to confirm whether they should be permanently removed from the database.
4. See instructions in [Deleting Records](#) if you need to unmark a document for deletion.

Back-Up Records Marked for Deletion

After reviewing the records marked for deletion, make sure your query is updated to reflect the final list of records to delete. You can now export the records to another database. See [Exporting Database Records](#)¹¹⁵ for more details.



Always export your deleted records before you pack the database, just in case you need to retrieve them later. Once you pack a database, any records marked for deletion are permanently removed. There is no undo function for this process.

Pack the Database

See [Packing](#)⁹¹ for details on how to Pack a Database.

Zap a Database

Zapping a database permanently deletes every record in the active database. All documents and search files are erased and free space is returned to Concordance. If databases are concatenated, only the documents and search files in the primary database are erased when you zap a database in a set of concatenated databases.



Zap is permanent and cannot be undone. It is recommended that Zap should only be available to administrators

1. On the **File** menu, select **Administration**, and click **Zap**. If prompted, enter your Administrator user name and password.
2. A confirmation dialog displays. Click **Yes** to confirm you want to Zap the database.
3. After the Zap process completes, *No documents in query* is displayed on the Status Bar.

Packing

Pack the Database

Packing the database regularly can increase database processing and search speed. It should be part of your normal database maintenance.



Packing is an exclusive process. There is no undo function for this process. Records are immediately and permanently removed from the database. You should export a copy of your deleted records prior to packing.



When packing concatenated databases, you must pack each database individually.

1. On the **File** menu, select **Administration**, then **Pack**, and click **Database**.
2. Depending on security, you may be prompted to enter an administrator id and password.
3. The pack process runs and a dialog displays showing progress.
4. Upon completion you can verify the records were deleted by opening the Table view and validate the deleted records are gone. It is best to also pack the dictionary after packing the database.



If you have an ACCESSID field in your database, you will notice that the accession number does not re-adjust for deleted records. This allows you to view gaps in your database records and verify removal.

Pack the Dictionary

In addition to packing the Database, you should pack the Dictionary to get rid of unnecessary entries. Good routine maintenance includes packing the dictionary after you pack the database.

1. On the **File** menu, select **Administration**, then **Pack**, and click **Dictionary**.
5. Depending on security, you may be prompted to enter an administrator id and password.
6. The pack process runs and a dialog displays showing progress. When the dictionary has been packed, the dialog closes.

Authority Lists

Authority word lists are lists of words and phrases that open in Edit View when you place your cursor in a field associated with a word list. Typing text automatically scrolls the list to the word or phrase nearest in spelling. Most words and phrases

are retrieved with just a few keystrokes. Authority list entries are always inserted at the current cursor location in Edit View.

An authority list can contain anything, including zip codes, author's names, and complex chemical names. Any data entry task that is repetitive and prone to errors is a good candidate for an authority list. Selecting entries from the list lowers the number of errors introduced through data entry, and the number of keystrokes — thus saving labor and expense while improving accuracy.

Authority lists are created in the List File Management dialog. Once an authority list is created, the list is assigned to a field or fields using the Data Entry Attributes dialog. Authority lists are saved in files with a .lst file extension.

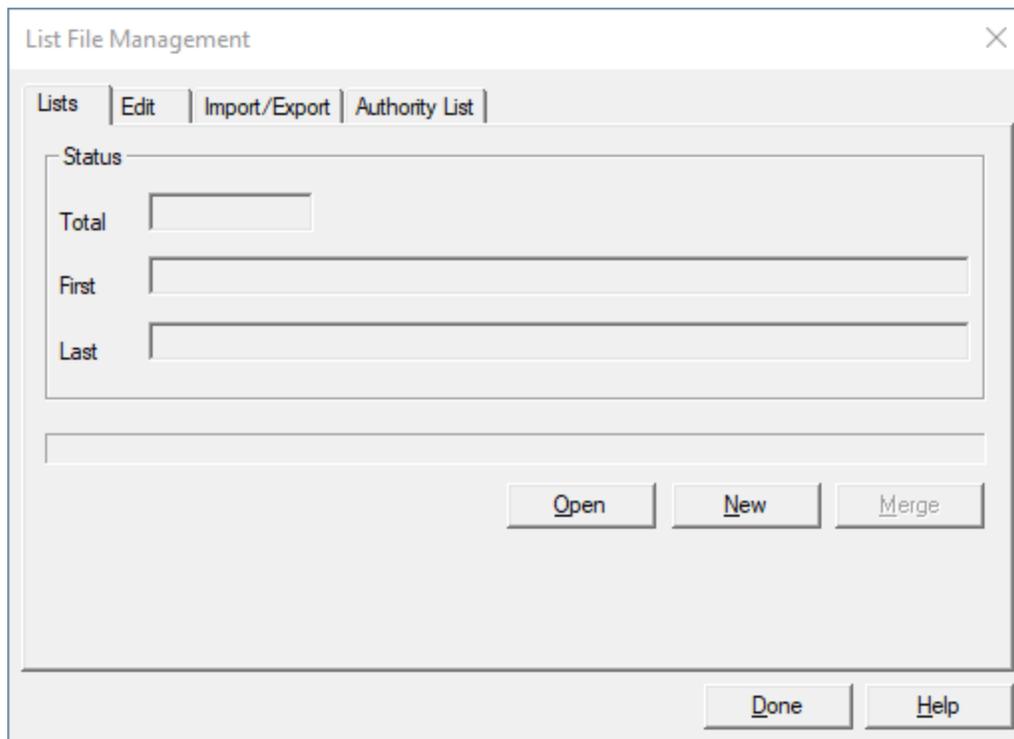
You can create authority list values in three ways:

- Manually create list values
- Import existing values from a database field
- Import values from an ASCII file

After creating the authority list you need to associate it with a field in the database, and then verify that it works.

Create an Authority List

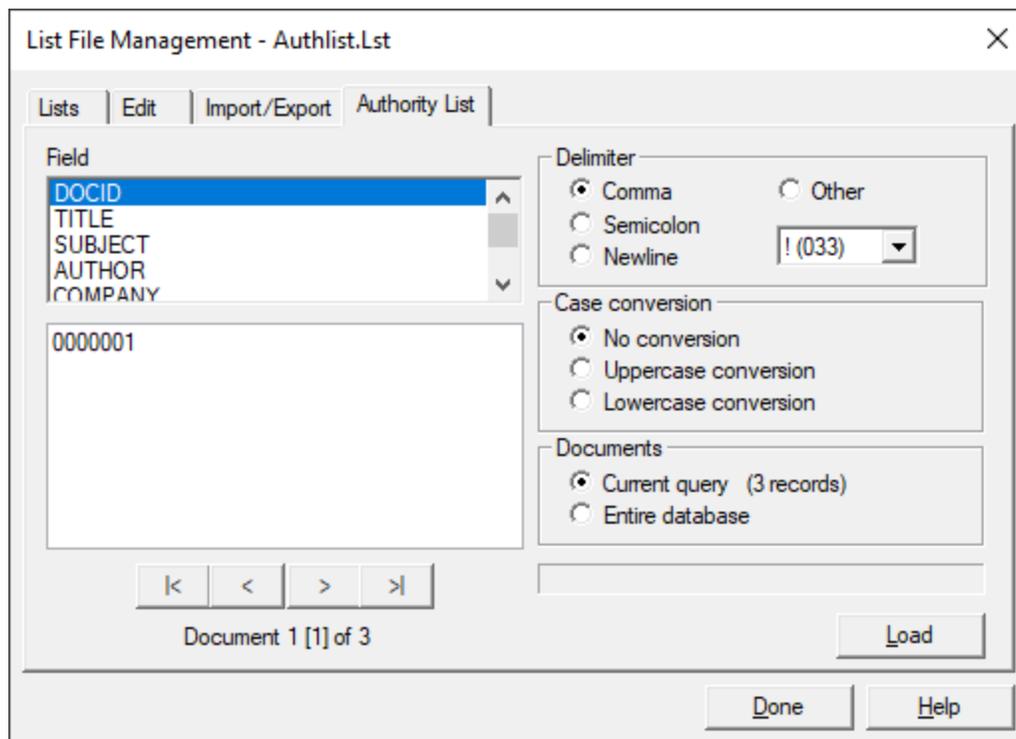
1. On the **Tools** menu, select **Manage List Files**. The **List File Management** dialog displays.



2. On the **Lists** tab, click **New**. A message displays asking if you want to allow duplicates in the list file. Select **Yes** or **No**.
3. A message displays asking if you want to create a case sensitive list file. Select **Yes** or **No**.
4. The **Save As** dialog displays. Navigate to the location for the new .lst file and enter a **File name**. Click **Save**.
5. The new list file is now open in the **List File Management** dialog. Select the **Edit** tab.
6. In the **Key** field, type an item to add to the authority list. The **Key** field is case sensitive and allows up to 240 alpha-numeric characters.
7. For authority list files, the **Data value** is not used. Leave this 0.
8. Click the **Add** button to add the new item to the list.
9. Repeat steps 6 through 8 for each new authority list item you want to add.
10. Click **Done** when you are finished.

Create Authority List From Field Data

1. On the **Tools** menu, select **Manage List Files**. The **List File Management** dialog displays.
2. On the **Lists** tab, click **New**. A message displays asking if you want to allow duplicates in the list file. Select **Yes** or **No**.
3. A message displays asking if you want to create a case sensitive list file. Select **Yes** or **No**.
4. The **Save As** dialog displays. Navigate to the location for the new .lst file and enter a **File name**. Click **Save**.
5. The new list file is now open in the **List File Management** dialog. Select the **Authority List** tab.



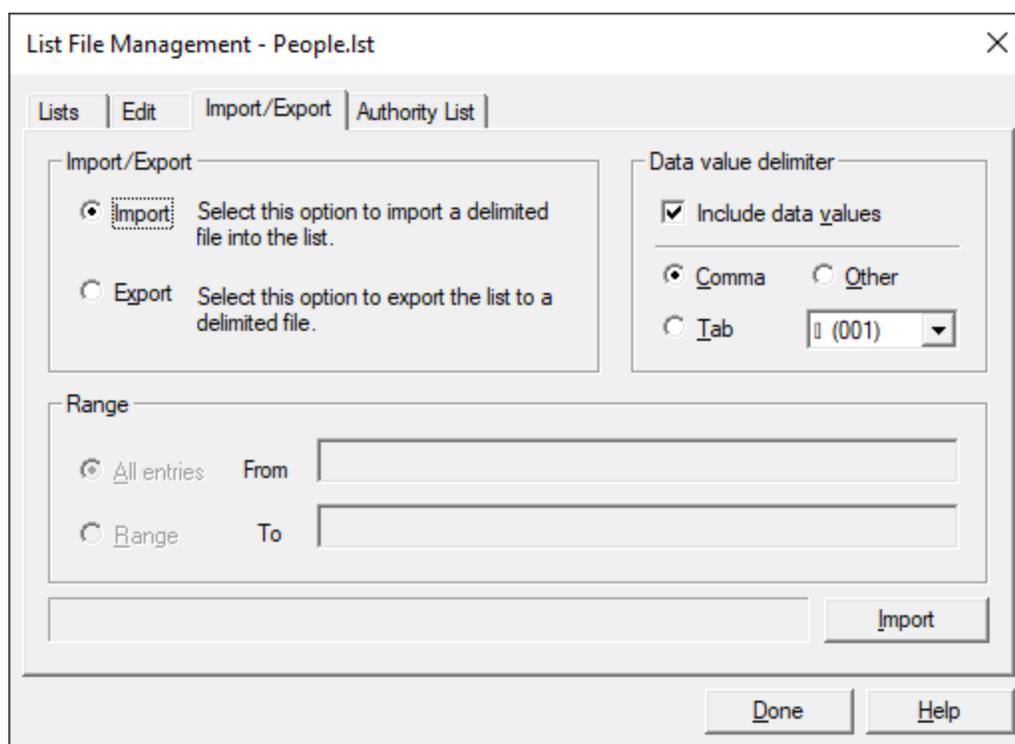
6. In the **Field** list, click the fields containing the values you want to use for your authority list. To select multiple fields, use CTRL+click.

7. In the **Delimiter** section, select the delimiter you want to use to separate items in the authority list file. The default is **Comma**.
8. In the **Case conversion** section, select whether you want all items to be converted to uppercase, lowercase, or to not be converted.
9. In the **Documents** section, select the **Current query** or **Entire database** option to determine which field values will be pulled into the authority list.
10. Click the **Load** button to add the field values to the authority list.
11. You can go to the **Edit** tab and modify any of the authority list items.
12. Click **Done** when you are finished.

Create Authority List From a File

If you have an ASCII file with listed or delimited data you can save time by importing it into an authority word list.

1. On the **Tools** menu, select **Manage List Files**. The **List File Management** dialog displays.
2. On the **Lists** tab, click **New**. A message displays asking if you want to allow duplicates in the list file. Select **Yes** or **No**.
3. A message displays asking if you want to create a case sensitive list file. Select **Yes** or **No**.
4. The **Save As** dialog displays. Navigate to the location for the new .lst file and enter a **File name**. Click **Save**.
5. The new list file is now open in the **List File Management** dialog. Select the **Import/Export** tab.

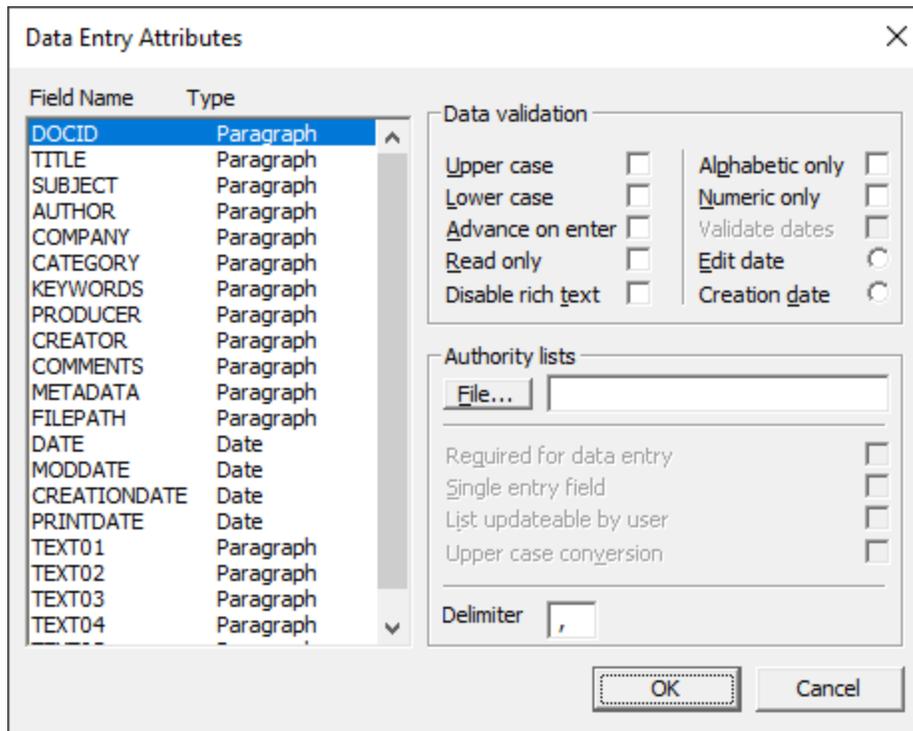


6. Select **Import**.
7. Data values are not used by the authority list, so it does not matter whether **Include data values** is selected. If it is selected, the import populates the Data value field on the Edit tab in the List File Management dialog box with any data values from the file.
8. In the **Data value delimiter** section, select the delimiter used in the file you will load. The default is **Comma**.
9. Click **Import**. Navigate to and open the ASCII .txt file you want to load into this authority list.
10. You can go to the **Edit** tab and modify any of the authority list items.
11. Click **Done** when you are finished.

Associate an Authority List with a Field

Once you have created an authority list in Concordance, you need to associate the list to a field so it can be used for data entry in the Edit View.

1. On the **Edit** menu, click **Validation**. The Data Entry Attributes dialog displays.



2. In the **Field Name** list, click the field you want to associate with the authority list.
3. In the **Authority lists** section, click the **File** button. Navigate to and open the authority list file (.lst).
4. Select the options that apply to the authority list:
 - **Required for data entry** - When the user's cursor is placed in the empty field, the authority list automatically opens. If the field is already populated, the authority list opens when a user clicks the right mouse button or attempts to type in the field. When **Required for data entry** is selected, users can only choose a field value from the list or cut, copy or paste the text in the field.
 - **Single entry field** - The field only allows one field value from the list to populate the field. If a user clicks another field value from the list, the original value is replaced by the newly selected value. You can select both **Single entry field** and the **Required for data entry** to ensure users only populates the field with one field value from the authority list.

- **List updateable by user** - Users can add and delete field values from the authority list assigned to the field. If you do not want users to modify the authority list, be sure **List updateable by user** is not selected. When **List updateable by user** is selected, the Insert and Delete buttons are displayed at the bottom of the authority list dialog.
 - **Upper case conversion** - Concordance automatically converts all text to upper case before text is copied to the field or the text is added to the authority list. Do not select **Upper case conversion** if you are using an existing authority list containing lower case field values. If **Upper case conversion** is selected in this scenario, when a user selects a lower case field value from the list, the value will not be added to the field.
5. The **Delimiter** field defaults to the comma character. To change the field delimiter, type a different character in the **Delimiter** field. The character in the Delimiter field is used to separate field values that were added to the field from an authority list.
 6. Click **OK** to save your changes.



The **Data validation** and **Authority lists** sections in the **Data Entry Attributes** dialog box are independent sections. For example, assigning an authority list with words to a field selected as **Numeric only** does not cause an error. The data from the authority list overwrites the **Numeric only** setting.

Test an Authority List

After associating an authority list with a field, you can test to make sure that the authority list opens for the field in Edit View.

1. In **Browse** or **Table** View, select a record.
2. On the **Standard** toolbar, click the **Edit** button to open the record in the **Edit** view in edit mode.
3. Click the field you associated with the authority list.

- If **Required for data entry** was selected for the authority list in the **Data Entry Attributes** dialog, the authority list automatically opens when you click in the field if the field is empty. If the field is already populated, the authority list opens when a user clicks the right mouse button or attempts to type in the field.
- If **Required for data entry** was selected for the authority list, users can only choose a field value from the list or cut, copy or paste the text in the field.
- If **Required for data entry** was not selected for the authority list, users can right-click in the field to open the shortcut menu, and click the authority list file name to open the authority list associated with the field.

Field Groups

You or reviewers may want to search across multiple data fields at the same time without having to construct a long search query.

Writing field groups directly to an .ini file allows you to use an alias name to search across multiple fields at the same time without having to construct a long search query.

Example: ALLDATES = DATE, DOCDATE

By creating an alias field named ALLDATES and associating it with all various date fields from a concatenated database set, users can search all date fields without having to modify date field names in each database. You can also create a field group for data fields in a non-concatenated database.



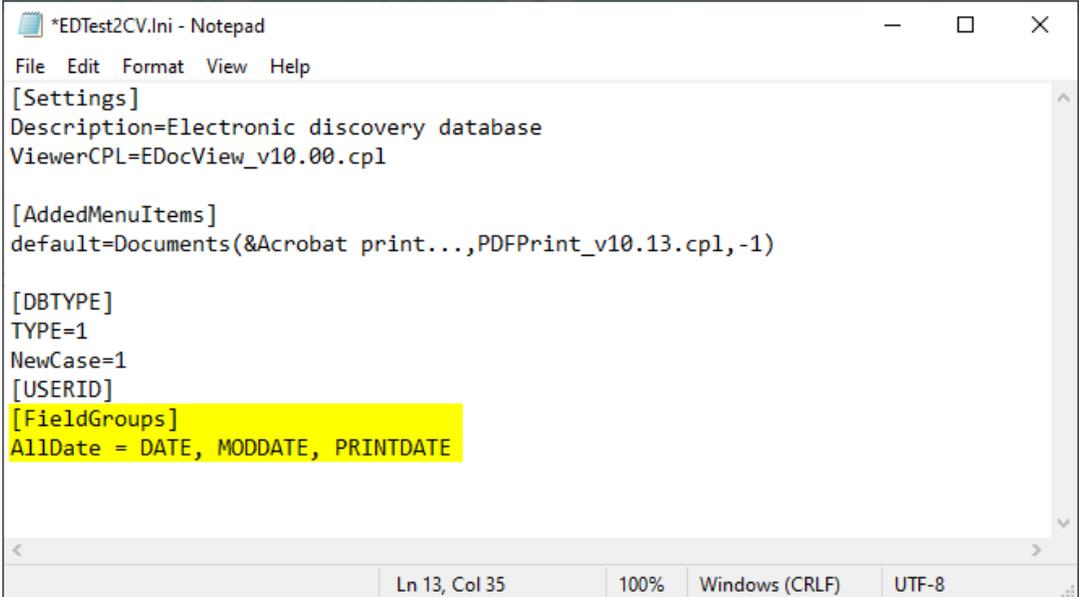
The CREATEDATE and CREATIONDATE fields, or their equivalents, cannot be included in a field group because of the validation settings applied to them.



Field groups written directly into an .ini file will also save into a Concordance database template.

Add a Field Group to the .ini File

1. Open the database .ini file using any text editor program. The .ini file is stored in the same directory as the database's .dcb file.
2. Look for a [FieldGroups] section in the file. If it doesn't exist, scroll to the bottom of the file and add `[FieldGroups]` as the last line of the file.
3. Underneath the [FieldGroups] section, enter your new fieldgroup on a separate line (i.e. `FieldGroup = fieldname1, fieldname2, fieldname3`). You can add as many fields as you want to the field group.



```
*EDTest2CV.ini - Notepad
File Edit Format View Help
[Settings]
Description=Electronic discovery database
ViewerCPL=EDocView_v10.00.cpl

[AddedMenuItems]
default=Documents(&Acrobat print...,PDFPrint_v10.13.cpl,-1)

[DBTYPE]
TYPE=1
NewCase=1
[USERID]
[FieldGroups]
AllDate = DATE, MODDATE, PRINTDATE

Ln 13, Col 35    100%    Windows (CRLF)    UTF-8
```

4. Save the file.

To test the field group, in Concordance, run a search using the field group alias (ex. `AllDate = ??/??/1980`). Your search results will include documents that match your search criteria in any of the fields associated with the field group.

To use a field group for concatenated databases, add the same field group to the other databases in the concatenated database set.

Managing Data

In addition to managing the overall Concordance database, the Administrator performs functions that help manage the data within the database. As with all other administrative maintenance, be sure you know who is actively using the database whenever you are altering the data.

You may want to query the database for any documents that have been recently edited. On the **Search** menu, select **Search for edited documents**. All documents that have been edited since the last database index/reindex are displayed in Browse or Table View.

Splitting and Joining Records

It may be necessary to split or join records that were not unitized properly at scan time. For example, you might have a record containing one document that should have actually been represented as two records. Conversely, you might have a document split over two records that should have been one document contained in one record.

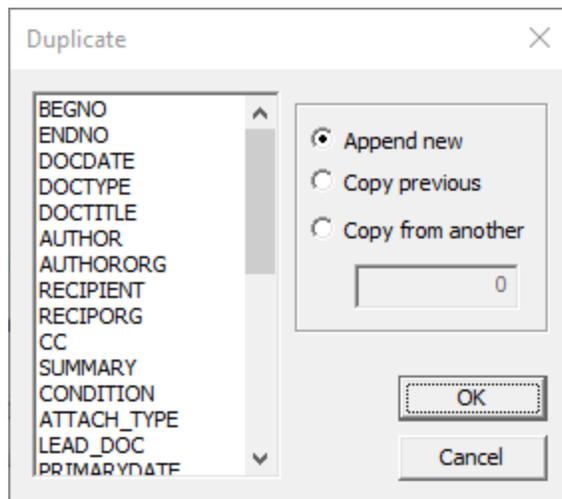
Correcting document boundaries in Concordance is a manual process requiring several steps. It is important to proceed carefully to ensure that all of the data is corrected appropriately, so there is no data loss. It is recommended that you back up the database and imagebase prior to splitting or joining documents.



We recommend working with single-page TIFF files to simplify adjusting document breaks. If your images are multi-page TIFF files, they will need to be reprocessed in order to have the proper document breaks.

Split Documents in Concordance

1. In the Browse or Table view, open the record that you want to split into multiple records.
2. Click the **Edit** button on the Toolbar to open the record in Edit View.
3. On the **Edit** menu, click **Ditto (Edit View)**. The Duplicate dialog displays.



4. Select the fields containing the data you want to duplicate into the split document. You can select multiple fields by pressing the SHIFT or CTRL key while selecting the fields.
5. Select **Append new** and click **OK**.
6. A new record is created containing the fields you selected and that record is opened in Edit View while the Browse or Table view continues to display the original document.
7. Make the necessary edits to the new record. For example, the **BEGNO**, **PAGES**, and **OCR** fields or their equivalents may need to be modified to reflect the document split.
8. Click **Edit** to save the changes to the new record.
9. Navigate to the original document, and click **Edit** to open the original document in Edit View.
10. Make the necessary edits to the data in the original record to reflect the document split.
11. Click **Edit** to save the changes to the original record.

Checking for Duplicate Records

After importing records, you may want to check for duplicates in Concordance. Duplicates are identified by comparing the content in selected fields. When Concordance finds duplicate records, Concordance tags each of the duplicate

records. Give some forethought to what fields you want to use to check for duplicates. Before checking for duplicate records, make sure that there are not any records that were tagged in a previous duplicate check before you start the process again.

When Concordance checks for duplicate records, Concordance only checks the records in the current query. If you want Concordance to check for duplicates in the entire database, be sure to run the Zero Query before checking for duplicates.

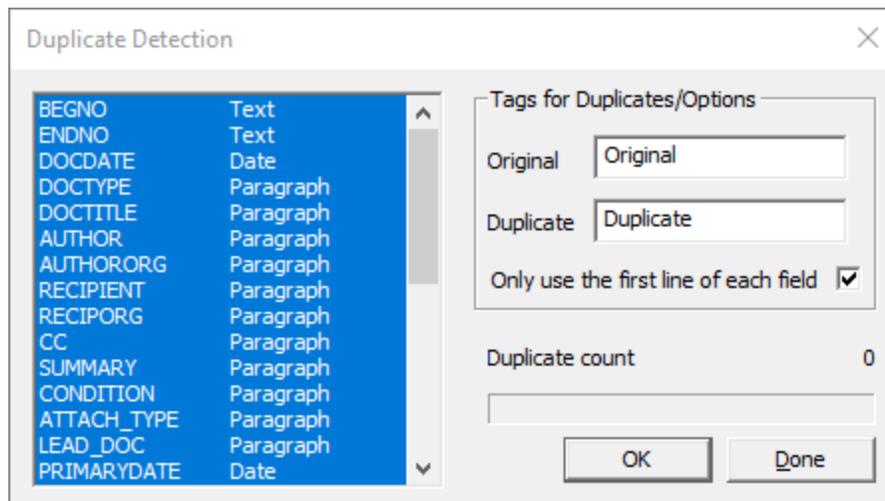
The duplication detection categorizes documents in three ways:

- When a record is unique, no tag is assigned to the record
- The first time a duplicate record appears, the **Original** tag, or its equivalent, is assigned to the record
- The subsequent times the duplicate record appears, the **Duplicate** tag, or its equivalent, is assigned to the records

It is best practice to remove access to **Check for Duplicates** on the **Tools** menu from most users, except your advanced users.

Check for Duplicate Records

1. Run a search query to locate the records you want to search for duplicate records. When Concordance checks for duplicate records, Concordance only checks the records in the current query. If you want Concordance to check for duplicates in the entire database, be sure to run the Zero Query before checking for duplicates.
2. On the **Tools** menu, click **Check for duplicates**. The Duplicate Detection dialog displays.



3. In the field list, select fields you want Concordance to identify duplicate records in the database's current query. To select multiple fields, use SHIFT+click or CTRL+click. You can select as many fields as you want, but there is a limit of 245 characters that can be compared. Paragraph fields count as 60 characters.
4. Enter a tag to apply to the **Original** (first) record encountered in a duplicate set, and another tag to apply to the **Duplicate** (second) record in a duplicate set. Make sure the tags you use have not already been applied to records from a previous duplicate check.
5. If you selected a paragraph field in the field list, it is best practice to select **Only use the first line of each field**.
6. Click **OK** to run the duplicate check. The **Duplicate count** updates to show the number of duplicates found and those records will be tagged with the tags you specified.
7. Click **Done** to exit the **Duplicate Detection** dialog.
8. You can now query the database for the duplicate tags you specified.

Tallying Duplicates

You can also use the Tally feature to help identify duplicate records in the database. The Tally feature creates an itemized list of data values within a field, including the

number of occurrences of each data value in the field. See Searching by Tally for more information.

Attachments

The Find Attachments command can be used to identify parent and attachment documents in a database. For more information, see Options available in the Search Panel.

Below are a few examples of Parent and Attachment document relationships in Concordance. There are many field naming conventions and other possible styles for Parent and Attachment fields in a Concordance database.

Example 1 - Parent Document with Two Attachments

1st Record (Parent Document)
BEGDOC: DSC0000001
ENDDOC: DSC0000001
BEGATTACH: DSC0000001
ENDATTACH: DSC0000010

1st Record (Parent Document)
2nd Record (First Attachment)
BEGDOC: DSC0000002
ENDDOC: DSC0000004
BEGATTACH: DSC0000001
ENDATTACH: DSC0000010
3rd Record (Second Attachment)
BEGDOC: DSC0000005
ENDDOC: DSC0000010

1st Record (Parent Document)
BEGATTACH: DSC0000001
ENDATTACH: DSC0000010

Notice that for each record above, the BEGDOC and ENDDOC fields reflect the Bates number range of the parent document and each attachment document. The BEGATTACH and ENDATTACH fields reflect the Bates range of the entire document (parent and all attachments).

Example 2 - Parent Document with One Attachment Using Attachment Range Field

1st Record (Parent Document)
BEGDOC: DSC0000001
ENDDOC: DSC0000002

1st Record (Parent Document)
ATTACHRANGE: DSC0000001- DSC0000010
2nd Record (First Attachment)
BEGDOC: DSC0000003
ENDDOC: DSC0000010
ATTACHRANGE: DSC0000001- DSC0000010

Example 3 - Doc IDs With a Parent Document and One Attachment

1st Record (Parent Document)
DOCID: DSC00000001
PARENTDOCID: DSC00000001
2nd Record (First Attachment)
DOCID: DSC00000002
PARENTDOCID: DSC00000001

In this scenario, the PARENTDOCID field establishes the parent to attachment relationship for this document.

Global Replacements

The Global Replace command allows you to search and replace words, phrases, dates, or carriage returns in specific fields throughout your entire record database. You can search and replace populated or empty fields, with or without case sensitivity. Global replacements only work on the current query.



Global edits are immediately saved and committed to a database. There is no undo option. We recommend that you always back up the database before making any global replacements.

Global Replace

1. Back up your database before running the global replacement.
2. Run a search to located the records that need a global edit.
3. On the **Edit** menu, click **Global Replace**. The **Global Replace** dialog displays.

Field	Type
BEGNO	Text
ENDNO	Text
DOCDATE	Date
DOCTYPE	Paragraph
DOCTITLE	Paragraph
AUTHOR	Paragraph
AUTHORORG	Paragraph
RECIPIENT	Paragraph
RECIPORG	Paragraph
CC	Paragraph
SUMMARY	Paragraph
CONDITION	Paragraph
ATTACH_TYPE	Paragraph
LEAD_DOC	Paragraph
PRIMARYDATE	Date
PAGES	Numeric
ATTYNOTES	Paragraph
REVIEWSTATUS	Paragraph
OCR1	Paragraph
OCR2	Paragraph
ISSUE	Paragraph

Target: _____

Replacement: _____

Document range

First:

Last:

Replace options

Ignore case

Confirm before replace

Status

Documents: 0

Replacements: 0

OK Cancel

4. In the **Field** list, select the fields containing the text you want to replace. To select multiple fields, use SHIFT+click or CTRL+click. Concordance will only search the fields selected in this list.
5. In **Target**, type the text you want to replace.
 - You can replace empty fields by leaving **Target** blank.
6. In **Replacement**, type the text you want to replace the **Target** text with.
 - You can empty a field by leaving **Replacement** blank.
 - Use \n in **Target** or **Replacement** to represent a hard carriage return. If you actually want to search for the characters \n, type \\n instead.
 - To replace dates, the format of the dates entered in Target and Replacement must match the date format of the selected date field. Dates should be zero filled (i.e. for a date with format MMDDYYYY, enter single digit days or months with leading zeros like 07171960).
7. Enter a Document range (**First** and **Last**) if you want to limit the replacement to specific document numbers from the current query.
8. Under **Document range**, enter the **Last** document number from the current query to search for the **Target** text.
9. Select **Ignore case** if you want to replace text without matching upper and lower case in **Target**.
10. Select **Confirm before replace** to be prompted for confirmation for each replacement.
11. Click **OK** to proceed with the global replacements.
12. If you selected **Confirm before replace**, a **Text Found** dialog displays for each matching **Target**. Select **Yes** to confirm the replacement.
13. Click **Done** to close the Global Replace dialog.

Changes are immediately viewable. In order to run full-text searches on the edited record, the database must be reindexed.

Updating Hyperlinks

Hyperlinks often require updating or replacement if you move database files to another network directory. Hyperlinks are stored in <database name>-Notes.dcb for each database.

If you move your native documents or attachments from one drive to another, you need to globally replace the drive letter in the NOTEATTACHED field of the <database name>-Notes.dcb. If your attachment includes the full directory file path in the main database, you also need to replace the drive letter in the FILEPATH field.

Exporting Data

Concordance offers a variety of options for exporting data in order to back up databases or save data into a format that can be imported into another database. Data exports are often required when there is a need to share data with third parties or for document production.

In Concordance you can export:

- As a Concordance database
- To an OPT file for use with Concordance Native Viewer
- To a delimited text file
- To a database structure for creating a database template
- Database transcripts into .PCF or delimited text files

Exporting Database Structures

You can export a copy of the database structure to create a duplicate database or to create a new database template based off a current database. The structure is stored in a .dcb file and contains the original field names and their types. Data

exported from a database can be loaded into another database that has been exported.

Before exporting a database structure, you can save the structure to a .txt file that you can print for your reference. The text file contains a list of all the database's fields and field types.

Keep the following in mind when exporting concatenated databases:

- Concordance exports data from all databases within a concatenated set only when the concatenated databases have identical database structures.
- When exporting from a concatenated set with different database structures, the contents from the secondary database gets exported only for the fields that match the primary database. The remaining field contents will not be exported.

Save a Database Structure to a .txt File

1. In Concordance, open the database with the database structure you want to save.
2. On the **File** menu, click **Modify**. The **Modify** dialog displays.
3. Click **Save to File**. Navigate to and specify a **File name** in the **Save Field Definitions** dialog. Click **Save**.

Export a Database Structure

1. In Concordance, open the database with the database structure you want to export.
2. On the **Documents** menu, select **Export**, and click **Structure**.
3. Navigate to and specify a **File name** in the **Copy Structure** dialog. Click **Save**.

Exporting Database Records

When you export a Concordance database, you have the option to export to an existing database or to create a new database. The export includes every record in the current query, in the sort order they are listed. By default, all fields, data, and tags, are also exported, but you also have the option to select only specific fields for export.

Security and tag history are not included in the export when you export a database. You can export a database's security settings from the Security dialog box.

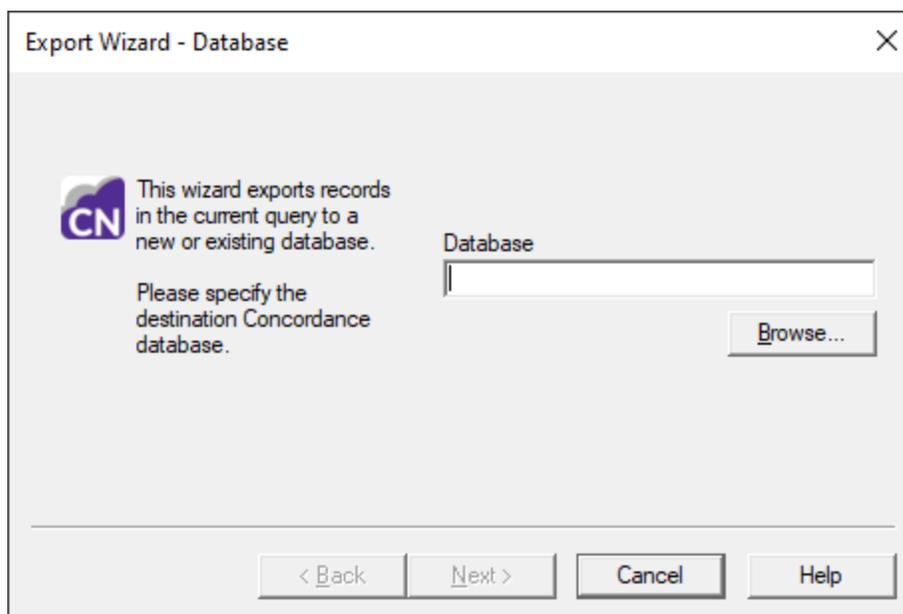
Before exporting a database, you can store the database's tag history in one of the database's fields using the TagHistoryAndStoreIt_<version>.cpl. See [Tag CPLs](#)²⁰² for more information.



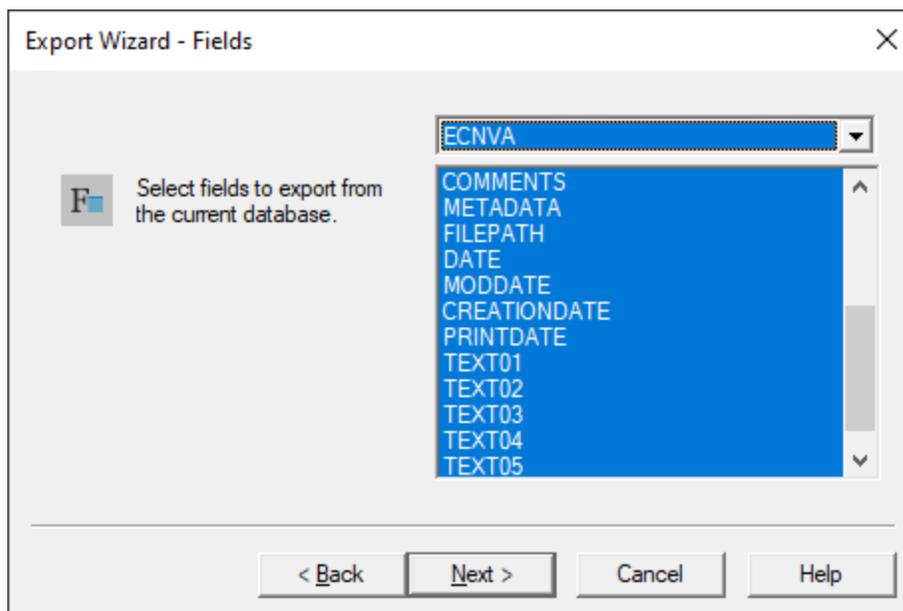
When exporting to an existing database, fields are only copied if they exist in both databases.

To Export a Concordance Database

1. Run a search query to locate the records you want to include in the export. When Concordance exports a database, Concordance can export just the records in the current query or can export all the records in the database. If you want to export all the records, you can run the Zero Query.
2. On the **Documents** menu, select **Export**, and click **As a Concordance database**. The **Export Wizard - Database** dialog displays.



3. Click **Browse**. If you are exporting to an existing database, navigate to and select the .dcb or .fyi file for the database you are exporting to. If you are exporting to a new database, navigate to where you want to store the database, type the new database **File name**. Click **Open**.
4. Click **Next**. the **Export Wizard - Fields** dialog displays.



- The database list defaults to the currently open database and all the database's fields are displayed in the list. If the database is a concatenated database, you can select a different database from the concatenated set.

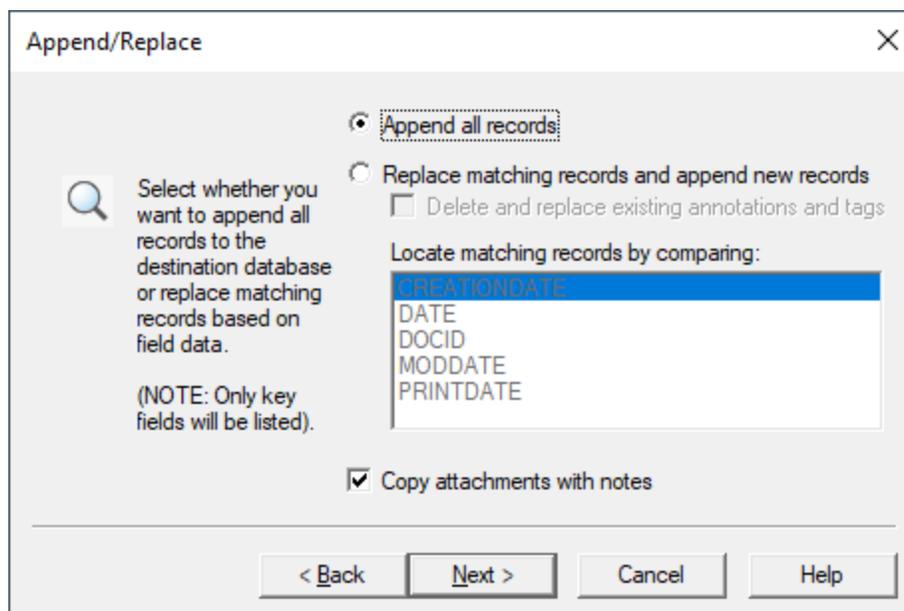


When exporting to an existing database, fields are only exported if the fields match the fields in the existing database you are exporting to.



When exporting concatenated databases, only the data in fields that are identically named and formatted in the concatenated set will be exported.

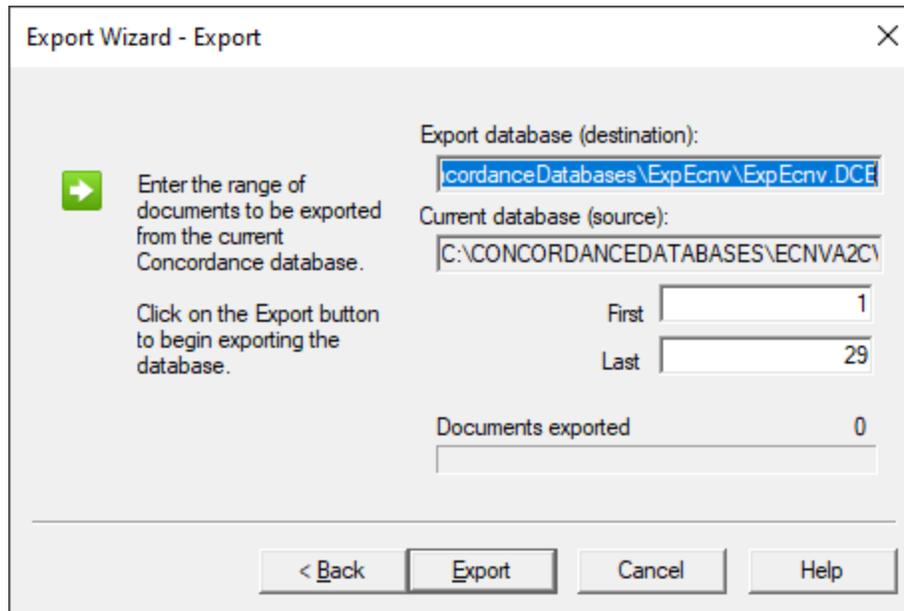
- Select the fields you want to export from the list. To select multiple fields, use SHIFT+click or CTRL+click.
- Click **Next**. The **Append/Replace** dialog displays.



- Choose one of the following options:
 - Append all records** - If you are exporting to a new database, selecting this option adds all records in the query to the new database. If you are

exporting to an existing database, selecting this option appends all records in the query after the last record in the existing database.

- **Replace matching records and append new records** - If you select this option, the export searches for a matching record. If a match is found, the export replaces that record. If the export does not find a match, the export appends the record.
9. **Delete and replace existing annotations and tags** is only available when you select the **Replace matching records and append new records** option. To have the export remove all existing tags and annotations for a record in the existing database when the export finds a matching record, select **Delete and replace existing annotations and tags**. Otherwise if **Delete and replace existing annotations and tags** is not selected, the export will ignore existing tags and annotations.
 10. The **Locate matching records by comparing** field is used to determine exact record matches between the two databases. Only key fields are listed. This is available if you select **Replace matching records and append new records**. Select the fields you want the export to use to determine record matches. To select multiple fields, use SHIFT+click or CTRL+click. Full-text paragraph fields are considered a match if the first sixty characters or the first line, whichever is less, match, regardless of the remaining contents of the field.
 11. Select **Copy attachments with notes** to copy a record's attachments with notes during the export. If selected, the export automatically creates sequentially numbered attachment folders in the same directory as the Concordance database, and copies attachments into the subfolders. Folders are named in the format ATTACH-000000 and increment by one if the initial folder exceeds maximum capacity.
 12. Click **Next**. The **Export Wizard - Export** dialog displays.



13. The **First** and **Last** fields default to the first and last record in the current query. Modify these fields to define the range of documents you want to export.
14. Click **Export**. If you are exporting to a new database, you will get a confirmation dialog. Click **Yes** to create the new database.
15. The Export Wizard automatically closes when the export is complete.

Exporting Delimited Text Files

In Concordance you can export data directly to another Concordance database or save the records as delimited text files.

The benefit of exporting to delimited text files is that this format is universal and works in other database management systems. Some forethought in planning the export of these files includes understanding that there are certain features in Concordance that have no parallel in other database managers such as Microsoft SQL Server and Microsoft Access. These features include record tags, issue coding, annotations, attachments, and hypertext links. Exporting in Concordance delimited text files does not preserve record mark-ups.

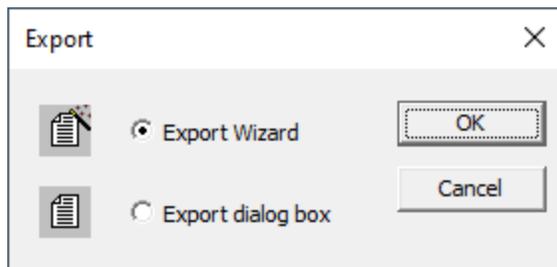
When you export database records to a delimited text file, the export includes every record in the current query, in the sort order they are listed. If you want to export the entire database, run the Zero Query.



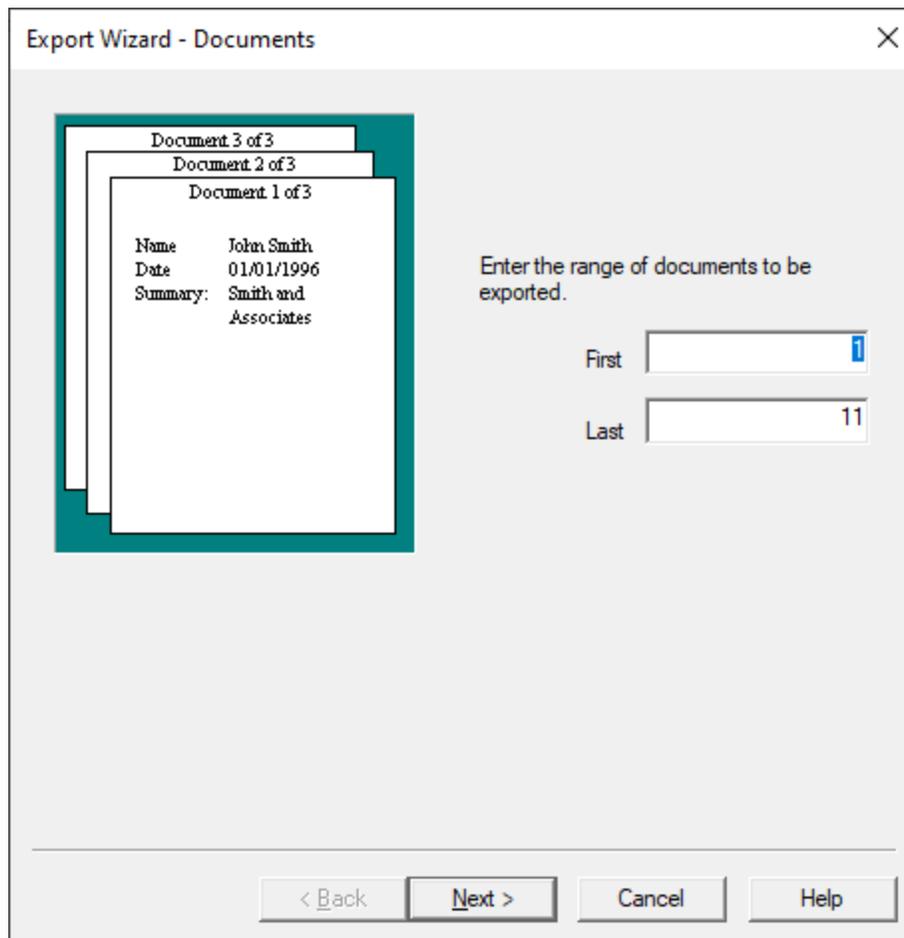
When exporting concatenated databases, only the data in fields that are identically named and formatted in the concatenated set will be exported.

Export to a Delimited Text File - Wizard

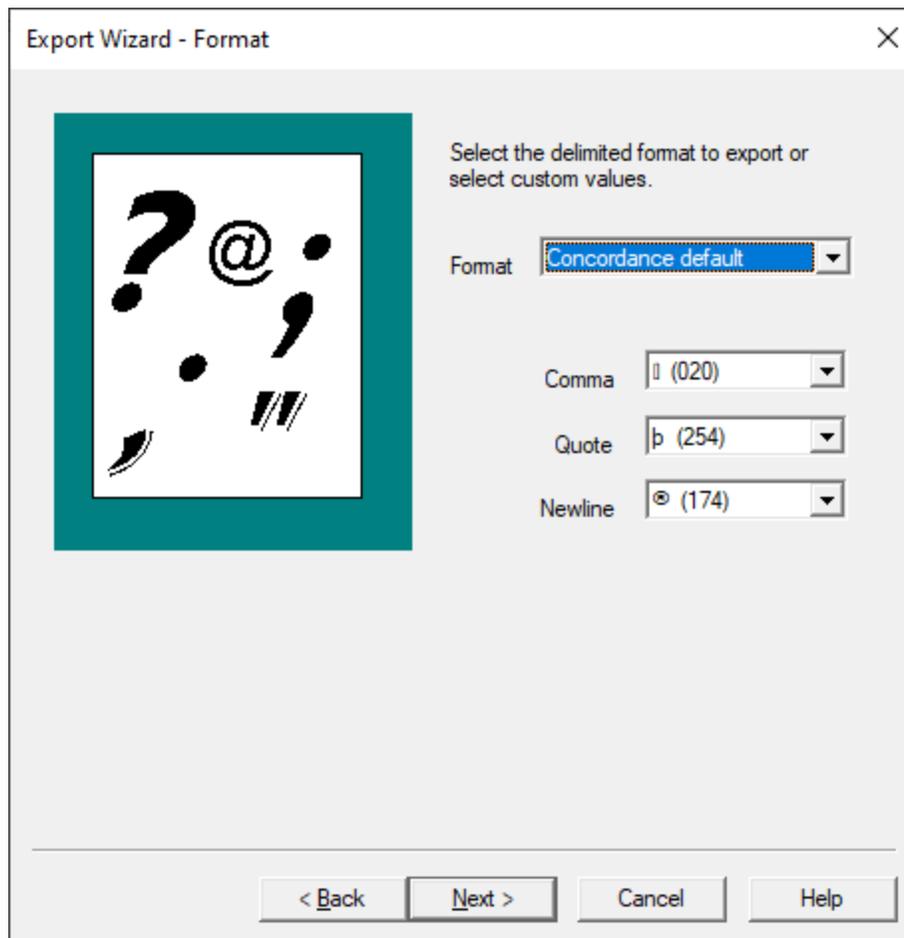
1. Run a search query to locate the records you want to include in the export. If you want to export all the records, you can run the Zero Query.
2. On the **Documents** menu, select **Export**, and click **To a delimited text file**. The Export dialog displays.



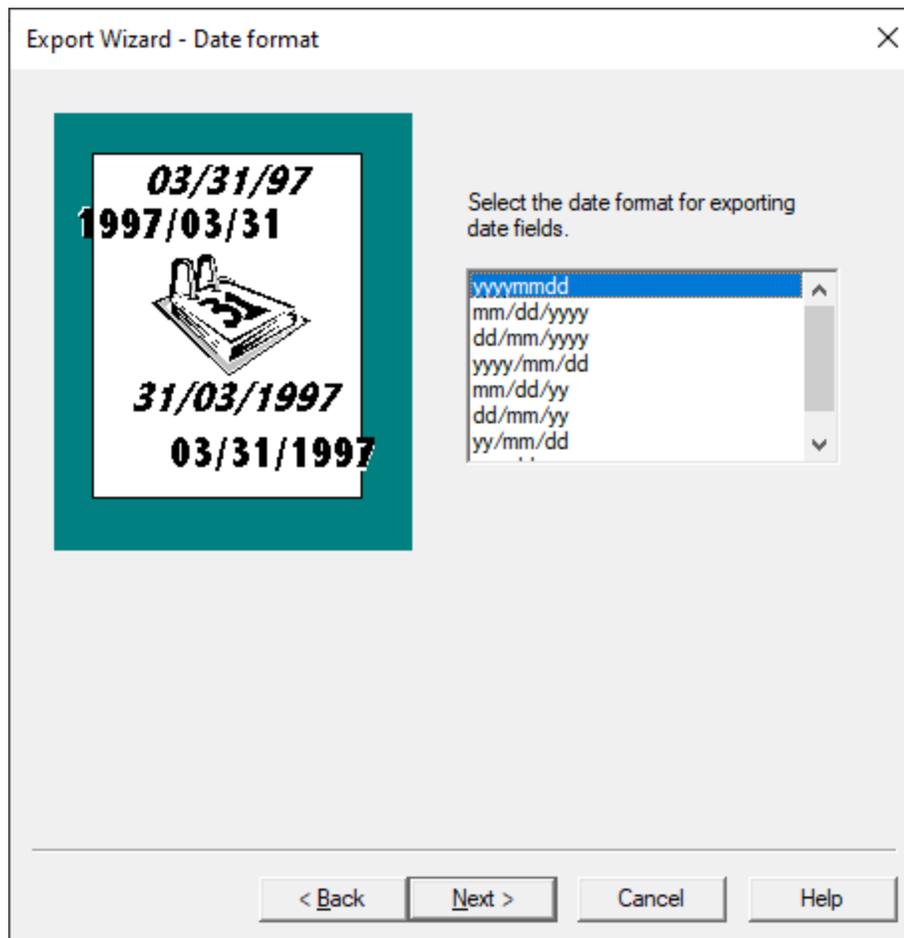
3. Select **Export Wizard** and click **OK**. The **Export Wizard - Documents** dialog displays.



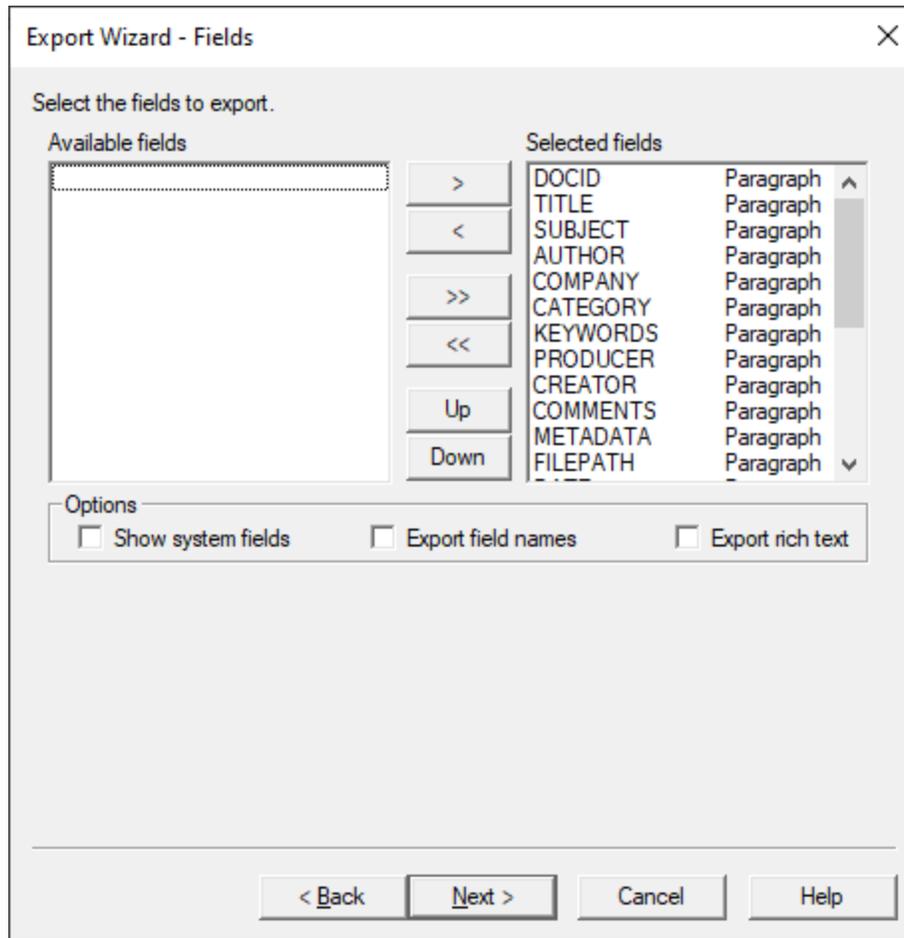
4. Enter the number for the **First** and **Last** records that you want to export from the current query.
5. Click **Next**. The **Export Wizard - Format** dialog displays.



6. Define the characters you want to specify as the **Comma**, **Quote**, and **Newline** delimiters in the delimited text file. If you are exporting within Concordance, you will not need to change the default values. Change these characters only if the characters are used within the text of your documents.
7. Click **Next**. The **Export Wizard - Date format** dialog displays.

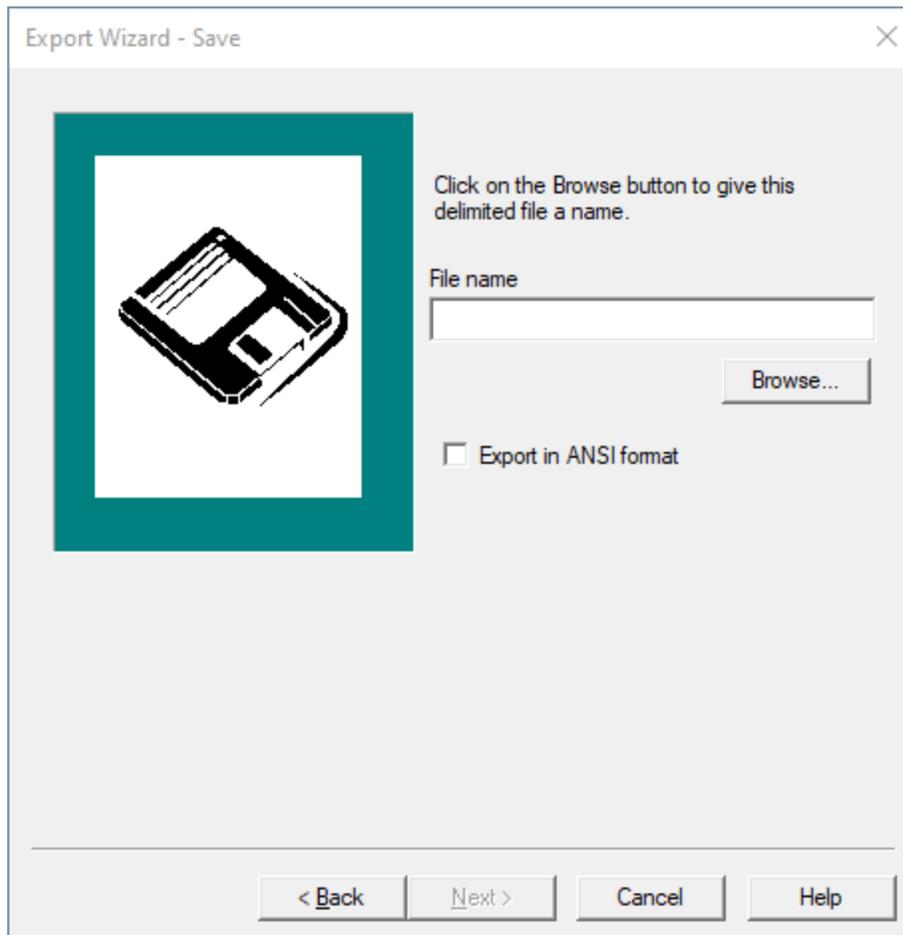


8. Select the date format you want to use in the delimited text file.
9. Click **Next**. The Export Wizard - Fields dialog displays.



10. By default, all of the database fields are added to the **Selected fields** list for the export. To only select some of the fields for the export, click the double arrow (<<) button to move all the fields to the **Available fields** list, then select the individual fields you want to export and use the right arrow (>) to move them to the **Selected fields** list.
11. To change the order of the fields in the export, in the **Selected fields** list, click the field you want to move and use **Up** or **Down** to move the field. The order in the **Selected fields** list will be the order of the fields in the delimited text file.
12. To display hidden system fields select **Show system fields**. System fields are fields used by Concordance to administer database functions, such as replication. They are generally not visible, but you can display and export them if desired.

13. To include field names in the export, select **Export field names**. If selected, field names are exported as the first record, with each field name taking the place of its field's data for that record. Exporting field names can help manage data if the data is imported into another program.
14. Select **Export rich text** to export Concordance data with rich text. Full text paragraph fields in Concordance can contain rich text. Rich text contains font changes, bullet lists, and other word processor commands that other database programs cannot handle. You can export with rich text if the data is destined for another Concordance database. Do not export rich text if the data is destined for another program.
15. Click **Next**. The **Export Wizard - Save** dialog displays.

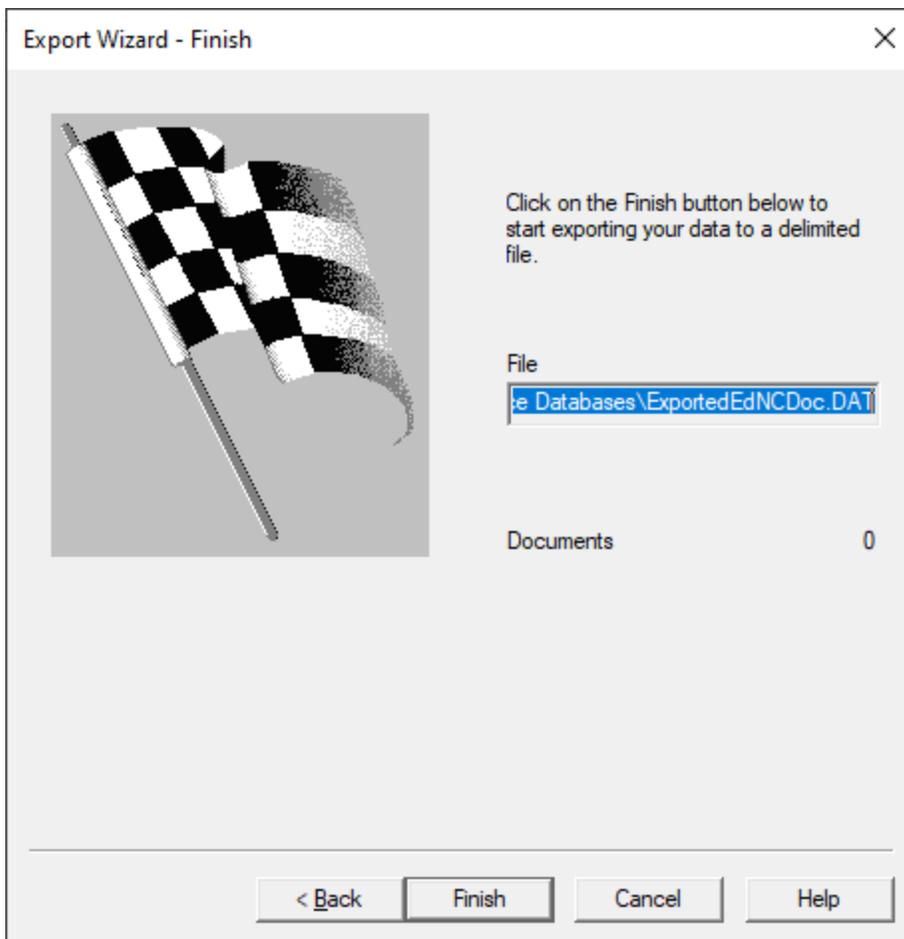


16. Click **Browse** to navigate to the export file location and provide an export **File name**. Click **Save**.

17. Select **Export in ANSI format** to export the data in ANSI (American National Standards Institute) format. You will want to select the Export ANSI check box if you will be importing the delimited text file into an application that does not support the Unicode Standard.

 When exporting to ANSI or ASCII format, characters that cannot be represented as a single-byte character will be lost in the export.

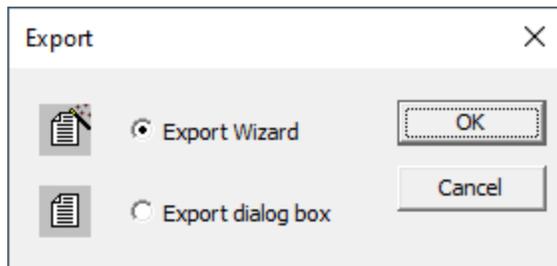
18. Click **Next**. The **Export Wizard - Finish** dialog displays.



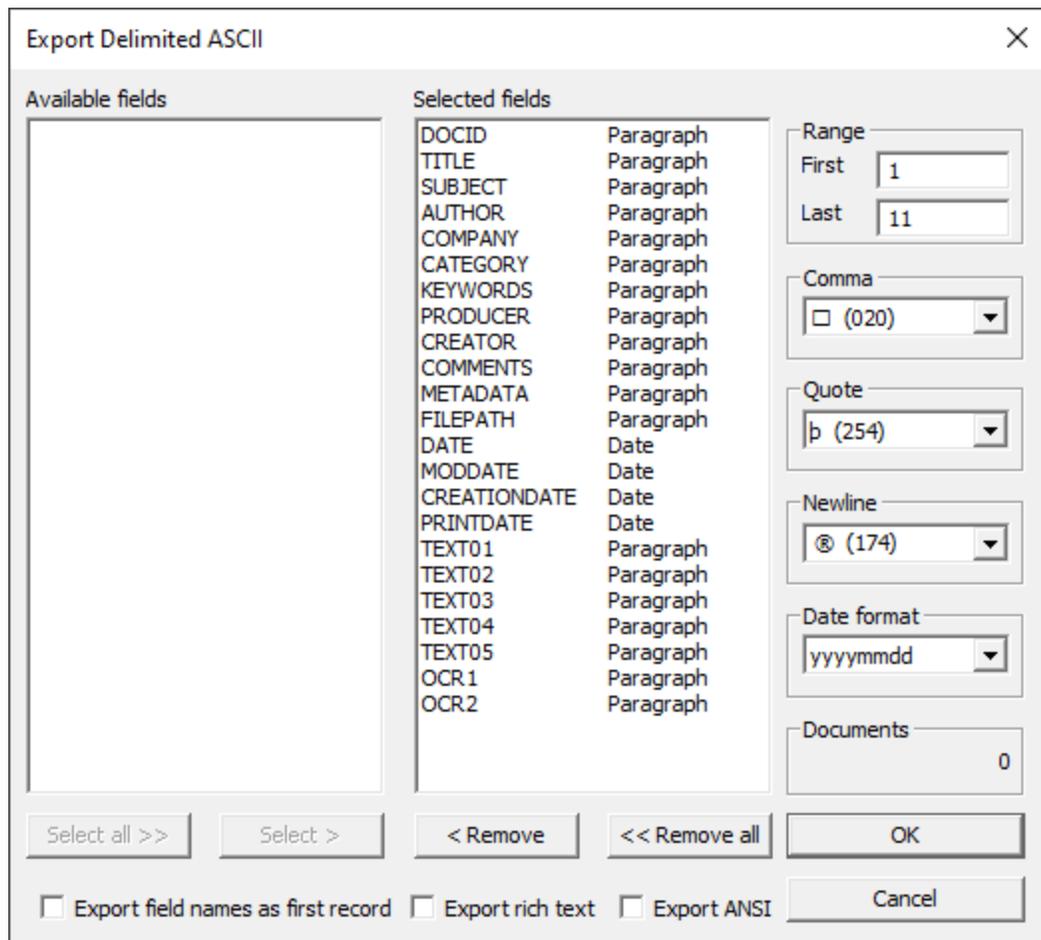
19. Click **Finish**. The Export Wizard automatically closes when the export is complete.

Export to a Delimited Text File - Dialog

1. Run a search query to locate the records you want to include in the export. If you want to export all the records, you can run the Zero Query.
2. On the **Documents** menu, select **Export**, and click **To a delimited text file**. The Export dialog displays.



4. Select **Export dialog box** and click **OK**. The **Export Delimited ASCII** dialog displays.



5. By default, all of the database fields are added to the **Selected fields** list for the export. To select specific fields for the export, click **Remove all** button to move all the fields to the **Available fields** list. In the **Available fields** list select the fields you want, and click **Select**. The field order in the **Selected fields** list will be the field order in the delimited text file.
6. Select **Export field names as first record** to include field names in the export. Field names are exported as the first record, with each field name taking the place of its field's data for that record. Exporting field names can help manage data if the data is imported into another program.
7. To export Concordance data with rich text, select **Export rich text**. Full text paragraph fields in Concordance can contain rich text. Rich text contains font changes, bullet lists, and other word processor commands that other database programs cannot handle. You can export with rich text if the data is destined for another Concordance database. Do not export rich text if the data is destined for another program.

- To export the data in ANSI (American National Standards Institute) format, select **Export ANSI**. You will want to select the Export ANSI check box if you will be importing the delimited text file into an application that does not support the Unicode Standard.



When exporting to ANSI or ASCII format, characters that cannot be represented as a single-byte character will be lost in the export.

- Enter the number for the **First** and **Last** records that you want to export from the current query.
- Define the characters you want to specify as the **Comma**, **Quote**, and **Newline** delimiters in the delimited text file. If you are exporting within Concordance, you will not need to change the default values. Change these characters only if the characters are used within the text of your documents.
- Select the **Date format** you want to use in the delimited text file.
- Click **OK**. Navigate to the export file location and provide an export **File name**. Click **Open**.
- The **Export Delimited ASCII** dialog closes automatically when the export completes.

Exporting Transcripts

Administrators are not typically involved in the general printing of transcripts, but may be asked to export transcript files from Concordance into another application such as West LiveNote.

Transcripts can be exported to the West LiveNote standard Portable Case Format (.pcf) file structure or to a delimited text file. This allows you to export several transcripts to a single file, keeping annotations, quick marks, notes, and issue codes intact. Hyperlinks are also transferred, but any external files they link to are not transferred and must be copied manually.

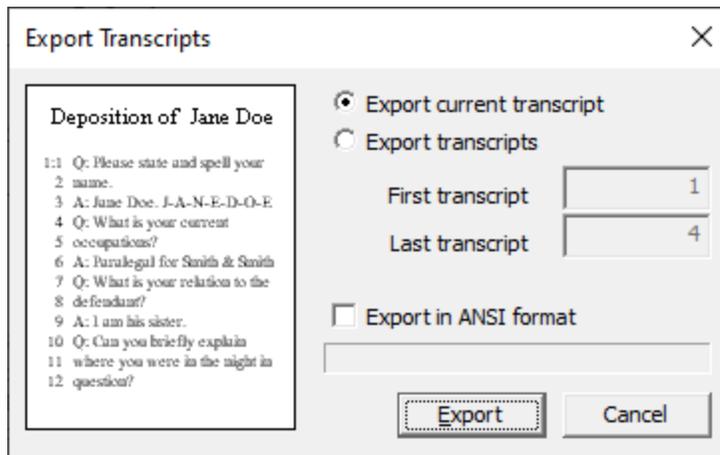
Transcripts can also be exported to delimited text files. See [Exporting Delimited Text Files](#)¹¹⁹.



When exporting concatenated databases, only the data in fields that are identically named and formatted in the concatenated set will be exported.

Export Transcripts to a .pcf File

1. In Concordance, open the database containing the transcripts you want to export.
2. Run a search query to locate the transcripts you want to include in the export. If you want to export all the records, you can run the Zero Query.
3. On the **Documents** menu, select **Export**, and then **Database transcripts**. The **Export Transcripts** dialog displays.



4. To export only the current transcript, select **Export current transcript**.
5. To export multiple transcripts, select **Export transcripts**, then enter the **First transcript** and **Last transcript** numbers to specify the range of transcripts from the current query to export.
6. Select **Export in ANSI format** to export the data in ANSI (American National Standards Institute) format. You will want to select the Export ANSI check box if you will be importing the delimited text file into an application that does not support the Unicode Standard.



When exporting to ANSI or ASCII format, characters that cannot be represented as a single-byte character will be lost in the export.

7. Click **Export**. Navigate to where you want to save the transcript .pcf file, provide a **File name**, and click **Save**.
8. The **Export Transcripts** dialog automatically closes when the Export is complete.

Managing Image Data

Concordance image data is dependent on the viewer that is associated with the database.

Both Concordance Viewer and Concordance Native Viewer store information on all native documents and image files within the Concordance Image Base (.cib) file. This is a SQLite database that stores information such as folder path location, markup history, and preferences settings for Concordance Viewer and Concordance Native Viewer.

Concordance Image stores image information in two files: the .dir file that stores image keys, and the .vol file that stores image volume data.

All image data files, regardless of the viewer used, are stored in the associated database folder.

As an administrator, several features are available to help manage image data. Be sure you know which viewer is configured for the database so you can properly manage the associated image data.

Image Load File Formatting

For Concordance Viewer, Concordance Native Viewer, and Concordance Image, an image load file (.opt, .log, .txt) is a delimited ASCII file containing all information necessary to link database documents with their associated images. The load file can be used to load image information after the database is created. Each line in the load file consists of seven fields delimited with commas:

Field	Description
IMAGE KEY or ALIAS	Should match a media (image) key in the Concordance database (field with the Image attribute selected). This is a unique key. Concordance stores this key in order to reference the image. Media keys are case-sensitive.
VOLUME	Name of the volume where the documents and image reside.
PATH	Full path and file name of the image.
DOCUMENT BREAK	Enter a Y if this image marks the beginning of a document.

Field	Description
F O L D E R B R E A K	Enter a Y if this image marks the beginning of a folder break.
B O X B R E A K	Enter a Y if this image marks the beginning of a box break.
P A G E C O U N T	Number of pages associated with the document or image.

Example: 00010067,NROTEK001,C:
\MY_DATABASES\NROTEK001\001\00010067.doc,Y,,,3



A load file does not necessarily need the volume name, but still needs the field for volume name to be represented. Every line in the load file should have 6 commas. Example: 0000001,,D:\VOLO001\001\0000001.tif,Y,,,1



A document or image media key and file path cannot contain a comma (,) since the comma as a delimiter in the load file.



Media keys should not contain more than 1000 characters.

Image Base Management

For Concordance Viewer and Concordance Native Viewer, Image Base Management tools are provided to allow you to:

- Rename/delete media paths and folders
- Rename/delete media keys (aliases)
- Load additional OPT files into an existing Concordance imagebase
- Export the imagebase database to an OPT file
- Calculate document page count

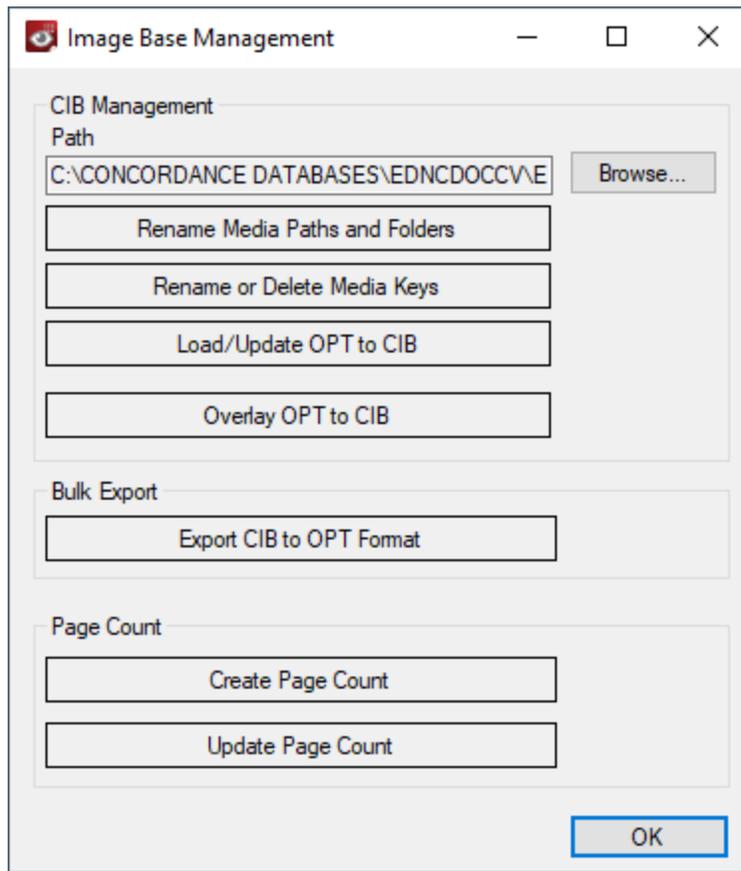


If **Image Base Management** is not available from the **File>Administration** menu, then you have not been given access privileges. If you need access, please contact your Concordance Administrator.



As a best practice, make sure that all users are logged out of the database prior to using the **Image Base Management** tools.

Please see [Concordance Image](#)¹⁴⁷ for corresponding information about managing image data for Concordance Image.



Recreating a CIB

In some circumstances you may need to delete and recreate an existing Concordance Image Base (.cib). For example, if you need to reimport all of your image information. This requires that you delete the existing .cib file prior to reimporting the image information.



When you delete a Concordance Image Base (.cib), all markup history is lost. Make sure that you create a backup of your CIB file before deleting it.

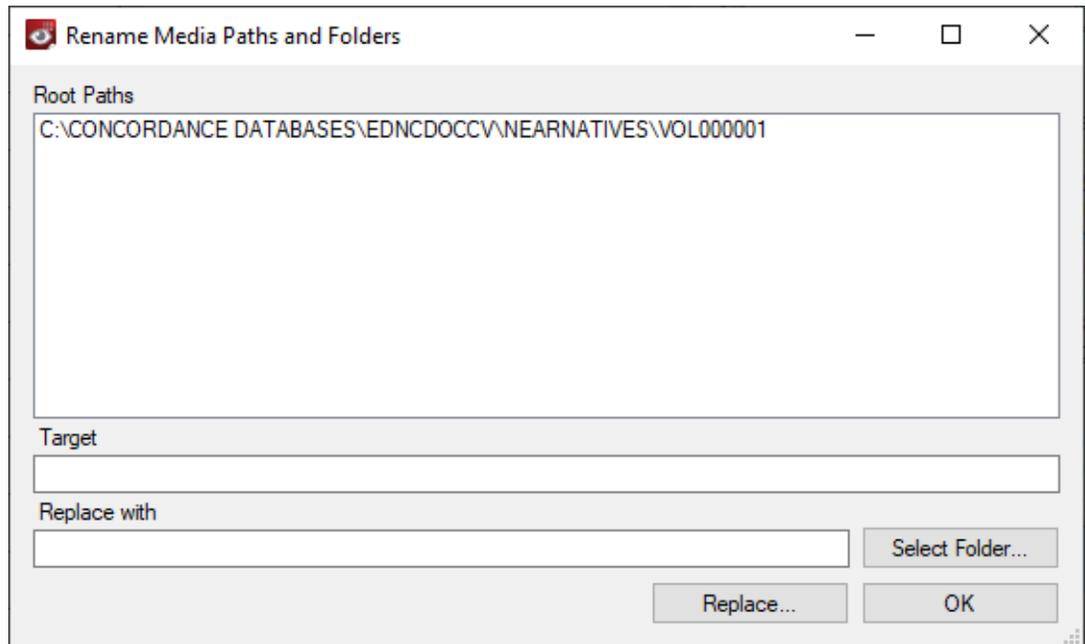
After registering your media, if you receive an error message stating that Concordance Viewer or Concordance Native Viewer is unable to open the corresponding document, you need to edit your folder paths. The folder path listed in the message box is the path stored in the Concordance imagebase pointing to where your files are located so the viewer can open and display the document. You need to change the path to the directory location where your documents actually reside.



Use caution when resetting folder paths as there is no undo function and changes are permanent. You should backup up the .cib file before performing this process or other imagebase management tasks.

Rename Media Paths and Folders

1. On the **File** menu, select **Administration**, and then click **Image Base Management**. The Image Base Management dialog displays.
2. Click **Rename Media Paths and Folders**. The Rename Media Paths and Folders dialog displays.



3. The current file paths display in the **Root Paths** list. To update one of the current file paths:
 - Select the path to update in the **Root Paths** list. The path now displays in the **Target** field.
 - Click **Select Folder**, then browse to the new folder location and click **OK**. The newly selected folder displays in the **Replace with** field.
 - Click **Replace**. A **Confirmation** dialog displays. If the new path does not exist, it will display in red text. Click **Confirm** to finalize the path update.
4. Click **OK** to close the Rename Media Paths and Folders dialog.

Your load file alias should match the media (image) key information in the corresponding Concordance database. Concordance stores this key in order to reference the image for viewing with Concordance Viewer or Concordance Native Viewer.

You can use the Image Base Management feature to make changes to the media (image) aliases as needed.



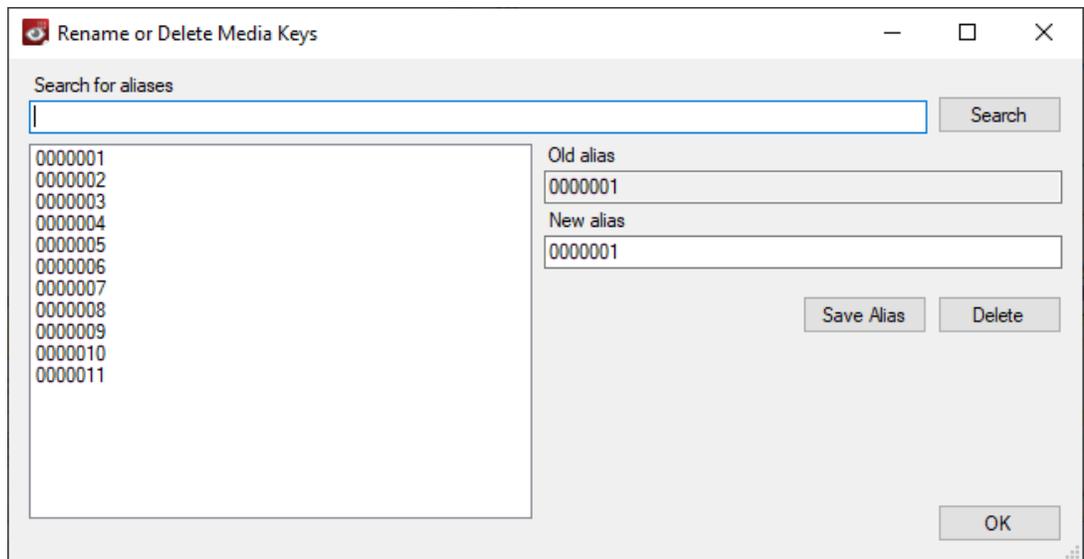
Make sure that when you rename or delete any media keys, you rename or delete the media key in the Concordance database.



Unicode characters are not supported for media (image) key field names.

To Edit Media Keys

1. On the **File** menu, select **Administration**, and then click **Image Base Management**. The **Image Base Management** dialog displays.
2. Click **Rename or Delete Media Keys**. The **Rename or Delete Media Keys** dialog displays.



3. The current list of media keys displays on the left. To update one of the media keys:
 - Select the media key from the list. The **Old alias** and **New alias** update with that media key information.
 - Enter the updated media key in the **New alias** field.

- Click **Save Alias**.
4. Click **OK** to close the **Rename or Delete Media Keys** dialog.

Delete Media Keys

1. On the **File** menu, select **Administration**, and then click **Image Base Management**. The **Image Base Management** dialog displays.
2. Click **Rename or Delete Media Keys**. The **Rename or Delete Media Keys** dialog displays.
3. The current list of media keys displays on the left. To delete one of the media keys:
 - Select the media key from the list. The **Old alias** and **New alias** update with that media key information.
 - Click **Delete**. A confirmation message displays. Select **Yes** to confirm deleting the media key.
4. Click **OK** to close the **Rename or Delete Media Keys** dialog.

The Concordance Image Base (.cib) file for Concordance Viewer and Concordance Native Viewer links native documents and images with their corresponding records in Concordance. An .opt file is used to import the document and image information into the .cib file. Once a .cib file is created for a Concordance database, you can view the referenced documents and images in Concordance Viewer or Concordance Native Viewer.

If you have an existing .cib file and receive additional files for the database, you can use the Image Base Management tools in Concordance to load the new files and .opt file to the .cib without affecting the current records or any markup that have been applied.

The .opt file can contain both documents and images that are either single-page or multiple-page files and each file must contain a unique ID (media key). Before loading an .opt file, make sure to review the file to verify that it provides an image

alias (media key), volume, file name and path, and page break. If your document and image files and image load file was provided by a vendor on removable media, the path information will likely need to be changed.

If a vendor provides documents and images, but not the corresponding load file (.opt, .log, .txt), you can still load your document and images into Concordance and then use Documents>Export>Concordance Native Viewer command to create an OPT file to use with Concordance Native Viewer. This option is not available for Concordance Viewer.



When importing a multi-page image file, make sure that the file is formatted as a .tif file (.tif formatted files are the only image type file that recognizes document breaks). All other image formatted files (.jpg, .bmp, .gif, etc.) can only be imported as a single-page single image file.

The viewer can only associate one image file with a record, so you cannot use multiple single-page image files to represent a multi-page image.

Load Additional .opt Files

1. On the **File** menu, select **Administration**, and then click **Image Base Management**. The **Image Base Management** dialog displays.
2. Make sure the .cib you want to load to is displayed in the **Path** field, otherwise **Browse** to the correct .cib file and select it.
3. Click **Load/Update OPT to CIB**.
4. Navigate to the location of the load file (.opt, .log, or .txt) and select it. Click **Open**.
5. A progress dialog displays. If no errors occur, the dialog closes automatically.
6. Click **OK** to close the **Image Base Management** dialog.



Successfully loaded OPT files are renamed to filename.Imported_opt in the directory folder where the .opt file was loaded.



We recommend that you take some time to experiment with loading an image file and practice edits or repairs to it so you become adept at identifying and fixing any corruption yourself. Most technical support calls for this phase of administration are due to an incorrect file path.



Use caution when overlaying images paths as there is no undo function and changes are permanent. We recommend backing up the database files before performing this process or other imagebase management tasks.



File paths, folders and imagekeys are case-sensitive. Make sure the new image path and filename case match to ensure that the paths are replaced.



The imagekey values in your load file must match the values in the imagekey field in the database.

Overlay an .opt File (Concordance Viewer)

There may be circumstances where you need to replace existing images with new images. For example, if you originally loaded placeholder images when the database was created.

1. On the **File** menu, select **Administration**, and then click **Image Base Management**. The **Image Base Management** dialog displays.

2. Make sure the .cib you want to load to is displayed in the **Path** field, otherwise **Browse** to the correct .cib file and select it.
3. Click **Overlay OPT to CIB**.
4. Navigate to the location of the load file (.opt, .log, or .txt) and select it. Click **Open**.
5. A progress dialog displays. If no errors occur, the dialog closes automatically.
6. Click **OK** to close the **Image Base Management** dialog.

Overlay an .opt File (Concordance Native Viewer)

There may be circumstances where you need to replace existing images with new images. For example, if you originally loaded placeholder images when the database was created.

1. On the **File** menu, select **Administration**, and then click **Image Base Management**. The **Image Base Management** dialog displays.
2. Make sure the .cib you want to load to is displayed in the **Path** field, otherwise **Browse** to the correct .cib file and select it.
3. Click **Overlay OPT to CIB**.
4. A dialog displays to confirm overlay. All existing markups, including redactions, will not be transferred to replacement images. Click **Yes** to continue.
5. If any errors occur, a log file will be saved in the Logs folder in the location where the database is saved.

To make a backup of your Concordance Image Base you can export the database's .cib file to an .opt formatted file. The .opt file is a text file that contains the contents of the imagebase at the time of the export.



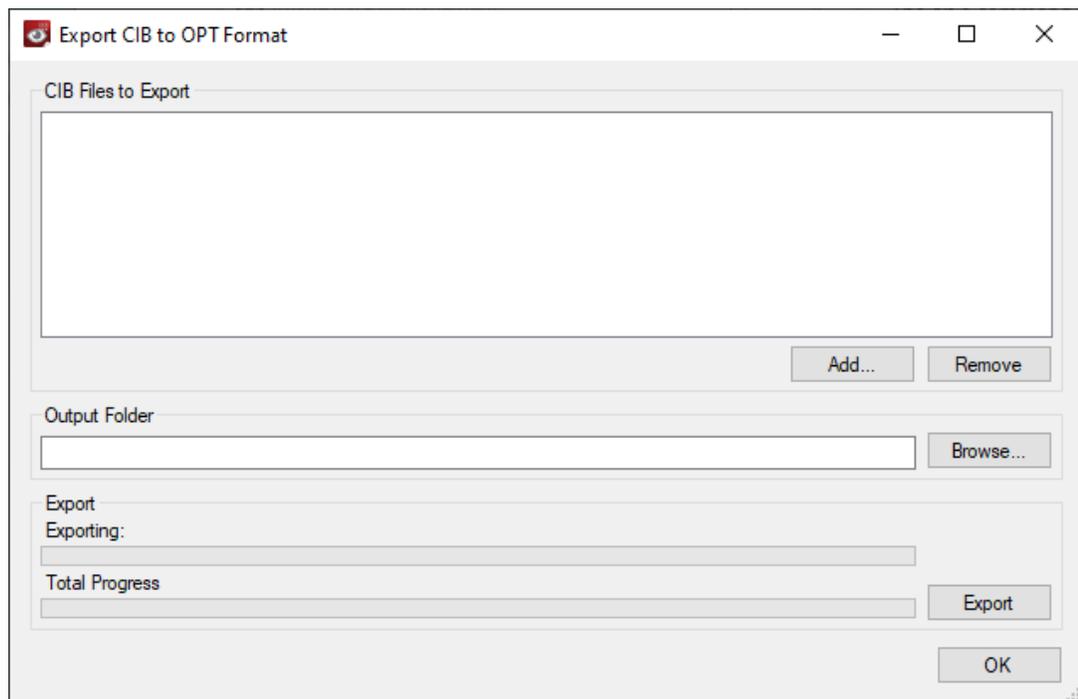
If you plan to export the imagebase database more than once, make sure that you delete or rename the existing .opt file(s) prior to exporting since existing files will not be overwritten. The exported .opt file does not include markup history.



Exported OPT files associated with a Concordance Native Viewer imagebase do not contain page count information. Therefore, if you are loading an exported OPT file into Concordance Image, you must reset the document breaks in Concordance Image for the images to load properly.

Export .cib to .opt

1. On the **File** menu, select **Administration**, and then click **Image Base Management**. The **Image Base Management** dialog displays.
2. Click **Export CIB to OPT Format**. The **Export CIB to OPT Format** dialog displays.



3. Click **Add**. Navigate to and select the .cib file you want to export. Click **Open**. The selected .cib file displays in the **CIB Files to Export** list.
4. Click **Browse** next to **Output Folder**. Locate the folder where you want the exported .opt file and click **OK**.
5. Click **Export**. The data is exported.
6. Click **OK** to close the **Export CIB to OPT Format** dialog.
7. Click **OK** to close the **Image Base Management** dialog.

You can export multiple .cib files at once by adding them to the **CIB Files to Export** list before selecting **Export**. All exported files will be written to the **Output Folder**.

The Create Page Count command can be executed to establish an accurate page count for viewing and printing documents and images. This command calculates the total number of pages for each record and the total number of pages within the entire image base.

Anytime additional documents or images are added to the image base, the Update Page Count command should be run to ensure the page count is kept current for reviewers.

Create Page Count

1. On the **File** menu, select **Administration**, and then click **Image Base Management**. The **Image Base Management** dialog displays.
2. Make sure the .cib you want to use is displayed in the **Path** field, otherwise **Browse** to the correct .cib file and select it.
3. Click **Create Page Count**.
4. A confirmation dialog displays. Click **Yes** to continue.
5. A progress dialog displays. Once the page count is complete, click **Close**.

6. Click **OK** to close the **Image Base Management** dialog.

Update Page Count

1. On the **File** menu, select **Administration**, and then click **Image Base Management**. The **Image Base Management** dialog displays.
2. Make sure the .cib you want to use is displayed in the **Path** field, otherwise **Browse** to the correct .cib file and select it.
3. Click **Update Page Count**.
4. A progress dialog displays. Once the page count is updated, click **Close**.
5. Click **OK** to close the **Image Base Management** dialog.

Concordance Viewer

Imported eDocs and eMails are automatically converted to near-native PDF files for viewing with Concordance Viewer. For load file imports, the extensions in the OPT file are scanned. Filetypes in the OPT that are not supported in Concordance Viewer will be converted to PDF and stored with the database files in the NearNatives folder for display in the viewer. If there are filetypes in the OPT that are not supported by the viewer and cannot be converted to PDF, the user will see an image placeholder in the viewer with the text "Image key not found".

Concordance Native Viewer

For the discovery process, it is common practice to pre-process documents, by converting them to image files for review. However, it is often more desirable to review certain documents in their native format. Concordance Native Viewer provides access to both native files and images within one application, thus speeding up the review process.

Concordance Native Viewer opens a near native view of the document including images, layout and more. The near native view can be reviewed, redacted, and marked-up for production.

When importing native documents into Concordance for viewing in Concordance Native Viewer, it's best to create a new database. The database must contain a valid media (image) key and file path field. The media (image) key field is used to link the Concordance database with Concordance Native Viewer. The filepath field stores the path to the native document.

1. In Concordance, create the database you want to use with Concordance Native Viewer. For more information see [Creating a Database](#).
2. Import the data into the database.
3. Verify that each record has a unique identifier in the field that you marked as the media (image) key field and the filepath field displays the path to the native document.
4. From the **Documents** menu, click **Export**, and then click **Concordance Native Viewer**.
5. In the **Export to Concordance Native Viewer**, select the database field where the file path is stored. Note the output file path. This is where the .opt file will be exported for importing in Concordance Native Viewer.



Each time you perform an export, a unique OPT filename is generated with the date and time the file is created (<database>_YYYYMMDD_hhmmssfff) .

6. When finished, click the Camera button to view the documents and images in Concordance Native Viewer.

Concordance Image

Image files are the original record scanned into a file format that is viewable in Concordance Image. Typically, the vendor who processed your documents supplies you with a corresponding image load file along with your images. If you do not receive this file, you can still load your images. However, having the image load file is recommended.

Image files can be paper documents that are scanned, or e-mail or native documents that are also processed. Your images can be single-page or multiple-page files and are usually named with your image alias. We recommend using single-page TIF files because the images load faster for review and are easier to work with if you need to adjust document breaks.

Your corresponding image load file provides an image alias or key, volume, path with file name, document break, folder break, box break, and page count. These files are usually in .opt, .log, or .txt file formats. The volume, folder break and box breaks are optional and may be blank, but the .opt file itself must consist of seven comma-delimited fields. Document break, folder break, and box breaks are indicated by the letter "Y".

Since your image files and image load file are typically provided by a vendor on removable media, the path information listed could be written in the D:\ drive and will need to be changed. You can provide the vendor with a specified directory path in advance if you already have a designated location for your images. If not, you can change the directory information yourself.

How to Change a Directory File Path for Images

- Directly within the image load file (recommended)
- In Concordance Image after loading the file information

Both directory file path changes are made with a simple search and replace. Once you have moved your images from the CD or DVD to the server, this directory is what you want to place in the image load file or in Concordance Image. You can edit the file path before or after the import process.

What a Concordance Image Record Profile Includes

- Up to 16,770,266 images per document
- Up to 536,870,912 volumes
- Can open .tif, .jpeg, .bmp, .gif, etc. Concordance Image cannot open PDF files.
- Image key: Value in the image field, if it matches the file name
- Image alias: Value in image field, when different than image file name
- Combined length of the image key, plus the file name and path must not exceed 1001 characters

Concordance Image Guidelines

- TIF and OCR text files can be stored in the same folder
- All TIF files from the same document do not have to be in same volume
- If you do not have a Concordance database with document breaks, you will need to use a load file with document breaks, or set them manually in Concordance Image

Imagebase Component Files

File	Description
.dir	Imagebase that stores image keys (aliases)

File	Description
.vol	Tracks volumes, must be in same directory location and saved with the same name as the .dcb file
Database - Redline.s.dcb	Stores all marks made on images including type, location, color, and user
.log	Exported image load file from existing imagebase

1. From the Windows **Start** menu, open Concordance Image.



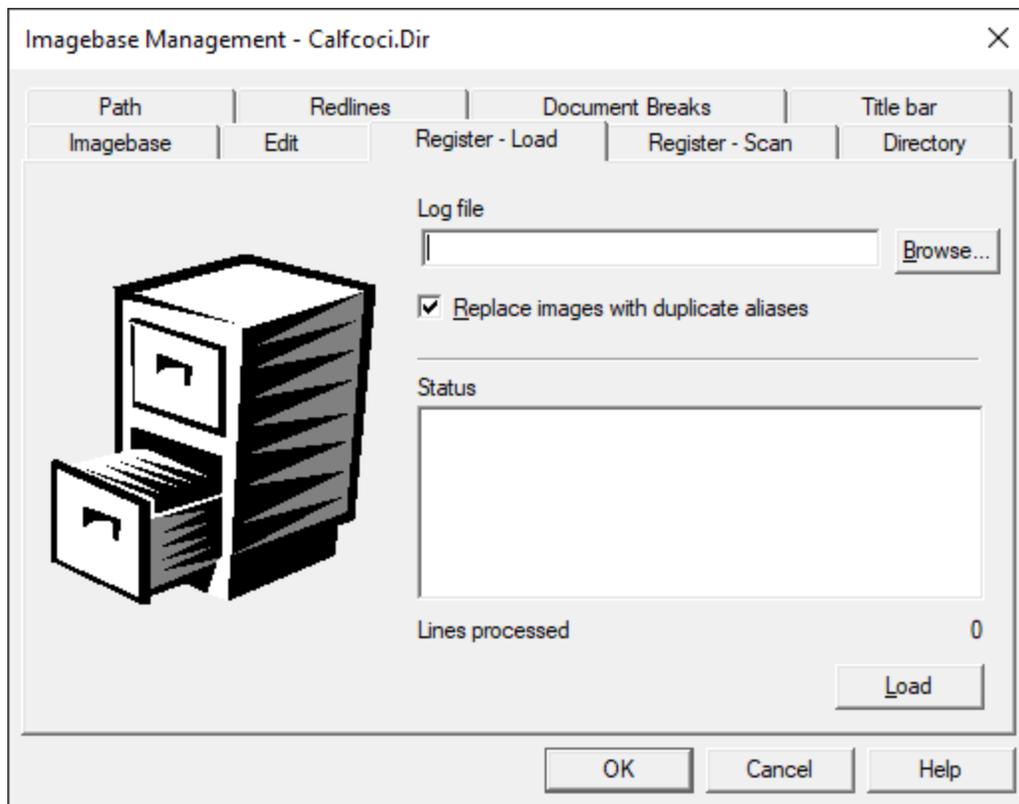
We recommend launching Concordance Image from the Start menu only when you are first registering images. During normal image record review from Concordance, simply click the View image (camera) button on the Dynamic toolbar in Concordance.

2. In Concordance Image, on the **Tools** menu, click **Imagebase Management**.
3. Browse to and select the database .dir file you want to load, then click **Open**. The **Imagebase Management** dialog displays.



Make sure that you select the correct .dir file located in the same directory as your database. If not, you will be modifying the imagebase for a different database.

4. Select the **Register - Load** tab.



5. Click **Browse**. Navigate to and **Open** the .opt file you want to load.
6. Click the **Load** button.
9. In the **Status** field, verify that the image files transferred into the database, and then click **OK**.
10. In Concordance, open a record to view your image files.



If imagebase .dir and .vol files are accidentally deleted, you need to reload the imagebase in Concordance and relink it to its corresponding database.



We recommend that you take some time to experiment with loading an image file and practice edits or repairs to it so you become adept at identifying and fixing any corruption yourself. Most technical support calls for this phase of administration are due to an incorrect file path.

Tips and Tricks for Loading Image Files

If your image files aren't importing properly, check the following:

- Locate and replace volume paths on the Directory tab.
- Customize the path prefixes on the Path tab.
- Verify the file name and path information in the image load file.
- Edit the .vol file in List File Management dialog box to remove unwanted entries. Or, export a .log file and edit in text format.
- Use UNC paths when on a network for inconsistent drive mappings.
- Verify that all documents in the current query link to an image, and verify that every image exists. Records with missing links in the imagebase are tagged and tracked in a .log file.
- Have the image re-processed if the TIF file is corrupt or is an incompatible format.
- Rotate images using Adobe Photoshop®, Microsoft Office Document Imaging, or Irfanview.



A common Concordance Technical Support call is due to the file path in the image load files being incorrect. Be certain to verify this information. You can search and replace the path to the correct directory where your image resides.



Before loading a data volume, verify that the Bates Number for the first record to be loaded does not overlap with the last bates number used in the existing collection. If it does, you should request a correction from the source prior to loading.

If you do not have a corresponding image load file, you may want to register an imagebase by scanning images from a disk or directory source. Once the images are registered, you want to make sure that you create aliases and set the document breaks prior to document review.

Use the **Register - Scan** tab in the **Imagebase Management** dialog in Concordance Image to scan directories and register applicable image files in the database. Registering an imagebase by scanning the images from disk is the easiest way of creating an imagebase.



All file names must be unique no matter where they are located. In other words, you cannot register images from two different folders with the same file structure and file names even if the images are different. In order to create an imagebase from this scenario, you must create a .log file and use unique aliases to distinguish between images with similar file names.

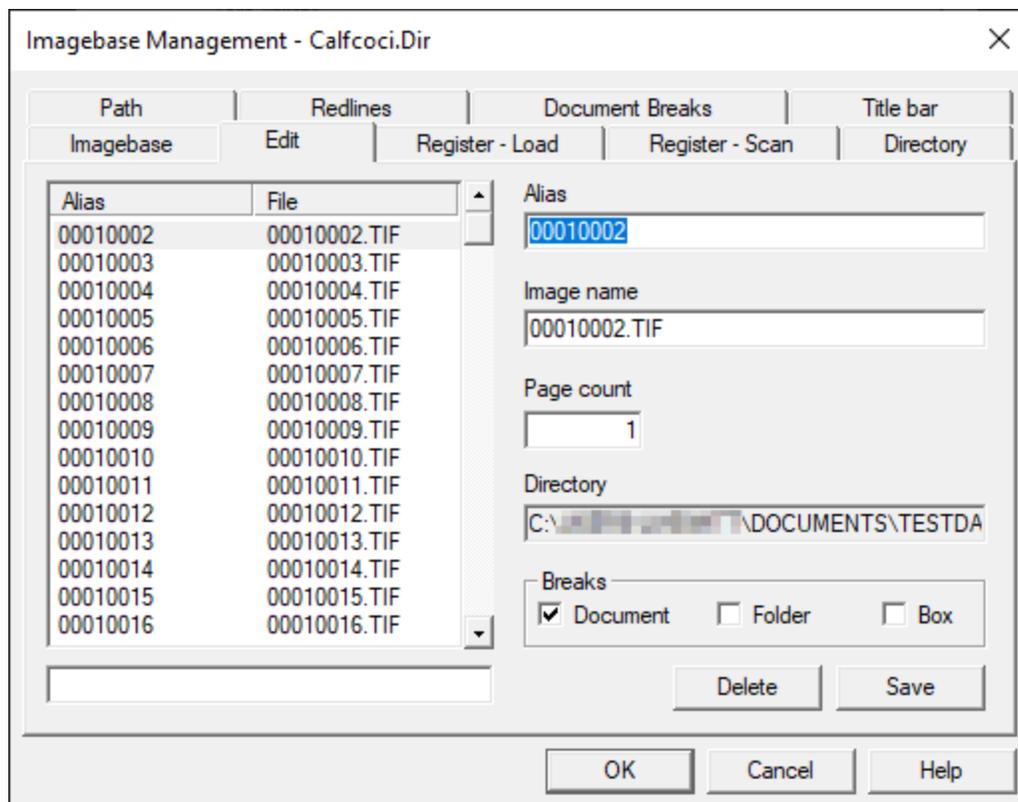


If the image represents the first image in a set of images, the exact value, 00001, must be the value in the image key field for your Concordance database for Concordance Image to find the image path and name in an imagebase. To eliminate any confusion, an

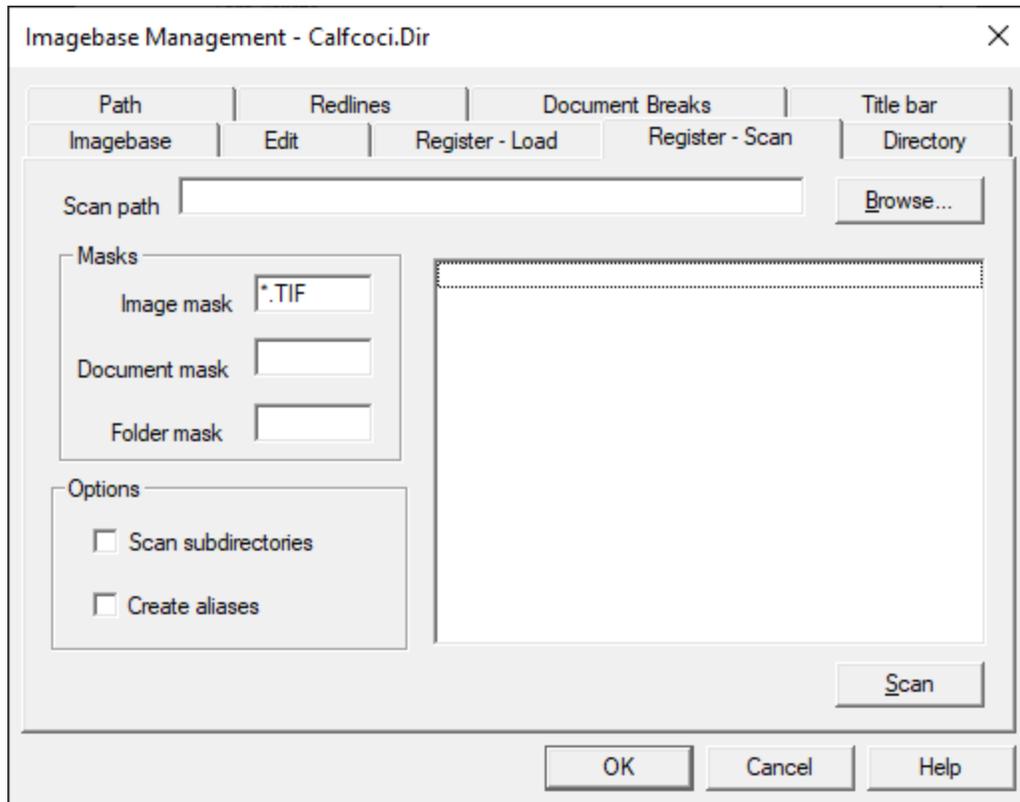
alias is also matched with information that is used to synchronize Concordance and Concordance Image. Run the Create Alias from Filename CPL. The images link automatically based on the Image field. Key and image fields are defined on the New or Modify dialog box.

To Scan Images

1. In Concordance Image, on the **Tools** menu, click **Imagebase Management**.
2. Navigate to and **Open** the database's .dir file.
3. The **Imagebase Management** dialog displays.



4. Click the **Register - Scan** tab.



5. Click **Browse**, navigate to the folder containing the files you want to scan, and click **Open**.
6. The **Image mask** field defaults to *.TIF. Only the image files matching the file type entered in the Image mask field will be registered in the imagebase. Update **Image mask** to include the files you want to scan. You can use *.* to include all image files from the folder.
7. If desired, in the **Document mask** field, type the applicable document mask. Any image matching the **Document mask** will be marked as a document break.
8. To use a folder mask, in the **Folder mask** field, type the applicable folder mask. Any image matching the **Folder mask** will be marked as a folder break.



If you are using a **Document mask** or **Folder mask**, make sure that the image also qualifies as an image based on the **Image mask**.

9. Select **Scan subdirectories** if you want to include files in folders underneath the one selected in **Scan path**.
10. Selecting **Create aliases** will automatically generate aliases for images in your imagebase during the scan based on the field designated as the image field.
11. Click **Scan** to initiate the register scan. When complete, the dialog displays the total number of files registered for each scanned subdirectory.

You may find that you receive image files containing records that do not have preset document breaks or breaks that are not placed correctly or need to be changed. If so, you can set or change them in Concordance Image.

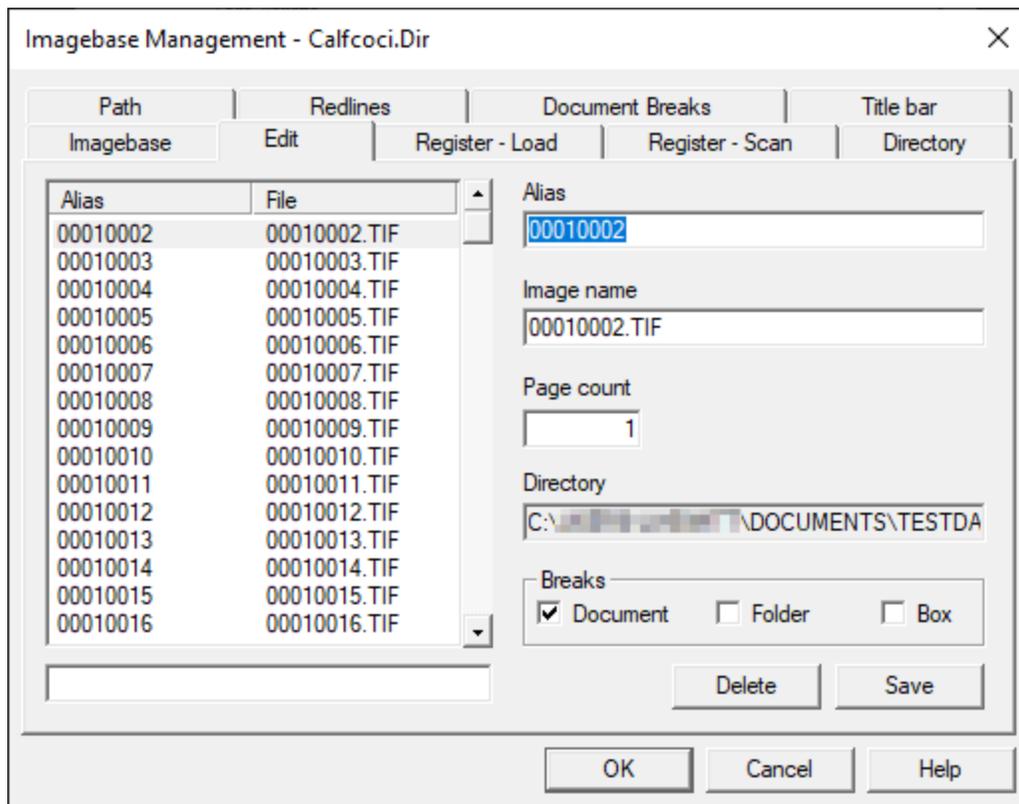
Concordance Image assumes that data is stored at a document level in each database, and marks the image specified in the image field as the document break. If the image field information is incorrect, you need to reset the document breaks. The **Imagebase Management** dialog allows you to set document breaks in the imagebase based on the current Concordance query.



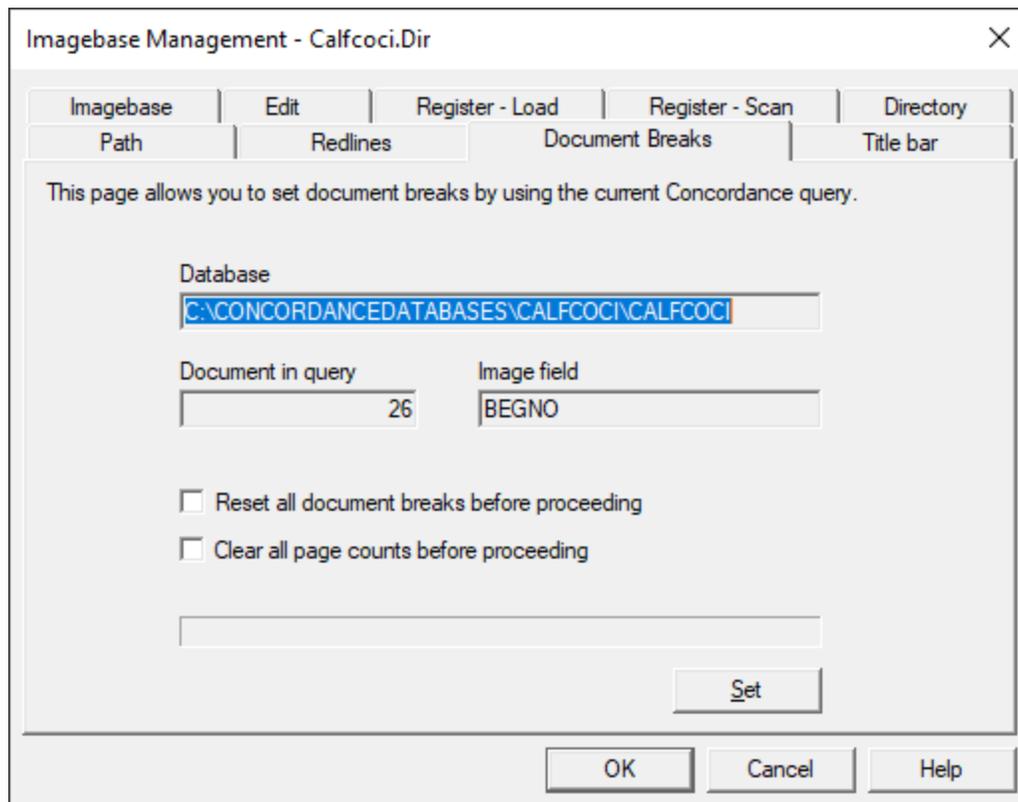
The Document Breaks tab in the **Imagebase Management** dialog will not be active if you do not have an active Concordance database link to the imagebase.

Setting Document Breaks

1. In Concordance Image, on the **Tools** menu, click **Imagebase Management**.
2. Navigate to and **Open** the database's .dir file.
3. The **Imagebase Management** dialog displays.



4. Click the **Document Breaks** tab.



5. To reset all all document breaks before creating new document breaks, select **Reset all document breaks before proceeding**. Any image marked as a document prior to processing is no longer flagged as a document break.
6. To clear all page counts before creating new document breaks, select **Clear all page counts before proceeding**. Any image having a page count prior to processing will no longer have one. The page count value will be reset to 0.
7. Click **Set** to reset all document breaks.

Splitting Document Images in Concordance Image

1. In Concordance, run a query to isolate the records that need to be adjusted.
2. On the **Dynamic** toolbar, click **View image** (camera) to open the corresponding images in Concordance Image.
3. In Concordance Image, on the **Tools** menu, click **Imagebase Management**.
4. Navigate to and **Open** the database's .dir file.

5. The **Imagebase Management** dialog displays.
6. Click the **Document Breaks** tab.
7. To reset all all document breaks for the documents in the current query, select **Reset all document breaks before proceeding**. Concordance Image checks to see if the image alias values match the values of the Concordance field in the Image field. If the image alias and Concordance fields values match, Concordance Image sets the document break at the image alias value. If the values do not match, Concordance Image will not create a document break at the image alias value.
8. To reset all page counts for the documents in the current query, select **Clear all page counts before proceeding**. Concordance Image clears the existing page counts and resets the page counts based on the new document breaks.
9. Click **Set** to adjust document breaks for documents in the current query.
10. Click **OK** to close the **Imagebase Management** dialog.
11. Close and reopen Concordance Image to view the adjusted document breaks.



Document breaks in Concordance Image can be changed manually for each individual image on the **Edit** tab in the **Imagebase Management** dialog.

Administrators can review a database's .vol imagebase file that is used with Concordance Image.

To View a Database's .Vol File

1. In Concordance, on the **Tools** menu, click **Manage List Files**. The List File Management dialog displays.
2. On the **Lists** tab, click the **Open** button.
3. Navigate to and open the database .vol file you want to review.

4. Click the **Edit** tab to view the contents of the .vol file.
5. When you finish reviewing the .vol file, click **Done** to close the **List File Management** dialog.

The imagebase may need to be deleted for various reasons. If you need to reimport all of your image information, you will need to delete the existing imagebase first.

If you need to remove unwanted entries from the imagebase, export the imagebase to a log file, remove the unwanted entries from the log file, delete the imagebase's .dir and .vol files, and then reimport the updated log file into Concordance Image.

To Delete an Imagebase

1. Close Concordance and Concordance Image.
2. Locate the imagebase's .dir and .vol files.
3. Rename or delete the imagebase's .dir and .vol files. Renaming the .dir and .vol files creates a backup of the imagebase, in case you need to restore the imagebase later.
4. Create a new imagebase for the database:
 - a. In Concordance, on the Dynamic toolbar click **View image** (camera).
 - b. Clicking View image generates the imagebase for the database. Creating an imagebase creates the database's .dir, .vol, and redlines .dcb file.
5. The first time you click View image, Concordance Image launches with an error message displayed - "*Couldn't find xxx in the imagebase*". Click **OK** to close the message.
6. Re-scan and register the images associated with the database. For more information about scanning and registering images, see [Scanning Images](#)¹⁵².

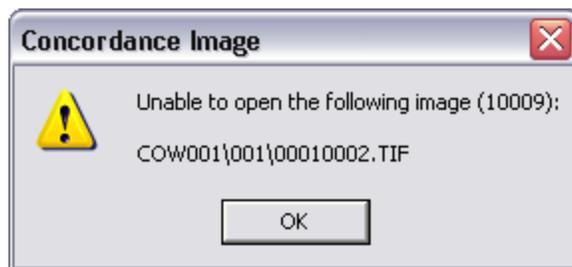
Concordance Image enables you to export the entire imagebase to an image log file. The image .log file is a text file that contains the contents of the imagebase at the time of the export. If you export and imagebase multiple times, you have the option to overwrite the existing log file, create a new .log file, or add the imagebase contents from the latest export to the end of the existing .log file.

Export an Imagebase to an Image Log File

1. In Concordance Image, open the imagebase you want to export. You can open an imagebase in Concordance Image by clicking the View image (camera) button in Concordance if the database associated with the imagebase is currently open in Concordance, or in Concordance Image, on the File menu click Open image, click OK to close the message, navigate to and open the imagebase's .dir file.
2. On the **Tools** menu, click **Export imagebase to log file**. The **Export Imagebase** dialog displays. The Imagebase field defaults to the directory and imagebase name of the current imagebase.
3. To export a different imagebase, click the **Browse** button to open the **Select Imagebase** dialog box, locate and open the imagebase .dir file. The Log file field defaults to the same directory and has the file name for the new image log file.
4. To store the image log file in a different directory, click the **Browse** button to open the **Select log file** dialog box, navigate to where you want to store the .log file, type the file name in the **File name** field, and click **Save**. The first time your export an imagebase the drop-down list in the Log file field is unavailable. Once an image .log file has been created, if you export the imagebase again, the drop-down list is available. You have the option of selecting one of the following options:
 - **Overwrite/create new file:** Click Overwrite/create new file to overwrite the existing log file or if you modified the log file name in the Log file field and want to create a new log file.
 - **Append to file:** Click Append to file to add the exported contents of the imagebase to the end of the existing log file.

5. Click the **Export** button to create the image .log file. The log file is created in the directory displayed in the Log file field.
6. Click the **Done** button to close the **Export Imagebase** dialog box.

After registering your images, if you receive an error message stating that Concordance is unable to open an image, you need to edit the directory path. The directory path listed in the message box is where Concordance Image is looking for your image files so it can open and launch the image. You need to change the path to the directory location where your images actually reside.



You can fix the imagebase directory path in three ways:

- Modify the directory in the image load file
- Modify the directory in Concordance Image
- Map images on drives

Modify the Directory in the Image Load File

1. Navigate to and open the database's image load .log file in any text editor program.
2. Find the portion of the file path that needs to be modified.

3. Use the text editor's search and replace feature to update the file path(s) to the correct location.
4. Save the edited load file with a new filename. This will retain the original image load file in case you need it.

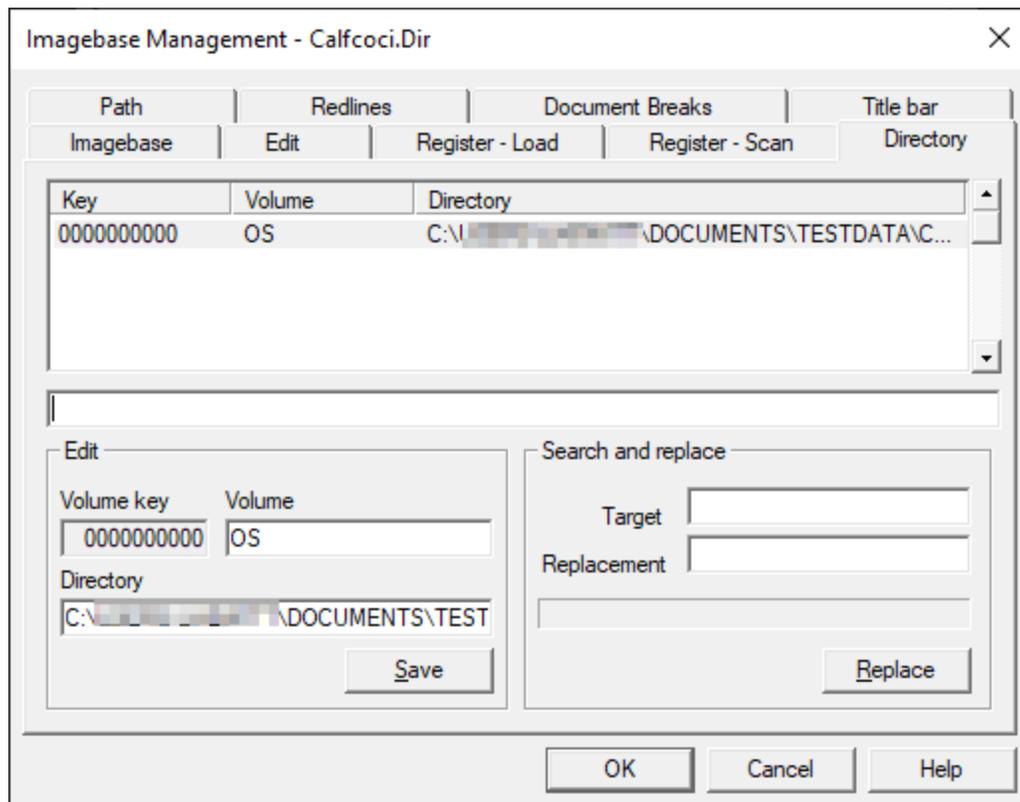
Modify the Directory in Concordance Image

If you moved your database files, you need to reset the directory path where your images are now stored. To do so, you need to update the directory path on the **Directory** tab in the **Imagebase Management** dialog.



Use caution when resetting directory paths as there is no undo function and changes are permanent. We recommend backing up the .dir and .vol files before performing this process or other imagebase management tasks.

1. In Concordance Image, on the **Tools** menu, select **Imagebase Management**.
2. Navigate to and **Open** the database's .dir file. The **Imagebase Management** dialog displays.
3. Click the **Directory** tab.



- i. The current image directory paths are listed at the top of the Directory tab. The Edit section of the tab is used to edit individual image directory paths, and the Search and replace section is used to globally search and replace directory path information throughout the imagebase.
4. To edit an individual directory path, select the applicable directory in the directory list and then edit the **Volume** and/or **Directory** fields. Click **Save**.
 5. To run a global **Search and replace**, in the **Target** field type the directory text you want to search for and in the **Replacement** field type the new directory text. Click **Replace**.

 When using Search and replace



If you use **Search and replace** be careful how to specify the paths. If you want to only replace the drive letter you need to include the proper punctuation. For example, type "C:\" instead of just "C" in

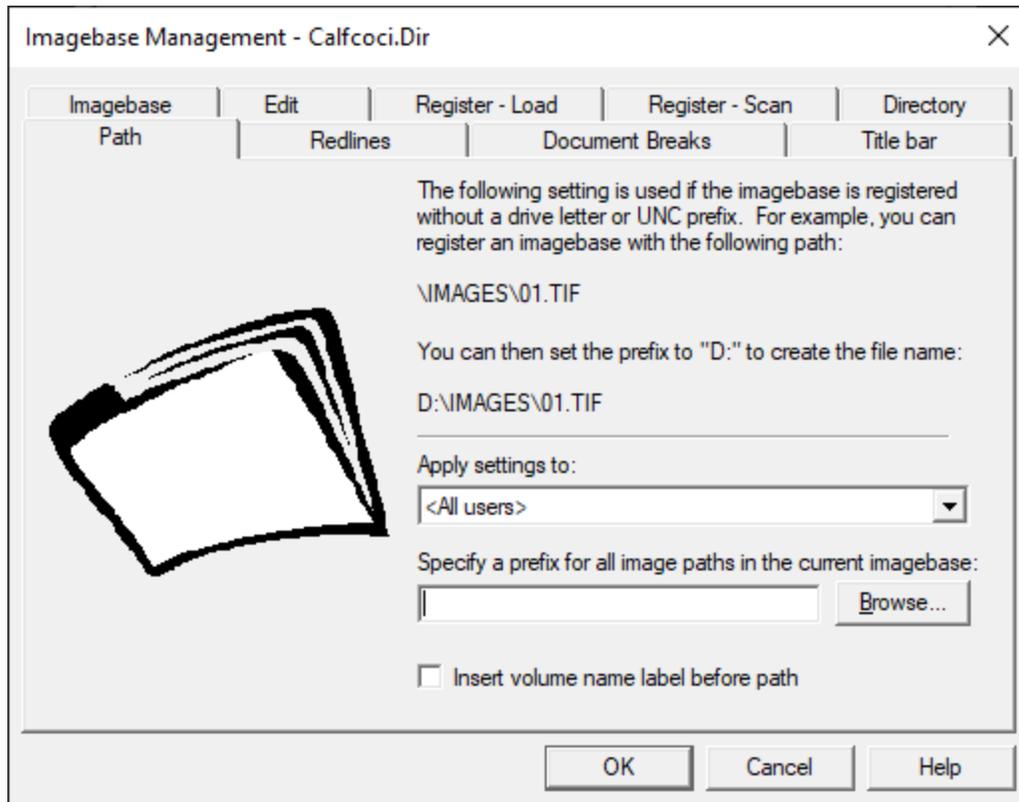
the **Target** field. Otherwise you would replace every instance of the letter C with the **Replacement** text.

6. When you are finished making the applicable directory path changes, click **OK** to close the **Imagebase Management** dialog.

Map Images on Drives

If you want to register your images without specifying a drive letter or UNC prefix, you can do so on the **Path** tab in the **Imagebase Management** dialog. You can specify a prefix to all image paths for the current imagebase. Settings and specifications entered on the **Path** tab globally affect the imagebase, and Concordance assumes that all images are stored in the same location.

1. In Concordance Image, on the **Tools** menu, select **Imagebase Management**.
2. Navigate to and **Open** the database's .dir file. The **Imagebase Management** dialog displays.
3. Click the **Path** tab.



4. In **Apply settings to**, select which user you want to apply the image path settings. You can apply the settings to all the database users by selecting **<All users>**, or you can apply the settings to an individual user by selecting their user ID in the **Apply settings to** field.
5. In **Specify a prefix for all image paths in the current imagebase**, type the drive letter you want to use for all image paths in the imagebase.
 - You can register an imagebase in Concordance Image without specifying a drive letter or UNC prefix. This gives you the flexibility to access the images from different workstations with different drive mappings. For example, you can register the following image on a CD: \\IMAGES\CASE01\01\01.TIF
 - Let's say user1 maps his CD-ROM drive to D: and user2 maps his CD-ROM drive to E:. User1 can set his prefix as D: and user2 can set his prefix to E:. There is no need to register one imagebase for each user. The same can apply to users on a network that have different drive mappings to servers. In fact, one user can map to the images using a UNC mapping while another can map to the images using a drive letter.

6. To register images on a CD jukebox, select **Insert volume name label before path**.
 - If you do not want to register images on a CD jukebox, clear the Insert volume name label before path check box.
 - Adding a drive letter and selecting the Insert volume name label before path check box along with a path prefix, allows you to register images on a CD jukebox. Multiple users with different drive mappings (or UNC mappings) to the jukebox can use the same imagebase. With most CD jukeboxes, the CD volume name is placed in front of the root level directory of the CD. For example, you can register the following image on a CD with volume label, CD001: \IMAGES\CASE01\01\01.TIF
 - Let's say a user maps the jukebox to drive J:. Selecting the Insert volume name label before path option maps the image to the following path: J:\CD001\IMAGES\CASE01\01\01.TIF
7. Click **OK** to save your changes and close the **Imagebase Management** dialog.

Redlines databases are functional databases that track the coordinates for every redline applied to an image in the imagebase, and store the color and marking codes in a field also noting when it was created. You can view and modify redlines globally to change redaction text, highlight colors, and notes.

It's also a good idea to add an AUDITTRAIL field to the redlines database to track who created or modified redlines, and when. Add this field prior to reviewers annotating or redacting images, and be sure to validate this field in the Data Entry Attributes dialog box. See Data Fields for more information about database fields.

As an administrator, you may need to locate and remove a white highlight from a document or globally replace redaction text. Finding a white highlight in Concordance Image can be difficult. Using the Redlines database allows you to search on specific markings and change them directly in the database, which are then reflected on the image. Use the Redlines Highlight Color table below to locate the highlights in your image file.

You can also change the color of other redlines in the redlines database. To locate the color code for a redline, apply a redline in a specific color to a record in

Concordance Image and search the [database name]-Redlines.dcb for the record that contains that color marking. The number associated with the color is displayed in the Color field in the redlines database.

Redlines Highlight Color

C o l o r	N u m b e r	Use
Y e l l o w	6 5 5 3 5	Standard highlight color
W h i t e	1 6 7 7 2 1 5	Covering Bates numbers for production

C o l o r	N u m b e r	Use
B l a c k	0	Covering text



Image Key Trick – Image keys are merely Bates numbers for documents that appear in text. Highlight a Bates number in the Browse view in Concordance, right-click the highlighted Bates number, and click View Image to launch the document in Concordance Image.

Edit an Individual Record in a Redlines Database

1. In Concordance, open the redlines database you want to edit. Redlines databases use the following file naming convention: <database>-Redlines.dcb.
2. To edit the redlines for an individual record in the database, navigate to the record you want to edit.
3. On the Standard toolbar, click **Edit** to open the **Edit** view and activate edit mode for the record.

4. Locate the fields you want to edit. Some fields may be gray because you don't have permission to edit these fields.
5. Make your redline edits. Concordance automatically saves your edits as soon as you navigate to another record or change your view in Concordance.
6. Changes are immediately viewable. However, in order to run full-text searches on the edits in the record, the database needs to be reindexed. Once this action is performed all reviewers can search the updates. To reindex the database, on the **File** menu, click **Reindex**.
7. If Concordance Image is open while you are editing a record in the redlines database, to refresh the image you are viewing to include the edits you made to the record in the redlines database, in Concordance Image, navigate to the next record then return to the original record to view the redline edits.

Make a Global Edit in a Redlines Database



Global edits are immediately saved and committed to a database. There is no undo option. You should back up the database before making any global replacements.

1. Back up your database before running the global replacement. See [Backup and Archive](#)^[62] for more information.
2. In Concordance, open the redlines database you want to edit. Redlines databases use the following file naming convention: <database>-Redlines.dcb.
3. Run a search query to locate the records that need a global edit.
4. On the **Edit** menu, click **Global Replace**. The Global Replace dialog displays.

Field	Type
IMAGEKEY	Paragraph
XOFFSET	Numeric
YOFFSET	Numeric
WIDTH	Numeric
HEIGHT	Numeric
ORIENTATION	Numeric
TYPE	Text
COLOR	Numeric
TEXT	Paragraph
FONTNAME	Text
FONTDATA	Numeric
USER	Text

Target: _____

Replacement: _____

Document range

First: _____ 1

Last: _____ 0

Replace options

Ignore case

Confirm before replace

Status

Documents 0

Replacements 0

OK Cancel

5. In the **Field** list, select the fields containing the text you want to replace. During a global replacement, Concordance only searches the fields currently selected in the Field list.
6. In **Target**, type the text you want to replace.
7. In **Replacement**, type the text you want to add to the field. If you are modifying a redlines color throughout the database, type the number associated with the redlines color in the Target and/or Replacements field to modify the color.
8. In **First**, type the first document in the current query to search for the global replacement.
9. In **Last**, type the last document in the current query to search for the global replacement.

10. To ignore upper and lower case lettering during global replacements, select **Ignore case**.
11. To request confirmation before replacing text, select **Confirm before replace**.
12. Click **OK** to make the global replacements. If **Confirm before replace** is selected, each time Concordance locates the text in the Target field during the global replacement, Concordance displays the found text in the **Text Found** dialog and requests confirmation before completing the replacement.
13. Once the global replacement process finishes, in the **Status** section, **Documents** displays the number of documents searched, and **Replacements** displays the number of replacements made. The field below the Field list and Status section, displays the replaced text.
14. Click **Done** button to close the **Global Replace** dialog.
15. Changes are immediately viewable. However, in order to run full-text searches for the edits in the records, the database needs to be reindexed. Once this action is performed all reviewers can search the updates. To reindex the database, on the **File** menu, click **Reindex**.
16. If Concordance Image is open while you are running a global replacement in the redlines database, to refresh the image you are viewing to include any edits made to the record in the redlines database, in Concordance Image, navigate to the next record then return to the original record to view the redline edits.

If you receive TIFF images without a load file, you have some options on how to prepare the images for review.

If the images relate to an existing Concordance database, they can be loaded into the database's imagebase in Concordance Image on the **Register - Scan** tab in the **Imagebase Management** dialog. For more information about adding images to an imagebase, see [Scanning images](#)¹⁵².

When you receive TIFF images without a load file and there is no database associated with the images, the most efficient solution is to contact the delivering party and ask them to send a load file for the images. If this is not possible, you can create a simple load file and simple Concordance database to link to the images.



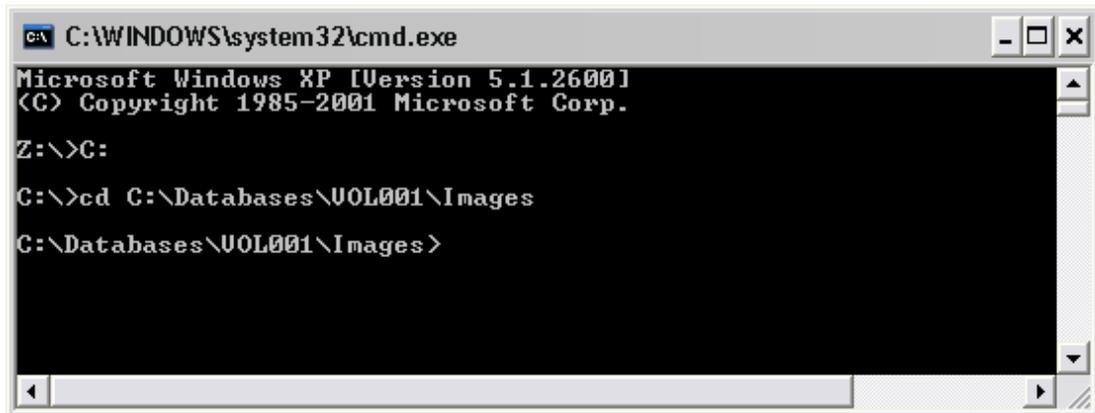
The process described below is designed for use with single-page TIFF files with unique names and a .TIF extension.

Create a Text File Containing the Image File Names

There are several good software utility programs that can be used to create a text file containing file names in a specific folder. Consider TreeSize and CopyPath. Refer to the software documentation or help system for instructions.

On a Microsoft Windows operating system, DOS commands can be used. This is often described as porting a file list.

1. Copy the images from the delivery media, such as a CD or thumb drive, to a folder on the computer network.
2. On the **Start** menu, click **Run** to open the **Run** dialog box.
3. In the **Open** field, type **cmd** and click **OK**. A command prompt window displays.
4. In the command prompt window, type the drive letter where the .tif images are currently stored followed by a colon and press Enter.
5. Type **cd [directory path to the folder containing the .TIF images]** and press Enter. The command prompt directory now reflects the folder where your images reside.

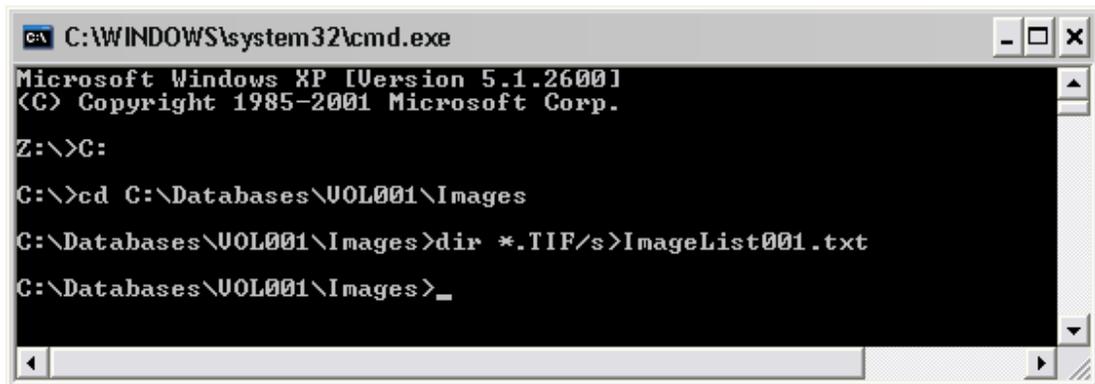


```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

Z:\>C:

C:\>cd C:\Databases\UOL001\Images
C:\Databases\UOL001\Images>
```

6. Type **dir *.TIF/s>[image text file name].txt** and press Enter. After pressing Enter, the .txt file is created in the same directory as the .tif images you entered. The .txt file contains a list of the TIFF file names from the directory you entered. You need to repeat this procedure for each image volume you have.



```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

Z:\>C:

C:\>cd C:\Databases\UOL001\Images
C:\Databases\UOL001\Images>dir *.TIF/s>ImageList001.txt
C:\Databases\UOL001\Images>_
```

7. When you are done creating the text files, type **exit** and press Enter to close the command prompt.

Create a Data Load File for the Images

After creating the text files for your image files, you need to create a data load file for the images.

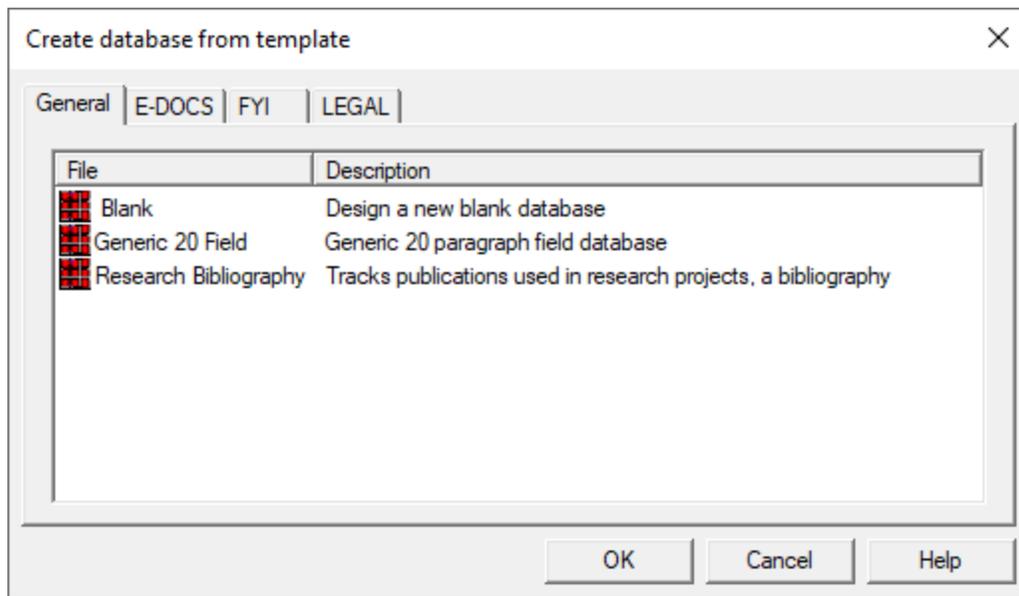
1. In Windows Explorer, browse to the .txt file you created for the images.

2. Open the .txt file using a text editor program.
3. Highlight only the image file names in the .txt file and copy all the file names. Do not include the .tif file extension when you are copying the image file names. If you are using TextPad or UltraEdit, the easiest way to copy only the file names is to use the block selection feature in the editor. For example, in TextPad, on the **Configure** menu, click **Block Select Mode** to turn on the block selection feature.
4. Open a new file in the text editor and save the new file as a .dat file. The .dat file will be the data load file for the images.
5. In the .dat file, paste the image file names.
6. If you have more than one image volume and created multiple .txt files for the images, open the other .txt files, copy the image file names, and paste these image file names into the .dat file as well.
7. Add a carriage return at the end of the last record in the image list. Concordance will not load the last record if the carriage return at the end of the record is missing.
8. Save the .dat file.

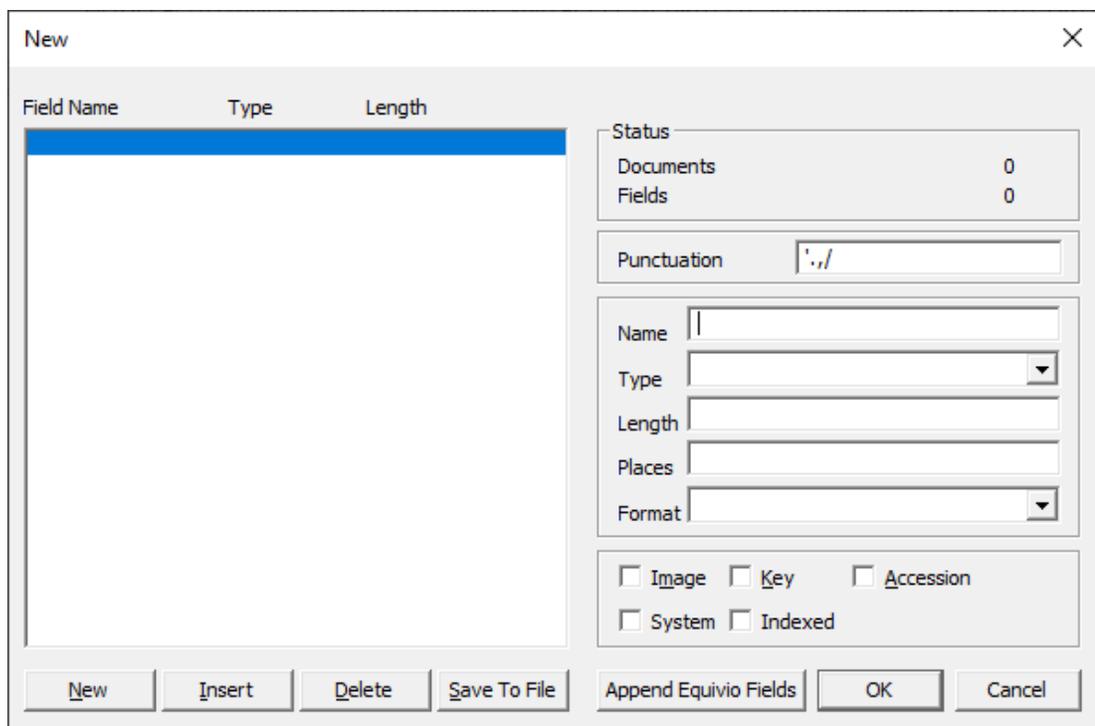
Create a Database

After creating a data load file for the images, you need to create a simple database. The instructions for creating a database in this topic only include the steps necessary for creating a very simple database that can be used for importing a data load file created for images. For detailed information about creating a Concordance database, see [Creating a Database](#).

1. In Concordance, on the **File** menu, click **New**. The **General** tab in the **Create database from template** dialog displays.



2. Select the **Blank** template and click **OK**.
3. Navigate to the directory for the database, type the **File name** of the database, and click **Open**. The New dialog displays.



4. Click the **New** button to add an image field to the database.

5. In the **Name** field, type the name of the image field.
6. In the **Type** field, select **Text**.
7. In the **Length** field, type a field length number long enough to include all the characters in your image file names.
8. Select the **Image** check box.
 - An image field is used to link Concordance with an image viewer, such as Concordance Image or Opticon. The Image check box only needs to be selected for one of the database's fields. It is best practice to select the Image check box for the BEGNO field or it's equivalent.
 - If you are using Concordance Image as your image viewer, all you have to do to launch Concordance Image and link your imagebase files with your database records is open the database in Concordance and click View image (camera) in Concordance.
 - If you are using an image viewer that is not Concordance Image or Opticon, you will need to configure the image view for Concordance on the Viewer tab in Preferences dialog box. See Viewer Preferences for more information.
 - Regardless of the image viewer you use, when you view a document associated with an image in Concordance, the corresponding image is displayed in the selected viewer.
9. Create any additional field you want to add to the database. For more information, see Data Fields.
10. Click **OK** to save your database.



If you accidentally click the OK button or press Enter while entering fields in the New dialog box, you will close the dialog box. To reopen it, on the File menu, click Modify. Click the New button to add a new field to your database.

Clicking OK saves the data entered in the dialog box and saves the database. When you reopen the New dialog box in the database, the dialog box name is changed to the Modify dialog box.

Import the Data Load File Into the Database

Now that you have created the data load file and database for the images, you are ready to import the data load file into the database.

1. With the database you created open in Concordance, on the **Documents** menu, select **Import**, and click **Delimited Text**. The **Import** dialog displays.
2. Select **Update current database** and **Import dialog box**, then click **OK**. The **Import Delimited Text** dialog displays.
3. The image field you created is displayed in the **Selected** fields list. **Comma**, **Quote**, and **Newline** default to the default delimiters for Concordance. The **Date format** defaults to `yyymmdd`, and by default, **Ignore first line** is not selected.
4. Click the **Go** button to open the **Load delimited file** dialog.
5. Navigate to and open the `.dat` file you created for the images.
6. The `.dat` file is imported into the database. When the `.dat` file is imported, the number of documents that successfully loaded is displayed in the Documents loaded field. Verify that the number of documents matches the number of image file names in the `.dat` file. The Status field also displays the number of documents loaded into the database.
6. Click the **Done** button to close the **Import Delimited Text** dialog box.

Scan the Images Into the Imagebase

After the data load file is imported into the database, you need to create the imagebase and scan the images into the imagebase. See [Scanning Images](#)^[152] for more information.

1. In Concordance, click **View image** (camera) on the Dynamic toolbar.
2. Clicking the View image button generates the imagebase for the database. Creating an imagebase creates the database's dir, .vol, and redlines .dcb file. The first time you click the View image button, Concordance Image launches with an error message displayed.
3. Click **OK** to close the message.
4. See [Scanning Images](#)^[152] for details on how to scan the images using the **Register - Scan** tab on the **Imagebase Management** dialog.

Managing Tags

Typically a Concordance Administrator or Litigation Support Manager works with a lead attorney to build a set of tags for case review that include standard naming conventions that adhere to internal guidelines for a case review. These tags are often organized into folder structures that indicate phases of review, case topics, or are designated by reviewer. Once tagging conventions are determined, the administrator will likely set up these tags and folders after the database is built so the review team can begin searching and tagging immediately.

Both reviewers and administrators are able to create and apply tags to documents, but administrators have the ability to do this in multiple ways so they can track and manage tagging activity for the database.



If you are working with a team of administrators, we recommend that only one or two people be in charge of tag management, especially when making new ones and deleting unnecessary tags. This prevents duplication of efforts and helps tag trees remain uncluttered for all reviewers working in the database.

Managing tags includes the following activities:

- Creating and applying tags to documents and queries
- Removing, renaming, and deleting tags and folders
- Importing and Exporting tags
- Querying tags and folders
- Tracking tag activity in the Tags task pane and .TRK file
- Backing up the tag file

Here are a few important things to remember about Tags:

- Tags and tag folders do not support Unicode characters. Only ASCII (values 032-126) characters are allowed. If a tag name or tag folder name contain an invalid character, you are prompted to rename the tag or tag folder.
- For a tag folder to exist in Concordance, it must have at least one tag created in it. If you move all the tags out of a folder, the folder will be deleted.
- There is no known maximum limit on the number of tags you can create and apply in Concordance.
- To create a folder for administrative tags, prefix the name so that it displays at the end of the tag/folder tree and does not distract reviewers (ex. *zAdmin*).
- When creating tags and folders, the combined folder and tag string cannot exceed 199 characters.

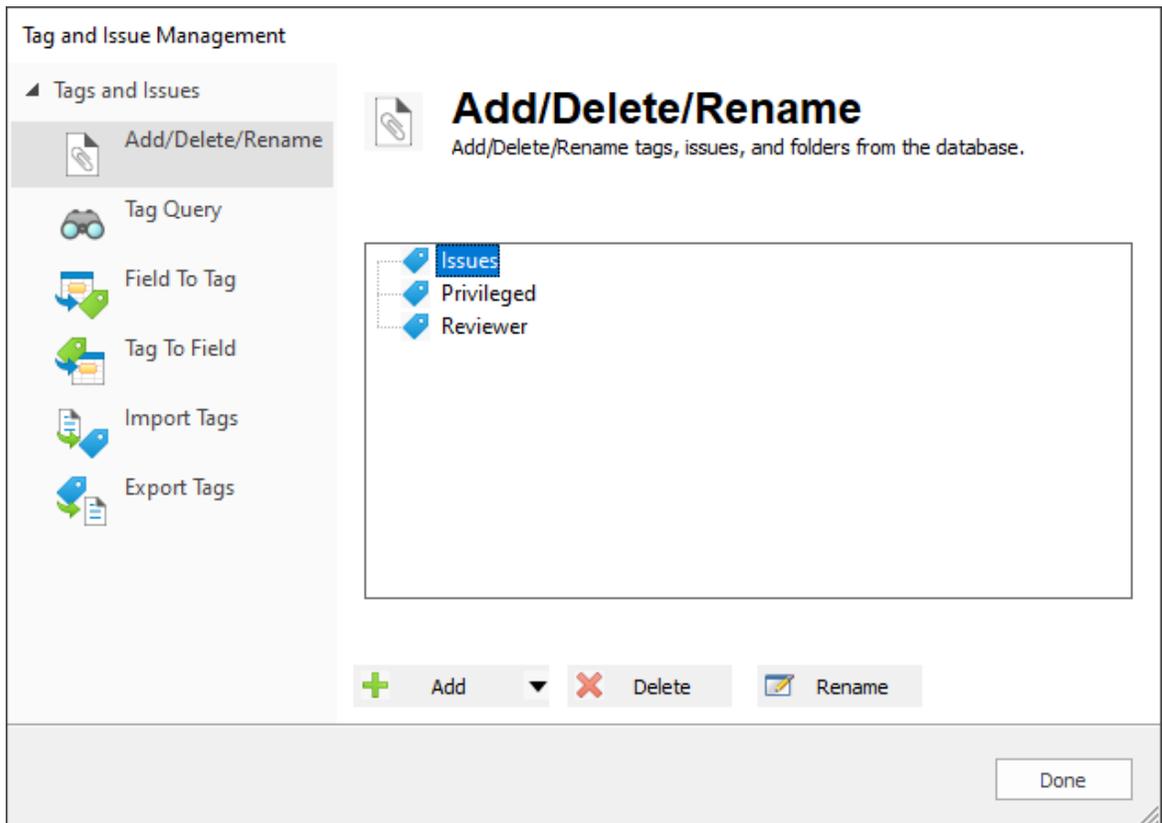
Tag and Issue Management

Using the Tag and Issue Management dialog box, you can add/remove, reorganize, and rename tags and tag folders in the current database. Concordance verifies that only one named tag or folder is present within the same hierarchy. If tag or folder with the same name already exists, Concordance prompts you to rename the tag or folder. Concordance then automatically updates all records with the new tag name.

Administrators usually create and manage the tags available to all users in the database on the Add/Delete tab in the Tag and Issue Management dialog box.



Before renaming a tag or tag folder, it is best practice to run the `TagHistoryandStoreIt_<version>.cpl` to capture a current query of all tag history before transferring documents to a new tag.



The Manage Tags/Issues dialog box does not allow non-ASCII characters for tag or tag folder names. You can add non-ASCII character tag and tag folder names using CPLs or INI files.

Create Tags and/or Tag Folders

1. On the **Tools** menu, click **Manage Tags/Issues**. The **Tag and Issue Management** dialog displays, on the **Add/Delete/Rename** tab.
2. To create a tag folder, click the arrow next to the **Add** button and select **Folder**. Enter the new folder name next to the new folder.
3. To create a tag, click the arrow next to the **Add** button and select **Tag**. Enter the new tag name next to the new tag.
4. To create a tag inside a folder, select the folder, then click the arrow next to the Add button and select Tag. Enter the new tag name next to the new tag.
5. Once you are done creating tags and/or folders, click **Done** to close the **Tag and Issue Management** dialog. The new tags and/or folders will display in the Tags Panel of the Navigation Pane.

Delete Tags and/or Tag Folders

Selected tags and issues can be deleted from the database. This permanently removes them from the database and cannot be undone. Folders are automatically deleted after all of the tags and issues in the folder are deleted. You cannot manually delete a folder.



Tags added to the database using the .ini file need to be removed from the .ini file first, and then deleted from the Add/Delete tab. Tags not removed from the .ini file remain in the database even after deleting them from the Add/Delete tab.

1. On the **Tools** menu, click **Manage Tags/Issues**. The **Tag and Issue Management** dialog displays, on the **Add/Delete/Rename** tab.
2. Select the tag you want to delete, then click **Delete**.
3. A confirmation dialog displays. Click **Yes** to confirm deletion.
4. When finished, click **Done** to close the **Tag and Issue Management** dialog. The deleted tags are removed from the database.

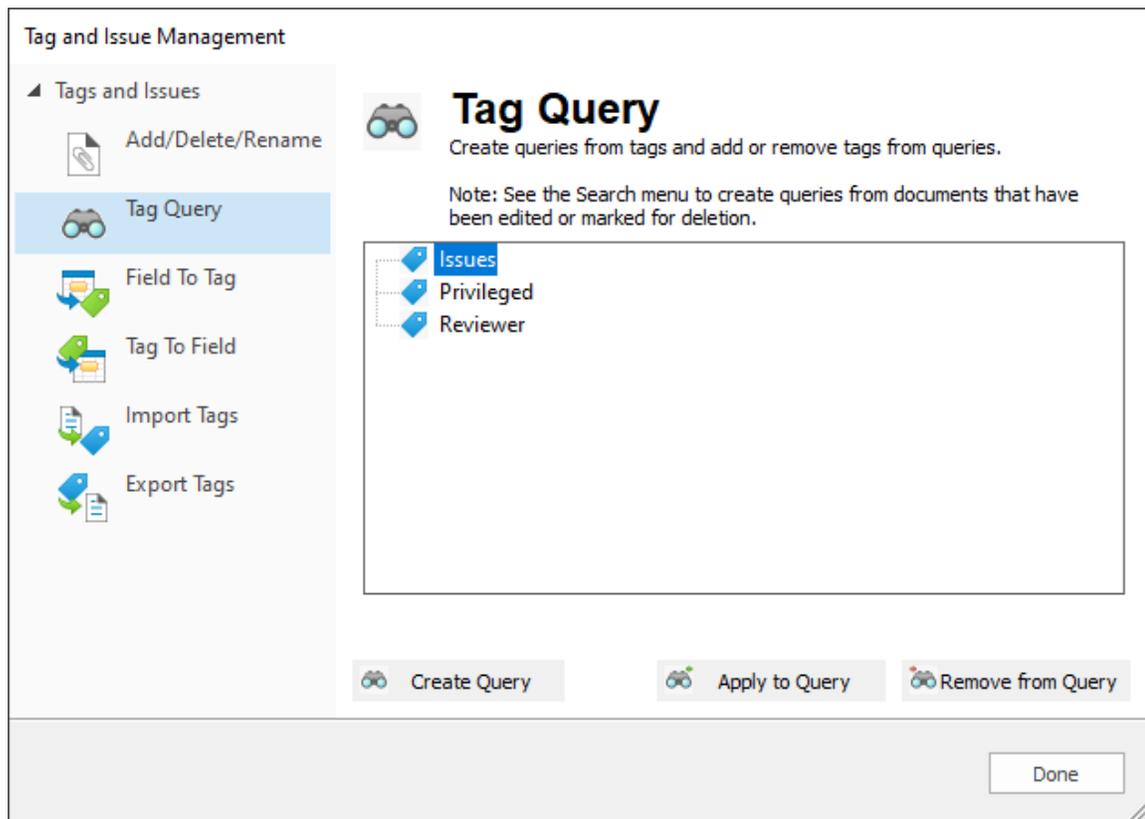
Rename Tags and Tag Folders

It is recommended to run the TagHistoryandStoreIt_<version>.cpl to capture the current tag history before renaming tags. See [Tag CPLs](#)²⁰²¹ for more information.

1. On the **Tools** menu, click **Manage Tags/Issues**. The **Tag and Issue Management** dialog displays, on the **Add/Delete/Rename** tab.
2. Select the tag you want to rename, then click **Rename**.
3. Enter the updated tag name.
4. When finished, click **Done** to close the **Tag and Issue Management** dialog. The applicable records are updated with the renamed tag name.

Reorganizing Tags and Tag Folders

1. On the **Tools** menu, click **Manage Tags/Issues**. The **Tag and Issue Management** dialog displays, on the **Add/Delete/Rename** tab.
2. Do any of the following:
 - To move a single tag from one folder to another folder, select the tag and drag to the new folder.
 - To move multiple tags, hold CTRL while selecting the tags to move, and then drag the tags to the new folder.
 - To move a folder and all the tags in the folder, click the folder and drag to the new location.
 - To move multiple folders, hold CTRL while selecting multiple folders to move, and then drag the folders to the new location.

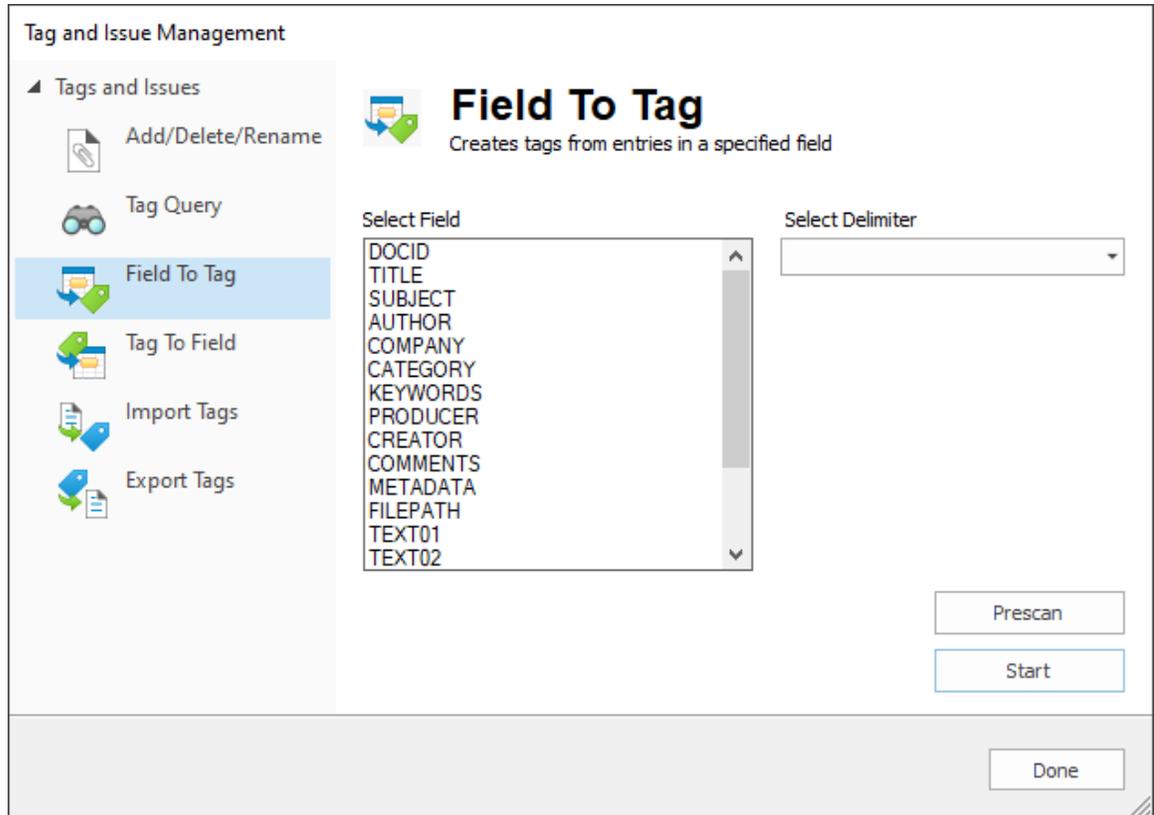


As an administrator, you may find that searching for a batch of documents first and then applying a tag to the query is more efficient than tagging individual records one at a time. This tactic may be useful if you are pre-categorizing tagged documents into folders for the review team or gathering documents for witness kits.

Apply Tags to Queried Documents

1. Run a search for the documents you want to locate and tag.
2. On the **Tools** menu, click **Manage Tags/Issues**. The **Tag and Issue Management** dialog displays, on the **Add/Delete/Rename** tab.
3. Click the **Tag Query** tab.
4. Select the tag you want to apply to the documents in the query you ran in step 1. Hold CTRL when selecting multiple tags.

5. Click **Apply to Query**. The number of tags applied displays in the bottom right corner of the dialog.
6. Click **Done** to close the **Tag and Issue Management** dialog.



The Field To Tag feature copies the unique values from a selected field and uses those values to create tags in the Tags pane.

Creating Tags From Data Within a Specified Field

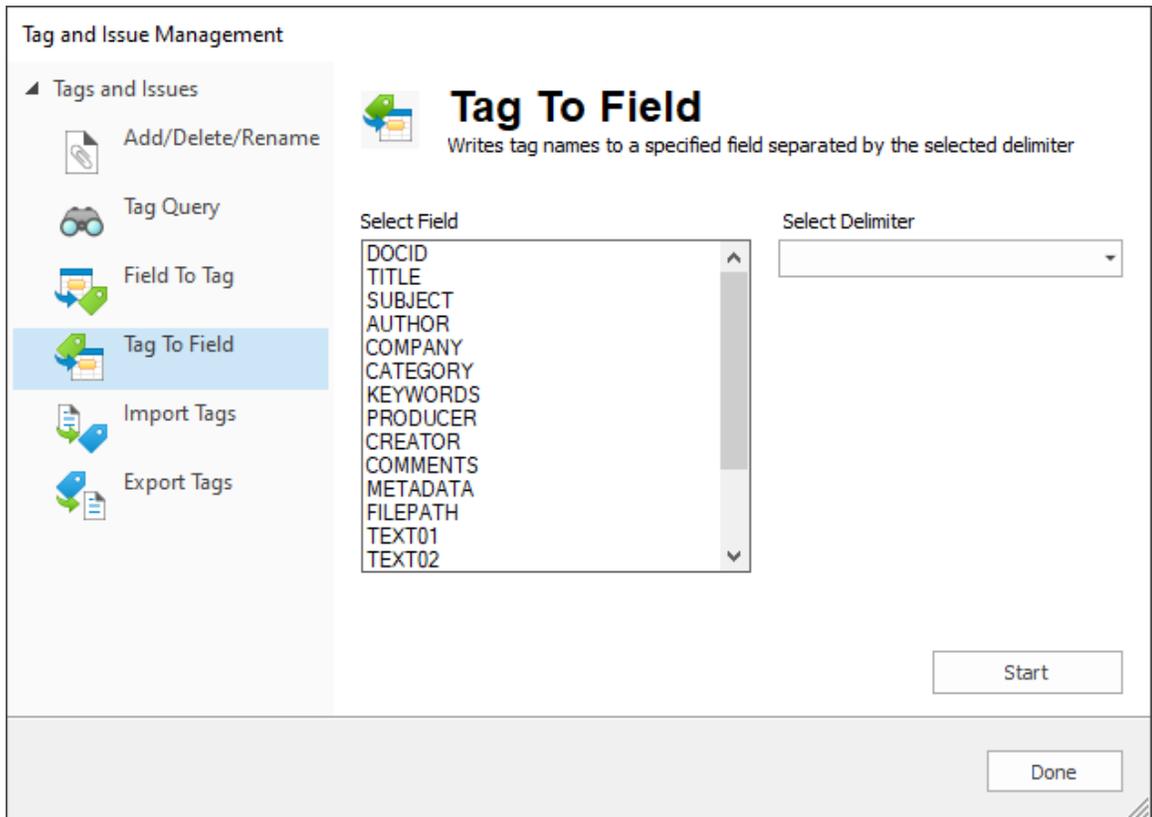
1. On the **Tools** menu, click **Manage Tags/Issues**. The **Tag and Issue Management** dialog displays, on the **Add/Delete/Rename** tab.
2. Click the **Field To Tag** tab.

3. In the **Select Field** list, select the field whose values you want to convert to tags.



When selecting a field to create a tag from, ensure that you select a field that is listed before your OCR numbered fields.

4. From the **Select Delimiter** list, select the delimiter to use to separate the tags in the field. Choose a separator that does not appear within the selected field data.
5. Optionally you can click the **Prescan** button to scan the data in the specified field for unsupported characters, tag name size (limited to 199 characters), and delimiter issues. Any resulting errors are displayed in the **Prescan** dialog. Close the **Prescan** dialog after verifying any errors.
6. Click the **Start** button. The field values are processed and a new tag added for each field value. The **Start** button updates to **Complete**.
7. Click **Done** to exit the **Tag and Issue Management** dialog. The Tags Panel of the Navigation pane displays and shows you the newly added tags.



The Tag To Field feature writes applied tag names to a specified field in the database, separated by a specified delimiter.

Creating a Field with Tag Names

1. On the **Tools** menu, click **Manage Tags/Issues**. The **Tag and Issue Management** dialog displays, on the **Add/Delete/Rename** tab.
2. Click the **Tag To Field** tab.
3. In the **Select Field** list, select the field to use for saving the tag names.
4. From the **Select Delimiter** list, select the delimiter to use to separate the tags in the field.
5. Click the **Start** button. The tags are processed and any records with tags applied are updated to add the applied tag names to the specified field.

6. Click **Done** to exit the **Tag and Issue Management** dialog. If a record has one or more tags applied, the tag(s) will now be written to the field you specified.

You can Import Tags from a text file, or Export Tags to a text file, allowing you to quickly copy tag structures between databases without having to create them manually.



Tags and tag folders do not support Unicode characters or high-end ASCII characters. Only ASCII (values 032-126) characters are allowed. If a tag name or tag folder name contains an invalid character, you are prompted to make corrections.

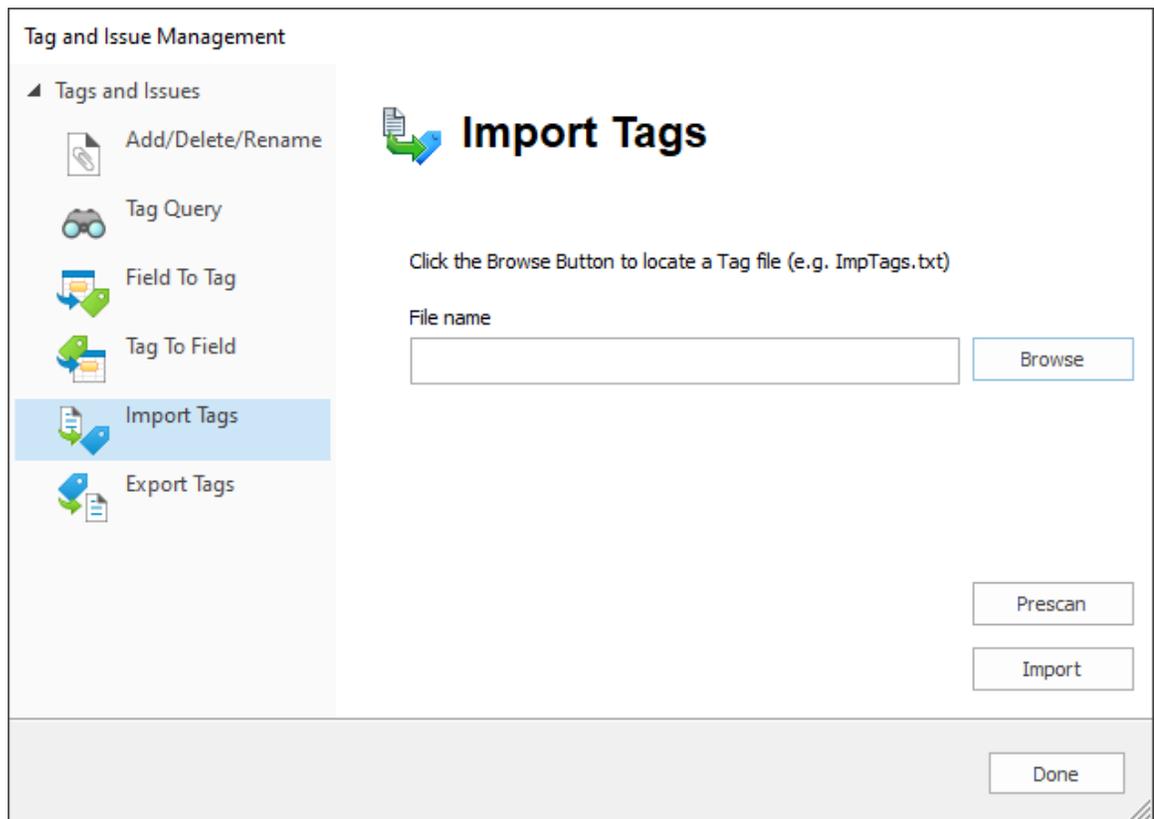
When creating a tag file for importing, each line represents a tag, with an associated folder if applicable. Separate tags from their associated folder with >>.

A screenshot of a Notepad window titled 'TagsToImport.txt - Notepad'. The window has a menu bar with 'File', 'Edit', 'Format', 'View', and 'Help'. The text area contains the following lines:

```
NeedsReview
Research
Reviewer»Waterman
Reviewer»Raney
|
```

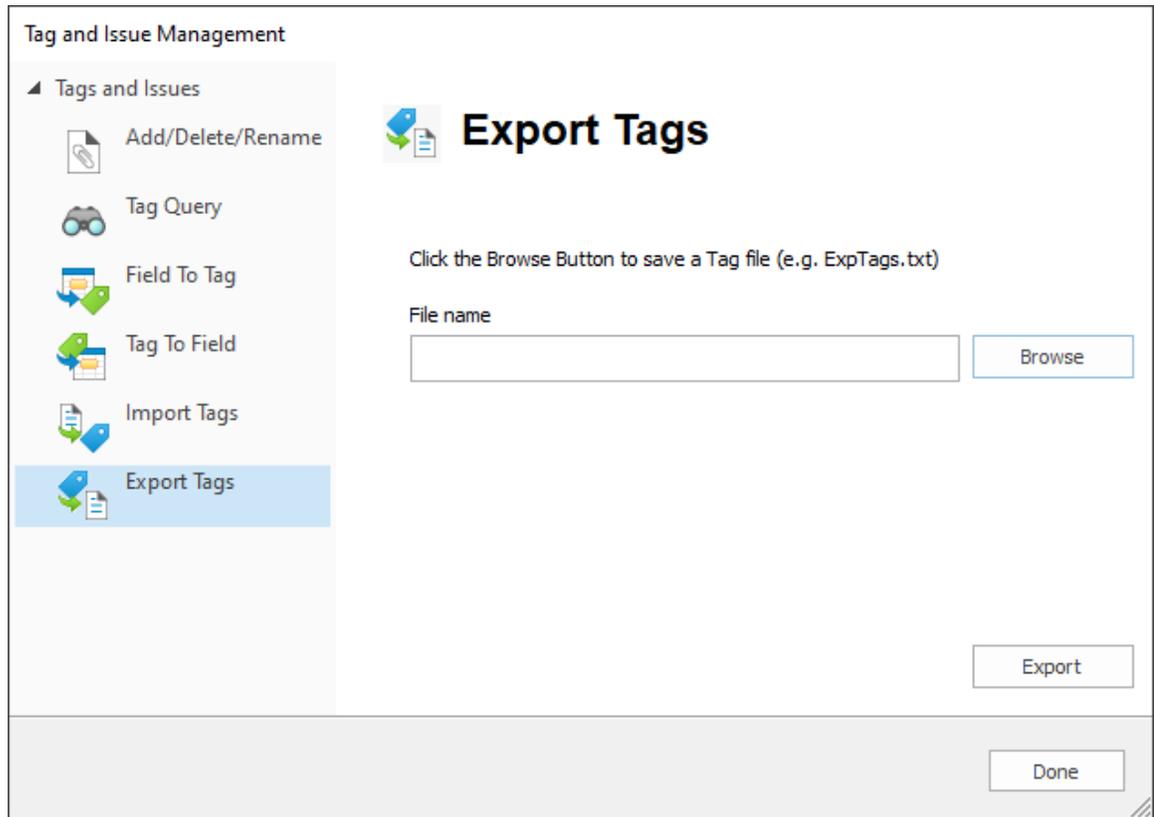
The status bar at the bottom shows 'Ln 5, Col', '100%', 'Windows (CRLF)', and 'ANSI'.

```
TagsToImport.txt - Notepad
File Edit Format View Help
NeedsReview
Research
Reviewer»Waterman
Reviewer»Raney
|
Ln 5, Col 100% Windows (CRLF) ANSI
```



To Import Tags From a Text File

1. Create a text file containing the tags and/or folders to import.
2. On the **Tools** menu, click **Manage Tags/Issues**. The **Tag and Issue Management** dialog displays, on the **Add/Delete/Rename** tab.
3. Click the **Import Tags** tab.
4. Click **Browse**, navigate to and select your text file containing the tags to import, then click **Open**.
5. Optionally you can click **Prescan** to validate your input file. Click **Done** on the **Tag Import Prescan** dialog after validating any errors.
8. Click **Import**. The tags are imported.
9. Click **Done**. The newly imported tags now appear in the Tags Panel of the Navigation Pane.

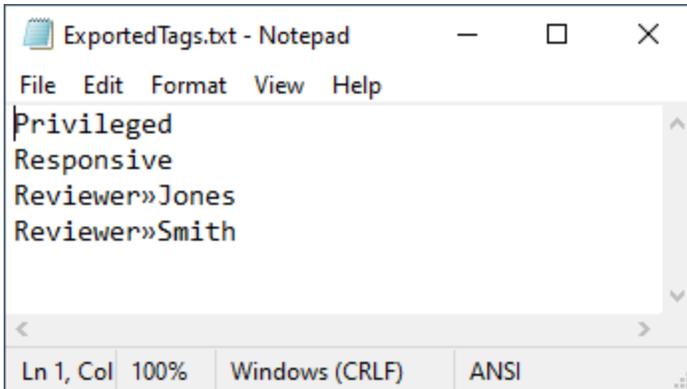


Issue tags cannot be exported unless the tag is applied to a Concordance record.

To Export Tags to a Text File

1. On the **Tools** menu, click **Manage Tags/Issues**. The **Tag and Issue Management** dialog displays, on the **Add/Delete/Rename** tab.
2. Click the **Export Tags** tab.
3. Click **Browse**, navigate to and specify a file name for the tags text file, then click **Save**.
4. Click **Export**.

5. Click **Done**. The specified file now contains all current tag names, with folders. Only public folders and tags are exported, no personal folders and tags.



TRK File

Concordance stores tag and tag history information in the .trk file. You can review the .trk file at a given time to review all tags currently set in the database. The .trk file includes three sections:

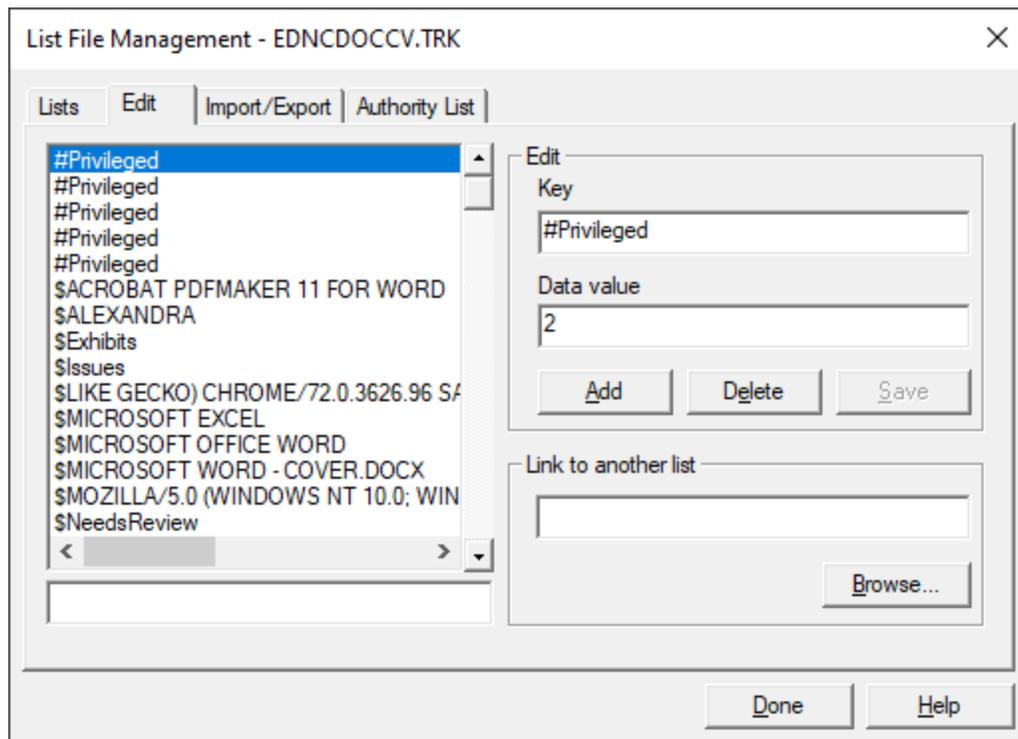
- **Index Section** - These records begin with a hash mark (#). These records show how many tags a document has applied to it. For example, if there are 10 documents in a database with three tags applied to each document, then there would be 30 records in this section.
- **Tag List** - These records begin with a dollar sign (\$). One record exists for each unique tag name in the database. If there were three tags in the database, there would be three records in the tag list.
- **Tag History** - These records begin with a plus or minus sign (+ or -). These records identify added and deleted tags.



In the .TRK file, personal folders and the tags in the folder are preceded by the » character and the user's Windows login or security user ID.

To Review the .Trk File

1. On the **Tools** menu, click **Manage List Files**. The **List File Management** dialog displays.
2. Click **Open**, navigate to and select the database's .trk file. Click **Open**.
3. Browse to and click the database's .trk file, and click **Open**.
4. Select the **Edit** tab. The .trk file information is displayed. records in the database's .trk file are listed on the Edit tab.

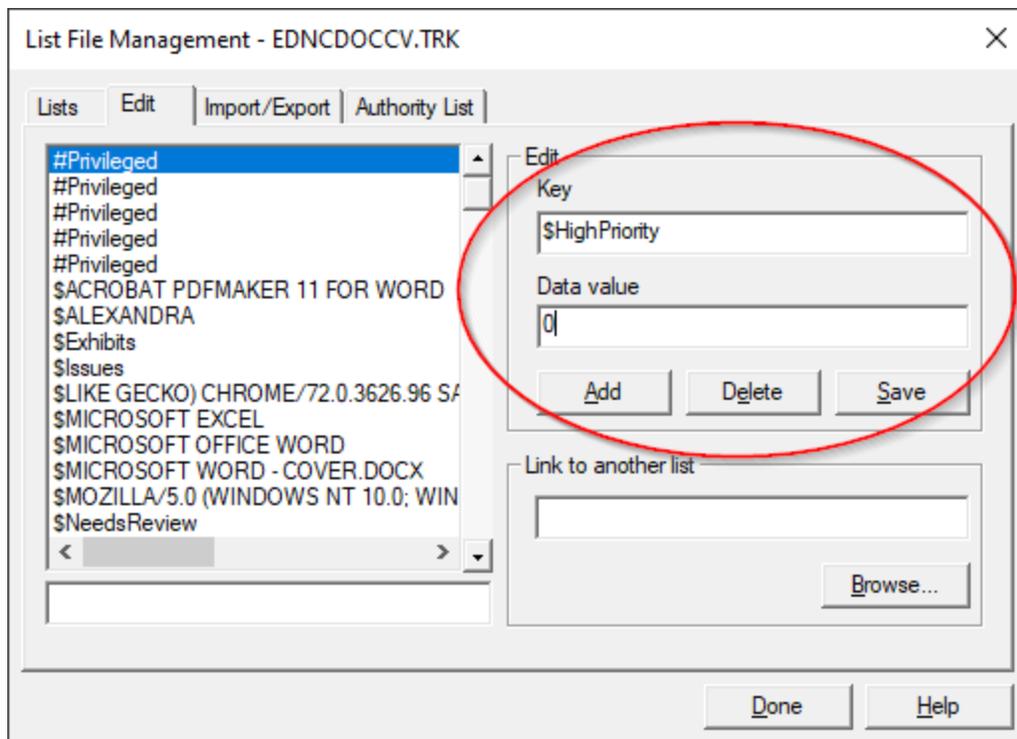


5. Review the displayed information.
6. Click **Done** to close the **List File Management** dialog.

Add a Tag to a .trk File

In addition to creating tags in the Tags task pane or using the Tag and Issue Management dialog, you can write tags directly into the .trk file. This is useful if you want to transfer many tags from one database to another.

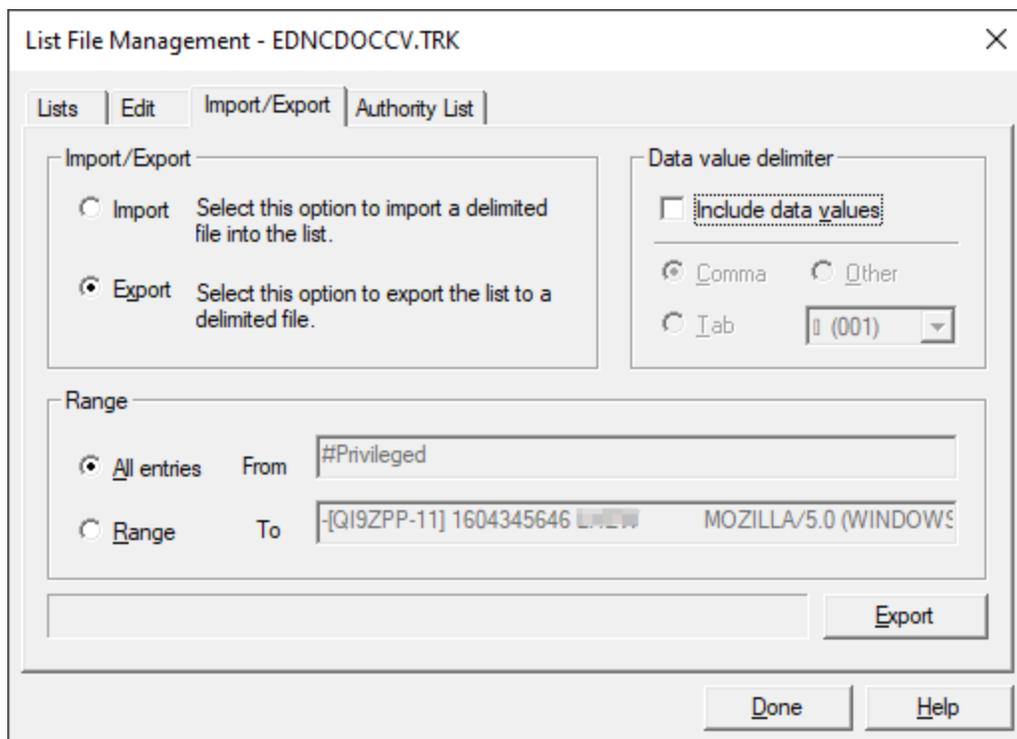
1. On the **Tools** menu, click **Manage List Files**. The **List File Management** dialog displays.
2. Click **Open**, navigate to and select the database's .trk file. Click **Open**.
3. Browse to and click the database's .trk file, and click **Open**.
4. Select the **Edit** tab.
5. In the **Edit** section on the right:
 - Enter in a new tag name beginning with the dollar sign (\$) in the **Key** field. You can include a folder name by preceding tag name with the folder name and >>.
 - For new keys, type a zero for **Data value**.



6. Click **Add**. The new tag is added to the .trk file.
7. Click **Done** to close the **List File Management** dialog.
8. If the Tags Panel was already open in the Navigation Pane, you will need to close and reopen it to re-read the .trk file. Your newly added tag displays.

Export Tags From a .trk File

1. On the **Tools** menu, click **Manage List Files**. The **List File Management** dialog displays.
2. Click **Open**, navigate to and select the database's .trk file. Click **Open**.
3. Browse to and click the database's .trk file, and click **Open**.
4. Select the **Import/Export** tab.
5. Select **Export**.

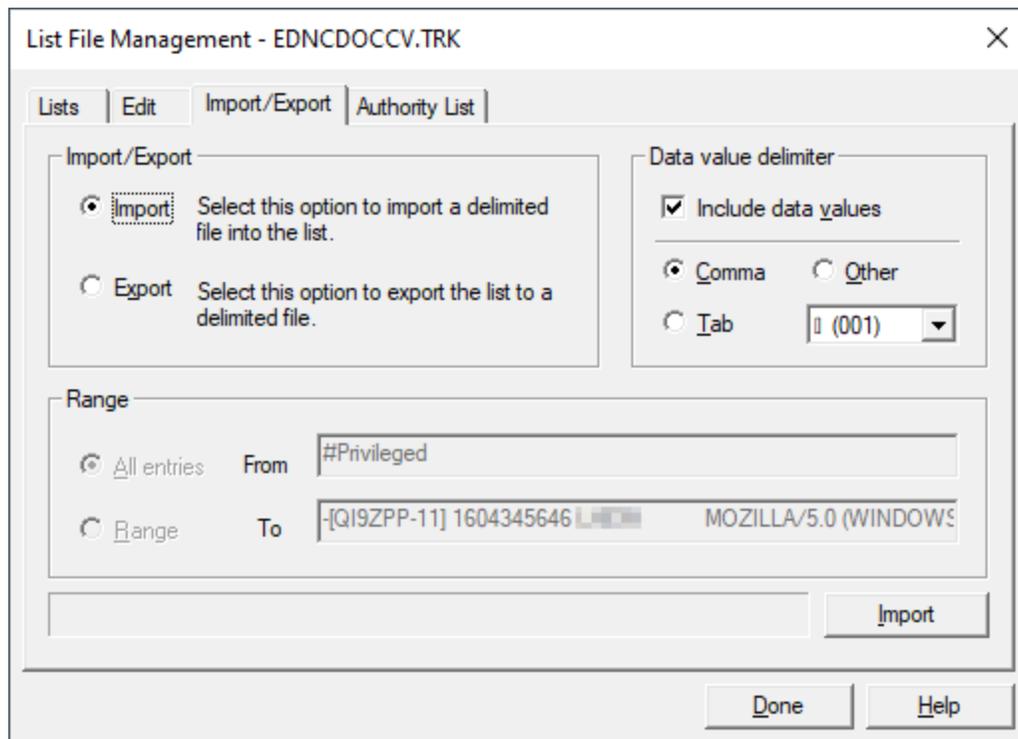


6. If you want to include data values with the key values, select **Include data values**. You must also specify a delimiter to separate the key value from the data value. Data is exported with the key first, followed by a delimiter, and then the numeric data value. Be careful exporting data values if you are planning on importing this data into another database.

7. In the Range section select which .trk entries you want to export - either **All entries** or **Range**.
8. Click **Export**.
9. Browse to a file location and specify the file name for the exported tag data. Click **Save**.
10. Click **Done** to close the **List File Management** dialog.
11. Using a text editor, open the tag data file you just created. All tag entries are in the .txt file beginning with a dollar sign (\$). If you want to use the file for importing in another database, edit the file and remove all records that don't begin with a dollar sign (\$).

Import Tags From Another Database

1. On the **Tools** menu, click **Manage List Files**. The **List File Management** dialog displays.
2. Click **Open**, navigate to and select the database's .trk file. Click **Open**.
3. Browse to and click the database's .trk file, and click **Open**.
4. Select the **Import/Export** tab.
5. Select **Import**.



6. If your import file includes data values with the key values, select **Include data values**. You must also specify a delimiter to separate the key value from the data value. Data is imported with the key first, followed by a delimiter, and then the numeric data value. Be careful importing data values.
7. Click **Import**.
8. Navigate to and select the text file with tag data that you want to import. Click **Open**.
9. Click **Done** to close the **List File Management** dialog.
10. If the Tags Panel was already open in the Navigation Pane, you will need to close and reopen it to re-read the .trk file. Your newly added tag displays.

In Concordance, database administrators can either scan or scan and repair the .trk file. The TRK Maintenance Tool scans all tags in the currently open database and can also be used to clean up SQLite table entries in the .trk file (e.g., broken links or orphaned entries).

Each time the TRK Maintenance Tool runs the scan only or repair/scan option, it generates a .csv file report that is saved in the database directory. The TRK Maintenance Tool report includes the following information:

- Full path and name of the .trk file
- Number of errors found
- Number of orphaned tags
- The name of each orphan tag in the file and the number of documents containing each tag
- Number of missing tag links
- Total number of tags
- The name of each tag in the file and the number of documents containing each tag
- Total number of documents tagged

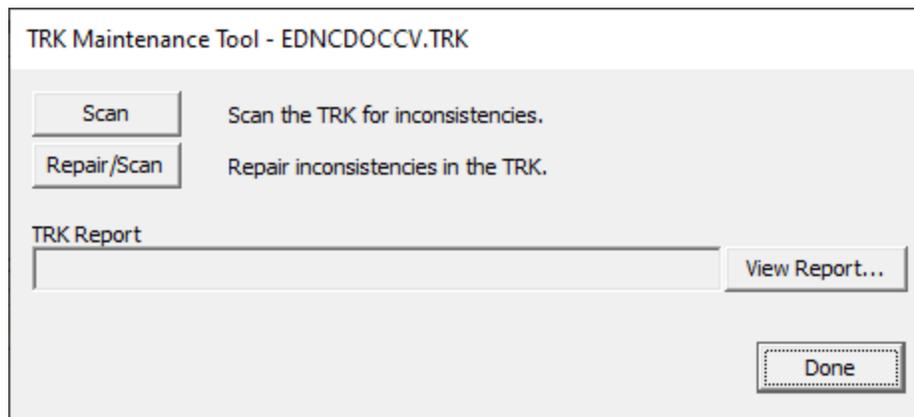
The TRK Maintenance Tool, like indexing, is an exclusive Concordance process that requires all users, except the database administrator, to be logged out of the database when the process runs.



The TRK Maintenance Tool is designed to run on individual Concordance databases. The tool does not run on concatenated database sets.

Scan the .TRK File

1. On the **File** menu, select **Administration**, and click **TRK Maintenance Tool**. If prompted, enter your Administrator user name and password. The **TRK Maintenance Tool** dialog displays.



2. Click the **Scan** button. The .trk file is scanned and a scan complete dialog displays. Click **Done** to close the message.
3. The TRK Maintenance Tool dialog updates to show the **TRK Report** file that was generated and also displays the date and time for the last scan, along with the number of errors found.
4. Click **View Report** to open the scan report in Excel.
5. Click **Done** to close the **TRK Maintenance Tool** dialog.

The TRK Maintenance Tool scan report is stored in the database directory with the following naming convention: <database name>_<scan date>_<scan time>.csv.

Repair the TRK File

1. Follow the process above To Scan the .TRK File.
2. Click the **Repair/Scan** button.
3. You are required to create a backup of the .trk file before repairing it. The **Save TRK Backup** dialog displays and shows a default .trk backup file name. You can update the name if necessary. Click **Save** to create the .trk file backup.
4. The repair runs and a scan complete message displays. Click **Done** to close the message.
5. Click **Done** to close the **TRK Maintenance Tool** dialog.

It is recommended that you make regular backup files of your tags. An exported copy of a database does not retain tag history. Utilizing Windows Services, the Backup and Restore Tag Utility backs up a single database or directory of databases and provides tools to restore any damaged or lost files to an earlier point in time.

The Backup and Restore Tag Utility searches the specified directory and when changes are made to a database's .trk file, the utility backs up the file at the scheduled backup interval, and saves it to the specified directory. Email notification can be set up to alert you when a .trk file is identified as damaged or the storage capacity of the backup file location has been reached. The backup files are located in the same location as the associated database.

Multiple backup services can be configured for different directories where Concordance databases are stored. A log file is created for each directory with the backup information, including when a backup was skipped because the previous backup took too long. The log file is stored in the Concordance 10 Logs folder in the Program data path.

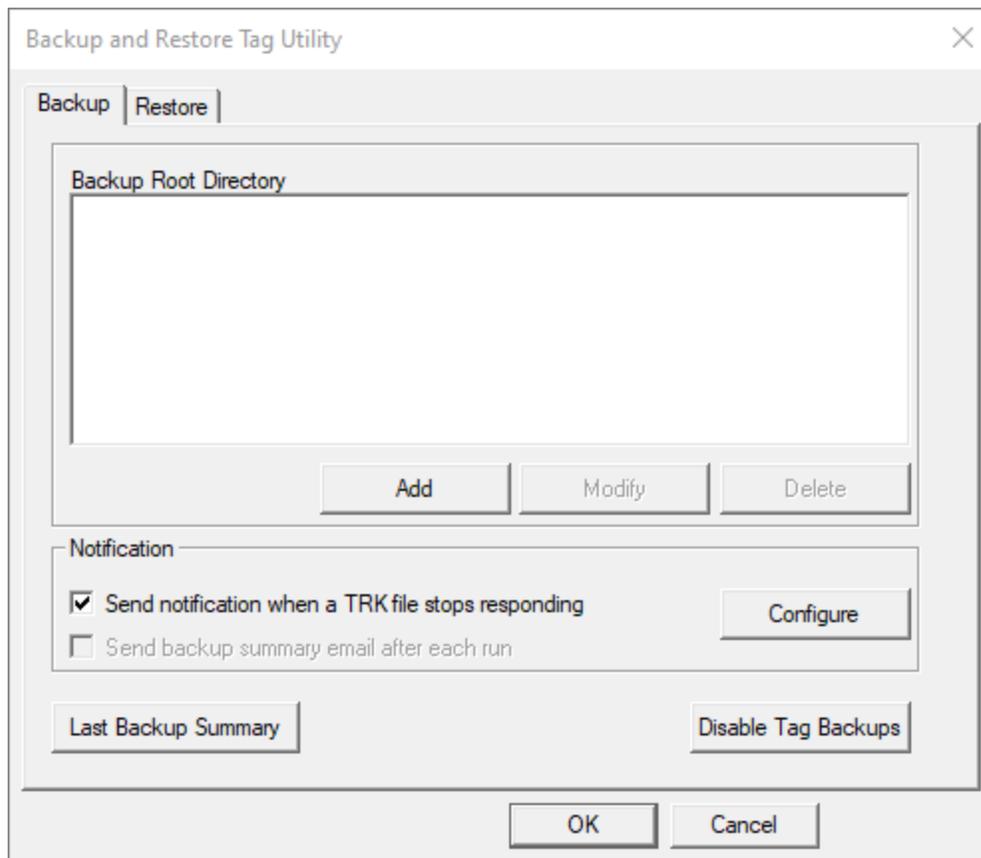
Keep the following in mind when scheduling the .trk backup:

- Schedule the Backup and Restore Tag Utility to run when all databases are closed to ensure the process is not interrupted.
- The utility does not create a backup for the Notes.trk or the Redlines.trk.
- A backup will not be created if the directory path, including the .trk filename, exceeds 251 characters.

Make sure that you have administrator-level permissions for the computer you want to run the Backup and Restore Tag Utility. For more information, see Windows Help and Support.



When scheduling the backup of large .trk files that may require more than an hour to run, make sure you allow enough time between backups to ensure one process completes before the next one begins.



To Setup a Tag Backup Schedule

1. From the **Tools** menu, select **Backup and Restore Tag Utility**.
2. To setup a backup folder:
 - Click the **Add** button.
 - In the **Configure Backup Root Directory** dialog, click **Browse**.
 - In the **Select Folder** dialog box, navigate to the directory or folder that contains the database(s) you want to backup tags, and then click **OK**.
 - The path for the directory or folder is displayed as the **Backup Root Directory**. The path for the directory or folder should not exceed 251 characters in length.
 - From the **Frequency** list, select how often to run the backup utility.

- In the **Start Time** box, specify the start time for the backup utility.
 - In the **Maximum # of backup files per DB** field, type the maximum number of backup files to store in the folder for the database.
 - When the backup folder reaches the maximum limit, the oldest backup file is replaced with the latest version.
 - When finished, click **Apply**.
3. To setup email notifications:
- In the **Notification** section, select **Send Notification when TRK file stops responding** to receive an email for non-functioning .trk files.
 - Select **Send backup summary email after each run** to receive an email outlining the latest backup processes.
 - Click the **Configure** button.
 - In **SMTP Server**, type the e-mail server to send e-mail notifications.
 - In **SMTP Server Port**, type the port number to use for outgoing mail transport.
 - In **Username**, type the name you want to appear as the author of the e-mail.
 - In **Email Address**, type the email address for the author.
 - In **Recipient**, type the email address for the individual who will receive the email notification.
 - To verify the email address is valid, click the **Test** button. If the email is valid, a message displays stating the test was successful and the recipient will receive a test email.
 - When finished, click **Apply**.
4. When finished, click **Enable Tag Backups**.

5. In the **Backup Service Login** dialog either select **Local Service Account** to run the service locally, or select **This Account** to specify a **Username** and **Password** to use for the backup service. Click **OK**.
6. Click **OK** to close the **Backup and Restore Tag Utility**.

View the Backup Summary Report

1. From the **Tools** menu, click **Backup and Restore Tag Utility**.
2. Click **Last Backup Summary**. The **Backup Summary Report** dialog displays. You can **Print** the report if needed.
3. Click **OK** to close the **Last Backup Summary**.
4. Click **OK** to close the **Backup and Restore Tag Utility**.

Change a Tag Backup Schedule

1. From the **Tools** menu, click **Backup and Restore Tag Utility**.
2. In the **Backup Root Directory** section, select the folder path you want to modify.
3. Click the **Modify** button.
4. In the **Configure Backup Folder** dialog, make any necessary changes, and then click **Apply**.
5. To make changes to the email notification, click the **Configure** button, make any necessary changes, and then click **Apply**.
6. When finished, click **Enable Tag Backup**.
7. When finished, click **OK** to exit the utility.

Delete a Scheduled Backup Folder

1. From the **Tools** menu, click **Backup and Restore Tag Utility**.

2. In the **Backup Root Directory** section, select the folder path you want to remove.
3. Click the **Delete** button.
4. When prompted, click **Yes** to confirm the deletion.
5. When finished, click **OK** to exit the utility.

Restore a Damaged .trk File

1. From the **Tools** menu, click **Backup and Restore Tag Utility**.
2. Click the **Restore** tab.
3. In the **Damaged TRK file(s)** section, select the .trk file to restore.
4. From the **Restore Tags From** list, select the date and time to use for restoring the .trk file.
5. Click the **Restore** button.

Tag CPLs

Running the TagHistoryAndStoreIt CPL

The TagHistoryAndStoreIt_<version>.cpl allows you to take the information from the Tag history panel in the Tags task pane and place it into a field for the purpose of searching, backups or storing historical information.

Storing a database's tag history can help you track tagging issues, such as a user accidentally bulk un-tagging a group of documents. The information captured by the TagHistoryAndStoreIt_<version>.cpl allows you to run relational searches on specific tags, users, and the date that an event occurred.

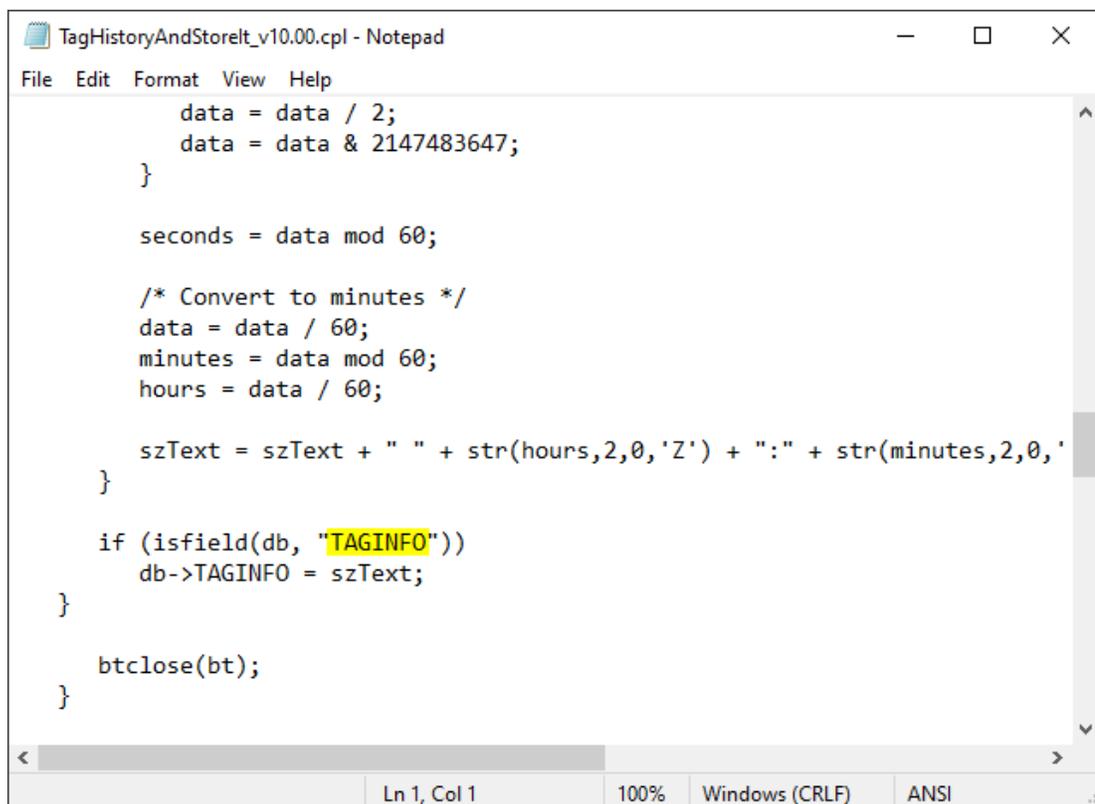
Tag history will also need to be stored when using the Export as a Concordance Database feature because the export includes a database's current tagging information, but does not include the tag history.

By default, the CPL places all of the tag history for a query of documents into the TAGINFO field. If you want to store the tag history in different field in your database, you need to replace the TAGINFO field name with the other field name in the TagHistoryAndStoreIt_<version>.cpl file before running the CPL.

If your database has an existing field named TAGINFO, then you do not need to modify the CPL before running the CPL.

To Change the Tag History Field in the CPL

1. Open the **TagHistoryAndStoreIt_<version>.cpl** using a text editor.
2. Search and replace all references to the TAGINFO field with the name of the field you want to use to store your tag history. If you have an existing field named TAGINFO, then you will not need to modify the cpl.



```
TagHistoryAndStoreIt_v10.00.cpl - Notepad
File Edit Format View Help
    data = data / 2;
    data = data & 2147483647;
}

seconds = data mod 60;

/* Convert to minutes */
data = data / 60;
minutes = data mod 60;
hours = data / 60;

szText = szText + " " + str(hours,2,0,'Z') + ":" + str(minutes,2,0,'
}

if (isfield(db, "TAGINFO"))
    db->TAGINFO = szText;
}

btclose(bt);
}
```

3. Save your changes and close the **TagHistoryAndStoreIt_<version>.cpl** file.

To Store Tag History

1. In Concordance, on the **Standard** toolbar, click the **All** button to query all records in your database.
2. On the **File** menu, click **Begin program**.
3. Navigate to the CPL directory installed with Concordance, and click the **TagHistoryAndStoreIt_<version>.cpl** file. The default directory CPLs installed with Concordance is C:\ProgramData\CloudNine\Concordance 10\CPL.
4. Click **Open**. The CPL automatically extracts your tag history from each database record and adds the tag history to the TAGINFO field, or its equivalent, for each record.
5. Open the **Browse** view and locate the field where you placed the tag history. The field now lists the tags that were added to and removed from the record, when the tags were added or removed, and by whom.

TAGINFO	:	Record number: 1 Accession number: 1 Serial number: [RZ8RBB-1] 1248899837 USER
		Tags added:
		+ [RZ8RBB-1] 1248899837 USER Status»Responsive UserID on 07/29/2009 23:10:00 GMT
		+ [RZ8RBB-1] 1248899837 USER Witness Kits»Goniff,JA UserID on 07/29/2009 23:14:04 GMT
		Tags deleted:
		- [RZ8RBB-1] 1248899837 USER Witness Kits»Goniff UserID on 07/29/2009 23:14:36 GMT

Running the TagSaver CPL

You can create a backup file of your tags or restore the backed up tags into another database using the TagSaver_<version>.cpl. We recommend running this CPL script once or twice daily, depending on how much active reviewing is occurring.

The tag back-up is stored in a database's .gat file and the tag data is retrievable, when needed.

TagSaver CPL benefits:

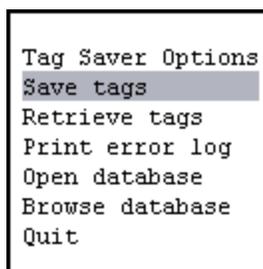
- You can move tag application information to different databases
- You can restore backup files (.gat) to other databases to move tag structure



When restoring tags from a .gat file, the maximum number of characters allowed in a tag name is 199.

To Back Up Tags in a Database

1. In Concordance, click the **All** button on the **Standard** toolbar to query all records in your database.
2. On the **File** menu, click **Begin** program.
3. Navigate to the CPL directory installed with Concordance, and click the **TagSaver_<version>.cpl** file. The default directory for CPLs installed with Concordance is C:\ProgramData\CloudNine\Concordance 10\CPL.
4. Click **Open** to open the **Tag Saver Options** list.



5. Click **Save tags** or press Enter. Clicking Save tags or pressing Enter opens the field list. Use the arrow keys on your keyboard to scroll through the field list.
6. Click or press Enter on the field you want to associate with the tags. You need a common field with a unique value, such as the Begno (Bates number) field. Do not use the Access ID field when exporting tag history.

	Field	Type
Begno	Text	
Endno	Text	
Docdate	Date	
Doctype	Full Text	
Doctitle	Full Text	
Author	Full Text	
Authororg	Full Text	
Recipient	Full Text	
Reciporg	Full Text	
Cc	Full Text	
Summary	Full Text	
Condition	Full Text	

7. After you select the field, the CPL creates the <database name>.gat file in the same directory as the database's .dcb file. This is your tag backup.
8. The **Tag Saver Options** list displays. Click **Quit** to return to Concordance.

The database's .gat file is not automatically updated when you add or modify tags in the database. It is best practice to run the TagSaver_<version>.cpl periodically to ensure your tag backup is current.

To Restore Tags From a .GAT File to a Database

1. Copy the .GAT file containing the tags you want to add to your database, and paste the file into the database directory for the database you want to add the tags.
2. Rename the .GAT file you copied to the database directory using the same name as the database's .dcb file. For example if the database's .dcb file is Cowco.dcb, the .gat file needs to be named Cowco.gat.
3. In Concordance, open the database you want to add the tags.
4. On the **Standard** toolbar, click the **All** button to query all records in your database.
5. On the **File** menu, click **Begin program**.

6. Navigate to the CPL directory installed with Concordance, and click the **TagSaver_<version>.cpl** file. The default directory for CPLs installed with Concordance is C:\ProgramData\CloudNine\Concordance 10\CPL.
7. Click **Open** to open the **Tag Saver Options** list.
8. Click **Retrieve tags**. The CPL adds the tags for all the records that were tagged in the .gat file to the database.
9. The **Tag Saver Options** list displays. Click **Quit** to return to Concordance.
10. Open the **Tags** task pane to verify the tags were added and applied correctly to the database.

Writing Tags in the INI File

One method of creating a permanent tag structure is to write tags directly into an .ini file. A database's .ini file stores various database configuration settings. Tags created in this file cannot be deleted in the Tag and Issue Management box.

When tags are created in Concordance or in the .trk file, the tags are not automatically written to the .ini file. To add tags to the .ini file, you need to manually write them into the file. Once tags are written in the .ini file they are available in the Tags Panel in the Navigation Pane. Once a tag is applied, the tags are automatically written to the .trk file.

Once you have written tags to an .ini file, you can save time creating tags for another database by copying and pasting the entries from one database .ini file to another.



If you are renaming tag or tag folder names in the .ini file, the Tags Panel in the Navigation Pane displays both the original and renamed tags. Renaming tags does not affect *.ini file tags.

Write Tags in the .ini File

1. Navigate to the database's .ini file. The .ini file is stored in the same directory as the database .dcb file.

2. Open the .ini file in any text editor program.
3. In the .ini file, the different database configuration settings are designated by the [] symbols around the configuration category. For example, field groups are listed under [FieldGroups], and added menu items are listed under [AddedMenuItems]. Tags are added after the [Tags] category, and each tag has a separate line in the .ini file.
3. If the .ini files does not have a tags list, type **[Tags]** in a new line to create the tags list.
4. Add the tags below the **[Tags]** line using the following format:
 - To add a tag outside of a folder, type: **Tag<#>=Tag_Name**
 - To add a tag within a folder, type: **Tag<#>=Folder_Name»Tag_Name**
 - To add a personal folder and tag, type:
Tag<#>=»UserID»Personal_Folder_Name»Tag_Name
 - Use underscore characters to indicate spaces in a tag or folder name.
5. Save and close the modified .ini file.
6. Open the database in Concordance.
7. Open the Tags Panel in the Navigation Pane to verify that the tags and folders you added are displayed.

Productions

Once a document collection review is completed, documents typically need to be produced to opposing parties, this is known as a production. Database administrators prepare the electronic production, based on queries or tagged sets of documents that are identified for production during the review phase.

Concordance provides two production options:

- **Standard Production** - produces a set of TIF or PDF files, .opt and a .dat load file.

- **Native File Production** - copies original native files out to a production destination directory and the files can be renamed with the production numbers. No redactions or other production type operations happen, simply a copy and rename.



It is recommended that a production run, executed from Concordance, be performed on a machine that is not currently running any other applications. This is due to the integration of a 3rd-party tool with Concordance that currently switches the input focus while the production process is running.



Before running a production, make sure that all users are logged out of the database.

Managing Rolling Productions

Due to the ever-increasing size of electronic productions, litigation support staff are often faced with the task of handling and tracking large volumes of data that are incoming and outgoing during the life cycle of an e-discovery project. As a best practice, we recommend establishing an organized tracking method to ensure that all data is properly handled and nothing is missed.

Here are some examples of data that can be handled during a large e-discovery:

- Data coming from clients that needs to be processed. This could include paper documents, electronic files, e-mail files, images, metadata load files, transcripts, graphics, and audio/video files.
- Data being produced from opposing parties to be loaded into a review tool, such as Concordance, for review by attorneys, paralegals, experts or investigators.
- Data going out to vendors for processing, scanning, coding, or printing.
- Data to be processed in-house using an e-discovery processing software, such as CloudNine™ LAW.

- Data such as exhibits, graphics, and presentations being prepared for trial to be loaded into trial presentation software.
- Transcripts and audio/video files from court reporters to be loaded into a transcript database for review and analysis.
- Data being copied or produced to other parties for review such as co-counsel and experts.
- Data being produced to opposing parties.
- Data that is to be archived from the network to disk or hard drive storage.
- Data that requires special handling, such as compliance with destruction or preservation orders.



When handling forensically collected data, be sure to follow appropriate legal procedures for preservation, handling, and chain of custody to avoid spoliation issues.

Tracking Data

There are many ways that data can be tracked using database software tools specifically designed to help facilitate data tracking for e-discovery, such as Concordance, Microsoft Access, or Microsoft Excel.

Sources of data such as external hard drives are typically labeled using some sort of uniform numbering system so that it is possible to track all incoming and outgoing volumes. Production volumes are also usually numbered in a series for record-keeping purposes. It is also important to keep track of production Bates number series to avoid accidental production of documents with overlapping Bates numbers.

Archiving Data

Establishing a uniform system for archiving data that must be preserved, but is no longer being actively used is also important. Maintaining a uniform archival

tracking system makes it easier to locate data in the event that it must be recovered from storage and uploaded to the network at a later date.

We also recommend that you become familiar with your organization's backup, retrieval, and data retention policies so that you are prepared in the event that you need to recover data on short notice.

Production Elements

Numbering Documents

As part of the production process, a new set of files are generated for documents that need to be produced. A Bates number series is then applied to all pages of all documents included in the production, with the option of burning or fusing the numbers to the image during the process. This number series usually differs from the internal document collection. You can then track what has actually been produced and your Bates number series for the production is sequential with no gaps in numbering.

Fusing Annotations

Redactions or other markups or redlines can be burned or fused to the images during production so that they cannot be altered. Confidentiality headers or footers can also be fused to the images during production. Production numbers are usually cross-referenced to those in the original review collection.

If the Concordance administrator included fields for production numbers in your database, these numbers are then written to the production number fields during the production process. Later when you look at your internal document collection, you are able to see the production number for any documents that were produced.

For multiple or rolling productions, tags or sequentially numbered production fields are tracked for which production series a document was produced under. For example, fields named PRODBEG1/PRODEND1, PRODBEG2, PRODEND2, etc.

Production Output

The output generated by a production run in Concordance is a set of TIF images or PDF files and a load file. The output generated by an electronic production in Concordance Image is a set of images and an image load file. Both the production set and the load file are typically burned onto removable media (or for very large collections, an external hard drive). Output volumes are labeled to track the production series.

Native Files

For native productions, the set of documents to be produced is typically converted to image or PDF files prior to production. Organizations need to adhere to proper forensic procedures for handling native files.

Non-Production Documents

Non-production documents and images from Concordance may also need to be shared with outside counsel, experts, clients, or other parties. Concordance Image's production tool is used to generate a non-production set of images and load files for this distribution.

For shared document reviews, you can use Concordance FYI and FYI Reviewer from CloudNine.

Generating Load Files and Images

The output from a production is a set of images and an image load file. The output generated depends on production requirements agreed upon with opposing counsel. A best practice is to know in advance what the recipient needs for output format. The database administrator can collaborate with someone from opposing counsel's technology department to determine their exact needs.

Production load files enable recipients to import images into their own viewer software. Images and load files are generated for either single or multi-page TIFF format. Load files for data are generated during the export process.

Administrators can also export specific fields of data and OCR from Concordance to include with the production. OCR text files are generated using a Concordance CPL (script).

Concordance export processes work well with most of the review tools on the market, or Concordance data can be converted to something that will work. Native review productions are usually handled a bit differently than non-native productions, since native productions do not have image files for the documents.

Productions and Concatenated Databases

- When running productions on a set of concatenated databases, all the databases in concatenated set must have identical database structures and have matching Media (Image) key field names across the concatenated set.
- Native file productions will only be performed on the primary database when differing database structures (any one of the field names is different between the primary and secondary databases or any additional fields exist in any one of the databases) are included a concatenated set.
- Productions for differing database structures should be run separately for each database.
- Productions should be run on a stand-alone machine without any other applications running.

Production Training

Anyone tasked with preparing productions should receive Concordance Administration training before attempting to produce documents from a live database. The litigation industry guidelines regarding how discovery documents are handled, processed, and shared between parties is a sensitive matter.

If you or anyone on your IT or Litigation Support Team are interested in learning more about productions, Concordance certification courses or register for the Concordance Administration Fundamentals and the Certified Concordance Software Administrator courses, please contact our Client Training Administrator for additional information at training@cloudnine.com.

Preparing Productions

Concordance provides the tools you need to permanently fuse headers, footers, and annotations onto the new .tif or .pdf files. This ensures that your files are branded properly and that opposing counsel and any internal review staff do not receive original copies or view privileged content.

There are several steps involved in the overall Production process:

1. Generate new production numbers and cross-reference them back to the Concordance database.
2. Create new files.
3. Burn in redactions and other selected annotations.
4. Create CD/DVD productions.
5. Create subsets of imagebases.
6. Create load files.

Each time you produce a batch of records, a new set of production files are created. This ensures that original records are never changed, and that there is always a backup copy of document changes.



When creating productions, close any other database tabs so Concordance does not synchronize with a different database incorrectly. We recommend having no more than three tabs or databases open during this process.

When exporting a concatenated set for productions, you can only export fields from one selected database structure.

Production Checklist

Refer to this checklist to ensure all steps are completed before running a production.

File Numbering	
<input type="checkbox"/>	Have you determined a file numbering and naming convention for your images?
<input type="checkbox"/>	Have you created fields in your database to store your new production numbers?
Delivery Media	
<input type="checkbox"/>	Do you have the proper production request file formats and media delivery types from opposing counsel or other third parties?

	File Numbering
	Tagging
<input type="checkbox"/>	Have you reviewed documents categorized for production for possible tagging inconsistencies by reviewers?
<input type="checkbox"/>	Did you run the Tag To Field command on production documents to capture tag activity at the time of production? Tag names can be placed into a field called PRODTAGS1.
	Back-ups and File

	File Numbering
	Storage
<input type="checkbox"/>	Did you save a backup copy of your media files before production?
<input type="checkbox"/>	Did you back up your imagebase files?
<input type="checkbox"/>	Did you a create subdirectory folder for your new files?
	Final Review
<input type="checkbox"/>	Have you reviewed the [database name]-Redlines.dcb

	File Numbering
	database for all markings and make global edits on redaction text and highlight colors, as needed? (Concordance Image only)

Standard Production

A standard Production run involves these main steps:

1. Locate the documents to produce.
 - Open the database containing the documents you want to produce.
 - Run a search query to locate the documents you want to produce.
 - Create a tag specific to this production (i.e. PROD1), and apply the tag to the documents to be produced.
2. Mark up documents for production
 - Verify that proper annotations have been applied to the records you want to include in the production. This includes:
 - Redactions to indicate and/or cover confidential or privileged information.
 - White redaction to hide internal control numbers, vendor branding, and other information not needed in the production.

3. Capture tag activity
 - Run the [Tag To Field](#)¹⁸⁶ Command to capture the tags that were applied to each record before creating the production.
4. Run the production. The process for running the production is determined by the viewer associated with your database:
 - [Run a production for Concordance Viewer](#)²²⁰
 - [Run a production for Concordance Native Viewer](#)²³⁰
 - [Run a production for Concordance Image](#)²³⁹
5. [Verify the production output](#)²⁵⁷
6. [Create a production database](#)²⁵⁸



Do not open the Admin Console while running a Production.

CONCORDANCE PRODUCTION

NAMING

Settings

Save Save as default Remove

NUMBERING

Create production numbers

OUTPUT SETTINGS

Create place holders for unsupported/missing files

Volume folders

File folders

Production path

Browse...

Create OPT

Create scrub redacted text files

IMAGE SETTINGS

File type Page settings Color settings

Tiff Multi-page Black and white CCITTFAX4 cor

Fit image inside header/footer

MARKUPS

Select All

Redaction Text Note

Image Stamp Line

Connected Lines Crossout Arrow

Rectangle Ellipse Strikethrough

Highlight Underline

HEADERS AND FOOTERS

Include headers and footers

Preview Start production Cancel

Production is the generation of a subset of document TIFF or PDF files, some of which have been redacted. Concordance Viewer production settings can be saved

and used each time you create a production. See [Production Parameter Settings](#)²²⁷ for more information.

Before starting a production run, you need to run a query to locate all the documents for the production.

Production Numbers

During a production with Concordance Viewer, you may choose to create production numbers and write the numbers back to the database. If **Create production numbers** is selected, Concordance saves the new production numbers to the new or appended .cib file and writes the beginning and ending production numbers for each document back to the Concordance database in the fields you specify. The additional parameters in the **Numbering** section of the **Concordance Production** dialog determine the generated production numbers.

Take an example of a production with three documents (A - 1 page, B - 4 pages, C - 2 pages). If you set **Prefix** to *ABC*, **Starting number** to *0001*, and select **Add a numeric suffix** then the production numbers will be generated in this way:

- Document A: Beginning Production Number = ABC0001.0001, Ending Production Number = ABC0001.0001
- Document B: Beginning Production Number = ABC0002.0001, Ending Production Number = ABC0002.0004

- Document C: Beginning Production Number = ABC0003.0001, Ending Production Number = ABC0003.0002

Using the same example details above, but unselecting **Add a numeric suffix** would result in these production numbers:

- Document A: Beginning Production Number = ABC0001, Ending Production Number = ABC0001
- Document B: Beginning Production Number = ABC0002, Ending Production Number = ABC0005
- Document C: Beginning Production Number = ABC0006, Ending Production Number = ABC0007

Running a Production

1. If you have not done so already, run a search query to locate the documents you want to produce.
2. In Concordance, from the **Tools** menu, select **Production**, then click **Production**. The **Concordance Production** dialog displays.
3. Select **Create production numbers** and edit the production number settings:
 - Select **New** to create new production numbers. Then:
 - In **Prefix**, type the value you want to precede each production number. The **Prefix** can be any combination of letters, numbers, or punctuation characters that are valid for file or folder names. The **Prefix** can be a maximum of 57 characters.
 - In **Starting Number**, type the number you want to use to start numbering the production files. Zero fill your **Starting Number** to define the desired number width. This can hold a maximum of 10 digits.
 - Select **Add a numeric suffix** if you want to add an incremental numeric value to a production number for each page in a document. The pages within a document will be produced beginning with a suffix

of .0001 and incremented accordingly. If more than 9999 pages exist in the document, the suffix values will roll over to .10000 and so on. This numbering may cause sorting issues for other applications used to view documents/images.

- For **Begin production number field**, select the field you want to use to store the beginning production number.
- For **End production number field**, select the field you want to use to store the ending production number.
- Select **Append** for **Copy production numbers to field** if you want the production numbers appended to any data that exists in the production number fields, or select **Overwrite** to overwrite any existing data in the production number fields.



If the production number appends to an existing field, the numbers may truncate if the content exceeds the field length.

- Select From **existing field** to select a Concordance database field to use for production numbers. Then:
 - In **Production Number Field**, select the existing field that should be used for production numbers.
 - Set **Begin production number field**, **End production number field**, and **Copy production numbers to field** as specified above.
4. In the **Output Settings** section:
- Select Use production numbers for media keys to use the new production numbers as media (image) keys in the produced .opt file. This option is only available if **Create production numbers** is selected.
 - Select Use production numbers for file names to replace the current file name with the generated production number when naming the produced files. This option is only available if **Create production numbers** is selected.

- Select **Create place holders for unsupported/missing files** if you want an *Image not available* placeholder image to appear for unsupported or missing files.
- Select **Volume folders** to create volume folders for the production files. Then specify the following:
 - **Prefix** specifies what should precede the volume number. The **Prefix** can be any combination of letters, numbers or punctuation characters that are valid for folder and file names.
 - **Starting Number** specifies the initial number for the volume folders.
 - **Maximum Volume Size** specifies the maximum size for a volume folder. This value should be specified as MB, GB, or TB with no space between the number and unit specified (i.e. 10MB, 20GB, or 5TB).



The contents of the volume directories can be copied to external media for distribution. Make sure you know the capacity of that external media before setting the **Maximum Volume Size**. This ensures that the entire contents of the volume can be copied without running out of space.

After a volume fills to the maximum size, a new volume folder is created and this process will continue sequentially. An individual produced file will not be split across volumes.

- Select **File folders** to organize the production files within the volume folders. Then specify the following:
 - **Prefix** specifies what should precede the file folder. The **Prefix** can be any combination of letters, numbers, or punctuation.
 - **Starting Number** specifies the initial number for the file folders. Zero fill the **Starting Number** to determine the desired number width.
 - **Maximum Record Count** specifies the maximum number of records to include in each folder.

- Click **Browse** next to **Production path**. Navigate to and select a folder location where the output files should be stored. The **Production path** should not exceed 250 characters.
- Select **Create OPT** to generate an .opt file for the production files. Click **Browse** next to **OPT path and file name** to navigate to and specify an output .opt file name.



It is recommended to select the **Add a numeric suffix** option under **Numbering** when you select the **Create OPT** option. This will ensure the produced documents/images can be loaded properly in a viewer application.

- Select **Create scrub redacted text files** if you want to remove redacted text from your produced text files. Additional parameters for scrub text include:

Create scrub redacted text files

Output path for text files

OCR all production documents

Extracted text field

Copy exported text path to field

- Click **Browse** to navigate to a folder to use as the **Output path for text files**.
- If desired, select **OCR all production documents**.
- If you want to write the extracted text back to a field in the database, select the field in the **Extracted text field** dropdown.
- If you want to write the path to the extracted text file to a field in the database, select **Copy exported text path to field** and select the field in the drop down underneath.

5. In the **Image Settings** section:

- In **File Type**, select **Tiff** or **Pdf** for the image output type.
- In **Page settings**, select either **Multi-page** or **Single-page**.
- In **Color settings** you can choose to produce files with **Black and white CCITFSX4 compression** or **Color LZW compression**.



All redactions are produced as black when **Black and white** is selected for **Color settings**. Color redactions will appear as they were defined when **Color** is selected for **Color settings**.

Color LZW compression cannot be used with Concordance Image.

- Select **Fit image inside header/footer** to reduce the size of the produced document or image to accommodate the specified headers and footers.

6. In the **Markups** section select one or more markups to include in the produced output. You can choose **Select All** to turn on all markups.



Be sure to include **Redaction** in your produced output if reviewers used redaction markups to hide protected or privileged information.

7. Select **Include headers and footers** to define header, footer, and watermark settings. A header or footer is a string of text assigned to a specific location within a document. The text can be static text or updated values such as date, time, and page number. Headers and footers can appear at the top and bottom of the document and can also be placed in the right and left margins. A watermark is a semi-transparent string of text that appears behind the existing document content. A watermark appears across each produced file from bottom left to top right and has a transparency setting of 20%. To set header, footer, and watermark parameters:

HEADERS AND FOOTERS

Include headers and footers Font

HEADERS AND FOOTERS

Left header <input type="text" value="None"/>	Center header <input type="text" value="None"/>	Right header <input type="text" value="None"/>
Left footer <input type="text" value="None"/>	Center footer <input type="text" value="None"/>	Right footer <input type="text" value="None"/>

MARGINS

Left margin top <input type="text" value="Hello"/>	Right margin top <input type="text" value="None"/>
Left margin center <input type="text" value="None"/>	Right margin center <input type="text" value="None"/>
Left margin bottom <input type="text" value="None"/>	Right margin bottom <input type="text" value="None"/>

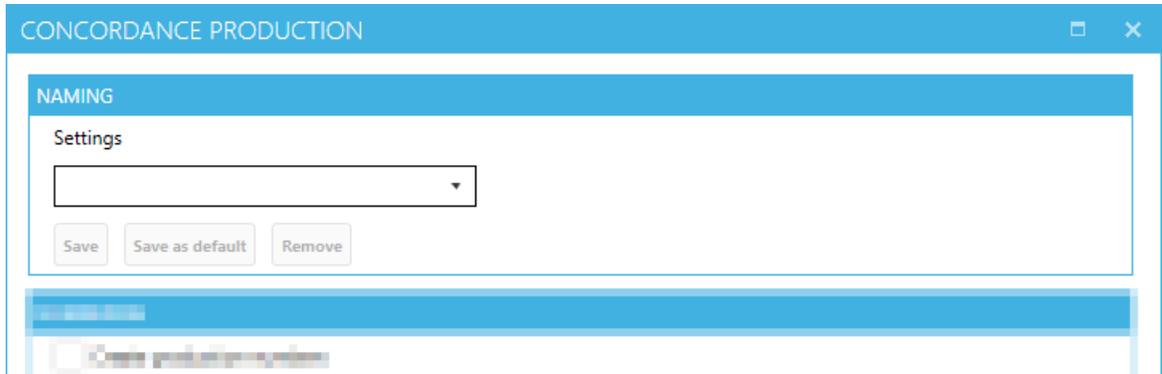
WATERMARK

Watermark

- For each item in the **Headers and Footers**, **Margins**, and **Watermark** sections, you can type a string of text or select a field from the drop down to be produced in that location within the output documents.
 - Click **Font** to edit the font properties for all the Header/Footer and Watermark text.
8. Click **Preview** to see what the current document will look like once it is produced with the settings you have chosen.
 9. After you have completed defining your production settings, click **Start production**. A progress dialog displays while production is running. Once production is complete, an information screen displays. click **OK** to close this dialog.

In order to save time for production runs that are similar in nature, you can save your production parameters for future use. The **Naming** section at the top of the

Concordance Production allows you to manage your production parameter settings.



Save Default Parameter Settings

1. In the **Concordance Production** dialog, specify all production parameters you want to save.
2. When finished, click **Save As default**.

Save Parameter Settings

1. In the **Concordance Production** dialog, specify all production parameters you want to save.
2. Enter saved setting name in the **Settings** drop down.
3. Click **Save**.

Load Saved Parameter Settings

1. In the **Concordance Production** dialog box, select a previously saved settings in the **Settings** drop down.

Delete Saved Parameter Settings

1. In the **Concordance Production** dialog box, select a previously saved settings in the **Settings** drop down.

2. Click **Remove**.

Concordance Production
_ □ ×

Help

Production Run Parameters

Parameter Set Selection

Load User Parameter Set

Save As Default Parameter Set

Save User Parameter Set

Remove Current Parameter Set

Parameter Set Selected: ▼

1 Production Run Parameters

Document Range	All
Create Production Numbers	Yes ▼
Prefix	
Starting Number	
Add a Numeric Suffix	No
Use Production Numbers for File Names	No
Use Production Numbers for New Media Keys	No
Copy Production Numbers to Production Fields	Append Production Numbers to Field Data
Beginning Production Number Field	BEGPRODNO
Ending Production Number Field	ENDPRODNO
Create Placeholders for unsupported/missing files	No

2 Output Location Run Parameters

CIB Database Output Mode	Create
CIB File	C:\Data\need-to-specify\need-to-specify.cib
Root Destination Folder	C:\Data\need-to-specify
Create Volume Folders	No
Create File Folders	No
Production Output Type	TIFF Multi Page (CCITTFAX4 - Black & White)
Color Settings	Grayscale
Fit Image Inside Headers/Footers	No
Create OPT File	No
Create Scrub Redacted Text Files	No

3 Markup Types (Yes = Markup Included)

Select All	No
Redaction	No
Text	No
Note	No
Image	No
Stamp	No
Line	No

Create Production Numbers

You may create production numbers that may be used for Media keys and output file names.

Headers / Footers

Edit Headers and Footers

Include Hdr/Ptr Spec.

Production Run Control

Start

Help

Size: 600 x 948

Production is the generation of a subset of document TIFF or PDF files, some of which have been redacted. Concordance Native Viewer production parameter settings can be saved and used each time you create a production. See [Production Parameter Sets](#) ²³⁸ for more information.

Before starting a production run, you need to run a query to locate all the documents for the production.

Production Numbers

During a production, you may choose to create production numbers and write the numbers back to the database. If **Create Production Numbers** is set to **Yes**, Concordance saves the new production numbers to the new or appended .cib file and writes the beginning and ending production numbers for each document back to the Concordance database in the fields you specify. The additional parameters underneath **Create Production Numbers** determine the generated production numbers.

Take an example of a production with three documents (A - 1 page, B - 4 pages, C - 2 pages). If you set **Prefix** to *ABC*, **Starting Number** to *0001*, and **Add a Numeric Suffix** to **Yes** results in this output:

- Document A: Beginning Production Number = ABC0001.0001, Ending Production Number = ABC0001.0001
- Document B: Beginning Production Number = ABC0002.0001, Ending Production Number = ABC0002.0004
- Document C: Beginning Production Number = ABC0003.0001, Ending Production Number = ABC0003.0002

Using the same example details above, but setting **Add a Numeric Suffix** to **No**, would result in this output:

- Document A: Beginning Production Number = ABC0001, Ending Production Number = ABC0001

- Document B: Beginning Production Number = ABC0002, Ending Production Number = ABC0005
- Document C: Beginning Production Number = ABC0006, Ending Production Number = ABC0007

Running a Production

1. If you have not done so already, run a search query to locate the documents you want to produce.
2. Create a directory folder to store the production files.
3. In Concordance, from the **Tools** menu, select **Production**, then click **Production**. The **Concordance Production** dialog displays.
4. In the **Production Run Parameters** section:
 - **Document Range** should be set to **All** to include all the documents in the current query, or **Range** to specify the **Selected Range** of documents from the current query to include.
 - Select **Yes** for **Create Production Numbers**.
 - For **Prefix**, type the prefix you want to precede the production number. The **Prefix** can be any combination of letters, numbers, or punctuation characters that are valid for folder or file names.
 - The **Starting Number** should be set to the number you want to use to start numbering the production files. Zero fill your **Starting Number** to define the desired number width. This can hold a maximum of 10 digits.
 - Select **Yes** for **Add a Numeric Suffix** if you want to add an incremental numeric value to a production number for each page in a document. The pages within a document will be produced beginning with a suffix of .0001 and incremented accordingly. If more than 9999 pages exist in the document, the suffix values will roll over to .10000 and so on. This numbering may cause sorting issues for other applications used to view documents/images.

- Set **Use Production Numbers for File Names** to **Yes** if you want to replace the current file name with the generated production number.
- Set **Use Production Numbers for New Media Keys** to **Yes** if you want to replace the current media key with the generated production number in the **CIB File** you specify.



When producing single-page .tiff formatted files, the **Use Production Numbers for File Names** and **Use Production Numbers for New Media Keys** options must be set to **Yes**.

- **Copy Production Numbers to Production Fields** should be set to either **Append Production Numbers to Field Data** or **Overwrite Field Data with Production Numbers**.
- For **Beginning Production Number Field**, select the field you want to use to store the beginning production number.
- For **Ending Production Number Field**, select the field you want to use to store the ending production number.



As a best practice, when you write the production beginning and ending numbers back to Concordance, select an empty field to ensure that the numbers do not append a field with existing data. If the production number appends to an existing field, the numbers may truncate if the content exceeds the field length.

- Set **Create Placeholders for unsupported/missing files** to **Yes** if you want an *Image not available* placeholder image to appear for unsupported or missing files. The placeholder can be customized with an image of your choosing by replacing the default file in the installation Program Data folder.

5. In the **Output Location Run Parameters** section:

- For **CIB Database Output Mode**, select **Append** to add the documents to an existing CIB database or **Create** to create a new CIB database.
- Click in the **CIB File** field, then click the ellipses. Navigate to and select the existing CIB file (for **Append**), or enter a new File name (for **Create**) and click **Open**.
- Click in the **Root Destination Folder**, then click the ellipses. Navigate to and select the root folder to use for the output production files and click **OK**. The Root Destination Folder should not exceed 250 characters.
- Select **Yes** for **Create Volume Folders** if you want volume folders for the production files. Then set the following options:
 - **Prefix** specifies what should precede the volume number. The **Prefix** can be any combination of letters, numbers or punctuation characters that are valid for folder and file names.
 - **Starting Number** specifies the initial number for the volume folders.
 - **Maximum Volume Size** specifies the maximum size for a volume folder.



The contents of the volume directories can be copied to external media for distribution. Make sure you know the capacity of that external media before setting the **Maximum Volume Size**. This ensures that the entire contents of the volume can be copied without running out of space.

After a volume fills to the maximum size, a new volume folder is created and this process will continue sequentially. An individual produced file will not be split across volumes.

- **Create File Folders** allows you to specify details for organizing the production files with volume folders. If desired, select **Yes** and then set the following options:
 - **Prefix** specifies what should precede the file folder. The **Prefix** can be any combination of letters, numbers, or punctuation.

- **Starting Number** specifies the initial number for the file folders. Zero fill the **Starting Number** to determine the desired number width.
- **Maximum Record Count** specifies the maximum number of records to include in each folder.
- Select Yes for **Use first file name in folder as folder name**.
- Select the **Production Output Type** that is appropriate for your needs. This specifies the output type and image compression for your produced files.



LZW compression produces a small file size image, which cannot be used with Concordance Image.

- **Color Settings** can be set to **Color** to produce files with original colors or **Grayscale**.
- Set **Fit Image Inside Headers/Footers** to **Yes** to reduce the size of the produced document or image to accommodate the space needed for the specified headers and footers.
- Select **Yes** for **Create OPT File** to generate an .opt file for the production files. In **Output path for OPT File**, click the ellipses, then navigate to and enter a name for the .opt file.



It is recommended that you select **Yes** for **Create OPT File** if you selected **Yes** for **Add a Numeric Suffix**. This will ensure the produced documents/images can be loaded properly into viewer applications.

- **Create Scrub Redacted Text Files**

6. In the **Markup Types** section:

- Select one or more markups to include individually by setting their value to **Yes**.
- Turn on all markups by setting **Select All** to **Yes**.



Due to how markups are rendered during production, please note that crossout, strikeout, highlight and underline markups are treated as one markup together. For example, if a crossout and highlight markup are both applied to a document, if you select **Yes** for **Crossout** in the production parameters, both the crossout and the highlight markup are produced.

7. Define any header, footer, or watermark settings you need. A header or footer is a string of text assigned to a specific location within a document. The text can be static text or updated values such as date, time, and page number. Headers and footers can appear at the top or bottom of a document and also can be placed in the right and left margins. Each header/footer location may contain 10 lines of text. A watermark is a semi-transparent string of text that appears behind the existing document content. A watermark appears across each produced file from bottom left to top right and has a transparency setting of 20%. To set header, footer, and watermark parameters:
 - Select the **Include Hdr/Ftr Spec.** check box to include a header, footer, or watermark in the output files.
 - Click **Edit Headers and Footers.** The **Edit Headers and Footers** dialog displays.
 - Open an individual Header/Footer or Watermark folder by expanding the item in the list.
 - In the expanded list select a <blank> field. Enter the text you want displayed in that area. To include a macro, type the percent sign (%) and the available macro list displays allowing you to select one. See [Macros](#) for the list of available macros.
 - Click **Font** to edit the font properties for all the Header/Footer and Watermark text.
 - Click OK to save your changes and close the **Edit Headers and Footers** dialog.

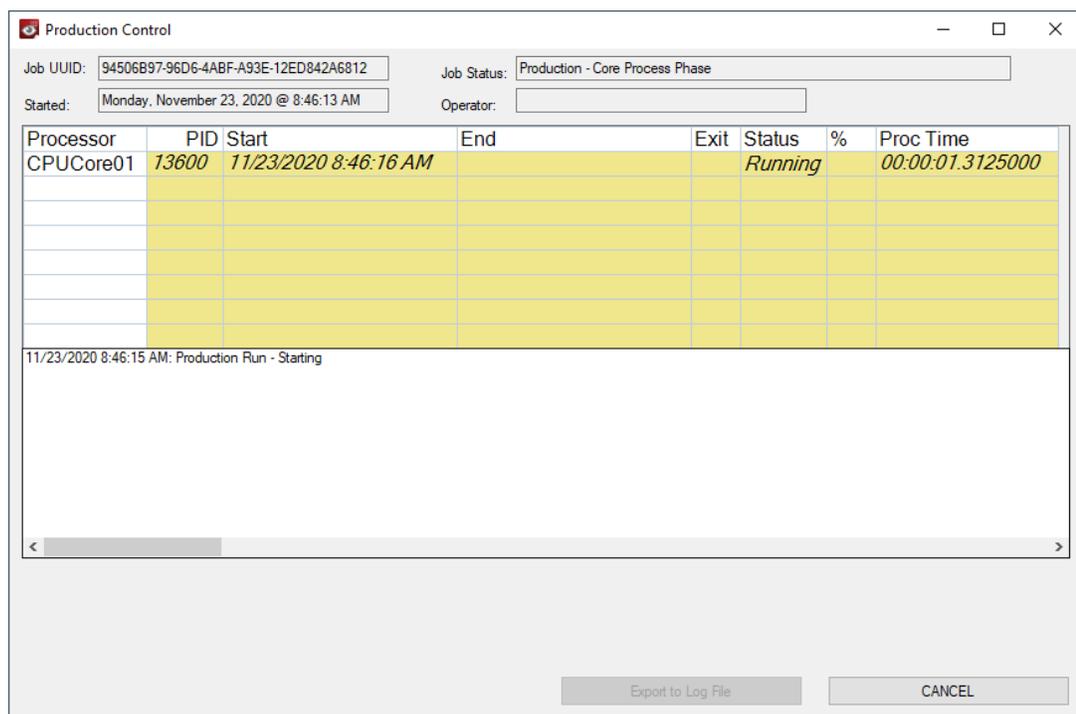


If you selected **Yes** for **Create Production Numbers**, you need to add the BatesPgNo() macro to at least one header or footer.



Printing and Production headers/footers and watermark settings are separate. Parameters defined for Production are only used for Production.

- When you are ready to run your Production, click **Start**. The Production Control dialog displays.



- The dialog updates to show progress information at the bottom while the production is running. **Production Control** displays progress as files are converted, distributed to the production volumes and file folders, creation of the CIB and OPT files, and production information written back to the specified fields in Concordance.

Save a Default Parameter Set

1. In the **Concordance Production** dialog, specify all production parameters you want to save.
2. When finished, click **Save As Default Parameter Set**.

Save a Parameter Set

1. In the **Concordance Production** dialog, specify all production parameters you want to save.
2. Enter a parameter set name in **Parameter Set Selected**.
3. Click **Save User Parameter Set**.

Load a Saved Parameter Set

1. In the **Concordance Production** dialog box, select a previously saved parameter set in the **Parameter Set Selected** list.
2. Click **Load User Parameter Set**.

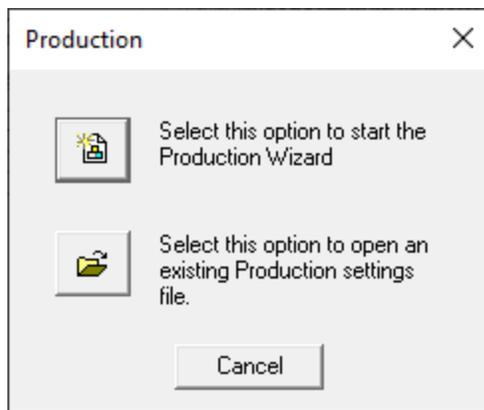
Delete a Saved Parameter Set

1. In the Concordance Production dialog box, select a previously saved parameter set in the **Parameter Set Selected** list.
2. Click **Remove Current Parameter Set**.

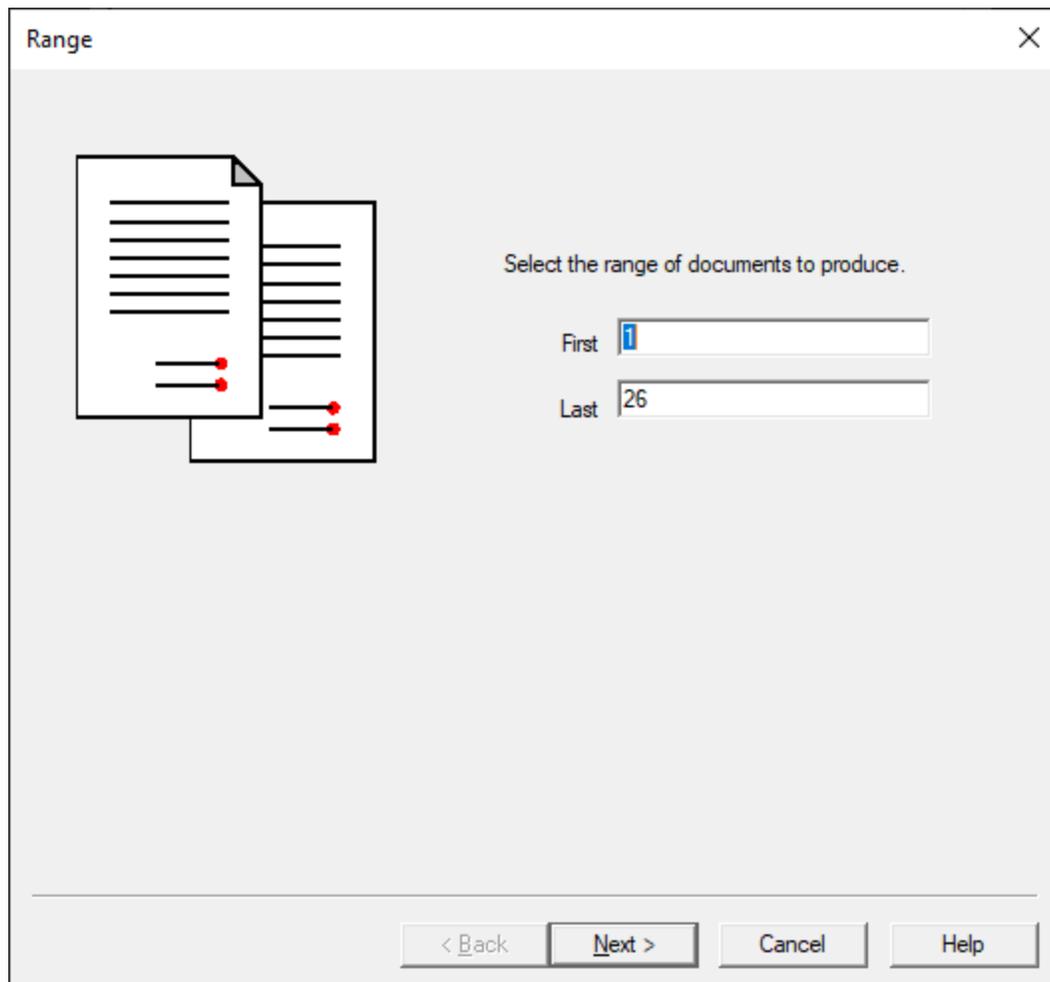
Images are produced using the Production Wizard in Concordance Image. You can produce images following the steps in the Production Wizard, or you can run the production using a previously saved production settings .psf file. See [Production Settings](#)²⁵⁶ for more information.

Running the Concordance Image Production Wizard

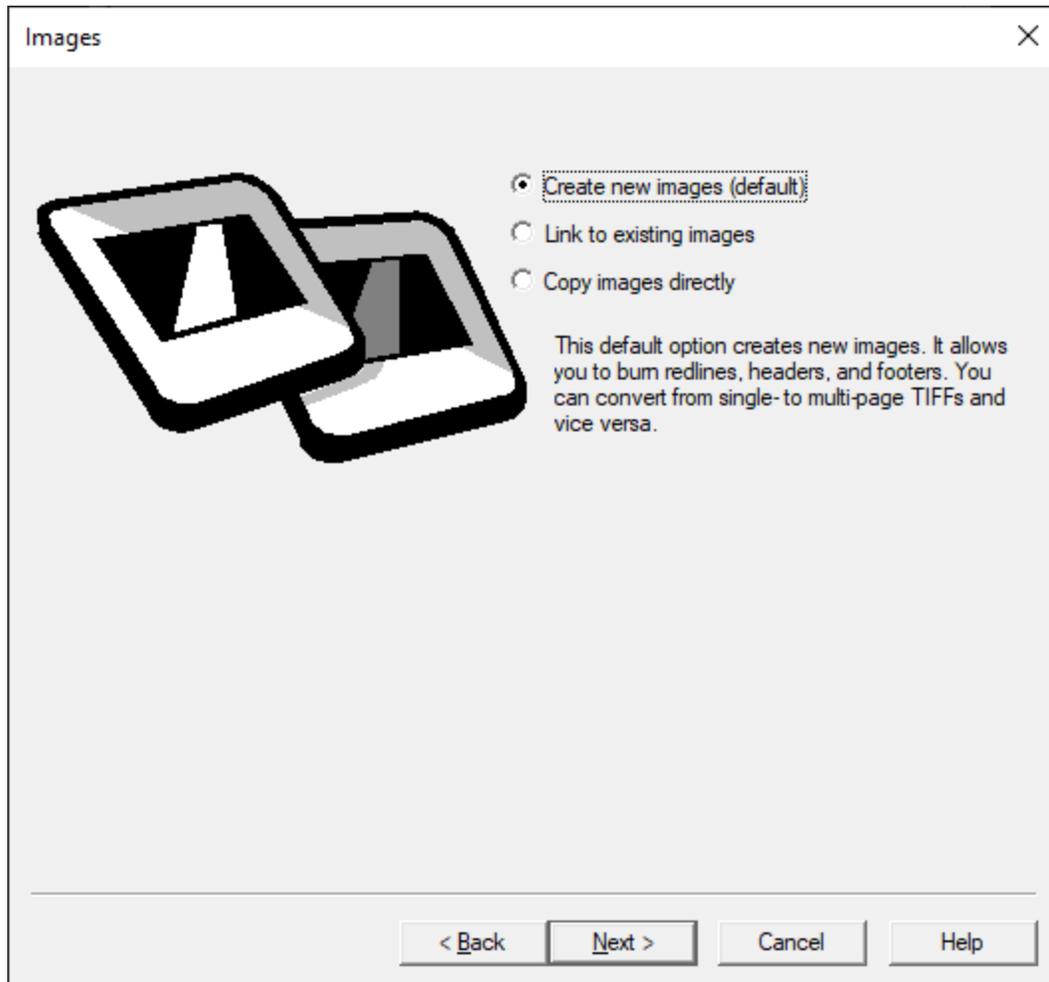
1. Create a directory folder to store the production files.
2. Determine your production page count. See [Determining your Page Count](#)^[255].
3. In Concordance Image, from the **Tools** menu, select **Produce**. The **Production** dialog displays.



4. If you do not have previous production settings saved, click **Select this option to start the Production Wizard**. The **Range** dialog displays.



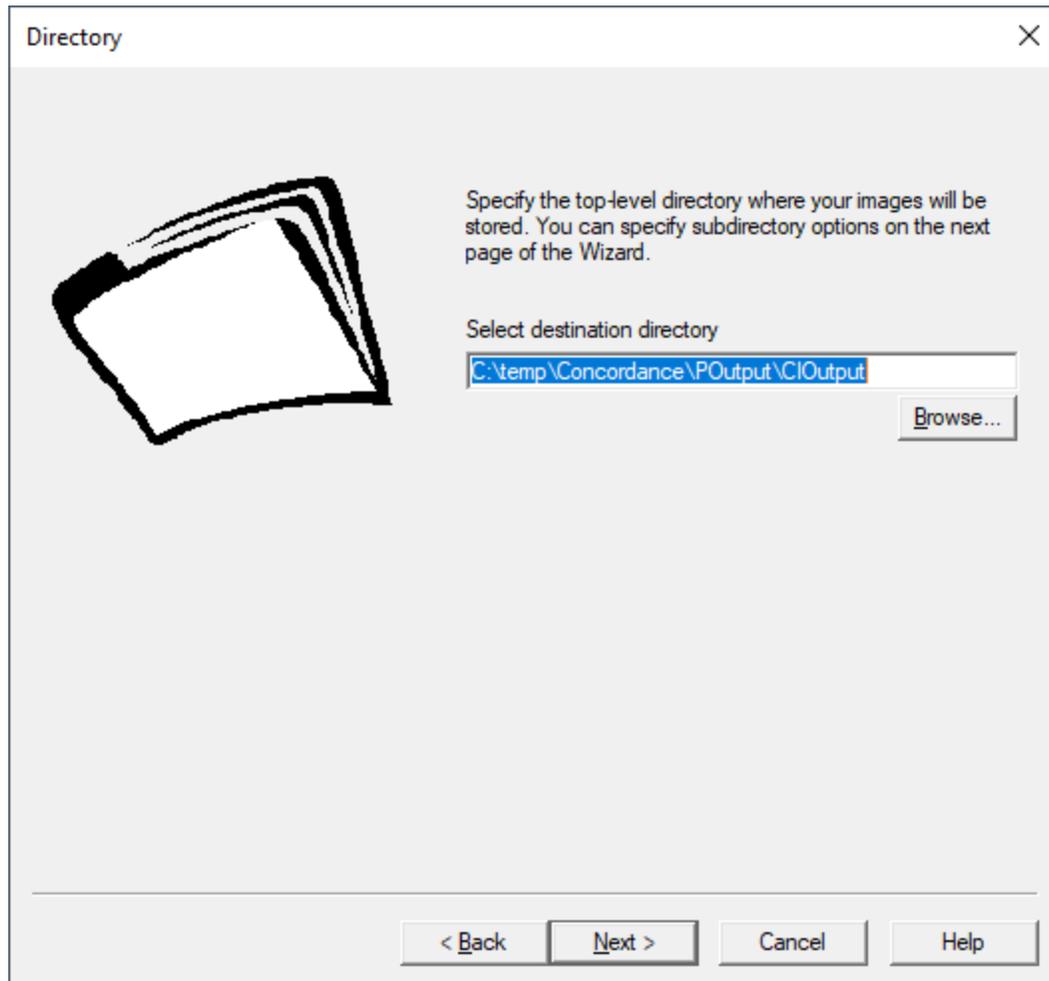
5. Enter the record number for the **First** and **Last** document in the range you want to produce.
6. Click **Next**. The **Images** dialog displays.



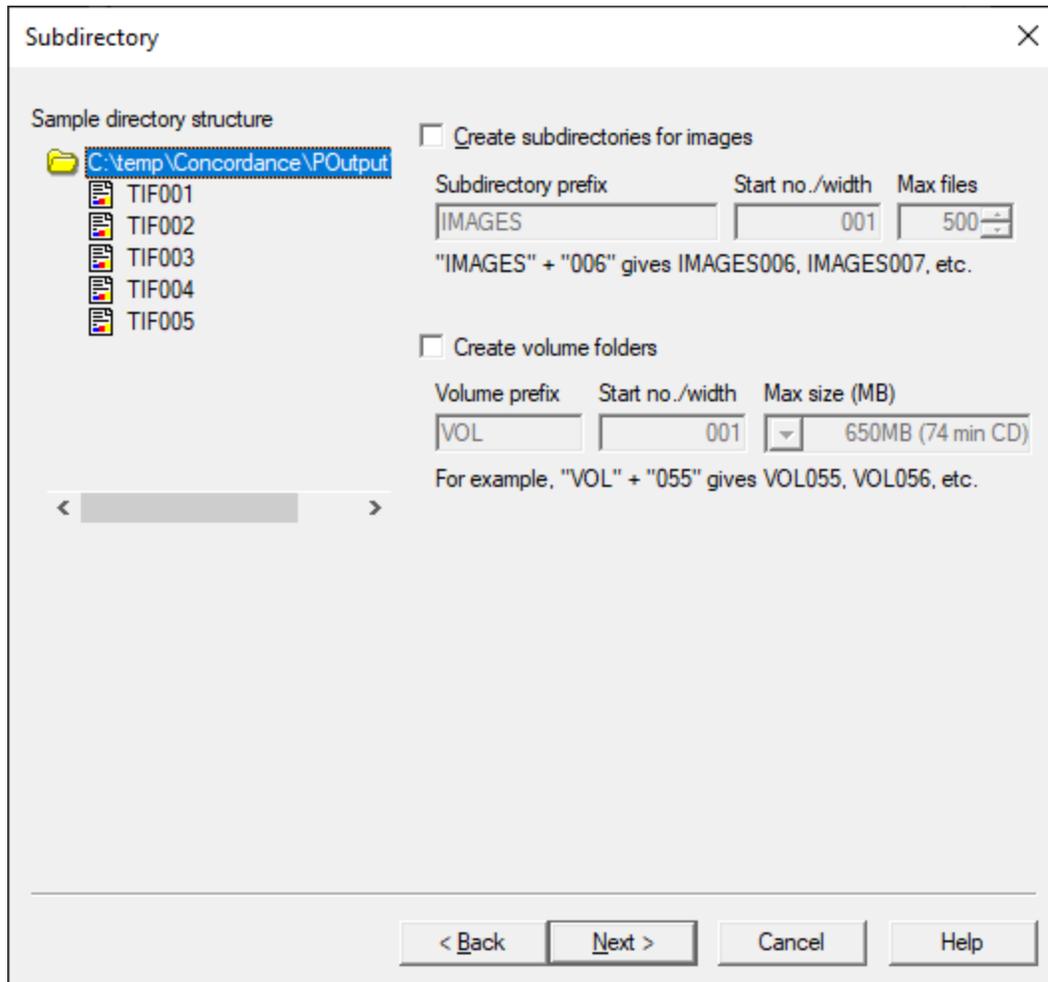
7. Select one of the following options:

- **Create new images (default)** - creates new images based on the original images. It allows you to burn headers and footers as well as redlines onto the images. You can also convert from single to multi-page TIFFs and vice-versa.
- **Link to existing images** - creates a production set that links to the existing set of images. Most of the time you will also create an imagebase or log file that links to the subset of images you are producing. This option does not allow you to burn headers, footers, or redlines onto the images.
- **Copy images directly** - copies the image directly from the source directory to the destination directory, but you cannot burn headers, footers, or redlines onto the images. Typically, this option is not used for productions, but is used for large print jobs.

- Click **Next**. If you selected **Create new images (default)** or **Copy images directly**, the **Directory** dialog displays and you can continue to step 8. Otherwise if you selected **Link to existing images**, the **Imagebase** dialog displays and you can skip to step 11.



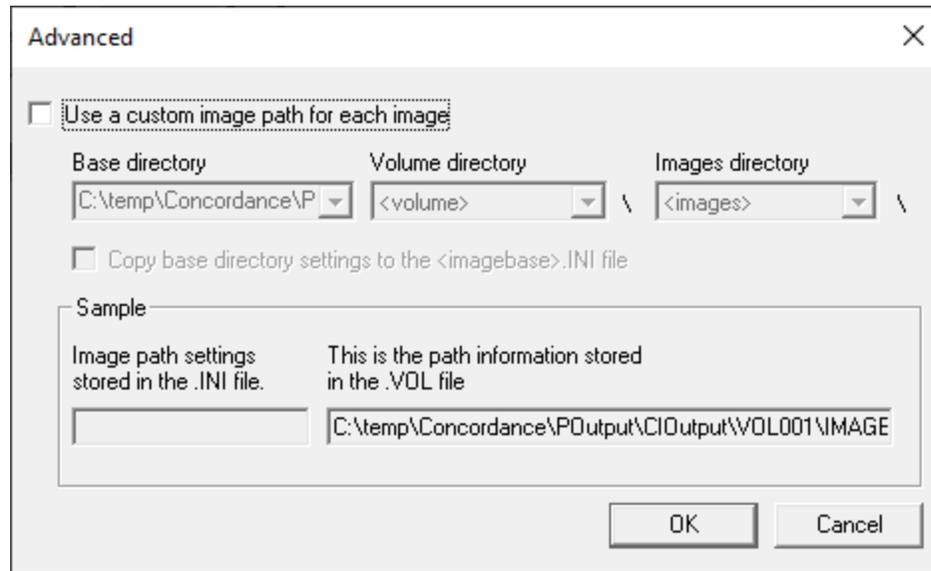
- The **Directory** specifies the top-level folder where production images should be saved. Click **Browse** to navigate to and open the folder to use for saved images.
- Click **Next**. The **Subdirectory** dialog displays.



11. If you create both image and volume subdirectories, volume directories are created below the top-level directory and image subdirectories are created below each volume directory. You can copy the contents of the volume directories directly to removable storage media for distribution.

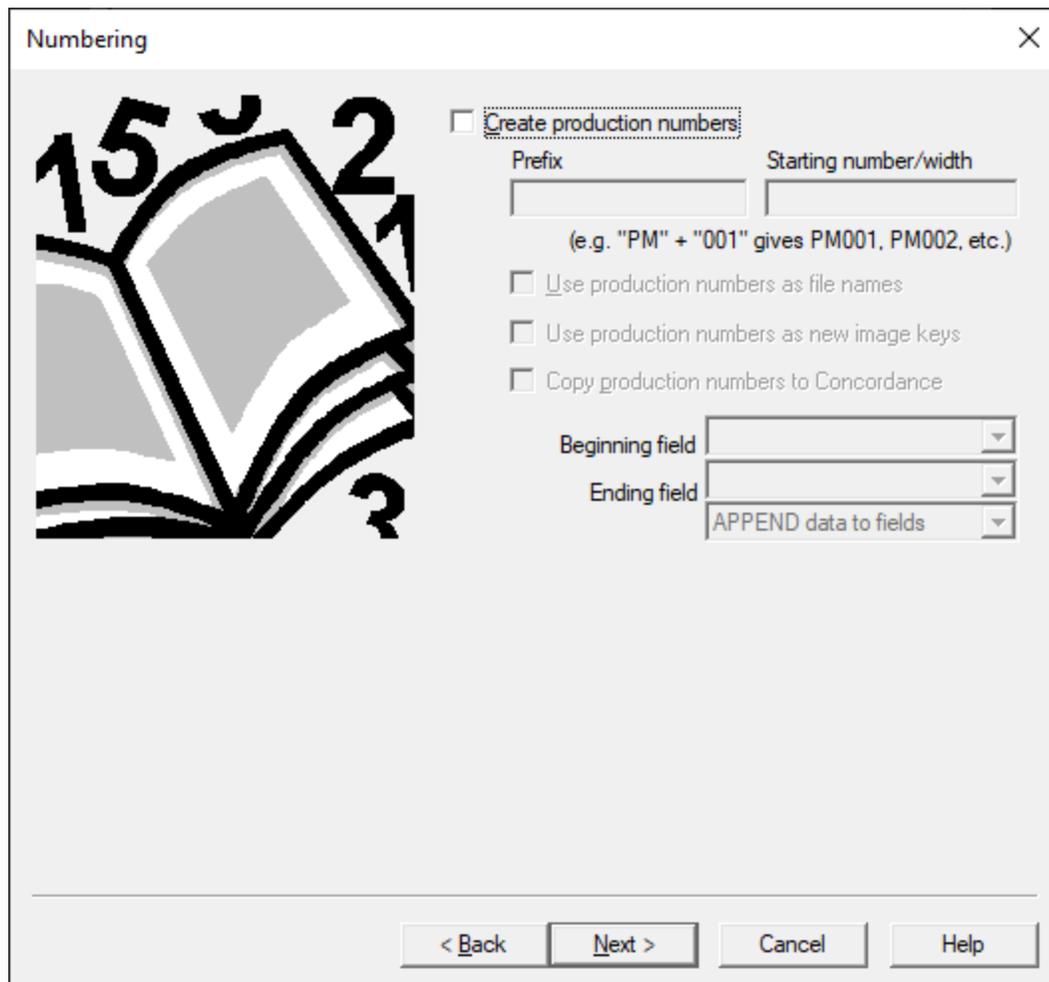
- Select **Create subdirectories for images** if you want to create image subdirectories. Then specify:
 - **Subdirectory prefix** is the string that will be used as a prefix for image subdirectory folder names.
 - **Start no./width** defines the starting number to use in the image subdirectory folder names. Zero fill your starting number to define the desired number width.

- **Max files** determines the maximum number of image files allowed in each image subdirectory folder.
 - Select **Create volume folders** if you want volume folders. Then specify:
 - **Volume prefix** is the string that will be used as a prefix for volume folder names.
 - **Start no./width** defines the starting number to use in the volume folder names. Zero fill the starting number to define the desired number width.
 - **Max size** determines the maximum file size allowed in each volume folder. When a volume fills to the maximum size, a new volume folder is created and the image subdirectories start renumbering from the beginning. Documents will not be split across volumes.
12. Click Next. The **Imagebase** dialog displays.
13. Select **Create new/append imagebase** if you want to create an imagebase that contains references to the images you are producing. If you are referencing these images from a Concordance database you need to select this option. Click **Browse** to navigate to a directory and specify a **File name** for the new imagebase or select an existing imagebase .dir file. Click **Save**. For new files, clicking **Save** displays a message confirming this is a new file. Select **Yes**.
14. Select **Create Concordance Image log file (cross reference file)** if you want the wizard to generate a log file. The log contains the image alias, path and file name for each of the images in the imagebase. The log file is a delimited ASCII file, and it can be used later to create an imagebase. Click **Browse** to navigate to a location and specify a **File name** for a new log or select an existing log to append to. Click **Save**. For new files, clicking **Save** displays a message confirming this is a new file. Select **Yes**.
15. Click **Advanced** if you want to create custom image paths for each image in the imagebase. The Advanced dialog displays.



- Select **Use a custom image path for each image** allows you to customize the image paths in the imagebase.
- In **Base directory**, select the top-level directory where your images will be stored. If you do not know the final destination for the images, select **<none>** in the **Base directory** field. Later, when you know the image path, you can add the image path to the imagebase using the Imagebase Management dialog.
- In **Volume directory**, select **<volume>** to organize images in volume directories or **<none>** if you do not want image volumes included.
- In **Images directory**, select **<images>** to organize images in image subdirectories or **<none>** if you do not want image subdirectories included.
- Selecting **Copy base directory settings to the <imagebase>.INI file** will save the path for future use.
- Click **OK** to close the **Advanced** dialog.

16. On the **Imagebase** dialog click **Next**. The **Numbering** dialog displays.

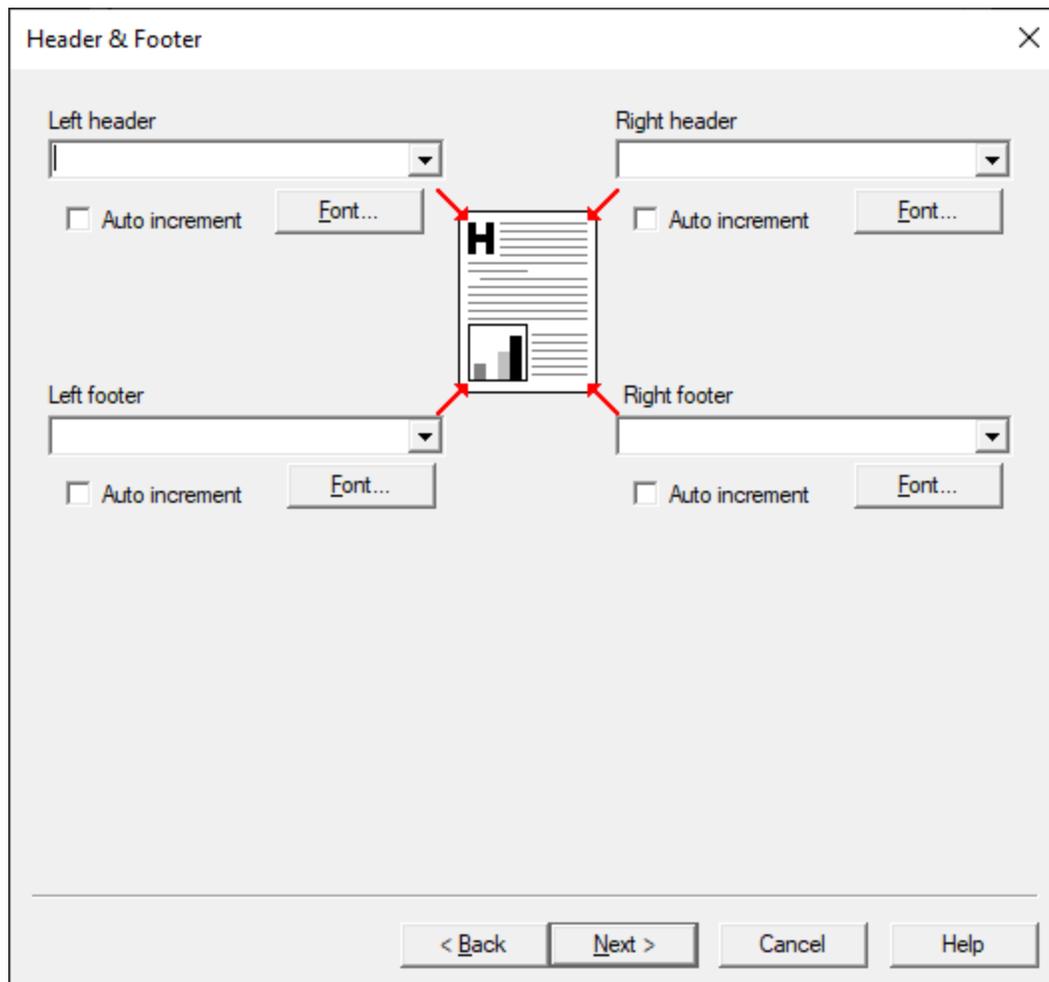


17. The **Numbering** dialog allows you to define production number details for the images in a production set. Select **Create production numbers** and then:

- **Prefix** specifies the production number prefix. This can be any combination of letters, numbers, or punctuation.
- **Starting number/width** defines the first production number to use. Zero fill the starting number to determine the number width. You must be careful to use an appropriate width that will accommodate the total number of pages that will be produced (determined in step 2).
- Select **Use production numbers as file names** to have Concordance Image replace image file names with production numbers. For example, if you had an image file named IMG0001.tif and your production number is P1CF0001, the new image file will be named P1CF0001.tif.

- Select **Use production numbers as new image keys** to store the production number image keys in the imagebase for accessing the image from Concordance.
- Selecting **Copy production numbers to Concordance** will store the beginning and ending production number for each document in the Concordance record. You must also specify:
 - In Beginning field, select the field you want to use to store the beginning production number.
 - In Ending field, select the field you want to use to store the ending production number.
 - Select either APPEND data to fields to append the production numbers to any existing data in the fields or OVERWRITE data in fields to replace existing data with the production numbers.

18. Click **Next**. The **Header & Footer** dialog displays.



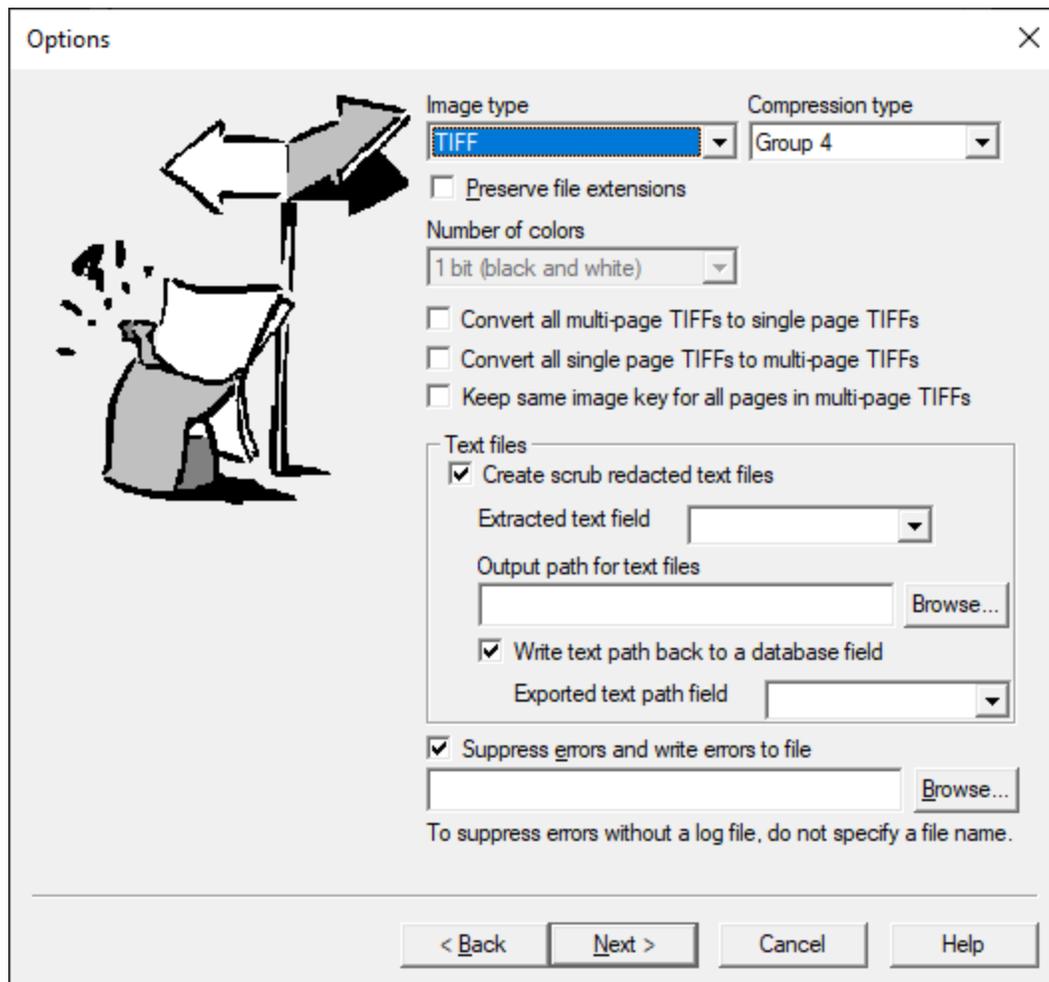
19. The **Header & Footer** dialog allows you to permanently place or information on any or all of the four corners of the production images. Images will be scaled to accommodate space for the headers and footers you specify on the production image.



Concordance only supports headers and footers in TIFF image files for a production.

20. In each of the **Left header**, **Right header**, **Left footer**, and **Right footer** drop downs you can:
- Manually type any text string that you want to appear in that position.
 - Select a macro (denoted by angle brackets) that defines the text to be produced. The Macros include:

- **<Date & Time>** – The date and time the image was produced
 - **<Date>** – The date the image was produced
 - **<Document number>** - The document number of the current image (i.e. Document 4 of 10)
 - **<Image key>** - The image key as it appears in Concordance
 - **<Page number>** – The current page number (i.e. Page 1 of 4)
 - **<Production number>** – The current production number
 - **<Time>** – The time the image was produced
- Select a Concordance field. Text from the associated field will be included up to the first line or first 60 characters.
21. For each header or footer you can also select **Auto increment**. If this is selected, Concordance Image will automatically increment the header or footer by 1. For example, if you manually type *PM-0001* for the **Left header** text and select **Auto increment**, Concordance Image will print PM-0001 for the left header on the first image, PM-0002 on the second image, and so on.
22. If desired, click **Font** for each header or footer to display the **Font** dialog and modify the font to use in that area.
23. Click **Next**. The **Options** dialog displays.



24. Select the **Image type** and **Compression type** you want for your produced image files. See [Image File Types for Production](#)²⁶⁵ for more information.
25. Select **Preserve file extensions** to keep the image file extensions.
26. For **Image type** and **Compression type** selections that support color, select the **Number of colors**.
27. Select either **Convert all multi-page TIFFs to single page TIFFs** or **Convert all single page TIFFs to multi-page TIFFs**. Then select **Keep same image key for all pages in multi-page TIFFs** if desired.



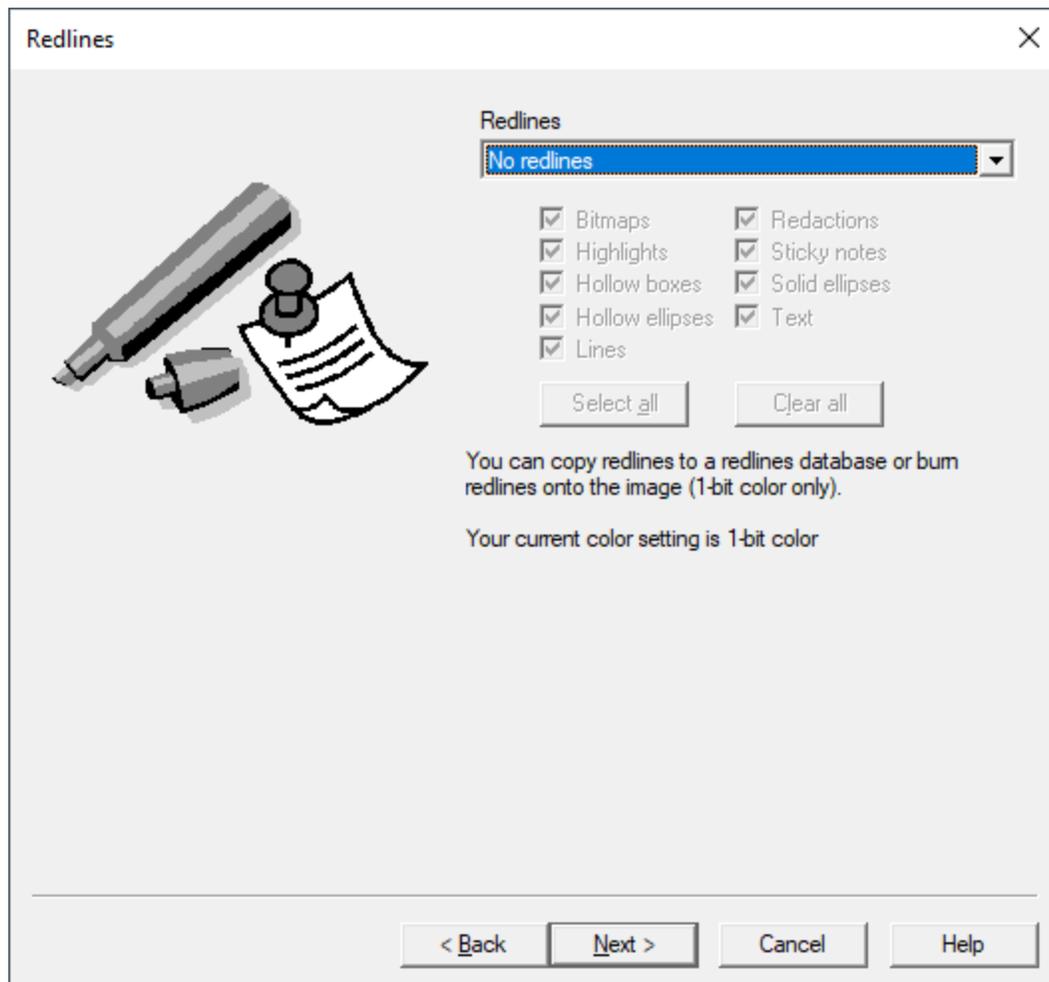
In order to properly convert multi-page TIFF files to single-page TIFF files, your image files should have a numeric suffix. For example, PM0001.tif and not PM0001a.tif.

28. If you selected **TIFF** or **CALS** as your **Image type**, you can select **Create scrub redacted text files** if you want to produce scrubbed text files for images that have been redacted. You also need to specify:

- **Extracted text field** is the Concordance field containing text for image files that do not have redactions and do not need to be OCRed.
- Click **Browse** to navigate to a location and select a folder to specify for the **Output path for text files**. This is where the text files will be produced. If an image file contains redactions, the output text file will be scrubbed. For non-redacted files the output text file will contain the data from the **Extracted text field**.
- If you want the path to the text file saved in a Concordance field, select **Write text path back to a database field** and then select the field in the **Exported text path field** drop down.

29. Select **Suppress errors and write errors to file** if you want any error messages during the production to be suppressed and written to an error log file. Click **Browse** to navigate to a location and specify a **File name** for the log.

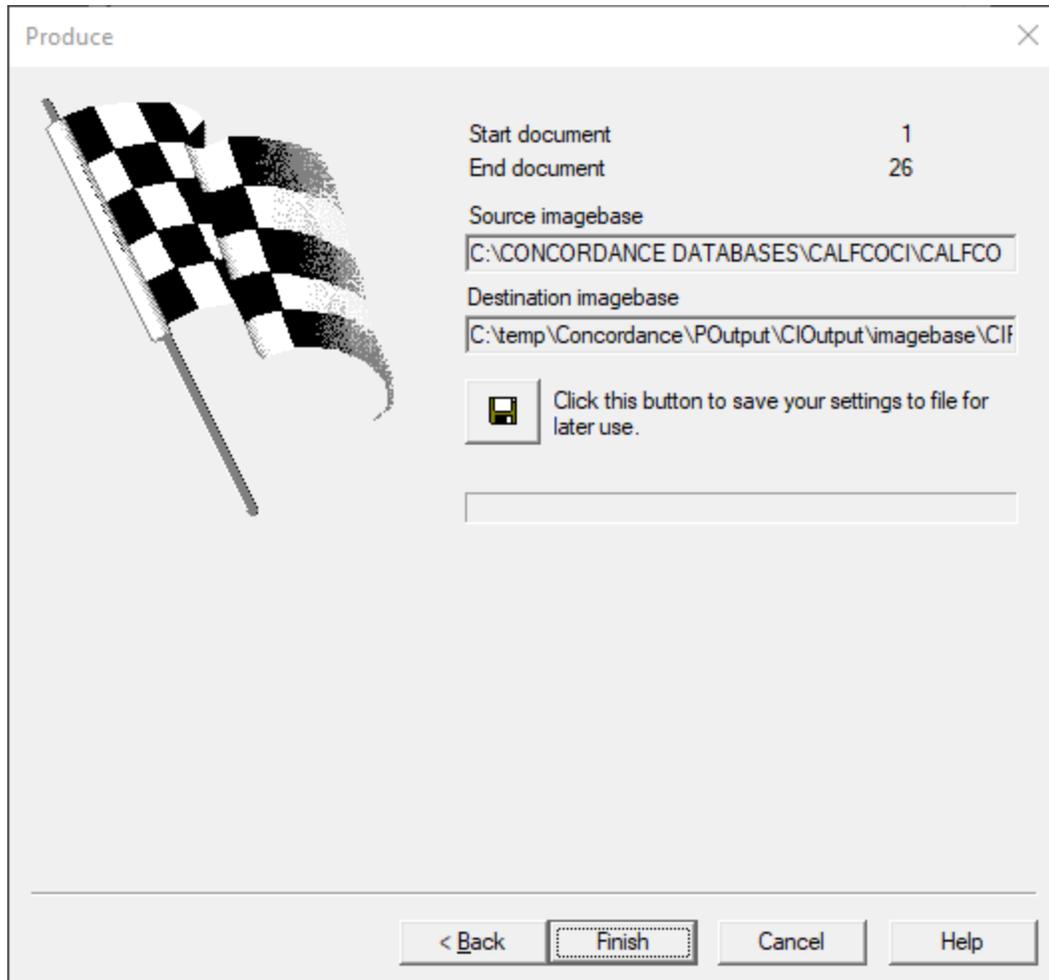
30. Click **Next**. The **Redlines** dialog displays.



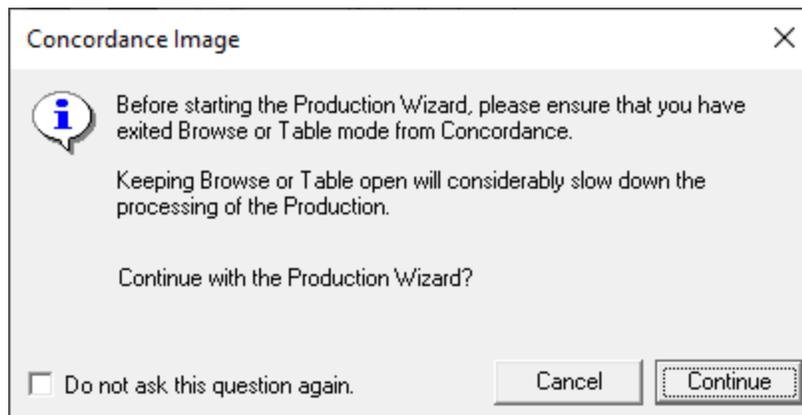
31. In the **Redlines** drop down, select an option:

- **No redlines** - this will ignore all redlines on the images being produced.
- **Copy redlines to redlines database** - this option copies the redlines from the produced images to a redlines database that tracks redlines for each image in the imagebase. Whenever you add or move redlines on an image, the redlines database is updated. If you select this option, redlines for produced images can be moved, deleted, and altered.
- **Burn redlines onto image** - this image will permanently place or burn redlines onto the produced images. The redlines cannot be moved, deleted, or altered in any way.

32. If you selected **Copy redlines to redlines database** or **Burn redlines onto image**, then you should select any specific redline types that you want to be copied or burned. Click **Select all** to select all redline types at one time.
33. Click **Next**. The **Produce** dialog displays. The **Start document** and **End document** numbers for the production are displayed at the top.



34. You can select **Click this button to save your settings to file for later use**. Navigate to a location, specify a **File name** for the production settings, and click **Save**.
35. Click **Finish** to produce the images. A continue message is displayed.



36. Click **Continue**. The **Produce** dialog displays a progress bar at the bottom while the production is running. If errors occur you will see a message allowing you to view the log file.

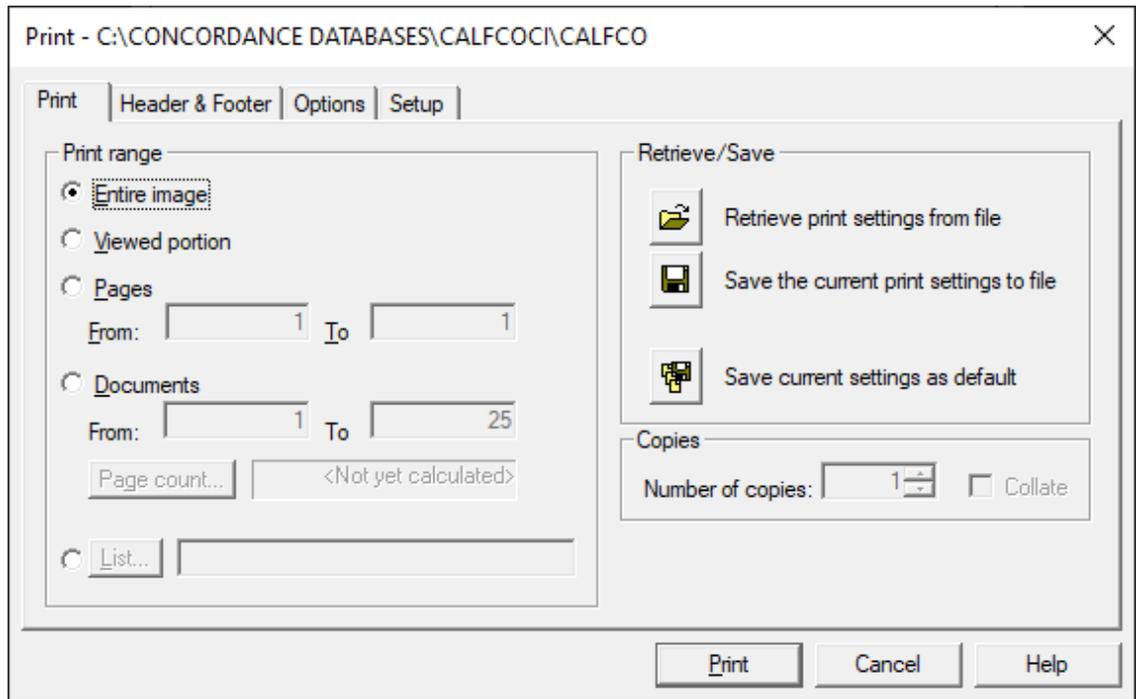
37. Click **Done** to exit the Production Wizard.

After completing the image production, it is best practice to export the production numbers and other necessary field data from Concordance to a delimited text file. This information may be needed later for opposing counsel or an internal production review. See [Exporting Delimited Text Files](#)¹¹⁹ for more information.

Determining your Page Count

Prior to running the Production Wizard in Concordance Image, you should determine the number of pages you will be producing. This page count will help you define the appropriate production numbers using the Wizard.

1. In Concordance Image, on the **File** menu, select **Print**. The **Print** dialog displays.

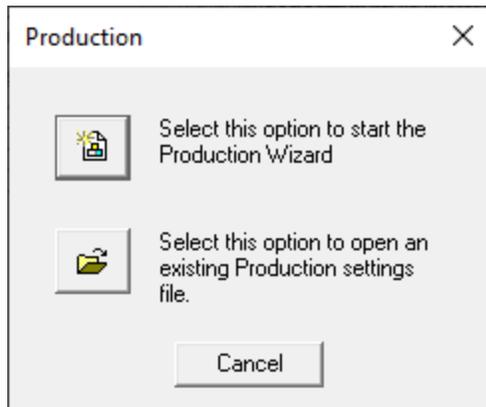


2. On the **Print** tab, select **Documents** in the **Print range** section.
3. Click **Page count**. The dialog updates to display the current page count. Make a note of this page count.
4. Click **Done** to close the **Print** dialog.

Using Saved Production Wizard Settings

If you have previously run a Concordance Image production and saved your production settings to a file, you can reuse those settings again to generate another production.

1. On the **Tools** menu, click **Produce**. The Production dialog displays.



2. Click **Select this option to open an existing Production settings file.**
3. Browse to the location and select the production settings file (.psf) you want to use. Click **Open**. The **Produce** dialog is displayed.
4. Click **Finish** to start the production.

After running a production, it is best practice to verify the data that was produced.

Verify Production Data

1. In Windows Explorer, navigate to where you created the folder to store the production files.
2. Review the folder structure.
3. Review the produced images and corresponding files.
4. If the image load file is being produced to opposing counsel, you will want to modify the directory path information before handing it over.
5. In Concordance, return to your document set and navigate to the next record to refresh the database. You may also want to reindex.
6. Scroll to the bottom of the produced records to view the production number fields and any tags that were applied during production.

Creating a Production Database

After running a production and verifying the produced images, it is best practice to create a database for the production. See [Exporting Database Records](#)¹¹⁵ for more details on the Export Wizard.

Create a Production Database

1. In Concordance, make sure that the production query you used is still active in the database or rerun the production query in the database.
2. On the **Documents** menu, select **Export**, and click **As a Concordance database**. The **Export Wizard - Database** dialog displays.
3. Click **Browse**. Navigate to the directory where the production was created, type a production database **File name**, and click **Open**.
4. Click **Next**. the **Export Wizard - Fields** dialog displays.
5. The database list defaults to the currently open database and all the database's fields are displayed in the list. You can update the list of fields if you do not want all fields included in the production database.
6. Click **Next**. The **Append/Replace** dialog displays.
7. Choose the **Append all records** option since you are creating a new production database.
8. Click **Next**. The **Export Wizard - Export** dialog displays. The **First** and **Last** record numbers in the new production database to create are displayed.
9. Click **Export**. You will see a confirmation dialog. Click **Yes** to create the new database.
10. The Export Wizard automatically closes when the export is complete.
11. On the **File** menu, select **Open**. Navigate to the location where you created the new production database, select the .dcb file that was created, and click **Open**.
12. On the **File** menu, select **Modify**. The **Modify** dialog displays.

13. Identifying the production number as the image alias for this production database will allow Concordance and the viewers to synchronize the produced images with their corresponding records in the database. Modify the database's image alias:
 - Find the current database field that is marked with the **Image** check box. Clear the **Image** check box for that field.
 - Find the field you used to store your production numbers (i.e. BEGPROD) and update the field to select the **Image** check box.
 - Click **OK** to save your changes.
14. On the **File** menu, select **Reindex**.
15. Close Concordance and any viewer that may be open.
16. Reopen the production database in Concordance.
17. On the **Dynamic** toolbar, click the **View image** (camera) button to open the viewer and the produced images linked to the production database you created.

Native File Production

A native file production produces copies of the original native files in a specified production destination. The native file production does not include any markups or other production settings, Concordance simply copies the existing native files and renames them according to the parameters you specify.



The Native File Production operation cannot be used with Concordance Image imagebase files. You must convert the Concordance Image imagebase to a Concordance Native Viewer compatible imagebase (creating a CIB file) before using the Native File Production tools.



Make sure that the original native file name does not contain any Unicode characters as this may result in the production of a blank text file.

Run a Native File Production

1. If you have not done so already, run a search query to locate the documents you want to produce.
2. On the **Tools** menu, select **Production** then **Native File Production**. The **Native File Production** dialog displays.

Native File Production

Select output production

Browse

File Naming Scheme

Native File Name

Image Key

Field <none>

Custom

Write Production number to the database field

Overwrite Append

Exclusion List

Produces the native file with same name to the specified folder

Scans for duplicates for Native File Name / Field selection

Source Type

CIB(Imagebase)

Field

Write production path back to the database field

Production Status: Not started

Start Close

3. Click **Browse**, navigate to the folder location where you want to store the produced files and click **Select Folder**.



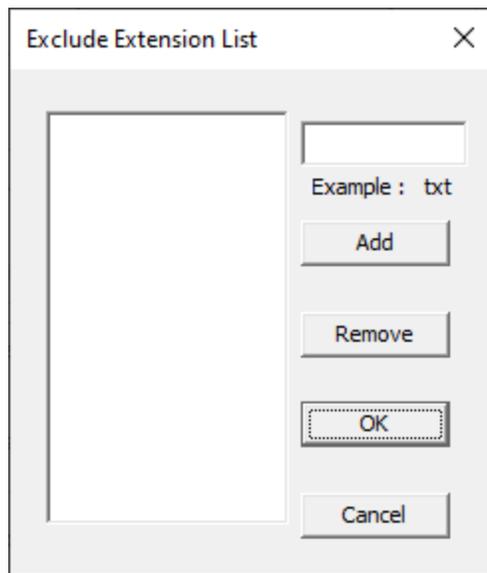
The production folder must be empty.

4. In the **File Naming Scheme** section, select one of the following:
- **Native File Name** - this option will keep the original native file name
 - **Image Key** - this option will name the files based on the corresponding image key
 - **Field** - this option names the files based on the contents of the field you specify in the corresponding drop down.
 - **Custom** - this field names the files based on the information provided:
 - Type a prefix to use for the produced files in the first field and the starting number to use in the second field. The starting number will be incremented for each file produced. The maximum number of digits allowed for the starting number field is nine.
 - Select **Write Production number to the database field** to save the production numbers to the field you specify in the accompanying drop down. Then select either **Overwrite** or **Append** to determine how the production numbers are saved to the field.
5. For **Source Type**, select one of the following:
- **CIB (Imagebase)** - to produce files as they are currently linked in Concordance Viewer or Concordance Native Viewer
 - **Field** - select a field in the drop down to produce files from a data field



The full path and filename to the source file must exist in the selected **Field**. If the file is not found at the path and filename specified, the file will not be produced and an error will be recorded in the log.

6. If you selected **CIB (Imagebase)** for **Source Type**, you can also define specific file extensions to exclude from the production, replacing with a placeholder page. Click **Exclusion List** to display the **Exclude Extension List** dialog. In the top right field type the file extension and click **Add**. Click **OK** to close the **Exclude Extension List** dialog.



7. Select **Write production path back to the database field** and select a field in the dropdown if you want to update a database field with the produced path and filename information.
8. To run the native file production, click **Start**. The **Native File Production** dialog updates to show a status bar at the bottom. When the job is complete, click **Close** to exit the **Native File Production** dialog.

Native File Production for Tagged Documents

Instead of running a Native File Production from a search query, you can also run a Native File Production from tagged documents.

1. Create a tag specific to this production and apply the tag to the applicable documents. See Tagging Records for more information.
2. In the Tags Panel of the Navigation Pane, right click the tag you created and select **Native File Production**. The **Native File Production** dialog displays.
3. Continue following the steps outlined above to complete the Native File Production.

Production Attachment Range

Attachment ranges that express the family relationships of produced documents can be populated from production numbers.

Generate Production Attachment Ranges

1. From the **Tools** menu, select **Production**, and then **Production Attachment Range**. The **Production Attachment Range** dialog displays:

The screenshot shows the 'Production Attachment Range' dialog box. It has a title bar with a close button (X). The dialog is divided into three main sections:

- Existing Attach Range Fields:** This section contains two radio buttons. The first is 'Attach Range', which is selected, and is followed by a dropdown menu. The second is 'Fields', which is unselected, and is followed by two dropdown menus labeled 'Beg Attach' and 'End Attach'.
- Existing Production Number Fields:** This section contains two dropdown menus labeled 'ProdBeg' and 'ProdEnd'.
- Production Attach Range Field:** This section contains a single dropdown menu.

At the bottom right of the dialog, there are two buttons: 'Start' and 'Close'. The 'Start' button is highlighted with a dashed yellow border.

2. In the **Existing Attach Range Fields** section:
 - Select the **Attach Range** option if a field in the database contains an attachment range, and then select the field that contains the attachment range data in the drop down.
 - Select the **Fields** option if there are individual beginning attachment number and ending attachment number fields in the database. Then select the appropriate fields in the **Beg Attach** and **End Attach** drop downs.

3. In the **Existing Production Number Fields** section, **ProdBeg** should be set to the field that contains the beginning production number and **ProdEnd** should be set to the field that contains the ending production number value in the database.
4. Select the **Production Attach Range Field** you want to use to store the production attachment range.
5. Click **Start**.

Image File Types for Production

Reference this table when making adjustments as needed to match the images you are producing for image type, compression, and number of colors.

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
T I F F	N o n e 1 - b	Black & White 16 colors 256 colors

Supported image Types	Compression	Colors
	i t 4 - b i t	16.7 million colors

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
	8 - b i t 2 4	

Supported Image Types	Compression	Colors
	- bit	
(C	Gr	

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
o n c o r d a n	o u p 3 1 - b	Black & White

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
c e l l m a g e O	i t	

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
n l y)		
(C	G r	

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
o n c o r d a n	o u p 3 2 D	Black & White

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
c e l m a g e O	1 - b i t	

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
n l y)		
(C	G r	

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
o n c o r d a n	o u p 3 T I F	Black & White

Supported Image Types	Compression	Colors
cel image O	F 1-bit	

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
n l y)		
(C	G r	

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
o n c o r d a n	o u p 4 1 -	Black & White

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
c e l m a g e O	b i t	

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
n l y)		
	P a	

Supported Image Types	Compression	Colors
	Color Bits	Black & White 16 colors 256 colors 16.7 million colors

Supported Image Types	Compression	Colors
	1-bit 4-bit	

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
	b i t 8 - b	

Supported Image Types	Compression	Colors
	i t 2 4 - b	

<p>S u p p o r t e d i m a g e T y p e s</p>	<p>C o m p r e s s i o n</p>	<p>Colors</p>
	<p>i t</p>	
<p>P C X (</p>	<p>P C X</p>	<p>Black & White</p>

Supported Image Types	Compression	Colors
Concordance	1-bit 4-bit	16 colors 256 colors

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
n c e l l m a g e	b i t 8 - b	

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
O n l y)	i t	

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
C A L S (C o n	G r o u p 4	Black & White

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
c o r d a n c e	1 - b i t	

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
I m a g e O n l		

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
y)		
J P E G	J P E G	16.7 million colors

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
(C o n c o r d	2 4 - b i t	

Supported Image Types	Compression	Colors
anc image		

S u p p o r t e d I m a g e T y p e s	C o m p r e s s i o n	Colors
e O n l y)		

Reporting

Concordance provides several tools for printing document records and transcripts, and can be used to create and print a variety of customized reports based on search results, field content, tagged document sets, and transcript annotations. Printing options are available in Concordance from either the Browse or Table view, and the output looks similar to the onscreen display, depending on which view you choose to print from. Document images can also be printed from Concordance Image, based on search results in Concordance.

While Concordance offers the basic options for printing, such as page numbers and dates, Concordance also offers selections for printing highlighted annotations, underlined hits, field labels, and more. This is especially useful for printing sets of records for full-text review or printing annotations from transcripts.

You can also print a spreadsheet report of queries displayed in Table view, with field text in the sort order selected. This option is useful when a summary listing is appropriate.

The Report Writer can be used to create custom reports from Table view, based on a sort query. You can also use the Report Writer in conjunction with a CPL script to create custom exploded sort reports. See [Report Writer](#)²⁹⁷ for more information.

The Annotation Report Writer Wizard can be used to create custom reports from your transcript files. The custom reports can include transcript notes, highlights, and attachments. See the Annotation Report Writer Wizard for more information.

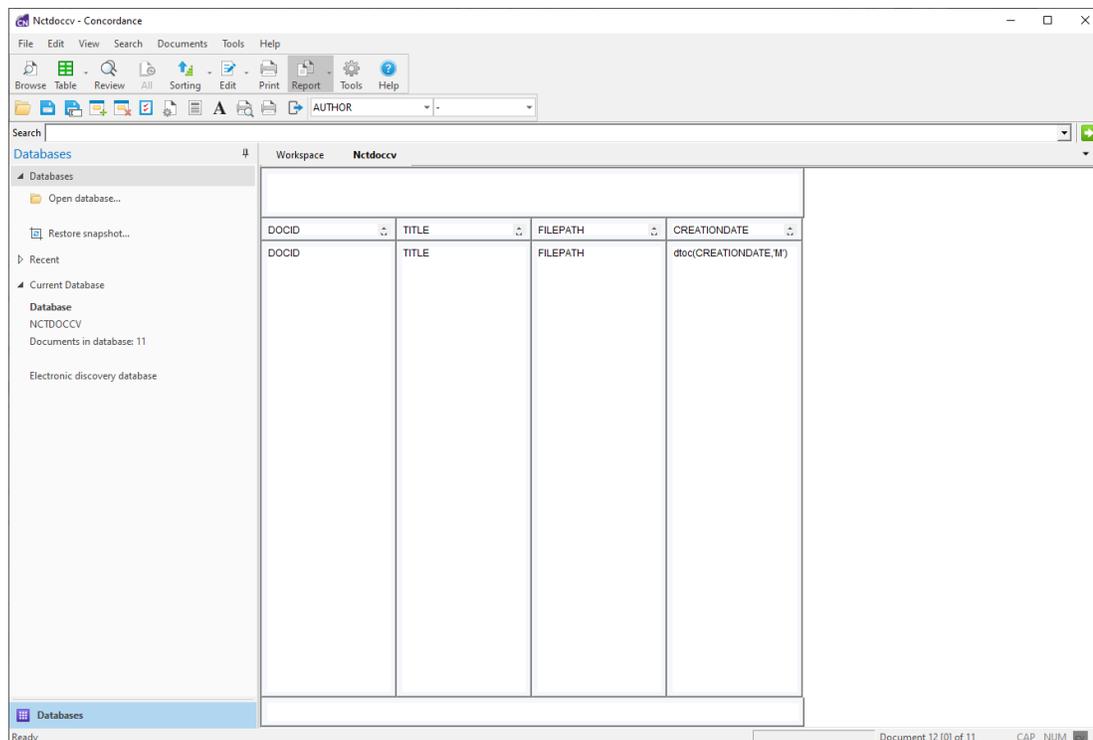
Report Writer

With the Report Writer, you can create simple reports, exploded sort reports, complex reports from concatenated databases, or reports where you need to print tens of thousands of records. The reports are based on a sort query.

You can select the fields to use, column widths, and page and individual column formats and alignment. The report columns can contain stacked fields, truncated fields, calculated data, and combined data and quoted text with tab alignment. The Report Writer supports date and math calculations, and advanced if-then-else logic. While many of these features are powerful, the report writer was designed to be easy and flexible.

In Concordance, the Report Writer is only available in the Table view, but you can also use the Report Writer in conjunction with CPL (Concordance Programming Language) scripts.

Report Writer UI



Editable Areas

The Report Writer screen is divided into four horizontal edit areas:

- **Page Header** - The top edit box is the page header. It is printed at the top of every page. Any text can be typed into the page header. The header can be pulled down to give you more room for a large header or font. There is no limit to the number of lines in the header. If you do not want a page header, just pull it up until it disappears.
- **Column Headers** - The next row of the report contains the column headers. These are printed at the top of every page, above the data columns. As with

the page header, the column headers are resized by grabbing the window borders and pulling them up or down. There is no limitation on the number of lines of text they can hold. Make them as large or small as you need. Resizing one column header will resize all column headers, they are always uniform in height.

- **Data Columns** - The next row contains the data columns. These contain the actual data printed in your reports. The data columns are interpreted; if you place a field's name--it must be in upper case--in the column, then that field's data ends up in the report. If you place something like, "Data: " + SUMMARY into the column, then the word "Data: " precedes the text from the field named SUMMARY. Any text or function or mathematic operator defined in the programming language can be used in a data column. This allows you to do things like convert data to upper or lower case, print only the first 100 characters, or calculate dates and other values in your reports.
- **Page Footer** - The bottom edit box is the page footer. The page footer is printed at the bottom of every page. Any text can be typed into the footer. The footer can be pulled up or down to give you more or less room for text or type size. Make the footer's window smaller if too much room appears between the footer and the page numbers or dates.

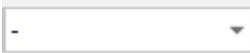
Report Writer Toolbar	
Button or Field	Description
	Opens the Open dialog box. Click the Open button to open an existing .arp report file in the Report Writer.
	Saves your latest report changes

Report Writer Toolbar	
	to the .arp file currently opened.
	Opens the Save As dialog box.
	Inserts a column to the left of a selected column. Click a column in the report and click the Insert button to open the Report Columns dialog box. Type the number of columns to insert and click OK to insert the new columns.
	Deletes a selected column. Click a column in the report and click the Delete button to open the Report Columns dialog box. Type the number of

Report Writer Toolbar	
	<p>columns to delete and click OK to delete the selected column, and if you entered more than one column, the remaining number of columns you entered to the right of the selected column.</p>
	<p>Deletes a selected column. Click a column in the report and click the Delete button to open the Report Columns dialog box. Type the number of columns to delete and click OK to delete the selected column, and if you entered more than one column, the remaining number of columns you</p>

Report Writer Toolbar	
	entered to the right of the selected column.
	Opens the Page Setup dialog box. In the Page Setup dialog box, you can edit the report's page setup settings, including the paper size, source, orientation, the page margins, and printer.
	Opens the Justify dialog box. Select the check box that applies to the text you want to format, click OK to open the Text Alignment dialog box, click the alignment option you want to use, and click OK.

Report Writer Toolbar	
	Opens the Font dialog box. Select the check box that applies to the text you want to format, click OK, modify the font, and click OK again.
	Opens the report in the print preview screen. The print preview screen allows you to browse through up to 100 pages of your report before printing the report.
	Opens the Print dialog box. Select your printer settings and click OK to print the report.
	Closes the Report Writer in Concordance. You will be

Report Writer Toolbar	
	prompted to save the report if any changes were made.
	Contains a list of the database fields you can add to the report.
	Contains a list of available CPL functions and operators you can add to the report.

Adding Field Titles and Data

There are two drop-down lists on the Report Writer toolbar. The first list contains a list of every field in the database. The second list contains a list of useful CPL functions and operators. When adding fields to a report, you should always select fields from the list box. It will automatically include necessary conversions for you, such as converting dates to text so that they can be printed. For instance, selecting the date field DATE will actually place dtoc(DATE) into the report column. This uses the date-to-character function to convert a numeric date into text. To add a field, function, or operator to a report, click on the report where you want to add a field, function, or operator and make a selection from the field or function list.



If you need to type field names manually, make sure that you use upper case letters. The report writer will not recognize field names

unless they are in upper case.

Stacked Fields and Other Useful Tricks

The Report Writer is very powerful and flexible. It can use any of the CPL (Concordance Programming Language) operators and functions. With the Report Writer, you can create some wonderful and complex reports. There are however, just a handful of functions and operators, like the plus sign, which you will use most of the time. This section describes the most useful functions and how to use them.

The first thing you may want to do is to combine some text with a field or two. The following example does just that. It stacks two fields in one column with titles for data:

```
"Date "+dtoc(DATE)+newline()+
```

```
"Customer "+CUSTOMER
```

Enclose any static text in quotes. Combine quoted text and other data with the plus sign. The `newline()` function forces anything that follows it onto the next available line. Also included in the example, but not shown, are tabs. The quoted text includes a tab character to align the two data fields--there are no spaces in the line.

Always remember to use plus signs to combine everything with everything else. Leaving one out, or putting two plus signs in a row, are the two most common report errors.

Sometimes you may have a very large field which would use a lot of paper if it were printed. The next example uses the `substr()` function to print the first 200 characters of the summary field, it sub-strings it.

```
substr(DIGEST,1,200)
```

The example about uses the `substr()` function to grab 200 characters, starting with the first character. For this scenario, it would be really useful if we could check first to see if the brief field was actually more than 200 characters long. Then we could

append ellipses (...) to show that we truncated the entry, if we need to truncate it at all.

```
(len(DIGEST)>200?substr(DIGEST,1,200)+"...": DIGEST)
```

This example uses two new features: the len() function and the conditional operator. The len() function determines the length of the text in any field. The conditional operator allows us to embed if-then-else logic into a report column. The conditional operator has the following format: (statement?true-response:false-response). The Report Writer tests the statement. If it is true, the true-response is the result, otherwise the false-response is the result. In our example the Report Writer determines if the length of the digest field is greater than 200 characters. If it is, the true-response returns the first 200 characters of the field with ellipses appended to show that it was truncated. If the statement is false, the entire field is printed. The parentheses around the conditional operator are required.

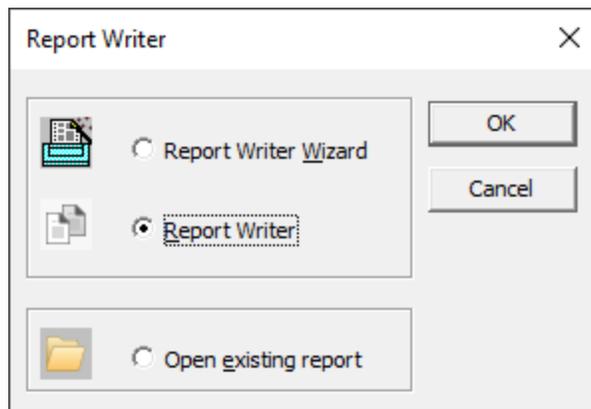
Use if-then-else syntax is (:?) and put literal text within quotes

```
If a date = 00/00/0000, then you can place quotes around "no date available"
```

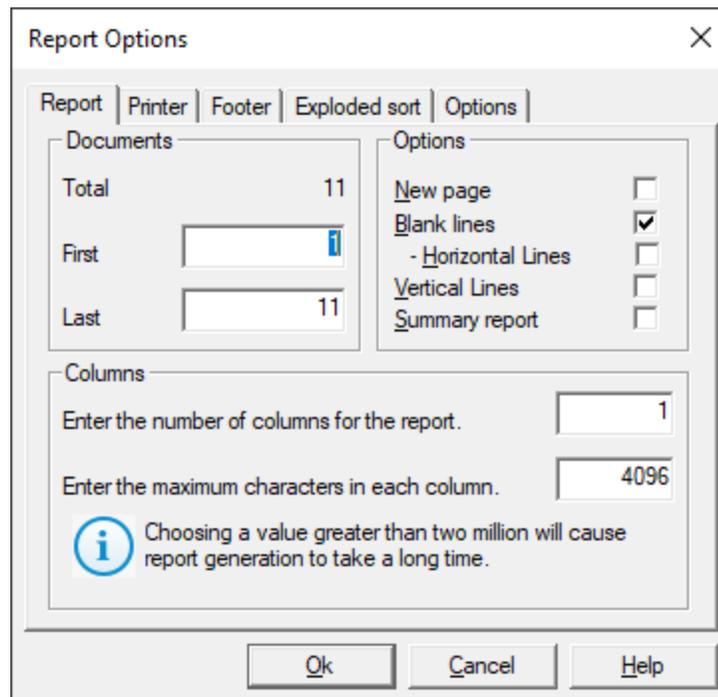
Stack fields with newline()

```
"Beg Bates : "+BEGNO+newline()+"End Bates : "+ENDNO
```

1. Run a search query to locate the documents you want to include in the report.
2. In Table view, use a table layout to organize the columns and column order you want to include in the report.
3. Click the arrow to the right of the Report button on the Standard toolbar and select **Report writer**. The **Report Writer** dialog displays.

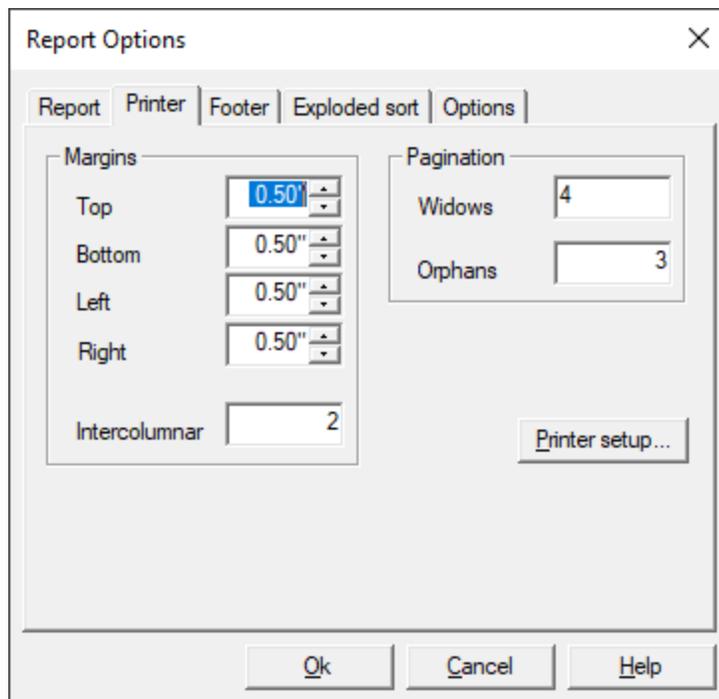


4. Select **Report Writer** and click **OK**. The Report Options dialog displays on the **Report** tab.



5. If desired, modify the range of records to be printed by editing the **First** and **Last** numbers in the **Documents** section.
6. Select the options you want:
 - **New page** will print each record on a separate page.
 - **Blank lines** allows blank lines between each record on the report.

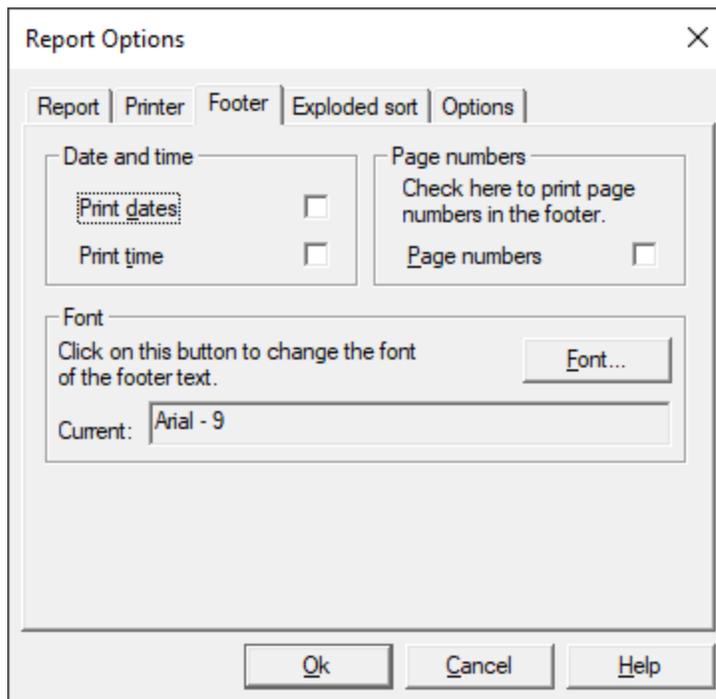
- **Horizontal Lines** will add a line between each record on the report, only if **Blank lines** is enabled.
 - **Vertical Lines** adds a vertical line between each report column.
 - **Summary report** will print only the first line from each field in the report.
7. Update the **number of columns for the report** and **maximum characters in each column** if needed.
 8. Click the **Printer** tab.



9. If desired, modify the **Top**, **Bottom**, **Left**, and **Right** margins for the report.
10. You can adjust the spacing between columns in your report using the **Intercolumnnar** field, which is represented in tenths of an inch.
11. The **Widows** field controls the minimum number of lines Concordance will allow to remain at the bottom of a page. If the number of lines to print at the bottom of the page is less than the value in the **Widows** field, then the document is moved to the top of the next page.
12. The **Orphans** field controls the minimum number of lines Concordance prints at the top of a page when splitting a document between pages. If the lines left

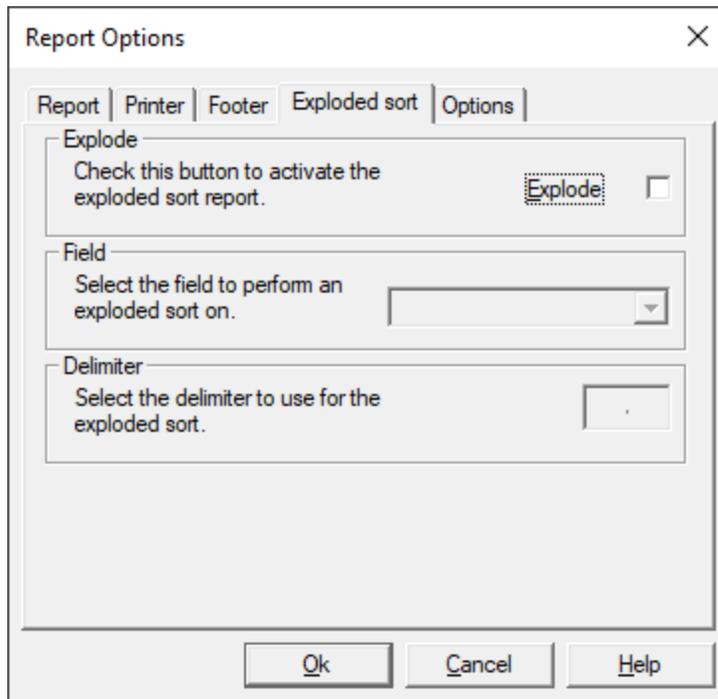
to print are less than the value in the **Orphans** field, then lines are borrowed from the previous page until the orphan minimum is met. This may cause the preceding page to go below the **Widows** threshold, causing the entire column to print at the top of the next page.

13. To adjust paper size, page orientation or other printer options, click **Printer setup** and adjust the settings on the Page **Setup** dialog that displays.
14. Click the **Footer** tab.



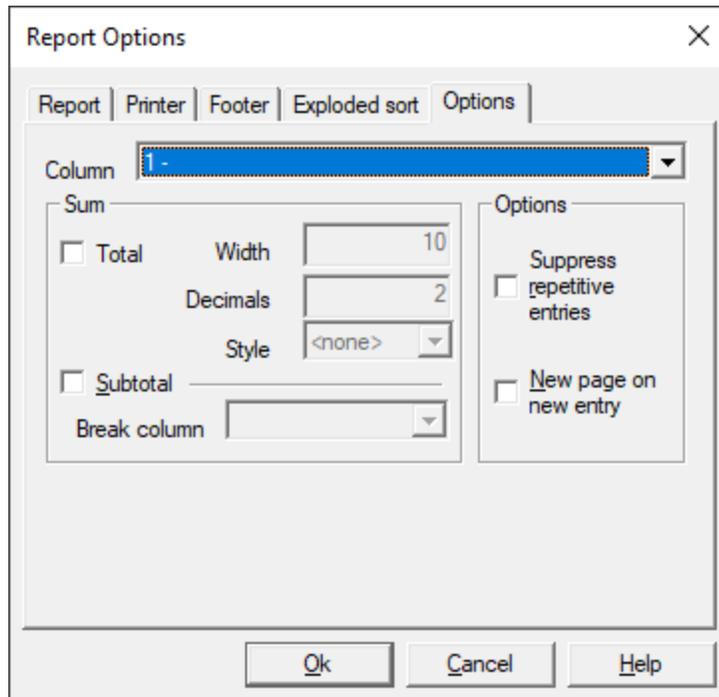
15. Adjust the footer settings based on your needs:
 - Select **Print dates** to print the current date in the lower-left corner of the report.
 - Select **Print time** to print the current time in the lower-left corner of the report.
 - Select **Page numbers** to print page numbers in the lower-right corner of the report.
 - Click **Font** to adjust the font settings for footer text. The default is Arial 9pt.

16. Click the **Exploded sort** tab.



17. An exploded sort is a report where each entry in a multiple entry field is sorted in alphabetical order and given its own line in the report as if it were a separate record. Concordance determines each sub-entry in a field by grabbing the data between delimiters such as a comma. Any punctuation character can be used as the delimiter as long as it is used consistently. If you select **Explode**, you must also **Select the field to perform an exploded sort on** and **Select the delimiter to use for the exploded sort**.

18. Click the **Options** tab.

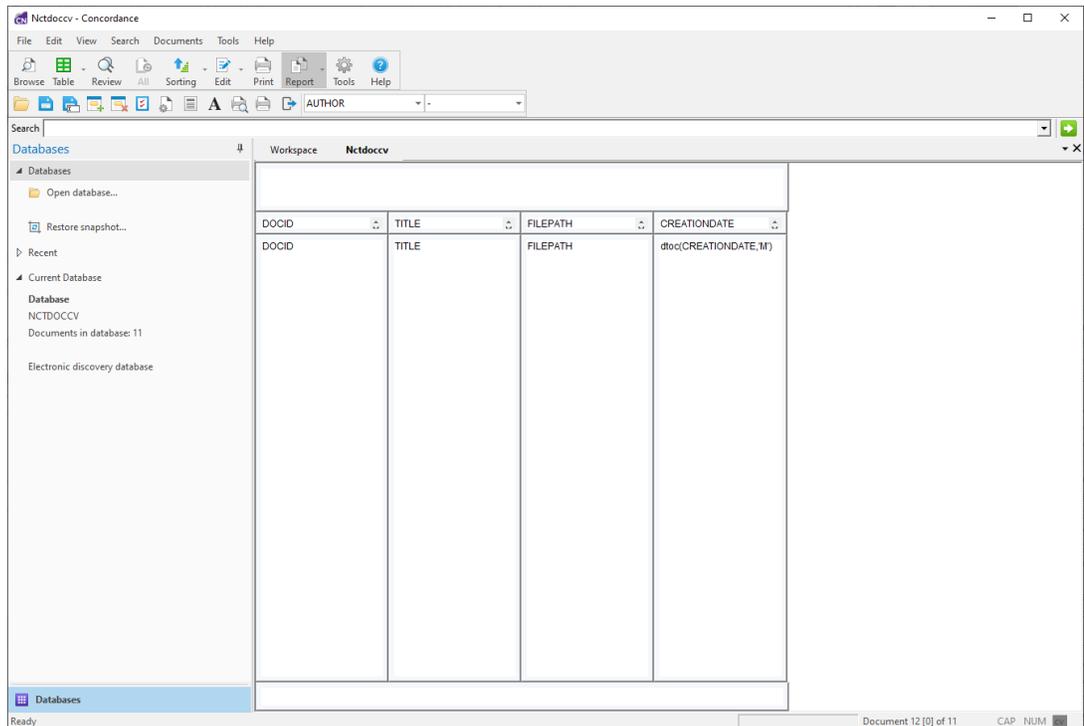


19. Select a column number in the **Column** drop down, and adjust any specific options you want for that column:

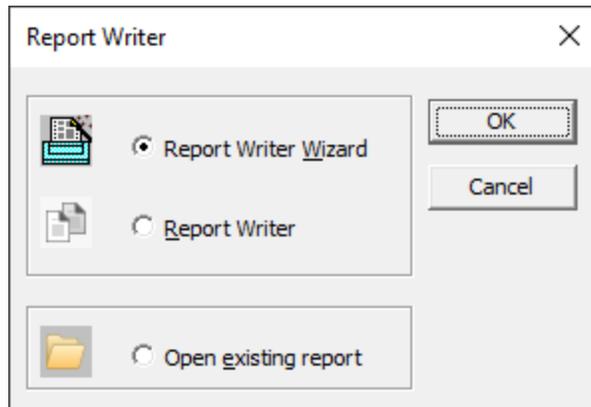
- **Total** will print a grand total of the field data in that column. If selected, provide values for **Width** (number of characters for the Total), **Decimals** (number of characters after the decimal point for the Total), and **Style** (how the total should be represented)
- **Subtotal** will print a total of the field data when broken into groups defined by **Break column**. If selected, provide the Column number from the list on the left in the **Break column** field.
- Selecting **Suppress repetitive entries** will only print the first instance of duplicate entries on the report.
- Selecting **New page on new entry** will print each record on a separate page whenever the column's contents change between one record and the next.

20. Click **Ok** to create the report template.

21. The template is displayed within the Concordance Report Writer and the Report Writer toolbar is displayed at the top.



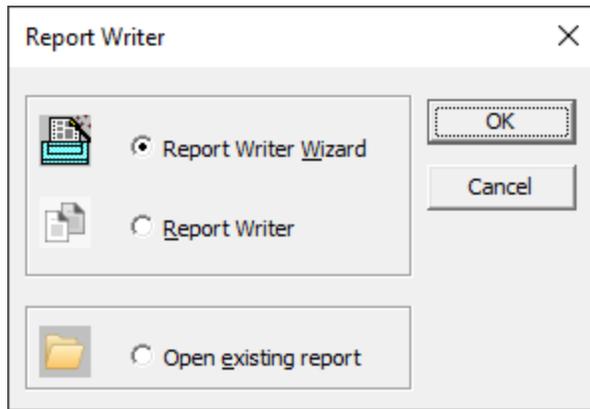
22. You can further customize the report, including adjusting the column widths, adding and removing columns, and adjusting text properties.
 23. After finishing any remaining adjustments, click **Print Preview** on the Report Writer toolbar to preview the report.
 24. If you are ready to print the report, click **Print** from the report preview.
 25. To close Report Writer, click **Exit** on the Report Writer toolbar.
-
1. In Table view, click the arrow to the right of the Report button on the Standard toolbar and select **Report writer**. The **Report Writer** dialog displays.



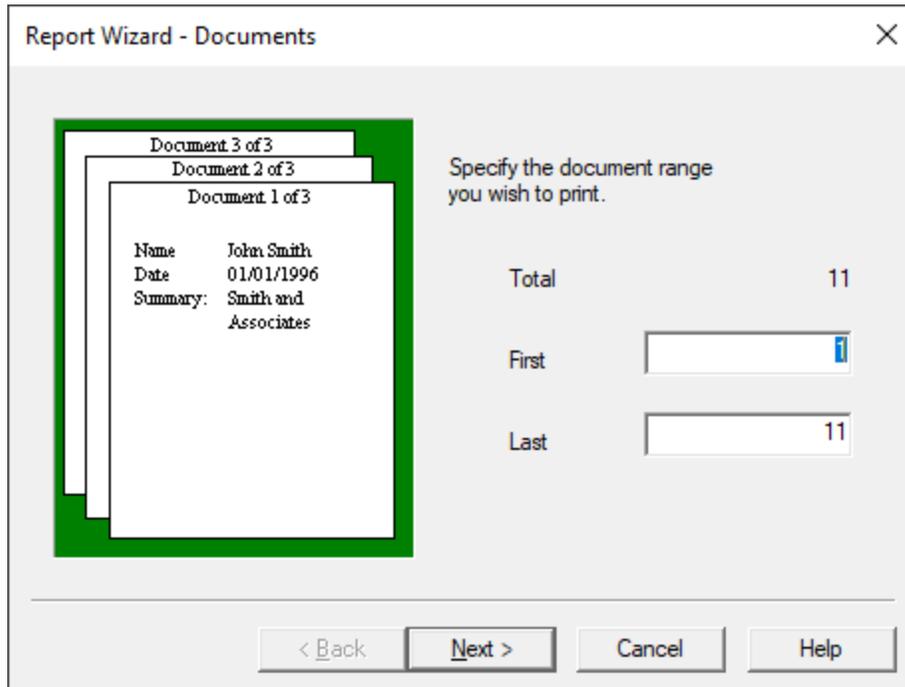
2. Select **Open existing report** and click **OK**.
3. Browse to and select a report .arp file you want to use. Click **Open**.
4. The report displays in the Concordance Report Writer.
5. Make any desired edits to the report.
6. Click Print Preview on the Report Writer toolbar to preview the report.
7. Click Print in the preview to send the report to a printer.
8. You can click **Save** or **Save As** on the Report Writer toolbar to update this report or save as a different report file.
9. To close Report Writer, click **Exit** on the Report Writer toolbar.

Using the Report Writer Wizard

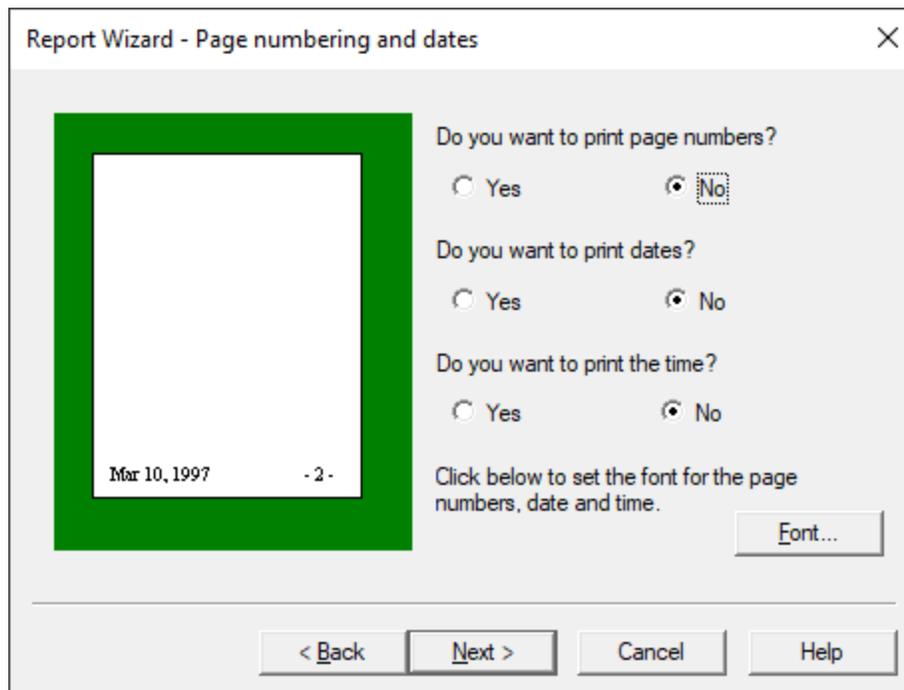
1. Run a search query to locate the documents you want to include in the report.
2. In Table view, use a table layout to organize the columns and column order you want to include in the report.
3. Click the arrow to the right of the Report button on the Standard toolbar and select **Report writer**. The **Report Writer** dialog displays.



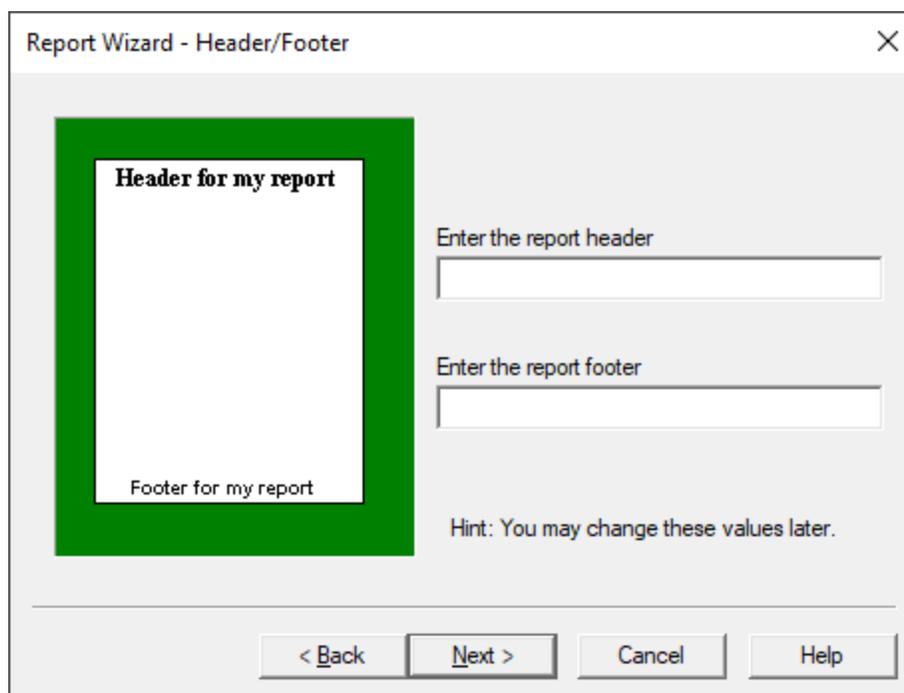
4. Select **Report Writer Wizard** and click **OK**. The **Report Wizard - Documents** dialog displays.



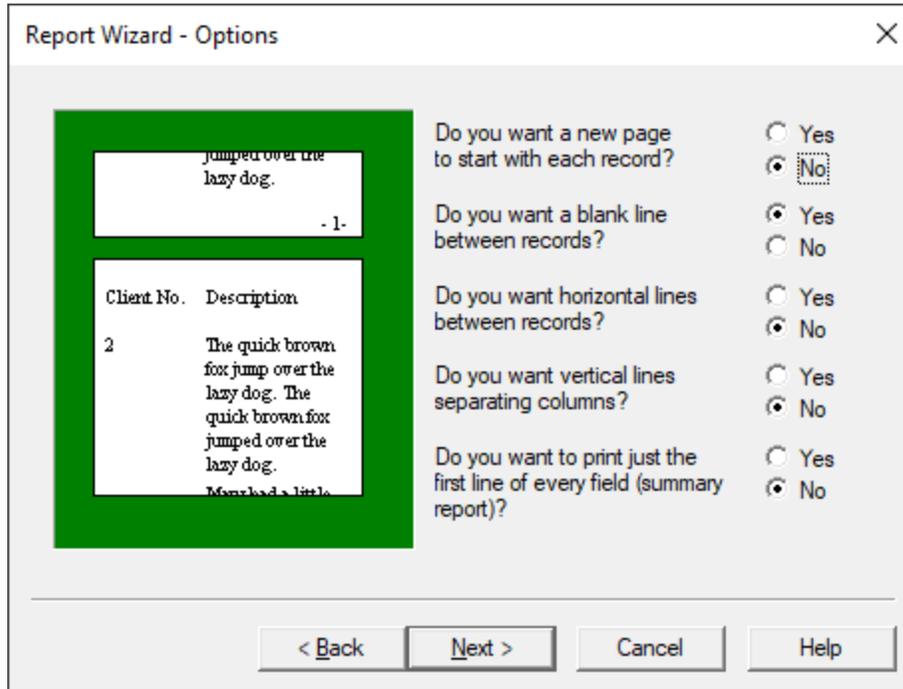
5. The **First** and **Last** fields are set to the first and last record numbers for the current Concordance query. You can modify these values to whatever records you want to use with the report writer.
6. Click **Next**. The **Report Wizard - Page numbering and dates** dialog displays.



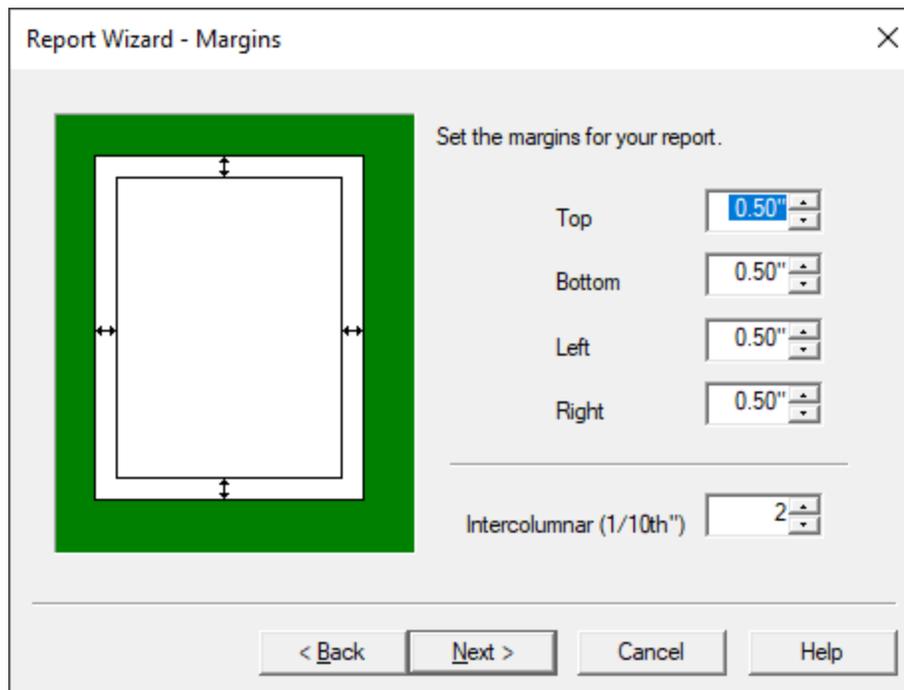
7. Select **Yes** or **No** for the three options displayed for page numbers, dates, and time. Click **Font** to display the **Font Dialog** and modify the font used to print page numbers, date, and time.
8. Click **Next**. The **Report Wizard - Header/Footer** dialog displays.



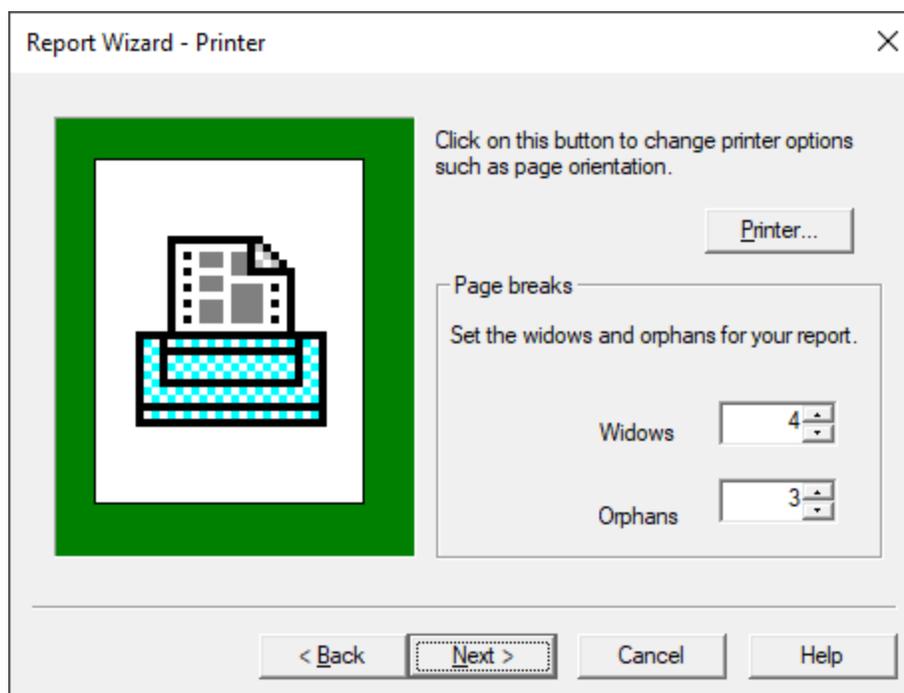
- If desired, fill in **Enter the report header** and **Enter the report footer** with text to be used for your report.
- Click **Next**. The **Report Wizard - Options** dialog displays.



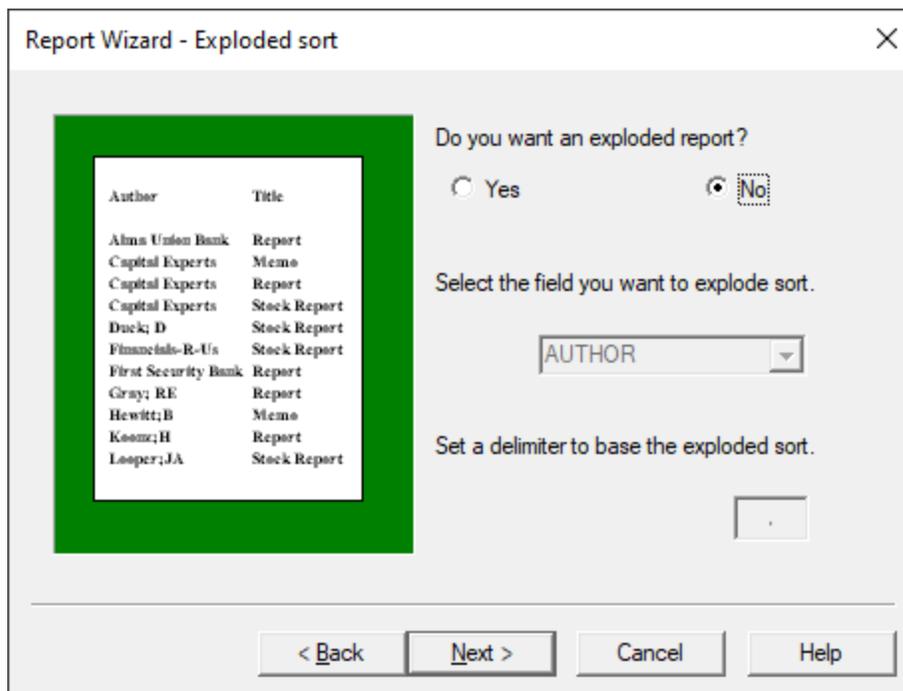
- Select **Yes** or **No** for the five options displayed for report record break, column border, and summary.
- Click **Next**. The **Report Wizard - Margins** dialog displays.



13. If desired, edit any of the print margins. Margin sizes are represented in inches. You can also update the spacing between columns in your report by adjusting the **Intercolumnar** value (represented in tenths of an inch).
14. Click **Next**. The **Report Wizard - Printer** dialog displays.



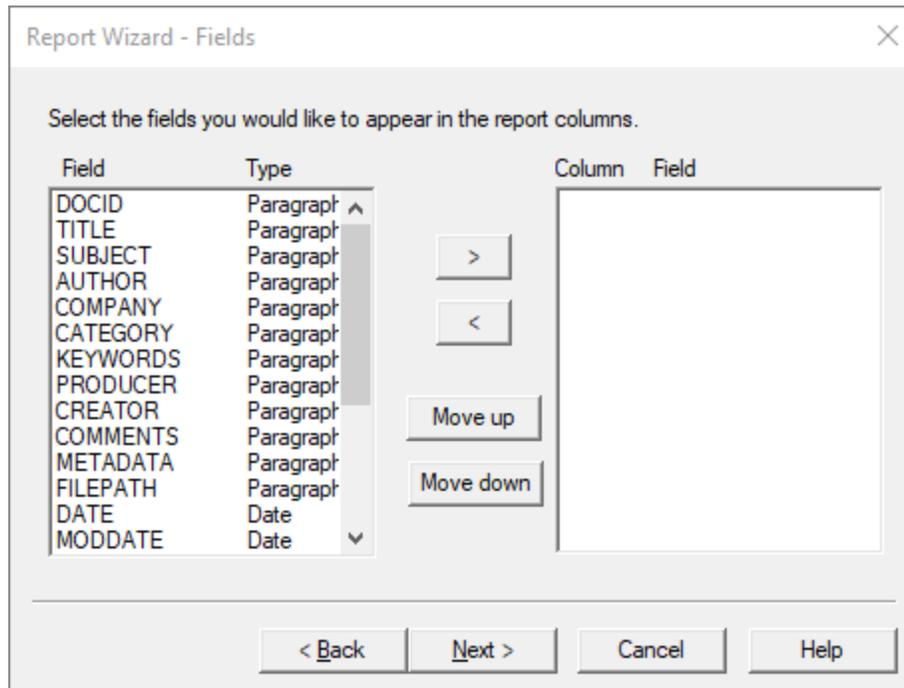
15. Click **Printer** to see the **Page Setup** dialog and adjust the paper, orientation, and margin settings. Click **OK** to return to the **Report Wizard - Printer** dialog.
16. The **Widows** field controls the minimum number of lines Concordance will allow to remain at the bottom of a page. If the number of lines to print at the bottom of the page is less than the value in the **Widows** field, then the document is moved to the top of the next page.
17. The **Orphans** field controls the minimum number of lines Concordance prints at the top of a page when splitting a document between pages. If the lines left to print are less than the value in the **Orphans** field, then lines are borrowed from the previous page until the orphan minimum is met. This may cause the preceding page to go below the **Widows** threshold, causing the entire column to print at the top of the next page.
18. Click **Next**. The **Report Wizard - Exploded sort** dialog displays.



19. Select **Yes** for an exploded report. An exploded sort is a report where each entry in a multiple entry field is sorted in alphabetical order and given its own line in the report as if it were a separate record. Concordance determines each sub-entry in a field by grabbing the data between delimiters such as a comma. Any punctuation character can be used as the delimiter as long as it is used

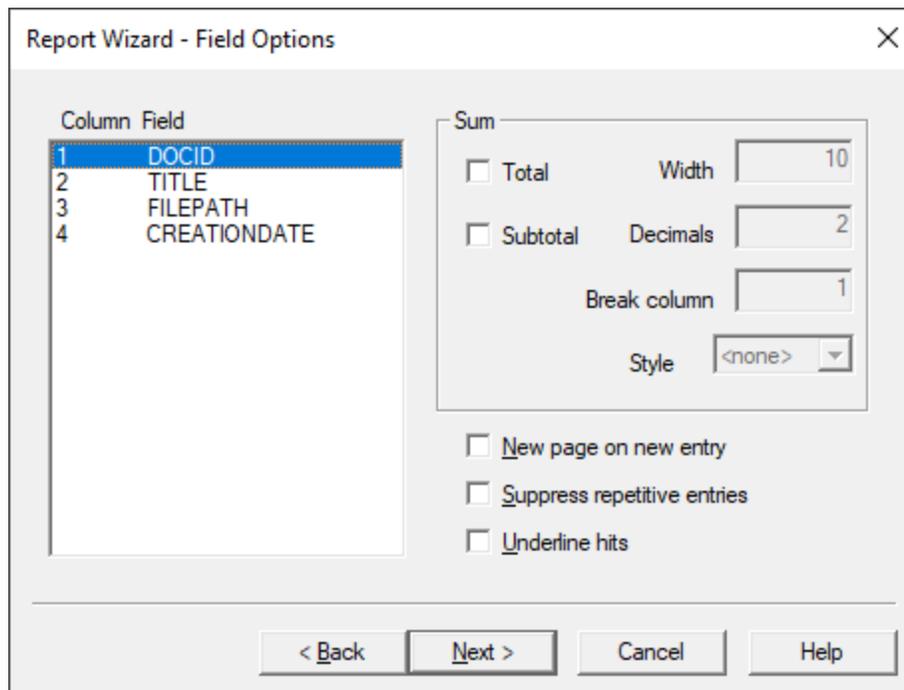
consistently. If you select **Yes**, you must also **Select the field you want to explode sort** and define a delimiter to use.

20. Click **Next**. The **Report Wizard - Fields** dialog displays.



21. The wizard automatically sets the number of columns in the report to equal the number of fields selected in the **Column** list. The order the fields are listed in the **Column** list is the order the fields will be displayed in the report. Select a **Field** on the left and use the arrow and move buttons in the middle to fill the **Column** list in the appropriate order.

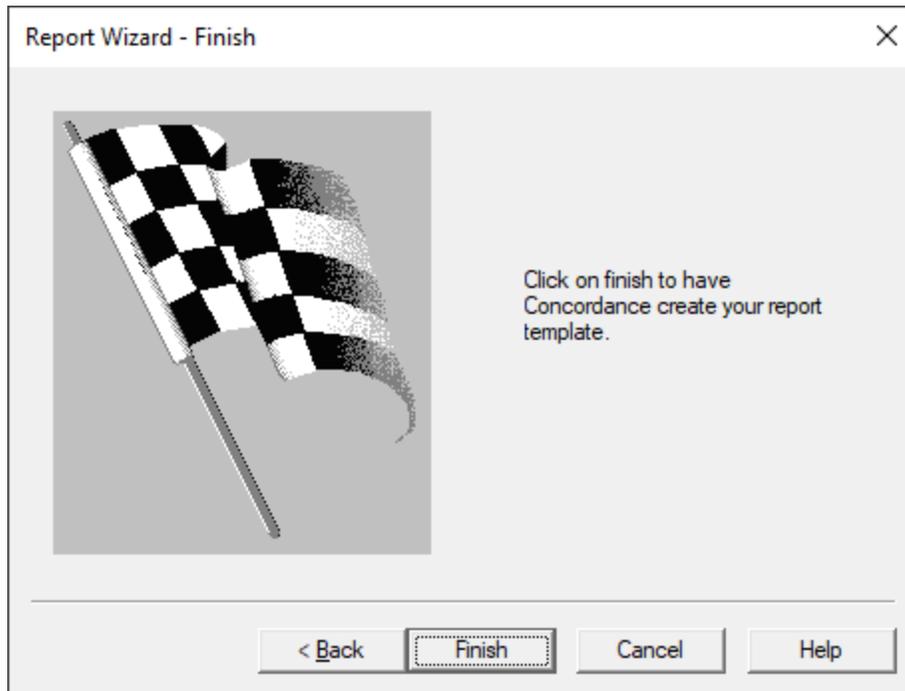
22. Click **Next**. The **Report Wizard - Field Options** dialog displays.



23. Each field can now have additional report details specified. Select a field on the left and then set the options you want on the right:

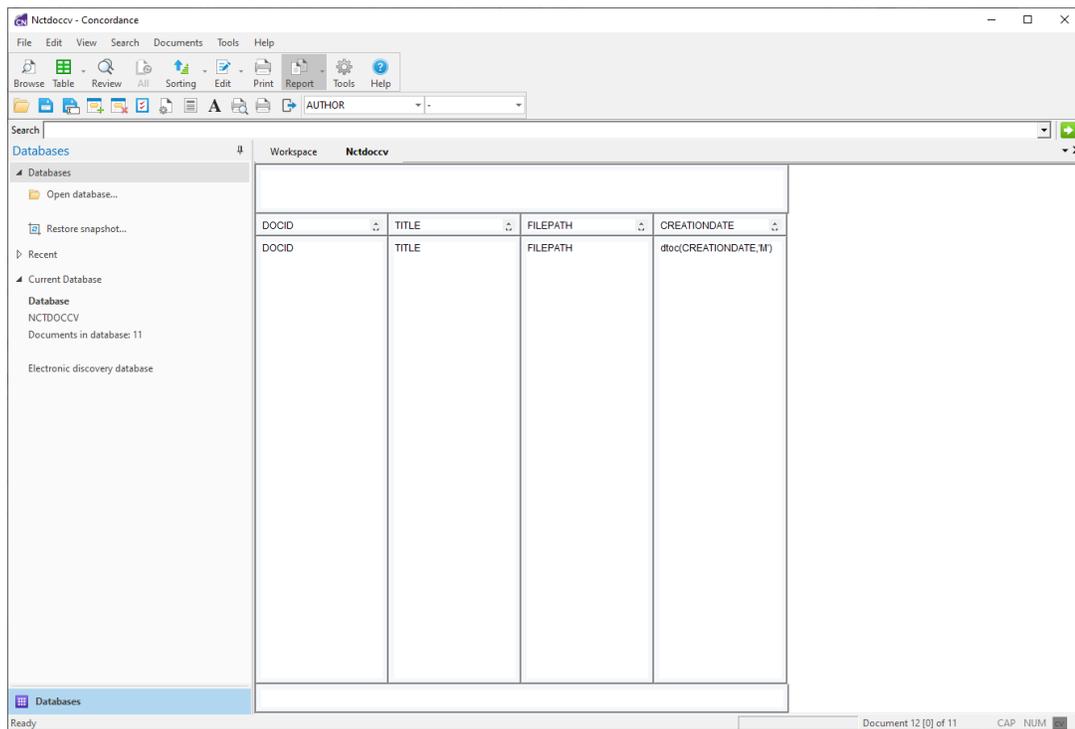
- **Total** will print a grand total of the field data in that column. If selected, provide values for **Width** (number of characters for the Total), **Decimals** (number of characters after the decimal point for the Total), and **Style** (how the total should be represented)
- **Subtotal** will print a total of the field data when broken into groups defined by **Break column**. If selected, provide the Column number from the list on the left in the **Break column** field, and **Style** (how the subtotal should be represented).
- Selecting **New page on new entry** will print each record on a separate page whenever the column's contents change between one record and the next.
- Selecting **Suppress repetitive entries** will only print the first instance of duplicate entries on the report.
- Selecting **Underline hits** will show all search hits in the selected field underlined in the report.

24. Click **Next**. The **Report Wizard - Finish** dialog displays.



25. Click **Finish** to create the report template.

26. The template is displayed within the Concordance Report Writer and the Report Writer toolbar is displayed at the top.



27. You can further customize the report, including adjusting the column widths, adding and removing columns, and adjusting text properties.
28. After finishing any remaining adjustments, click **Print Preview** on the Report Writer toolbar to preview the report.
29. If you are ready to print the report, click **Print** from the report preview.
30. To close Report Writer, click **Exit** on the Report Writer toolbar.

Security

Concordance features a two-key system for accessing the security console's Security dialog box. Depending on the role of each reviewer, users may need different levels of access to each part of the system. Some staff may even warrant having administrator-level access while others only need minimal access to Concordance to review records. Security access to the database requires some forethought and preliminary planning based on user roles, which should be outlined before you administer rights to the system.

Enabling security is optional. Once security is enabled, you also have the option to require a logon. Concordance can restrict security for fields and menu items. For increased security, you should require a database logon.

Based on the security profile setup, you can prevent most reviewers from seeing any administrator-level menu options or features. These items do not display at all or are unavailable for selection. Users can be assigned full read/write access, read-only access, write-only access, and no access on a field-by-field basis. Users without read access are unable to view or search on restricted fields. Their searches are post-processed to remove any references to these fields, so their searches may run slightly slower and hit counts may not provide the same results as users with full privileges.

Enabling security requires temporary exclusive control of the database. Only one administrator user ID and password is allowed per database. The administrator user ID and password is set when the Security dialog box is first accessed. This information should be shared with a supervisor or one other administrator, with a copy of all security settings stored on your network in a secure location.

Security Overview

- Administrator and user passwords are encrypted with the SHA-1 standard in the .dcb and .sec files.
- Best practice is to create an account for the Concordance administrator with full rights to everything upon first setup at the Supervisor permissions level.
- If you enable security and do not require logons, Concordance captures a user's network login and compares it to the user list in the database's Security dialog box. If a match is found, then the user receives corresponding rights. If a match is not found, the user receives the default user rights.
- Security is distinct to each database; you must create and modify user permissions for each database. You can import a .csv file from another database to speed up the process.
- New users select their passwords when first logging on to Concordance.

Logons and Passwords

Passwords for each user are set when the user first logs on to Concordance. The first word entered as a password is then confirmed in a security dialog box. Users can change their passwords at any time.

User ID and Password Rules:

- User IDs – 24-character maximum, not case sensitive, spaces allowed. It is best to match these to a user's Windows or network ID.
- Passwords – 24-character maximum, case sensitive, created on first access, slash characters are not allowed in passwords
- Blank user names are not allowed in Concordance



Concordance only allows one administrator user ID and password per database. The database's administrator ID and password should be shared with a supervisor or one other administrator,

with a copy of all security settings stored on your network in a secure location. Once the administrator user ID and password is created it is encrypted and is not visible or accessible anywhere in Concordance.

Understanding the Default User

When first accessing the Security dialog box, you will see that a default user already exists. If you enable security, but don't check the Login required check box, Concordance first checks to see if there is a Windows or network ID matching the user name in the security console. If a match is found, then you'll be logged into that database with those security settings applied. If there is not a match, you will receive the security settings that were applied to the default user.

For a minimal level of database security, you can create users that match the Windows or network IDs for all administrators and give them full rights. Then, apply a lower level of security to the default user and apply that security setting to everyone else. Another option is to delete the default user completely.

Setting Up Security

We recommend that you set up security for all users and enable logons. To help make this task easier, we suggest you create user templates based on review team roles like attorney and paralegal. This allows you to quickly apply security for new users because role templates already contain pre-defined settings. Once a user is added to the Security dialog box based off a role template, you can further customize any access rights for each user.



When you set up security, Concordance automatically saves passwords and security setting to a .sec file. You should also export a copy of your Security dialog box security settings to a .csv file and store the file in a secure location to reference in an emergency. Share this file with your supervisor or one other administrator.

If you are setting up security and adding users to a new database, and want to import the security settings, including users, from another database, be sure to import the security settings before manually defining any security settings or users in the database.

When you import a security settings .csv file, the file overwrites all existing security settings defined in the Security dialog box.

There are three files that hold security information:

- The .trk file stores all users' field and menu access rights
- The .sec file stores all user IDs and passwords
- The .dcb file stores the security console administrator's user ID and password



If you create new users from a role template, the settings are only duplicated from one tab in the Security dialog. We recommend duplicating settings from the Field rights tab, and then selecting the user's menu rights.



Whenever you add or rename a field in the database, it is added to the database without field access rights. In the Security dialog, the No rights check box is automatically selected for the field. You will need to set the field privileges for the new or renamed field for users already entered in the Security dialog box.



When you make changes to security settings in Concordance, some security setting changes will not be applied until the database is closed and reopened.

Before you can manage the Concordance database, you must set up the Concordance administrator user ID and password. Concordance requires the

administrator user ID and password to access some of the administration menu commands.

Administrator-Only Menu Commands

On the File menu, there are several administrator-only commands:

- **Security**
- **Pack > Database**
- **Pack > Dictionary**
- **Zap**
- **Convert Single Database**
- **Bulk Convert Databases to Current Version**
- **Remove Kashida Characters**

Optional Field and Menu Restrictions

There are two options you can implement to prevent users from accessing fields and menus.

Restricting Field Access

Even if security is not applied to a database, you can apply read-only rights to fields in Data Entry Attributes dialog box . Any field marked as read-only in this box applies to all database users and also overrides field rights applied in the security console.

For more information about the Data Entry Attributes dialog, see Data Validation.

Hiding Menu Items

If security is not applied to a database, you can restrict menu items from users for all Concordance databases by listing them in the Concordance_<version>.ini file. Any menu items listed in a corresponding .ini file are hidden from specified users.

Example: Entries in the .ini file are formatted as follows:

```
[DeletedMenuItems]
```

```
smithja=zap,modify
```

This example prevents user John Smith from being able to see or access the Zap and Modify menu items in any database that he accesses through the Concordance executable sharing the same folder as the .ini file. Concordance recognizes the user's Windows or network user ID to apply the restriction of menu items.

This feature is only available when Concordance security is not enabled on the Field rights tab in the Security dialog, and it does not allow you to hide custom menu items.



Users can potentially find the .ini file on your organization's network and then modify it. We recommend hiding menu items in the security console as the highest level of security.

Security Guidelines for Concatenated Databases

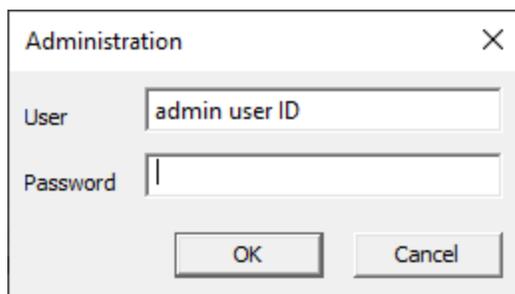
Setting up security for concatenated databases includes the following guidelines:

- Security settings need to be set up in each database. Setting security in a concatenated database set only affects the primary database.
- The user name and password must be the same for all databases in the concatenated set when security is enabled.

- When the user name and password in the primary database does not exist in a secondary database, and security is enabled, the concatenated database will not open. The user will receive a message that they do not have access rights to the specific database.
- When a secondary database has security enabled and the primary database does not have security enabled, the user is prompted for the user name and password when using the secondary database. The user name and password entered becomes the user name and password for the concatenated database set.

Setup the Concordance Administrator Account

1. Open the database in Concordance.
2. On the **File** menu, point to **Administration**, and click **Security**. The first time you click Security in the database, the **Administration** dialog displays. The **User** field defaults to the your Windows user ID.

A screenshot of the 'Administration' dialog box. The dialog has a title bar with the text 'Administration' and a close button (X). It contains two text input fields: 'User' with the text 'admin user ID' and 'Password' which is empty. At the bottom, there are two buttons: 'OK' and 'Cancel'.

The first time you attempt to login to the security console, you may notice a slight delay due to improvements to Concordance security encryption and logging features.

3. In the **User** field, type the administrator user ID. Blank user names are not allowed in Concordance.
4. In the **Password** field, type the administrator password.



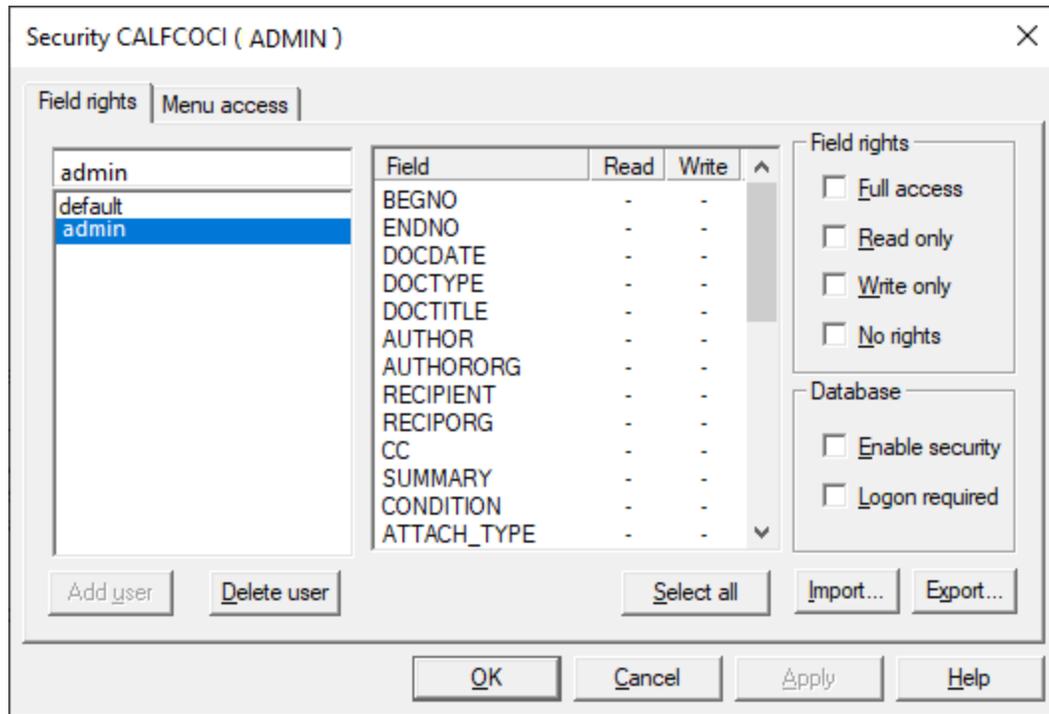
If you do not want to set the password to open the Security dialog box, leave the password empty and click OK. However, this allows anyone else to enter their own user name (or yours) and a password, locking you out of the administration functions or the database.

5. Click **OK**. The **Confirm New User/Password** dialog displays.
6. In the **User** field, type the administrator user ID again.
7. In the **Password** field, type the administrator password again.



Concordance only allows one administrator user ID and password per database. The database's administrator ID and password should be shared with a supervisor or one other administrator, with a copy of all security settings stored on your network in a secure location. Once the administrator user ID and password is created it is encrypted and is not visible or accessible anywhere in Concordance.

8. Click **OK** to open the **Security** dialog.



9. You will see the administrator user ID and the default user ID in the user list on the left of the **Field rights** tab. By default, new users, including the administrator user ID, will have no rights on the Field rights tab and full menu access rights on the Menu access tab.
10. On the **Field rights** tab, make sure that the administrator user ID is selected in the user list.
11. Click the **Select all** button to select all the database fields, and select the **Full access** check box.
 - Clicking the Select all button and selecting the Full access check box gives the Concordance administrator full read/write access to all fields.
 - Enabling security is optional, but it is best practice to enable security for Concordance databases.
12. To enable security for all users, select the **Enable security** check box. Once the Enable security check box is selected, Concordance enforces the field privileges for the users in the users list on the Field rights tab. This generally works on networks without requiring manual user IDs and passwords for each database.

13. To require all users to log on to Concordance each time they access Concordance, select the **Logon required** check box.



Selecting Logon required affects database access in FYI Reviewer. If selected, the user needs to log on with a non-blank password to access this database in FYI Reviewer. Be sure to inform FYI Reviewer users when setting the database security to Logon required.

- Enabling security requires momentary exclusive control of the database. Concordance attempts to gain exclusive control of the database when you save the Enable security and/or Logon required setting. An error message is displayed if users are logged on to Concordance and Concordance could not make the change. The check boxes will remain selected after you click OK or the Apply button if the change was successful.
 - If you do not want to enable security for the database, leave the Enable security and Logon required check boxes empty.
14. With the administrator user ID still selected in the user list, click the **Menu access** tab.
 15. Click the **Supervisor** button to ensure the administrator user ID has full rights to everything in Concordance.
 16. Click the **Apply** button to save the administrator user and its security settings.

Modify a User, Including the Default User

When first accessing the Security dialog box, you will see that a default user already exists. If you enable security, but don't check the Login required check box, Concordance first checks to see if there is a Windows or network ID matching the user name in the security console. If a match is found, then you'll be logged into that database with those security settings applied. If there is not a match, you will receive the security settings that were applied to the default user.

For minimal level of database security, you can create users that match the Windows or network IDs for all administrators and give them full rights. Then, apply a lower level of security to the default user and apply that security setting to everyone else. Another option is to delete the default user completely.

1. On the **File** menu, point to **Administration**, and click **Security**. The **Administration** dialog displays.
2. In the **User** field, type the administrator user ID.
3. In the **Password** field, type the administrator password.
4. Click **OK** to open the **Security** dialog.
5. On the **Field rights** tab, click user name in the user list.
 - If you are modifying the default user, click default in the user list.
 - By default, the No rights check box is selected for all fields.
6. In the **Field** list, select the fields you want to apply field rights. To select multiple fields, use CTRL+click or SHIFT+click.
7. In the **Field rights** section, select one of the following:
 - **Full access** - gives users read/write access to a field. This level of access for all fields is required for anyone who will be performing maintenance functions such as indexing, packing, or a database modify. If the user does not have full access to the fields, Concordance does not either.
 - **Read only** - gives users the ability to search, browse, and print the field. They may not edit or otherwise modify read-only fields. Commands such as Global edit and Load will not display fields which have read-only access. These fields are displayed in Edit view, but only for reference or to copy text to the clipboard.
 - **Write only** - gives users limited access. Users with write-only field access can load data into these fields using Load, and assign values to them through the programming language, but they will not be able to view or search these fields. The Edit view will not display write-only fields and therefore they cannot be edited. The searches will be post-processed to remove any references to hits in these fields. The searches may also run slower.

- **No rights** - denies all access to the field. Users will not be able search for data in these fields. Searches will be post-processed to remove any references to hits in these fields. The searches may run slower and the results may not contain the same count as a search with read-only field access.



Field privileges do not take effect until the database is closed and reopened.

8. Click the **Menu access** tab.

- By default, new users have full access to all menus and menu commands on the Menu access tab. You can manually select the menu access permissions for each menu, select one of the menu access presets, or select a preset and then manually customize the menu permissions for the individual user.
- Menu access presets:
 - **Supervisor** - access to all menus and menu commands.
 - **Administrator** - access to all menus and menu commands except the Modify, Security, and Zap menu commands.
 - **Editor** - no access to the menu commands restricted in the Administrator preset and does not have access to the following menu commands: New, Reindex, Index, Pack, Begin program, Edit program, or the menu commands for data validation . Editors can, of course, search and edit, global edit, load and unload data, and run reports.
 - **Researcher** - no access to the menu commands restricted in the Administrator and Editor presets, and cannot edit or append, load, overlay, or import data, perform global edits, or unload a copy of the database's structure.
 - **No access** - no access to any menus or menu commands. User can only open and exit the database.
- After selecting one of the menu preset buttons, you can explore the menu tree on the Menu access tab to view the default menu settings provided by Concordance for the selected preset. You can further customize the menu

settings for each user depending on the user's role and skill level, as needed.

- When a menu or menu command check box is selected, the user has access to this menu or menu command.
 - When a menu check box is selected but the check box is gray, the user has access to the menu, but does not have access to some of the menu commands on the menu.
 - When a menu or menu command check box is not selected (blank), the user does not have access and cannot view the menu or menu command in Concordance.
9. In the **Presets** section, click one of the menu access preset buttons, and/or manually define the menu and menu command access for the user in the menu tree.
 10. Click the **Apply** button to save your changes to the user settings.

Create Role Templates

Role templates allow you to use pre-defined field rights or menu access settings when you create a new user to help speed up the user creation process. For example, you can create a role template for your most commonly used roles, such as attorney, paralegal, and reviewer, and use the templates each time you create a user ID for one of your attorneys, paralegals, or reviewers.

The steps for creating a role template are the same as the steps for creating a new user. The only difference is that you will be using this role template user to create individual users in Concordance.

1. In the **Security** dialog box, click the **Field rights** tab.
2. In the field above the user list, select all the text of the user name currently selected in the user list, and type the role template name.
3. Click the **Add user** button.

4. On the **Field rights** tab, define the field rights for the role template.
5. Click the **Menu assess** tab and define the menu access rights for the role template. See the next section for specific steps for defining field and menu access rights.
6. Click the **Apply** button to save your settings.

Create a User

1. On the **File** menu, point to **Administration**, and click **Security**. Clicking Security opens the **Administration** dialog.
2. In the **User** field, type the administrator user ID.
3. In the **Password** field, type the administrator password.
4. Click **OK** to open the **Field rights** tab in the **Security** dialog.
5. When you are creating a user from an existing role template, you can only use the field rights settings or menu access settings from the role template to create a new user. You cannot use both the field rights and menu access settings from a role template to create a new user. We recommend duplicating settings from the Field rights tab, and then selecting the user's menu rights on the Menu access tab.
6. To use the field rights settings from a role template, on the **Fields rights** tab, in the field above the user list, select all the text of the user name currently selected in the user list, and type the new user name.
7. To use the menu access settings from a role template, click the **Menu access** tab, in the field above the user list, select all the text of the user name currently selected in the user list, and type the new user name.



The FYI Server and FYI Reviewer do not support user names, passwords, or database names containing characters in Unicode, such as Chinese or Japanese characters. Currently, FYI Server and

FYI Reviewer only support user names, passwords, or database names containing single-byte characters, such as English characters.

If your organization uses FYI Server and FYI Reviewer, be sure to only use single-byte characters when creating user names, passwords, and database names in Concordance.

8. Click the **Add user** button.
9. To modify the field rights settings, click the **Field rights** tab.
10. By default, the **No rights** check box is selected for all fields, unless you created the new user from a role template on the **Field rights** tab, in which case, the new user will have the same field rights as the role template.
11. In the **Field** list, select the fields you want to apply or remove field rights. To select multiple fields, use CTRL+click or SHIFT+click.
12. In the **Field rights** section, select one of the following:
 - **Full access:** gives users both read/write access to a field. This level of access for all fields is required for anyone who will be performing maintenance functions such as indexing, packing, or a database modify. If the user does not have full access to the fields, Concordance does not either.
 - **Read only:** gives users the ability to search, browse, and print the field. They may not edit or otherwise modify read-only fields. Commands such as Global edit and Load will not display fields which have read-only access. These fields are displayed in Edit view, but only for reference or to copy text to the clipboard.

The read-only setting for fields in the Data Entry Attributes dialog box takes precedence over the read-only setting for fields on the Field rights tab in the Security dialog box.



For example, if the Read only check box is selected for the OCR1 field in the Data Entry Attributes dialog box, and the Full access

check box is selected for the OCR1 field on the Field rights tab in the Security dialog box, the OCR1 field will be read-only for the user in the Edit view.

For more information about the Data Entry Attributes dialog box, see Data Validation.

- **Write only:** gives very limited access. Users with write-only field access can load data into these fields using Load, and assign values to them through the programming language, but they will not be able to view or search these fields. The Edit view will not display write-only fields and therefore they cannot be edited. The searches will be post-processed to remove any references to hits in these fields. The searches may also run slower.
 - **No rights:** denies all access to the field. Users will not be able search for data in these fields. Searches will be post-processed to remove any references to hits in these fields. The searches may run slower and the results may not contain the same count as a search with read-only field access.
13. Click the **Menu access** tab. By default, new users have full access to all menus and menu commands on the **Menu access** tab, unless you created the new user from a role template on the **Menu access** tab in which case, the new user will have the same menu access settings as the role template.
- You can manually select the menu access permissions for each menu, select one of the menu access presets, or select a preset and then manually customize the menu permissions for the individual user.
 - Menu access presets:
 - **Supervisor:** user has complete access to all menus and menu commands.
 - **Administrator:** user has access to all menus and menu commands except the Modify, Security, and Zap menu commands.
 - **Editor:** user does not have access to the menu commands restricted in the Administrator preset and does not have access to the following menu commands: New, Reindex, Index, Pack, Begin program, Edit program, or the menu commands for data validation . Editors can, of

course, search and edit, global edit, load and unload data, and run reports.

- **Researcher:** user does not have access to the menu commands restricted in the Administrator and Editor presets, and cannot edit or append, load, overlay, or import data, perform global edits, or unload a copy of the database's structure.
- **No access:** user does not have access to any menus or menu commands. User can only open and exit the database.
- After selecting one of the menu preset buttons, you can explore the menu tree on the Menu access tab to view the default menu settings provided by Concordance for the selected preset. You can further customize the menu settings for each user depending on the user's role and skill level, as needed.
- When a menu or menu command check box is selected, the user has access to this menu or menu command.
- When a menu check box is selected but the check box is gray, they user has access to the menu, but does not have access to some of the menu commands on the menu.
- When a menu or menu command check box is not selected (blank), the user does not have access and cannot view the menu or menu command in Concordance.

14. In the **Presets** section, click one of the menu access preset buttons, and/or manually define the menu and menu command access for the user in the menu tree.

15. Click the **Apply** button to save your new user settings.



Field rights and menu access settings do not take effect until the database is closed and reopened.

Delete a User

1. On the **File** menu, point to **Administration**, and click **Security**. Clicking Security opens the **Administration** dialog.
2. In the **User** field, type the administrator user ID.
3. In the **Password** field, type the administrator password.
4. Click **OK** to open the **Field rights** tab in the **Security** dialog box.
5. Click the user name in the user list and click the **Delete user** button.
6. Click **OK** to close the **Security** dialog box.

Exporting Security Settings

You can export the security settings from a Concordance database and import them into another Concordance database. When you export Concordance security settings, you are exporting all of the security settings, including users, that are defined for the database in the Security dialog box. The exported settings can be used to set up a database template with your security specifications.



It is best practice to always export a copy of your security settings each time you update them so you have a current backup copy to reference. Be sure your supervisor or secondary database administrator has access to this file in case of an emergency.

1. On the **File** menu, point to **Administration**, and click **Security**. Clicking Security opens the **Administration** dialog.
2. In the **User** field, type the administrator user ID.
3. In the **Password** field, type the administrator password.
4. Click **OK** to open the **Field rights** tab in the **Security** dialog box.

5. Click the **Export** button.
6. Navigate to where you want to save the exported security settings file, type the name of the file in the **File name** field, make sure that **Comma separated file (*.csv)** is selected in the **Save as type** field, and click **Save**. It is best practice to store this file in a separate, secure folder on your network.
7. Click **OK** to close the **Security** dialog box.

Here is an example of exported security settings file in a spreadsheet:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Fields	BEGNO	ENDNO	DOCDATE	DOCTYPE	DOCTITLE	TO	FROM	PAGES	OCR1	OCR2	ADMIN1	ADMIN2
2	Delete DEFAULT												
3	Rights DEFAULT	r	r	r	r	r	r	r	r	r	r	w	w
4	Delete ADMIN												
5	Rights ADMIN	rw	rw	rw	rw	rw	rw	rw	rw	rw	rw	rw	rw
6	Delete ATTORNEY												
7	Rights ATTORNEY	r	r	r	r	r	r	r	r	r	r	w	w
8	Delete PARALEGAL												
9	Rights PARALEGAL	r	r	rw	rw	rw	rw	rw	rw	rw	rw	rw	rw
10	DeletedMenuItems paralegal=MODIFY												
11	DeletedMenuItems paralegal=ZAP												
12	DeletedMenuItems paralegal=SECURITY												
13	DeletedMenuItems attorney=MODIFY												
14	DeletedMenuItems attorney=MANAGE LIST FILES												
15	DeletedMenuItems attorney=INDEX												
16	DeletedMenuItems attorney=IMPORT												

Importing Security Settings

You can import the security settings from one Concordance database into another Concordance database. When you import Concordance security settings, you are importing all of the security settings, including users, that were defined for the database in the Security dialog box.

The import requires at least one commonly named field between the .csv file and the database to which the file is being imported. Before importing a .csv file exported from another Concordance database, make sure that there is at least one commonly named field. For example, the security settings for the DOCTITLE field are exported to the security settings .csv file, and the .csv file is being imported into a database also containing a field named DOCTITLE.



If you are setting up security and adding users to a new database, and want to import the security settings, including users, from another database, be sure to import the security settings before manually defining any security settings or users in the database.

When you import a security settings CSV file, the file overwrites all existing security settings defined in the Security dialog box.

1. On the **File** menu, point to **Administration**, and click **Security**. Clicking Security opens the **Administration** dialog.
2. In the **User** field, type the administrator user ID.
3. In the **Password** field, type the administrator password.
4. Click **OK** to open the **Field rights** tab in the **Security** dialog box.
5. Click the **Import** button.
6. Browse to and click the .csv file containing the security settings you want to import and click the **Open** button.
7. The security settings from the file are imported into the database. If there were any existing security settings defined in the Security dialog box, they are overwritten by the security settings defined the .csv file during the import.
7. Click **OK** to close the **Security** dialog box.

Modifying Security Settings

Once a database's security and users are set up, you may need to modify the security settings, add additional users, or delete existing users.



When you make changes to security settings in Concordance, some security setting changes will not be applied until the database is closed and reopened.

Resetting Lost Passwords

To reset security accounts, you must know the Concordance user ID and password. Otherwise your options are limited based on your needs and access.

If a user has forgotten a password, simply delete the account and make a new one. This is another good reason to set up user role templates in the Security dialog for faster user set up. The user creates a new password upon first log on.

Resetting All Users

If you need to reset all user passwords or have forgotten your user ID but still have the security console administrator's user ID and password, you can do so by deleting or renaming the .sec file. This file is located in the same directory as your database and stores all user IDs and passwords.

By deleting or renaming the file, you are able to open the database with the security console administrator's user ID and password. Once you login, you won't see any data because security is still enabled, but you can access Security to reset all users to the database by importing a backup copy of your security settings.

You must know the database's administrator user ID and password for this process.

1. Navigate to the directory containing the database .sec file containing the database users you want to reset. A database's .sec file is stored in the same directory as the database .dcb file.
2. Rename or delete the .sec file.
3. In Concordance, open the database that needs security updated.
4. The logon dialog box opens the first time you log on.
5. Click **Cancel**. Clicking Cancel opens the Administration logon dialog.
6. In the **User** field, type the administrator's user ID.
7. In the **Password** field, type the administrator's password.

8. Click **OK**. After clicking OK, the database opens, but no data is visible.
9. On the **File** menu, point to **Administration**, and click **Security**.
10. Click the **Import** button.
11. Browse to and click the .csv file containing the users and security settings you want to import and click the Open button.
12. The security settings from the file are imported into the database. If there were any existing security settings defined in the **Security** dialog, they are overwritten by the security settings in the .csv file during the import.
13. Click **OK** to close the **Security** dialog.

Enabling or Disabling Security

Enabling security is optional, but it is best practice to enable security for Concordance databases. Security is enabled on the **Field rights** tab in the **Security** dialog.

1. On the **File** menu, point to **Administration**, and click **Security**. The **Administration** dialog displays.
2. In the **User** field, type the administrator user ID.
3. In the **Password** field, type the administrator password.
4. Click **OK** to open the **Field rights** tab in the **Security** dialog.
5. To enable security for all users, select **Enable security**. To disable security, unselect **Enable security**. If **Enable security** is selected, Concordance enforces the field privileges for the users in the users list on the **Field rights** tab. This generally works on networks without requiring manual user IDs and passwords for each database.
6. To require all users to log on to Concordance each time they access Concordance, select **Logon required**.



Selecting **Logon required** affects database access in FYI Reviewer. If selected, the user needs to log on with a non-blank password to access this database in FYI Reviewer. Be sure to inform FYI Reviewer users when setting the database security to **Logon required**.

7. Enabling security requires momentary exclusive control of the database. Concordance attempts to gain exclusive control of the database when you save the **Enable security** and/or **Logon required** setting. An error message is displayed if users are logged on to Concordance and Concordance could not make the change. The check boxes remain selected after you click **OK** or **Apply** if the change was successful.
7. Click **Apply** to save your changes.

Accessing Locked Databases

If your organization finds itself unable to access a database, you have two options available:

1. Export the Database - When exporting a Concordance database, security is not included in the export. If you have a user who has access to the Export menu, the user can export the database, create a new security administrator ID and password, and then apply security for all users. When exporting a database, the user is only able to export the fields that the user has access to under the existing security settings. You can also import the backup copy of the original database's security settings into the exported database. For more information see [Exporting Data](#)^[113].
2. [Contact Concordance Technical Support](#)^[405] - Concordance Technical Support analysts can reset your security console and restore all user IDs and passwords. This is not quickly done, and has the following requirements:
 - You must first supply a technical support analyst with a notarized affidavit from the owner of the database verifying your security files. This is most often from your corporate entity and requires a legal document on corporate letterhead with the appropriate stakeholders signature.

- A fee will be assessed before a technical support representative has permission to overwrite your security.

If you do not know this information ahead of time, there will be a delay in getting approval for the support override. Please ensure that you always have a current backup copy of your security profiles and settings, and that a supervisor or secondary administrator has access to this information in case of an emergency.

Exporting Security Logs

Security logging generates an audit trail of all changes to the security settings of a Concordance database. The log includes changes to user logins and permissions, importing or exporting security settings, and the start and end of security sessions.

Security logging is database-centered. Each Concordance database has its own security log, so only the actions affecting the security for the specific database are recorded in that database's security log.

Security logging occurs for a database when:

- An administrator in Concordance opens the **Security** dialog and makes changes to the security settings.
- An administrator in the Concordance FYI Admin Console opens the Management tab and adds or deletes a user from a database, or changes the password for a user belonging to a database.

You can view a database's security log by exporting the log and viewing the log file in Microsoft Excel. Exporting a Concordance database's security log generates the <database>_SecurityLog_Dump.csv file. The .csv file's text format is in the Unicode Standard. Fields are tab-delimited. Exporting a security log copies the information to a file, but does not delete the information from the log.

Enabling and Disabling Security Logging

Security logging is enabled by default for new databases. If you have an existing Concordance database you want to generate security logs, you need to enable security logging for the database. The DumpSLog.exe utility can enable or disable security logging for a database using the /enable or /disable parameter. When you disable security logging for a database, the utility deletes all existing security log information for the database.

The DumpSLog.exe file must be downloaded onto your computer before you can export security logs or enable or disable security logging using the DumpSLog utility. [Contact Concordance Technical Support](#)^[405] to download the utility.

Enable Security Logging for a Database

1. On the **Start** menu, click **Run** to open the **Run** dialog box.
2. Type **cmd** in the **Open** field and click **OK** to open a Windows command prompt.
3. Navigate to the folder containing the **DumpSLog.exe** file.
4. At the command prompt type **DumpSLog "[database path and name]" /enable** and then press Enter. Be sure to type quotation marks around the database directory in the command. For example, DumpSLog "C:\Program Files\CloudNine\Concordance 10\Database\COWCO" /enable

Disable Security Logging for a Database

1. On the **Start** menu, click **Run** to open the **Run** dialog box.
2. Type **cmd** in the **Open** field and click **OK** to open a Windows command prompt.
3. Navigate to the folder containing the **DumpSLog.exe** file.
4. At the command prompt type **DumpSLog "[database path and name]" /disable** and then press Enter. Be sure to type quotation marks around the database directory in the command. For example, DumpSLog "C:\Program Files\CloudNine\Concordance 10\Database\COWCO" /disable

When security logging is disabled in a database, on the Security log tab in the Security dialog box in Concordance, the Export security log button is disabled and the following message is displayed at the bottom of the Security log tab: Security logging is not enabled for this database.

Exporting Security Logs

There are two ways to export the security log. You can export the file from:

- Concordance on the **Security log** tab of the **Security** dialog
- A Microsoft Windows command line using the DumpSLog utility. This option can be used if you want to dump security log information using a script, unattended, or in a batch process. The DumpSLog.exe file must be downloaded onto your computer before you can export security logs or enable or disable security logging using the DumpSLog utility. [Contact Concordance Technical Support](#) ⁴⁰⁵¹ to download the utility.

Export a Database's Security Log Using Concordance

1. Open the database in Concordance.
2. On the **File** menu, point to **Administration**, and click **Security**. The **Administration** dialog displays.
3. In the **User** field, type the administrator user ID.
4. In the **Password** field, type the administrator password.
5. Click **OK** to open the **Security** dialog box.
6. Click the **Security log** tab. The **Destination file** displays where the <database>_SecurityLog_Dump.csv log file will be created. The **Destination file** defaults to the directory where the database files are stored. You can edit the log file destination and file name.
7. Click **Export security log** to generate the <database>_SecurityLog_Dump.csv log file.

8. When the export finishes, the number of rows exported is displayed below the Export security log button.

To Export a Database's Security Log Using the DumpSLog Utility

1. On the **Start** menu, click **Run** to open the **Run** dialog box.
2. Type **cmd** in the **Open** field and click **OK** to open a Windows command prompt.
3. Navigate to the folder containing the **DumpSLog.exe** file.
4. At the command prompt type **DumpSLog.exe** and then press Enter.
5. The **DumpSLog Help** dialog opens and displays the DumpSLog utility's command syntax and examples. The DumpSLog utility allows dumping security log information using a script, unattended, or in a batch process. Determine what options you want to use to generate the security log.
5. Click **OK** to return to the command prompt.
6. Type the security log command you want to use and press Enter. Be sure to type quotation marks around the database directory in the command. For example, `DumpSLog "C:\Program Files\CloudNine\Concordance 10\Database\COWCO"`
7. The `<database name>_SecurityLog_Dump.csv` log file is created in the same directory as the database.

Purging Security Logs

Security logs should be purged on a regular basis for optimal database performance. Security logging information is stored in a table within the .trk file, and if the security log becomes too large, it can slow down the overall performance of the database. The DumpSLog.exe utility can delete database security logs using

the /purge parameter. When you purge a databases security log, the utility deletes all existing security log information for the database.

To Purge a Database's Security Log

1. On the **Start** menu, click **Run** to open the **Run** dialog box.
2. Type **cmd** in the **Open** field and click **OK** to open the Windows command prompt.
3. Navigate to the folder containing the **DumpSLog.exe** file.
4. At the command prompt type **DumpSLog "[database path and name]" /purge** and then press Enter. Be sure to type quotation marks around the database directory in the command. For example, DumpSLog "C:\Program Files\CloudNine\Concordance 10\Database\COWCO" /purge

Security Log Format

The security log contains the following fields:

- **RowID**
- **UniversalTime**
- **UserID**
- **UserDomainLogin**
- **UserComputerName**
- **UserIDAffected**
- **EventName**
- **EventDetail**

Security Log Event Types:

EventName	EventDetail (with sample data)
FieldRights	STARTPAGE:RW,ENDPAGE:R-
MenuAccess	Disabled: FILE
UserDeleted	SmithJH, Legal/SmithJH
UserAdded	SmithJH, Legal/SmithJH
RightsExport	To: <file path>
RightsImport	Begin import from: <file path>
RightsImport	End import from: <file path>

EventName	EventDetail (with sample data)
SessionStarted	Settings: SecurityEnabled=0 LogonRequired=0
SessionEnded	Settings: SecurityEnabled=0 LogonRequired=0

Customizations

Adding custom menus and custom menu commands to Concordance can make your administration job much easier. Having CPL scripts and databases accessible as a shortcut in a menu provides instant access to the tools you need to use frequently. You can apply these menus and menu commands to the current database or all databases. You can add custom menu commands to existing or custom Concordance menus. By default, all users will be able to use and access the custom menu and menu command. To restrict custom menus and menu commands to a specific user, you need to add the user and the custom menu command for the user in the **Added Menu Items** dialog.

If you are familiar with programming and have attended a Concordance CPL class, you can add your own CPL scripts to a custom menu, which launches these programs without having to navigate to their directory folder.



Custom menu commands are not listed in the **Security** dialog for enabling and disabling menu access. If you need to restrict access

to custom menus and menu commands, be sure to add the custom menu command to specific users in the **Added Menu Items** dialog.

The following file types can be opened from Concordance custom menus:

- Database file (.dcb, .fyi)
- CPL file (.cpt, .cpt)
- Report file (.arp)
- Print file (.fmt)
- Concatenation file (.cat)
- Snapshot file (.snp)
- Query file (.qry)
- PDF file (.pdf)

The screenshot shows the 'Added Menu Items' dialog box. It features a 'User' list with 'Default' selected, a 'Menu item' section with fields for 'File', 'Menu', 'Position', 'Display name', and 'Function', and a table for 'Added menu items' with columns for 'Menu', 'Menu Item', 'File', 'Function', and 'Position'. The 'Database' is set to 'CALFCOCI'. Buttons for 'Add', 'Delete', 'New', 'Move up', 'Move down', 'OK', and 'Cancel' are present.

Adding a Custom Menu and Menu Command

1. In Concordance, open the database you want to add a custom menu and custom menu command.
2. On the **File** menu, select **Administration**, and then **Added menu items**. The **Added Menu Items** dialog displays.
3. The **User** list comes with a pre-defined **Default** user ID. The **Default** user ID works on databases that do not have security enabled or and databases with a default user ID defined in the **Security** dialog. Creating a custom menu and/or menu command for the **Default** user ID allows all users to view and access the menu and menu command.
 - To restrict access to the custom menu and/or menu command, you need to add each of the users you want to have access to the menu and/or menu command to the **User** list, and create the custom menu and/or menu command for each of the users you created. The users you create must

already be added to the database, and the user IDs you create in the **User** list must match the users' database user IDs in the **Security** dialog.



When a user is added as a database user and then added to the **User** list in the **Added Menu Items** dialog, the custom menu commands assigned to the **Default** user in the **Added Menu Items** dialog will not be available to the added user. You will have to assign the same custom menu commands to the added user in order for the user to access these menu commands.

3. To add a user to the **User** list, click in the box above the **User** list, type in the new user name, and click the **Add** button.



Adding a user to the **User** field in the **Added Menu Items** dialog box does not add the user to the database. To add a user to the database, see [Setting Up Security](#)³²⁴.

4. To add a custom menu and/or menu command for a user in the **User** list, select the user ID in the list.
5. Specify the database for the custom menu and/or custom menu command by selecting in the **Database** drop down. Selecting **All databases** will add the custom menu and/or custom menu command to all databases.
6. In the **Menu item** section, click **New** to create the custom menu and/or menu command.
7. Click **File** button and browse to and select the file you want to launch from the custom menu command. Click **Open**. You can open the following file types:
 - Database file (.dcb, .fyi)
 - CPL file (.cpl, .cpt)
 - Report file (.arp)
 - Print file (.fmt)
 - Concatenation file (.cat)

- Snapshot file (.snp)
- Query file (.qry)
- PDF file (.pdf)



The **Added Menu Items** feature only works with specific IPRO CPL scripts. Be certain to verify the supported IPRO scripts before loading them into a database.

8. To add the custom menu command to an existing Concordance menu, in the **Menu** drop down, select the menu you want to add the custom menu command. To add a new custom menu, type the name of the new menu in the **Menu** drop down.
9. For custom menus, **Position** determines where the menu is displayed on the Menu bar. For custom menus in an existing Concordance menu, **Position** determines where the custom menu is displayed within the menu. In the **Position** field, type the position number you want the custom menu and/or custom menu command to be displayed.
 - When you are creating a custom menu, zero is the first position on the left on the Menu bar. For example, if you typed 0 in the Position field, the custom menu will be displayed to the left of the File menu. Positive position numbers will move the custom menu the number of places to the right. For example, if you type +3 in the Position field, the custom menu will be displayed 3 places to the right. Typing -1 places the custom menu to the right of the Help menu.
 - Negative position values start at the right and work their way left on the Menu bar. Positive position values start at the left and work their way right on the Menu bar.
 - When you are creating a custom menu command, zero is the first position at the top of the menu. Positive position numbers will move the custom menu command the number of places down from the top of the menu. For example if you add a custom menu command to the File menu and type 3 in the Position field, the custom menu command will be displayed between the Snapshot and Close commands on the File menu. Typing -1 places the custom menu command at the bottom of the menu.

- Negative position values start at the bottom and work their way up the menu. Positive position values start at the top and work their way down the menu.

10. In **Display name**, type the custom menu command name as you want it to appear in the menu.



Amperсанд and parenthesis characters will not display correctly in a menu and should not be used for a **Display name**.

11. If the custom menu command opens a CPL program file, you can have Concordance run a specific function along with the required parameters. This should be a complete and valid CPL function call, such as myfunction("Hello", 1, 2, 3). For custom menu commands like this, enter the full function call syntax in the **Function** field.
12. As you add new custom menu items, the details are displayed in the **Added menu items** list. If you are creating multiple custom menus and/or custom menu commands, you can organize the display order of the custom menus, and the custom menu commands within the same menu by clicking **Move up** and/or **Move down**. When determining the display position of custom menus and/or custom menu commands in relation to each other, sometimes it is easier to leave the Position field set to -1 for each menu and menu commands, and just use the Move up and Move down buttons to position them.
13. Click **OK** to save your custom menu and/or custom menu command. You may need to close out of concordance and log back in to activate the new menu customizations.



The **Added menu items** list has a right mouse menu to make menu customization easier. The menu allows you to **Cut**, **Copy**, **Paste**, and **Select all** custom menu items. Simply right click in the list. You can create a set of menu items, copy them, and paste them into other user's profiles or other database profiles. This is the easiest way to replicate menus in the **Added Menu Items** dialog.

Troubleshooting

Reference this section to review troubleshooting information and common issues that you can resolve/ Once you've gone through this checklist, you'll most likely discover where the issue lies and can determine the course of action needed to resolve an issue. If you find you still have difficulties after reviewing items on this checklist, you can contact [Concordance Technical Support](#)^[405] for assistance.

Isolating Issues Checklist:

1. Is your problem happening to one person or all users?
 - a. If it's one person, there's potentially something wrong with the computer itself, such as the user's network privileges or another setting. Please check to ensure that the user is granted full privileges.
2. Is the problem only with this computer?
 - a. If so, you may need to rebuild the system profile.
 - b. Test whether the user can log into a Concordance database from another computer. If so, the problem is most likely the computer and not the application.
3. Is the issue occurring only in one database or all databases?
 - a. Determining this helps isolate whether it's a database or system issue.
 - b. Depending on the setup, try moving a database to a location other than its current placement.
 - c. Desktop to server or server to desktop.

Most Frequent Issues

Full Network Rights Given to Users

Many of our technical support calls can be resolved with this easy fix. If you find there are users having issues with accessing aspects of Concordance or there are other problems occurring, you'll want to verify that all users have full read/write privileges in the directory where each database resides.

File Path Problems

Whether you are trying to view images in Concordance Image or trying to launch a hyperlink to a native document or email attachment, there are times where you may run into the following issues:

Image Path Issues

1. "Couldn't find xxxx in the imagebase" - Receiving this message means you didn't register any image information to the .dir file, whether it was by registering an image load file or by scanning the image directories.
2. "Unable to open the following image (xxx): <path to image file>" - Notice that this message lists a path. Concordance Image is looking in that provided path to find the image file. You can copy the path in this dialog box by selecting CTRL + C. Next, on the Start menu, click Run and type in the listed path and click OK. If Microsoft Windows cannot find the file, then the path is incorrect. You will need to fix the directory path stored in the imagebase.

No Message: Nothing Happens

1. If this occurs while trying to view a file, your viewer setting in Preferences may be incorrect.
2. The image attribute is not enabled for the beginning Bates number field in the Modify dialog.
3. There may be something wrong with the image file itself. First, navigate to that specific image file on your server and try to launch it using the default Microsoft Windows program selected. If Windows can't open it, you'll need to take steps to get a corrected image from your vendor or producing party, if possible. This scenario usually produces either of these messages couldn't find or unable to open.

Native Files and Attachments

When clicking on a native document or attachment hyperlink and nothing happens, on the Start menu, click Run and type the listed path and click OK.

Windows may open a dialog box saying it can't open the file. It will ask you what program to use to launch the file. This occurs when Windows doesn't recognize the file extension. For example, if you just downloaded Adobe® Reader®, Windows may not recognize the .PDF extension and which program to use to launch it.

Once you select the program from a list in the dialog box, ensure that the *Always use the selected program to open this kind of file* is checked. In the future, the document hyperlink in Concordance will correctly launch the native document.

If Microsoft Windows can't find the file, then there is a problem with the path listed in Concordance.

Image File Problems

If a user finds an image file that won't open, the TIFF image file may be corrupt. Follow these steps to resolve the issue:

1. In Concordance Image, on the **File** menu, click **Open Image** and navigate to the physical .tif image file that has problems. If the image opens properly, then the problem is either an incorrect file path name stored in the imagebase or the TIFF file name doesn't match the image alias information to link it properly to the Concordance document record. Sometimes, the physical image file name has too many or not enough zeros, even though it was referenced correctly in the load file. To resolve the problem, navigate to the image file on your network and manually rename it to match it with the image alias that is stored in the imagebase.
2. If the image file does not open in Concordance Image as listed above, try launching the image file directly from the network directory. The image should open in the default Microsoft viewer. If it opens successfully, then the image may not be in a format that is acceptable by Concordance Image. Recreate the TIFF or print the image to a hard copy and rescan it to TIFF. Once you have a

new image, replace the .tif file in the proper directory and it should open in Concordance Image.

3. If the image file does not open by the default Microsoft viewer, an error message typically displays. In this case, you'll need to contact your source and ask for a new copy of the .tif file.

Overflow Message During Import

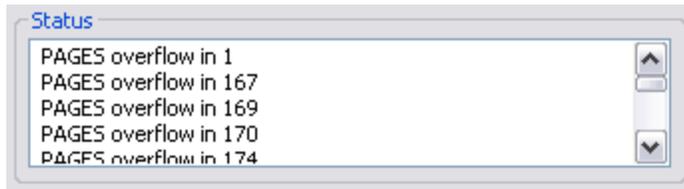
When importing data, you may receive various "overflow" messages in the Data Overflow or Status box.



If your message looks like this, then Concordance ran into an error on line 100 within the delimited text file you selected to import. You'll want to open up the delimited text file, navigate to line 100 and verify that the delimiters are correct and in place with the file containing a hard carriage return at the end.



This message is listed with the first selected field (BEGNO) followed by an overflow in every document. Most likely the problem is an incorrect import dialog selection for the delimiters. Verify what is used in the delimited text file and that your selection in the Import Wizard or dialog box in Concordance matches. You will also want to verify your other delimiter selections as well.



For this type of error message, there are many possible reasons that an error occurred. You will want to verify your delimiters, check your **Modify** dialog to ensure that the field type matches the type of data that is being imported in, and also verify that the field order in the import selections matches the delimited text file. Once you have modified your selections, be sure to save a new copy of your delimited text file prior to import. Next delete any records loaded incorrectly or on the **File** menu, point to **Administration**, and click **Zap** if it is your first import in the database. Because mistakes can occur during an import, it is best practice to always import additional delimited text files into a duplicate empty structure of your main database to ensure that everything loads properly. Once everything looks correct, use the matching import process to bring in the new records.

View Image (Camera) Button is Not Highlighted

If the View Image (camera) button is unavailable and grayed out when you are ready to manage your imagebase, you most likely forgot to select a field in the database as the Image key. You will need to open the **Modify** dialog and select the Image check box for a unique field, typically your beginning Bates number. Once you have made your changes, be sure to run a full index. After indexing the database, close Concordance and re-launch your database. The View Image button should now be available.

Indexing Takes Too Long

If your indexing speeds take too long, you'll want to check the following:

- Indexing Cache Preferences and Recommendations - refer to the System Requirements. For maximum speed, we recommend allocating 2 GB to your machine.
- How many database indexes are you running on your machine? Having indexes for each database run on individual machines greatly improves speed

since you're able to allocate more memory to processing one database, rather than having to share it across multiple databases at the same time.

- What is the size of your database? Record sizes vary based on how many metadata fields there are and how large your OCR text fields may be. The smaller the database: the faster your index processing. If your databases are too large, one option is to separate them into smaller databases and concatenate them for review. See [Concatenated Databases](#)^[81].

Offset Hit Highlighting

If you search for terms using full-text search strings and the hit highlighting is not working, here are steps to resolving the issue:

1. First, export one record that had hit highlighting issues to another Concordance database. This way, you can test the issue without impacting your reviewers.
2. In the exported database, view this record in **Edit View**. Right-click the field where offset hit highlighting occurred, and click **Reset field formatting** on the shortcut menu.
3. Reindex the database and try searching on the same search term to see if the hit highlighting issue is resolved in the record you just formatted.
 - If the problem is resolved, this was a rich text formatting issue. Sometimes, there can be problems with HTML hexadecimal color codes and .rtf files. Once these files have been imported into Concordance, the index may be offset in correctly identifying your hit terms. You can reset the field formatting on each individual record and reindex as listed above to resolve the issue.
 - If the issue has impacted a large number of records, there is a CPL script that can reset the field formatting of all records in a query set.
4. If the problem persists, then there is an issue with the .ivt file. Take the entire database offline and then run a full index.

Errors on Dictionary and .Ivt Files

If you receive a message that your dictionary or inverted text (.ivt) files had errors or were not found, then you'll want to rename the following files by adding **OLD** to the file name, and then run a full index: .dct, .ivt, .fzy, .key.

Unable to Read and/or Write to Fields

1. If you come across a field that is read-only in **Edit** View that you intended to have full access to, you may have applied security settings to the entire database. First, check the Field rights tab in the Security dialog box to verify the given access to each user. Second, check the specified field in the Data Entry Attributes dialog box as it can override a field's settings in the Security dialog box.
2. If you created a new field in the **Modify** dialog and security is enabled, you need to ensure that the new field has read/write access in the **Security** dialog for each individual user. Be careful to check these settings prior to running productions. You may have forgotten to create production fields in the database creation phase to store your new beginning and ending production numbers. Once you create these new fields, they are listed as options in the Production Wizard to cross-reference your new production numbers. But if you did not adjust security field rights for read/write access prior to initiating the production process, the numbers will not be written to the production fields.

Issue Tags

Starting with version 10 databases, the user must now highlight the text, hold down the Shift key and then select the tag in order to create an issue tag. If the user attempts or accidentally highlights text and then selects the tag without holding down the Shift key first, they will receive a message instructing them of the new method for issue tagging. This setting can be changed back to the older method in the **Issue Coding** section on the **Browsing** tab in the **Preferences** dialog.

Concordance

Administrator's Guide

References

Chapter

2

References

Additional Resources

Information for Concordance FYI can be found in the [Concordance FYI Answer Center](#).

Details for the Concordance Programming Language (CPL) are documented in the [Concordance CPL Answer Center](#).

Sample Databases

To successfully download and extract the Unicode sample databases, you will need WinRAR by RARLAB. WinZip® by WinZip Computing does not handle the foreign language characters in the Unicode sample databases correctly, causing the native file links not to work in the databases.

- [Calfco Sample Database](#)
- [Cowco Sample Database \(without images\)](#)
- [Cowco Sample Database \(with images\)](#)
- [Cowco Concordance Native Viewer Sample Database \(with native files\)](#)

PDF Guides

Content in the Concordance Answer Center is available for download in the Adobe Acrobat PDF format.

- [Concordance Installation Guide](#)
- [Concordance User Guide](#)
- [Concordance Administrator's Guide](#)

If you are planning to work offline, you can also download a compiled version of the Concordance Answer Center (Concordance.CHM file) and save it to a folder on your local computer.

- [Concordance Answer Center Compiled Help](#)

Preparing for Concordance

Preliminary planning for implementing any software application is important for achieving the best setup results, the first time. We recommend that you take some time to review this section to plan how your organization will be using Concordance so your administrative tasks are minimized for initial setup and your long-term maintenance of the application is streamlined into routine updates and adjustments, rather than reworking any database design and system security later.

Discovery Document Conversion

If you are unfamiliar with the e-discovery process, we recommend that you take some time to research this growing and rapidly changing industry and learn how it impacts your system network and strategy by understanding how critical it is that data load files are handled carefully during the import process. Because you are dealing with confidential materials, file corruption of your database records is a sensitive matter and legal implications regarding spoliation are strict and can carry hefty fines. Once data is altered, your ability to attain another copy of case records in some instances is minimal – especially if it's opposing counsel's case records – and can affect the lawsuit for the organizations involved.

System Requirements

Concordance's system requirements for hardware and software are minimal and network setup is flexible. The primary focus in ensuring that Concordance runs properly for you and your organization is all about processing speed = RAM on your network and individual workstations.

Please review the current system requirements for setup and suggested processor and RAM. Keep informed of Concordance release updates and how they impact your system. See System Requirements for more information.

Database Design

Engineered for capacity and speed, Concordance provides stability with its enormous database capacity and robust security features. Designed with a flat-file architecture and a proprietary back-end, Concordance can distribute and store data and processing over local-area networks. With Concordance's separate load and index processes, you can import a variety of load files and their native file attachments, accessing them both in Concordance and Concordance Native Viewer.

Proper review of your organization's records for a given case helps determine how you build and design your database structure. Concordance has some requirements for importing certain types of records, especially emails and transcripts. Additionally, reviewing your case load files provides you with a high level road map for how you want to move forward in planning your database design.

Database design considerations are based on:

- Possible database size – breaking record groupings into Database 1, Database 2, Database 3
- Document Type – email, native files, and transcripts
- Confidential/Privileged Status
- Content – Predetermined Subject Groupings

- Rolling Production Environments – adding content to primary databases by creating secondary databases and concatenating them
- Other

See Concordance Databases and [Importing Files](#)^[24] for more information.

Security Setup

Security levels are predominantly affected by the size of your organization and the user roles that constitute your review team. If your organization is large and has several geographical locations, system security for multiple ongoing cases is going to take time and forethought in planning. If you belong to a small organization, your system security may be minimal for internal staff because users are more likely to perform many roles using Concordance software.

Please consider implementing security in your organization to ensure that records are preserved in accordance with e-discovery regulations and database documents are secured from inadvertent alteration or deletion by applying recommended user permissions for field and menu items.

See [Security](#)^[322] for more information.

Implementation Checklist

We understand that each organization has its own organization guidelines and processes for supporting their review teams during case review. We also understand that transferring to and implementing new technology may affect current procedures and that you may need to adapt new ones given the demands of a rapidly changing e-discovery industry. Please reference the Preliminary Planning Checklist to guide you in preparation for implementing and maintaining Concordance at your workplace.

Preliminary Planning Checklist:

	E-Discovery, Collection, and Processing
<input type="checkbox"/>	Do you have an understanding of e-discovery rules and how they affect your specific case and the review process?
<input type="checkbox"/>	Do you have a collection and processing plan in place while also following forensic guidelines, as required?
<input type="checkbox"/>	Do you have vendor relationships set in place for various stages of your case?
<input type="checkbox"/>	Do you have a quality control plan in place?
<input type="checkbox"/>	Do you know what types of files you are receiving and whether they are recognized by Concordance?
	Database Design
<input type="checkbox"/>	Do you know what your case dataset looks like?
<input type="checkbox"/>	What is the size of your case, including the # of pages/documents and GB to be processed?
<input type="checkbox"/>	Will this case require a native review?
<input type="checkbox"/>	Do you understand what the case review workflow will be?

	E-Discovery, Collection, and Processing
<input type="checkbox"/>	What kinds of fields are needed for tracking administration and reviewer metrics?
<input type="checkbox"/>	What kinds of tags are needed for supporting administration maintenance?
<input type="checkbox"/>	What fields are needed for coding additional metadata?
<input type="checkbox"/>	Where will annotations be tracked by reviewers: Concordance Image sticky note, text associated note or field? If it's a field, what fields need preparation for annotations?
<input type="checkbox"/>	Do you have field and tag naming conventions set in place?
<input type="checkbox"/>	Do you have a list of categories for preparing your database tag structure?
<input type="checkbox"/>	Have you consulted key players involved with Concordance review and administration regarding database design?
<input type="checkbox"/>	Have you prepared a directory location with subdirectory folders in a structure that prepares you for optimal organization of the various files for the case?
<input type="checkbox"/>	Did you create extra miscellaneous fields in your database?

	E-Discovery, Collection, and Processing
	System Requirements
<input type="checkbox"/>	Have you reviewed the Concordance system requirements?
<input type="checkbox"/>	Have you given full network rights to all users in the directory where each case resides?
<input type="checkbox"/>	Did you adjust the indexing and dictionary cache settings for each workstation?
<input type="checkbox"/>	Do you have remote staff that will be using Concordance offline remotely and need a mobile license installed?
	Security
<input type="checkbox"/>	Did you plan security settings for all users accessing this case?
<input type="checkbox"/>	Did you apply security to each Concordance database individually?
<input type="checkbox"/>	Did you store the security console user ID and password in a safe location and share it with at least one other supervisor or administrator?
	Maintenance
<input type="checkbox"/>	How will subsequent loads of data be handled? Will they be uploaded to the main database or will you

	E-Discovery, Collection, and Processing
	use concatenation to join multiple databases?
<input type="checkbox"/>	Do you have indexing/reindexing schedules planned based on the workflow and timeline of the review?
<input type="checkbox"/>	Is there a back-up schedule in place?
<input type="checkbox"/>	Do you have a quality control checklist for major administration tasks like importing, exporting, and global edits?
<input type="checkbox"/>	Do you have a disaster recovery plan in place?
	Production
<input type="checkbox"/>	Do you have a production plan in place for delivering files to opposing counsel?
<input type="checkbox"/>	Do you know what types of reports will be generated or requested by the review team and how to print them?
	Roles and Responsibilities
<input type="checkbox"/>	Does your review team understand the database design and know how they will specifically use Concordance for review?
<input type="checkbox"/>	Does your review team understand timelines and processes required for administering and maintaining Concordance?

	E-Discovery, Collection, and Processing
<input type="checkbox"/>	Are roles and responsibilities clearly defined among administrators, litigation support staff, paralegals, and attorneys?
<input type="checkbox"/>	Are there policies in place for who can and cannot create/modify databases and other sensitive tasks?

Ongoing Maintenance

As an administrator you are busy managing multiple cases and the various software programs and databases in various network locations. We recommend you to take some additional time to plan a maintenance schedule for Concordance depending on the complexity of product licensing versions and how database structure is designed and geographically dispersed.

Typical database management for Concordance includes:

- Directory and subdirectory folder design to store multiple databases for multiple case reviews within your organization
- Back-up schedules for each case/multiple databases/concatenated databases
- Full index updates on databases performed during off hours (weekends or holidays) or offline if multiple databases can be updated while staff continues work in other databases
- Reindex updates when records are added or modified
- Subsequent data and image loads
- Deleting and packing databases and dictionary files after data entry/editing and indexing
- De-duplication

- Replicating and synchronizing databases
- Modifying or adding database fields, which then requires a full index
- Tracking metrics
- Running productions

Keyboard Shortcuts

Concordance

Browse and Table View

Shortcut Key	Description
F1	Open Concordance Help.
F2	Open Search task pane.
F3	Open or close the Review View.
F4	Open the Query by Example dialog box to run a form search.
F5	Open or close the Table View in the Browse View.
F6	Open or close the Browse View in the Table View.

Shortcut Key	Description
F8	Open the Sort task pane.
-	Navigate to the previous document.
+	Navigate to the next document.
C	Open the Copy dialog box to copy document data. (Browse View only)
D	Open the Goto dialog box to navigate to a specific document.
F	Navigate to the first document.
G	Open the Goto dialog box to navigate to a specific document.
L	Navigate to the last document.
N	Navigate to the next search hit.
O	Open the Font dialog box to view or modify the font.
P	Navigate to the previous search hit.

Shortcut Key	Description
V	Open the current document's corresponding image file in the image viewer.
CTRL+N	Open the New Database Creation Wizard for creating new databases using load files, E-documents and E-mails.
CTRL+T	Open the database templates for creating a new database using a template.
CTRL+D	Open the Dictionary dialog box when your cursor is in the Advanced Search panel.
CTRL+F	Open the Fields dialog box when your cursor is in the Advanced Search panel.
CTRL+S	Open the Fuzzy Search dialog box when your cursor is in the Advanced Search panel.

Tags Task Pane

Shortcut Key	Description
SPACE BAR	Toggle selected tag.
C	Open the Copy dialog box to copy document data. (Browse View only)
D	Open the Goto dialog box to navigate to a specific document.
F	Navigate to the first document.
G	Open the Goto dialog box to navigate to a specific document.
L	Navigate to the last document.
N	Navigate to the next search hit.
O	Open the Font dialog box to view or modify the font.
P	Navigate to the previous search hit.
other letter keys	Navigate to the tag starting with the same letter.

Review View

Shortcut Key	Description
F2	Open Search task pane.
F3	Open the Review View if it is not already opened.
F4	Open the Query by Example dialog box to run a form search.
ENTER	Execute the selected search query.
CTRL+D	Open the Dictionary dialog box when your cursor is in the Advanced Search panel.
CTRL+F	Open the Fields dialog box when your cursor is in the Advanced Search panel.
CTRL+S	Open the Fuzzy Search dialog box when your cursor is in the Advanced Search panel.
ESC	Cancel the current search that is in progress.

Edit View

Shortcut Key	Description
CTRL+PAGE UP	Navigate to the previous document.
CTRL+PAGE DOWN	Navigate to the next document.
TAB	Navigate to the next field in the document.
SHIFT+TAB	Navigate to the previous field in the document.
CTRL+TAB	Navigate to the last database or Workspace tab you opened.
CTRL+C	Copy the selected text.
CTRL+D	Open the Duplicate dialog box to copy field data to another record.
CTRL+F	Open the Find dialog box to find text in the current field.
CTRL+F	Open the Fields dialog box when your cursor is in the Advanced Search panel.

Shortcut Key	Description
CTRL+SHIFT+F	Find the next instance of the text entered in the Find dialog box.
CTRL+H	Open the Replace dialog box to find and replace text in the current field.
CTRL+L	Open the authority list associated with the current field. For fields not associated with an authority list, navigate to and open a saved authority list.
CTRL+S	Open the Fuzzy Search dialog box when your cursor is in the Advanced Search panel.
CTRL+V	Paste the copied or cut text.
CTRL+X	Cut the selected text
CTRL+Z	Undo the last action

Concordance Viewer

Shortcut Key	Description
PAGE UP	Navigate to the previous page
PAGE DOWN	Navigate to the next page
ARROW UP	Navigate to the previous page
ARROW DOWN	Navigate to the next page
ARROW LEFT	Navigate to the previous document
ARROW RIGHT	Navigate to the next document
TAB	Go to the next markup (if there are more markups on the page)

Concordance Native Viewer

Shortcut Key	Description
CTRL + C	Copy the current selection
CTRL + X	Cut the current selection
CTRL + V	Paste the copied selection
CTRL + SHIFT + A	Pan tool
CTRL + SHIFT + X	Zoom tool
CTRL + SHIFT + Z	Magnifier tool

Shortcut Key	Description
CTRL + E	Fit to Height
CTRL + W	Fit to Width
CTRL + SPACE BAR	Rotate clockwise 90 degrees
CTRL + SHIFT + SPACE BAR	Rotate counter-clockwise 90 degrees
PAGE UP	Navigate to the previous page
PAGE DOWN	Navigate to the next page
CTRL + P	Open Print dialog box

Concordance Image

Shortcut Key	Description
CTRL+O	Opens the Open dialog box to open an image in the viewer.
CTRL+B	Turn on or off the Toggle Bar Code Mode function.
CTRL+R	Toggle the display of the redlines on the image.
CTRL+P	Open the Print dialog box to print the images.
CTRL+C	Copy the current selection on the image.
CTRL+X	Cut the current selection on the image.
CTRL+V	Paste the cut or copied selection.

Shortcut Key	Description
I	Invert image color. (only works with black and white images)
CTRL+	Zoom in a little.
CTRL-	Zoom out a little.
+	Zoom in 50%.
-	Zoom out 50%.
ALT+Z	Zoom on selection.
W	Fit image to width.
H	Fit image to height.
CTRL+F	Display the full screen.
<	Rotate left from the original orientation.
>	Rotate right from the original orientation.

Shortcut Key	Description
/	Flip from the original orientation.
LEFT ARROW	Rotate left from the current orientation.
RIGHT ARROW	Rotate right from the current orientation.
DOWN ARROW	Flip from the current orientation.
CTRL+HOME	Navigate to the first page.
PAGE DOWN	Navigate to the next page.
PAGE UP	Navigate to the previous page.

Shortcut Key	Description
CTRL+END	Navigate to the last page.
G	Open the Go to page dialog box to navigate to a specific page.
CTRL+G	Open the Go to image key dialog box to navigate to a specific image.
CTRL+PAGE DOWN	Navigate to the next document.
CTRL+PAGE UP	Navigate to the previous document.

Developing with Concordance

DDE stands for Dynamic Data Exchange. It allows two applications to communicate through programmed commands in the Windows environment. It is not a simple interface and it should only be used by experienced programmers.

Any parameters used in communicating with Concordance are referenced by name. Commands tell Concordance to do something, or they send or receive data.

The examples given here are provided for the C programming language. There are four types of DDE commands that Concordance will recognize. The first command establishes the link between your program and Concordance. This is referred to as opening a DDE conversation.

Establishing a DDE Conversation

All DDE conversations are established by connecting to the DDE server, Concordance. Establishing the conversation requires your program to provide two parameters: the service and the topic. The service is the name of the DDE server, in this case Concordance. The topic is defined by the service and it varies from server to server. Concordance supports database names as topics. The database topic should use the full file path in either standard or UNC format. Concordance opens the database specified as the topic for use in the DDE conversation. Use an asterisk, *, as the topic to open the conversation using any database currently open and in use by an end-user. You can close that database later and open another using the DDE Execute commands.

Example

The following example is written in C. It opens a DDE conversation with a Concordance server. The `OpenConcordanceDDE()` function receives two parameters: the instance identifier and the database name. The instance identifier, `idInst`, is a value returned by `DdelInitialize()` when your program performed the required DDE initialization. The `pszDatabase` parameter is a pointer to a zero terminated string containing the name of a database to open, or `NULL` to open the DDE conversation based on the currently open database, i.e., using * as the topic.

```
HCONV OpenConcordanceDDE( DWORD idInst, char *pszDatabase)
{
    HSZ hszService, // Name of service to connect.

        hszTopic; // Topic of conversation.

    HCONV hConv; // Handle to DDE conversation.

    // Set the handle to a NULL value.
```

```
hConv = NULL;

// Use the database name if provided, otherwise
// use * if no database is specified, this will
// open the DDE conversation using the current
// database being viewed by the end-user.
if (pszDatabase == NULL)
    pszDatabase = "*";

// Create the service's string handle.
hszService = DdeCreateStringHandle(idInst, "Concordance", CP_WINANSI);

// Create the topic's string handle.
hszTopic = DdeCreateStringHandle(idInst, pszDatabase, CP_WINANSI);

// Connect to the service, Concordance.
hConv = DdeConnect( idInst, hszService, hszTopic, (PCONVCONTEXT)NULL);

// Free the DDE string handles.
DdeFreeStringHandle(idInst, hszService);
DdeFreeStringHandle(idInst, hszTopic);

// Return the handle to this DDE conversation.
```

```
// The handle is required for all further  
  
// communication with the Concordance DDE server.  
  
return(hConv);  
  
}
```

Once a DDE conversation has been established, all further communication between your program and Concordance takes place through the Microsoft Windows' `DdeClientTransaction()` function. The `DdeClientTransaction()` function has eight parameters:

```
DdeClientTransaction( void *lpvData, DWORD cbData, HCONV hConv, HSZ hszItem, UINT  
uFmt, UINT uType, UINT uTimeout, DWORD *lpuResult);
```

DDE Execute Commands

Execute commands request Concordance to perform actions. These include moving between records, performing a search, appending and deleting records, and opening and closing databases. These commands return success codes, but they do not return data. Several commands contain two parts: the command and the command parameter. For instance, opening a database also requires the name of the database you want to open. The command is sent as the single string `open drive:path\filename.dcb`.

DdeClientTransaction() Parameters

Execute commands use two `DdeClientTransaction()` parameters, `lpvData` and `cbData`. `lpvData` is a pointer to the command string. This may simply be the command string in quotes. `cbData` is the number of bytes in the command string, `lpvData`, including the terminating zero. For instance, `strlen(lpvData) + 1`.

Returns

The `XTYP_EXECUTE` commands return `DDE_FACK`, `DDE_FBUSY`, or `DDE_FNOTPROCESSED`. `DDE_FACK` and `DDE_FBUSY` are returned to indicate

success or TRUE and failure or FALSE. For instance, the lock command returns DDE_FACK if the record was successfully locked and DDE_FBUSY if it could not be locked, i.e., someone else already has it locked.

DDE_FNOTPROCESSED is only returned if the command is not recognized, usually due to a misspelling, or if the database is not open. The return codes are defined in the Windows ddeml.h include file, provided with your compiler.

EXECUTE Commands		
Command	Parameter	Function
append		Appends the current record to the end of the database. This is generally used with blank, to create a new record. For E-documents databases created using Concordance version 10.21 and later, this function is disabled. To append a document to an E-documents database, drag the document onto the database.
blank		Creates a blank record. If the current record has been edited, it is automatically saved before being blanked. Use blank records with the append command to add records to the database.

EXECUTE Commands		
Comm and	Parameter	Function
browse		Brings up the Browse screen.
close		Closes Concordance. This also terminates the DDE conversation.
closedatabase		Closes the current database.
closeall databases		Closes all open databases.
first		Retrieves the first record in the query.
goto	FIELD = VALUE	This performs a search for the record whose field exactly matches the value. The search is not limited to the current query set, it looks throughout the database. Wildcards and Boolean logic are not allowed in the query. The field must be a key field. The matching record is

EXECUTE Commands		
Command	Parameter	Function
		retrieved, but a new query is not incremented.
	Record number	Moves to any record in the current set of retrieved records.
gotoreference	/d=database /k=key /o=offset /l=length	This opens a specific database specified by database, goes to a key (the replication key) specified by key, and highlights a range of characters specified by the offset and length. database is the full path to the database.dcb file. key is the replication key. offset is the offset in characters to start highlighting from. length is the number of characters to highlight.
isdeleted		Checks if the record is marked for deletion.
isedited		Checks if the record has been edited since last indexed or reindexed.

EXECUTE Commands		
Comm and	Parameter	Function
last		Moves to the last record in the current set.
lock		Locks the current record so that you can edit it.
next		Moves to the next record.
open	Database path.	Opens a database.
pgdn		Moves to the next record for Browse or Table views. It is not necessary to send a repaint command after a pgdn.
pgup		Moves to the previous record for Browse or Table views. It is not necessary to send a repaint command after a pgup.
prev		Moves to the previous record.
repaint		Updates the Browse or Table display. Use this if

EXECUTE Commands		
Comm and	Parameter	Function
		your program changes the contents of the displayed record, or moves to another record.
search	Search string.	Executes a search.
unlock		Unlocks the record.
setfocus		Concordance sets focus to itself. This is equivalent to the Windows SetFocus() function.
table		Places Concordance into Table view.
zap		The database is zapped. Every record in the database is erased and permanently deleted.

DDE Request Commands

DDE request commands return data values. This group of Concordance DDE commands returns information about the database, such as a list of fields or the database's name, as well as the field contents.

DdeClientTransaction() Parameters

hszItem is a string handle created with DdeCreateStringHandle() and it contains the command string in CP_WINANSI format. Use the CF_TEXT format for field names when retrieving data from the database fields. Field names must be in all upper case. Set uFmt to either CP_WINANSI or CF_TEXT as appropriate.

Returns

XTYP_REQUEST commands return an HDDEDATA value containing the requested information. Use DdeGetData() to both obtain the length of the data and to copy it to local memory. Note that the data may not be terminated with a zero. Allocate one extra byte to your buffer before you copy the returned data. Null terminate the string yourself.

Numeric fields are returned as text strings. Date fields are returned in YYYYMMDD format.

REQUEST Commands	
Command	Data Returned
Database status	<p>This command returns information about the database in eight lines of text, delimited with carriage returns and line feeds. Each line contains a number indicating:</p> <ul style="list-style-type: none"> • Records in the database • Fields in the database • Needs reindexing

REQUEST Commands	
Comm and	Data Returned
	<ul style="list-style-type: none">• Current physical record number• Current record number in the query• Active query number• Records in the query• Total queries
Databa se name	The full path and file name of the database.
List of Fields	<p>A list of fields in the database. Each field is on a line terminated with a carriage return and a line feed. The field name is followed by six items indicating:</p> <ul style="list-style-type: none">• The field type: P, N, D, or T.• The field's length.• The decimal places, applies to numeric fields.• A Y(es) or N(o) to indicate if it is a key field.• A Y(es) or N(o) to indicate if it is an image field.

REQUEST Commands	
Comm and	Data Returned
Image field	The contents of the image field, if an image field has been defined, otherwise NULL is returned.
Total count	A string containing the count of all records in the database, including any concatenated databases.
Query count	A string containing the number of records in the current query.
FIELD	The contents of the named field.

DDE Poke Commands

DDE Poke commands send data to a Concordance field. The new data replaces any data already in the field. Data on the end-user's screen is not updated unless you send a repaint message.

DdeClientTransaction() Parameters

hszItem is a string handle created with DdeCreateStringHandle() and it contains the name of the field that will receive the data. You must set uFmt to CF_TEXT and use the CF_TEXT format to create hszItem. lpvData points to the data for the field, and cbData is the length of the data in bytes, i.e., strlen(lpvData). The data does not need to be a zero terminated string.

All data is sent as text strings, including values for numeric fields. Data destined for a date field must be in YYYYMMDD format, without slashes or any punctuation. For instance, 19991231 is valid but 31/12/1999 is invalid.

Returns

DDE_FAIL if the data was accepted. DDE_FNOTPROCESSED is returned if the command failed because:

- the field was not found
- the data format was not CF_TEXT
- the database isn't open
- you do not have sufficient security rights to change the field's contents

DDE_FBUSY is returned if the record is not locked and Concordance could not lock it to complete the command.

About the Unicode Standard

The Unicode Standard provides a consistent way to digitally represent the characters used in the written languages of the world. As an accepted universal standard in the computer industry, the Unicode Standard assigns each character a unique numeric value and name. This encoding standard provides a uniform basis for processing, storing, searching, and exchanging text data in any language.

In Concordance version 10.x, the Unicode Standard is supported in Arabic, Chinese, English, Hebrew, Japanese, Korean, Russian, and other languages.



Some Adobe PDF files with Arabic text do not display the Arabic text in the proper right-to-left order in Concordance. These PDF files display the text in reverse order (left-to-right) because the files report the language incorrectly or are not in the standard format.



When sending data to a 3rd party software program using the Send To command, only ANSI text is sent..

Installing Language Packs

To display characters in Unicode within Concordance, the appropriate language packs need to be installed on the computer.

Issues and Tips

Currently, the Unicode Standard is supported when importing, searching, printing, and exporting documents in the supported languages. The following issues and tips are important to know working with non-English documents.

Right-to-Left Documents

When importing documents with Right-To-Left (RTL) languages, such as Arabic, the imported text may be incorrectly justified to the left side. To correct this and change the justification to the right side, select the text and press the right [Ctrl] +right [Shift] keys.

Microsoft Excel Files

When importing Microsoft Excel files in Right-To-Left (RTL) languages, the spreadsheet cells may be displayed Left-To Right instead of Right-To-Left.

File Names

Files names containing Unicode characters are supported in Concordance.

Delimiters

The delimiters available from the drop-down lists in the Import Wizard, Import Delimited Text dialog, in the Export Wizard and Export Delimited ASCII dialog, and the Overlay Database dialog may appear as square symbols or may not be displayed. How the lists are displayed depends on the computer's language environment.

Delimiters use the Tahoma font, which displays the characters regardless of the language environment. All of the [delimiter characters](#)^[41] can be selected as a delimiter, even if the symbols they represent do not appear in the drop-down lists.

Removing Kashida Characters

Kashida characters are used in Arabic text to lengthen a word by elongating characters at certain points. The added Kashida characters change the word.

For example, the word for Term in Arabic is **مصطلح**. When Kashida characters are added, the word changes to **مصطلح**.

Searching for the word Term with Kashida characters results in inaccurate search results since it will not include the word Term without Kashida characters.

To prevent inaccurate searches, the Concordance administrator can remove the Kashida characters from the searchable text in the current database. This can be done in Concordance by going to the **File** menu, selecting **Administration**, and then **Remove Kashida characters**.

Words That Sound Like the Selected Word

When doing an Advanced Search from the Search task pane, selecting Display a list of words that sound like the selected word (also known as Fuzzy Search) only works with English language words. Using this option with words in other languages will display a list of words that do not sound like the selected word.

Navigating Search Results for Ideographic Languages

A character in an ideographic language, like Chinese, can represent a word. When navigating search results, each character is considered a separate hit. Clicking the Next hit and Previous hit buttons jumps to the next character in the search results.

For example, if your search term is the Chinese word for Mandarin Language School (國語學院) you will need to click Next hit four times for each word.

Data Validation Options

Database fields can be assigned data validation options from the Data Entry Attributes dialog box. However, certain validation options are only supported with English text. These include:

- Upper case
- Lower case
- Alphabetic only
- Numeric only

Match Whole Word Only

When searching for text using the Find or Replace commands, the Match whole word only check box does not work with ideographic languages such as Chinese. Clear the Match whole word only check box before searching for text in these languages.

Additional Options for Hit Highlighting

When printing documents with ideographic text, like Chinese, a character underlined for hit highlighting can easily be confused with other characters.

To allow hit highlighting in these languages, additional options have been added to the Formatting tab in the Print documents dialog box. Now you can use underline, bold, italics, color formatting or a combination of these options to highlight the search hits in your reports.

Exporting to ANSI or ASCII Format

You can export data from Concordance version 10.x to ANSI or ASCII format. The file can then be imported into an application that does not support the Unicode Standard; for example, into Concordance 2007 or earlier versions.

This option is available for delimited text files in the Export Wizard dialog box and the Export Delimited ASCII dialog box. It is also available when exporting database transcripts.



When exporting to ANSI or ASCII format, characters that cannot be represented as a single-byte character will be lost in the export. So exporting documents with double-byte characters, such as Chinese, to ANSI or ASCII format will result in data loss.

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