Concordance®

Installation Guide

Concordance 10.25.0.90



Concordance Installation Guide

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Concordance® 10.25.0.90

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Concordance

Installation Guide

Concordance

Chapter

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

Installation

Installing Concordance

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 by checking our <u>Concordance Release Notes</u>.

The minimum system requirements for Concordance are:

Hardw are/Sof tware	Minimum	Recommen ded
Processor (CPU)	Dual 3GHz Xeon® or Pentium HT (hyper- threaded) processors or higher, Intel i7, AMD Ryzen	Dual 3GHz Xeon® or Pentium HT (hyper-threaded) processors or higher, Intel i7, AMD Ryzen
Memory (RAM)	4GB	8 - 16GB
Hard Drive (Installatio n)	40GB of disk space or higher	40GB or disk space or higher
Operatin g System	Microsoft® Windows Server 2016, or Windows 10 64- bit	Microsoft® Windows Server 2019

File Storage (Images\T ext\Native Document s)	250GB	1TB A disk caching, fault tolerant RAID 1+0 array controller is recommended for speed and data integrity.
Database Backend	Microsoft® Windows Server 2016	Microsoft® Windows Server 2019
Network	Gigabit	Gigabit
Software (Required for Proper Operation)	 Microsoft Outlook 2010 or higher (32 bit) .NET Framework 3.5 AND 4.0 or higher Internet Protocol v4 (IPv4) 	 Microsoft Outlook 2013 or higher (32 bit) .NET Framework 3.5 AND 4.0 or higher Internet Protocol v4 (IPv4) *IPv6 is not supported

In addition to the above, the following specifications are required:

- Appropriate language packs installed
- Computer should also meet the suggested requirements for the operating system being used
- Users must have full network permissions to write to database directory folders/files
- All features under .NET 3.5 and .NET 4.0 or above should be installed prior to installing Concordance



Before installing Concordance, make sure that the machine is upto-date with the current Microsoft patches.

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Concordance and FYI Server do not currently support the use of IPV6 for connecting to databases on the FYI Server, only IPV4 is supported. Note that by default, Windows 10 (and later) and Microsoft Server 2012 (and later) automatically enable IPV6. If you need to disable IPV6, please refer to the the https://support.microsoft.com/en-us/kb/929852 article on the Microsoft web site.

Network Setup

Concordance offers you administrative flexibility when installing the application, database, and imagebase files. You have the option to place each on different servers, and even different site locations. Concordance is still able to locate the files it needs to operate and access database files.

A typical network installation includes:

- Installing multi-seat licensing on LAN
- Installing Concordance on applications and network servers

- Installing the Workstation .exe on all workstations
- Storing database files anywhere on LAN
- Storing databases and images anywhere on LAN
- Providing all users with full permission to database directory
- Allowing all users the ability to create/edit/delete, like Microsoft Word

Databases should be stored on a good network configuration with ample memory and processing capabilities that allows write capacity. Images should be stored on a good network configuration, but are large files that only need read access; don't clog your best server with image files unless they need to be linked. Ten to 100 MBPS may not be enough for clients with large datasets.

The network version of Concordance must be installed on a network server drive. The program will allow multiple users to concurrently access a database. The query sessions are maintained in separate, temporary files, located in the user's default directory or in the directory identified by the TEMP environment variable. Each session is private and will not affect any of the others.

User Configuration Settings

Network user configuration information is stored in two places. Specific user preferences, such as highlighting color and the default search operator, are saved in the workstation's system registry. For information on the registry key locations, see <u>Concordance Registry Keys 29</u>. Specific database settings are stored in the database.ini file. Shared table layouts are stored in the database's home directory.



In order to perform most of the database tasks, such as indexing, creating tags and notes, importing data, modifying the database, and creating new databases, the user must have Modify folder permissions to the folder where the database's .ini file is located. For more information, please contact your Network Administrator or the Windows Help and Support Center.

Network printing is handled by Microsoft Windows. Concordance will print to any printer you have defined through Windows.

Concordance has menu-option and database security that can be enabled by your Concordance Administrator.

Cache Preferences

The system requirements for Concordance are minimal and you can reference a current version listing in the Help system.

All processing occurs on the individual workstation. The processor and local RAM installed have the greatest impact on searching, sorting, and indexing speeds. Your network, internet connection speeds, and hard disk space will have some impact on the speed as well.

The cache preferences settings allow you to designate a specific amount of local RAM to indexing and searching. These settings are stored in Window's registry settings.

We recommend modifying this number as it greatly improves your indexing speed. The more RAM you have installed, the more you can designate to this indexing cache so Concordance can process and perform indexing/reindexing faster. You will want to adjust this preference setting on all indexing workstations.

Total RAM – Operating System RAM – Dictionary Cache = Indexing Cache

Adjust your cache settings when you are installing Concordance on each individual workstation that is used for indexing and reindexing. Make these changes before creating your databases or importing your load files.

Indexing Speed Recommendations

We recommend giving Concordance as much memory as possible. Concordance allocates memory to internal disk buffering during indexing. Any program that decreases the amount of available memory, or performs background processing,

could severely impact indexing performance. The larger the database: the greater the impact.

You can control the amount of cache, but be careful when allocating memory to the cache. Windows has virtual memory that is stored on the hard drive when it is not being used. If Concordance allocates a cache that forces too much swapping to disk, indexing will actually run slower.

Indexing speed can be greatly improved by the following:

- Using a disk-caching hard disk controller
- Adding a faster hard disk
- Using a faster computer
- Indexing on a Windows NTFS formatted hard drive.

The highest performance is obtained by combining some or all of these options. There are many recommendations on this subject. All but one has the effect of lowering the workstation's disk activity. We also recommend indexing individual databases on separate machines.

Lower workstation disk activity by:

- Adding more cache RAM to your workstation and allocating this RAM to the Indexing cache.
- You should leave 128MB unallocated and available for the Microsoft Windows operating system.
- Get a faster processor for the workstation
- Get a caching disk controller on the workstation
- Use a level 1+0 RAID array with your disk caching controller

Implementing these suggestions will result in a significant boost in indexing performance. Index cache and processor speed have the greatest impact.

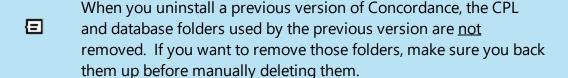
Installing Concordance

You will be prompted for a Serial Number and Activation Code during installation. Please have that information ready. You cannot install Concordance without them.



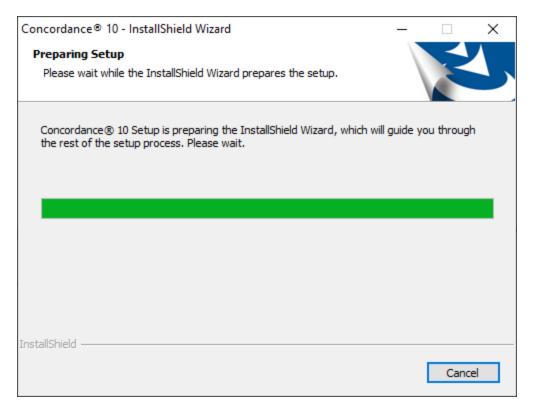
If you want to purchase new licenses, or cannot find your Serial Number and Activation Code, contact Concordance Support at **713-462-6262** ext. **14** or e-mail **concordancesupport@cloudnine.com**.

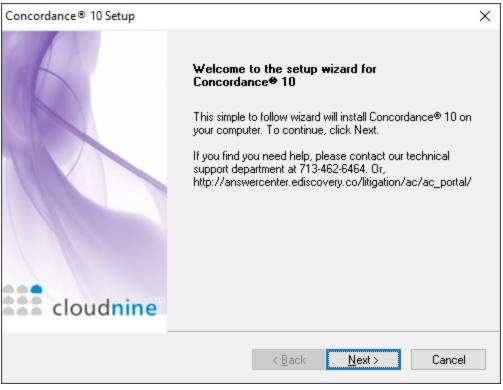
If you have Concordance 10.07 or earlier installed and want to install a newer version of Concordance 10, you must uninstall the older version first before proceeding.



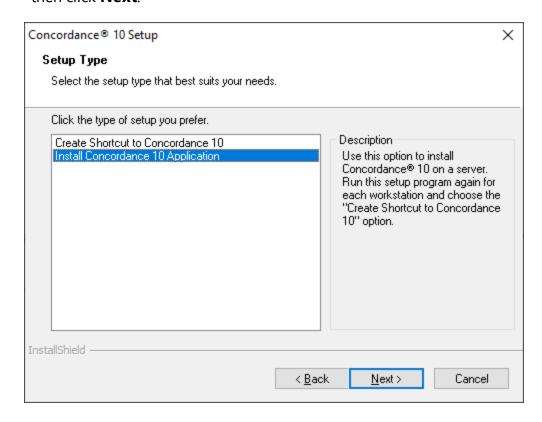
The default install directory for the Concordance application data files is *C*:*Program Files* (*x*86)*CloudNine**Concordance* 10.

Run the Concordance Installer as an administrator (right-click > Run as administrator). You will see a Preparing Setup screen, followed by a Welcome screen. Click Next to proceed.

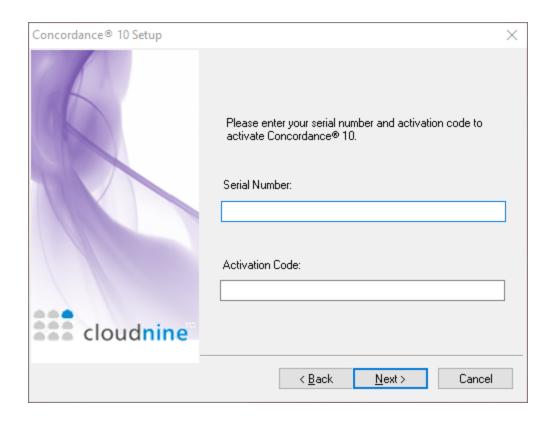




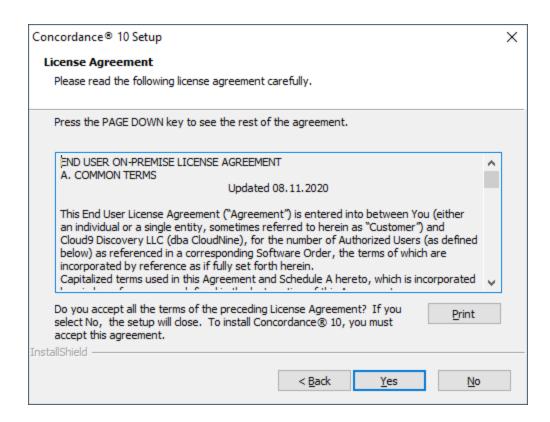
 You will arrive at the **Setup Type** screen. For standalone or server installations, select **Install Concordance 10 Application** from the list, and then click **Next**.



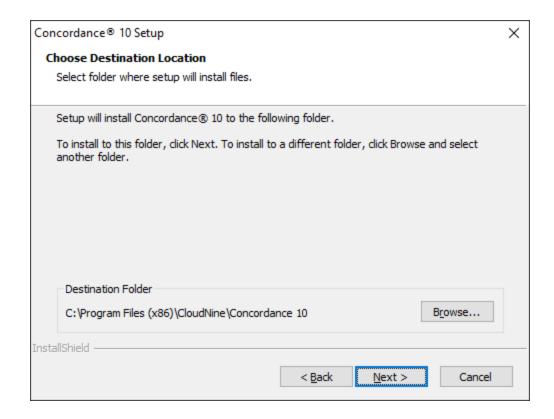
- If you want to install Concordance Workstation (also called a shortcut installation), please see Shortcut Installation [21].
- 3. You will be prompted for a **Serial Number** and **Activation Code**. Enter those values, and then click **Next**.



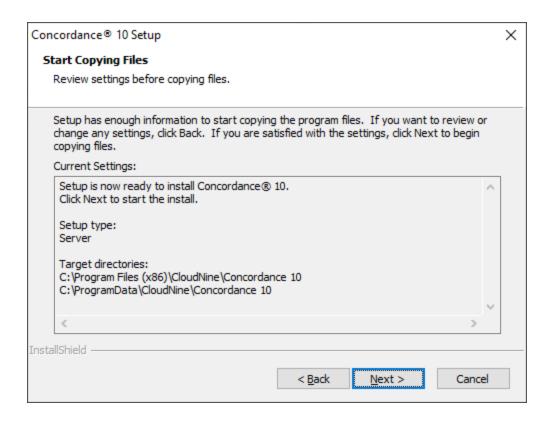
4. The **License Agreement** displays. Read the information, and select **Yes** to accept these terms.



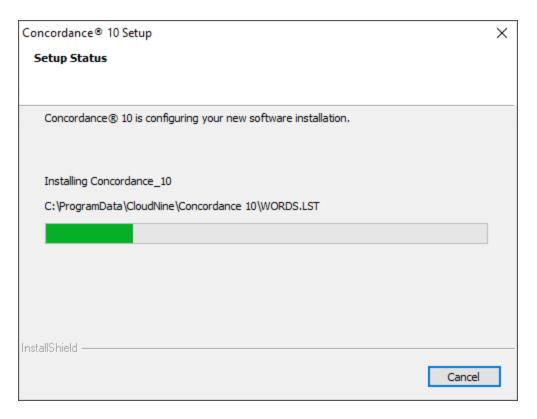
 On the Choose Destination Location screen, you can select a different install folder by using the Browse button, or click Next to accept the default installation folder.

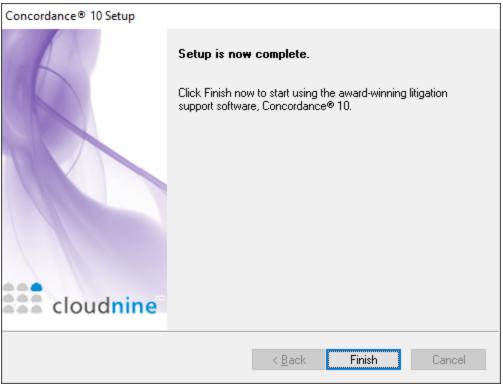


6. At the **Start Copying Files** screen, you have one final chance to review your installation settings. Click **Next** to begin the installation.



7. A progress screen for the installation will display. Once finished, you will see a completion message. Click **Finish** to exit the installer.





8. You can now use **Concordance**, or proceed with installing **Concordance Native Viewer** and/or **Concordance Image** as desired.

Shortcut Installation

The Shortcut Installation option (also known as Concordance Workstation) installs files necessary to run Concordance locally from another server installation. Default registry settings are created on the local workstation and a workstation desktop shortcut is provided that is linked to the Concordance installation on your server. The actual Concordance software is not installed on the local workstation.



Be sure that Concordance is properly installed on the server before initiating a Shortcut Installation.

If you will be using shortcut installations of Concordance 10.24+, make sure the following directories on the Concordance Server are shared with the workstations where the shortcut will be installed:



- The program data folder (C: \ProgramData\CloudNine\Concordance 10). Only the Concordance 10 folder needs to be shared, not the entire root ProgramData folder.
- The program files folder (C:\Program Files (x86) \CloudNine\Concordance 10).

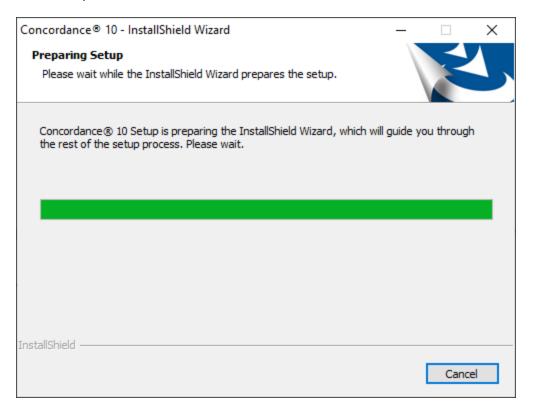


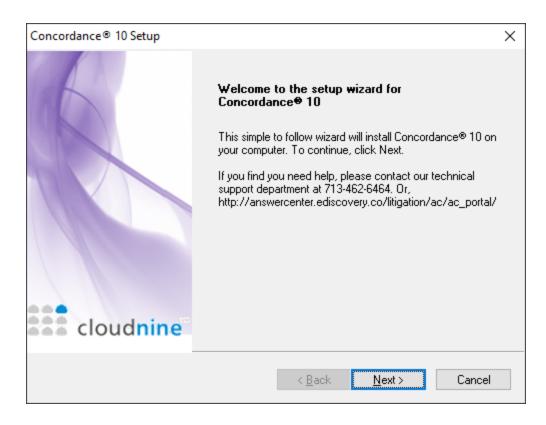
Do not install Concordance Workstation unless the server and/or workstation data has been backed up. If you use a backup application that locks files it may cause read/write failures to the Concordance database if it is being used. For that reason, be sure to schedule backups with your IT group or administrator, and confirm that any Concordance files are not being used while a backup is performed.



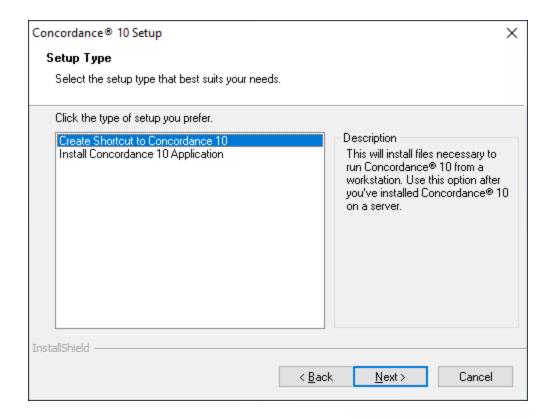
The e-documents import wizard is only compatible with the fully installed version of Concordance. This feature is not available for a Concordance Workstation installation.

- 1. Confirm that the program data folder on the Concordance server has been shared with this local workstation.
- 2. Confirm that you have backed up any current Server and Workstation data.
- 3. Uninstall any previous version of Concordance that you have installed on this local workstation from the Control Panel.
- 4. Run the **Concordance Installer** on the local workstation as an administrator. You will see a **Preparing Setup** screen, followed by a **Welcome** screen. Click **Next** to proceed.

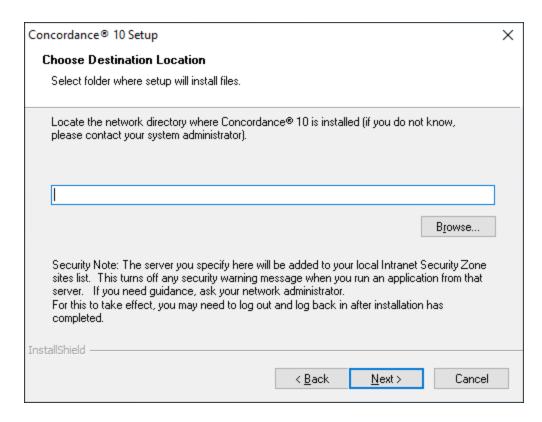




5. You will arrive at the **Setup Type** screen. For standalone or server installations, select **Create Shortcut to Concordance 10** from the list, and then click **Next**.



6. On the **Choose Destination Location** screen, click **Browse**. Navigate to the network location of the Concordance Server (for example \ \<Server>\Program Files (x86)\CloudNine\Concordance 10). Click **Next**.



- 7. On the second **Choose Destination Location** screen, click **Browse**. Navigate to the network location where Concordance (ALLUSERSPROFILE) files reside. This is the same location as the Concordance 10 license file on the Concordance Server (usually \ \<Server>\ProgramData\CloudNine\Concordance 10). Click **Next**.
- 8. Review your installation settings. Click **Next** to begin the installation.
- 9. Click **Finish** to exit the installer.
- 10. You can now use **Concordance** on this local workstation by selecting the Concordance 10 shortcut icon on the desktop.

Concordance Silent Installs

When you need to install and activate the full version of Concordance on numerous machines, you can save time by running silent installations. Silent installations use a **Setup.iss** (InstallShield® Silent response) file to automatically run installations without requiring any user input.

To install Concordance using a **Setup.iss** file, you will first need to create the file itself. This file only needs to be created once. When you are creating the **Setup.iss** file, you performing a normal Concordance installation, and record each step of the installation process. After the **Setup.iss** file is created, it can be used to install Concordance silently on any other machine.

- Please check to ensure you are not exceeding your License
 Agreement when you are creating the **Setup.iss** file for installing
 Concordance. Enterprise Client Licenses are the only licenses that
 allow installing full Enterprise Network Licenses on multiple
 servers or workstations.
- When upgrading to the latest version of Concordance, you must uninstall the older version before proceeding with the installation.

If planning to use silent installation with Concordance, it is recommended that the following prerequisites are installed on any machine that will use/create the **Setup.iss** file. Some prerequisites may require a reboot, which will interrupt the installation recording and playback.

- 囯
- Microsoft Visual C++ 2019 Redistributable x86
- Microsoft .NET Framework 4.7.2
- Microsoft .NET Framework 3.5 Sp1

Create a Setup.iss File for Installing Concordance

- Open a Windows Command Prompt by typing cmd into the Windows search bar and selecting the Command Prompt App.
- 2. Enter the full path to the **Concordance < version > _install.exe** file followed by **-r** and press **Enter**.
- 3. Complete all of the installation and activation steps.

- 4. Once the install completes, the **Setup.iss** file is created in the *C:\Windows* directory.
- 5. Create a network folder and add the following files to the folder:
 - Setup.iss
 - Concordance < version > _install.exe
 - **Concordance_<version>.license** (a hidden file found in the Concordance application data directory, normally found in *C*: *ProgramData\CloudNine\Concordance 10*)

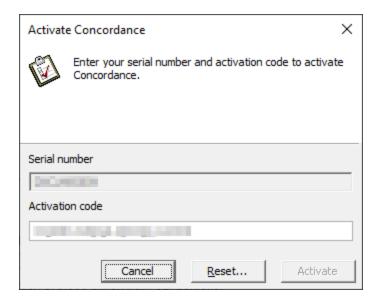
Install Concordance Using a Setup.iss File

- 1. Open a **Windows Command Prompt** by typing **cmd** in the Windows search bar and selecting the Command Prompt App.
- 2. Navigate to the network path where your silent install files are located (see step 5 above).
- Type Concordance < version > _install.exe -s -f1 < fully qualified path to setup.iss file > and press Enter. For example, for Concordance 10, if your setup.iss file is located in the C:\installs folder you would type Concordance 10_install.exe -s -f1"C:\installs\setup.iss".
- 4. The installation runs silently. After it completes, you can view information about the installation in the **Setup.log** file, which can be found in the same folder as the **Setup.iss** file.
- 5. Add a copy of the **Concordance_<version>.license** file to the directory where Concordance was installed (default is *C*: *ProgramData\CloudNine\Concordance 10*).

Activate or Reset Your Concordance License

To activate or update your Concordance Serial Number and Activation Code:

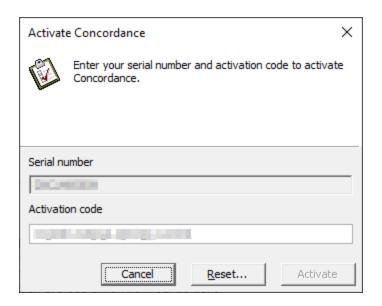
- Launch Concordance by clicking on Start (Windows Key) > CloudNine > Concordance 10 from the Windows Taskbar.
- 2. On the **Help** menu, click **Activate Concordance**.
- 3. Type the **Serial number** and **Activation code**, and then click **Activate**.



- 4. Click **Accept** at the End-User License Agreement.
- 5. Click **OK** to acknowledge the activation was successful.
- 6. Restart Concordance for these changes to take effect.

To reset your Concordance Serial Number and Activation Code:

- Launch Concordance by clicking on Start (Windows Key) > CloudNine > Concordance 10 from the Windows Taskbar.
- 2. On the **Help** menu, click **Activate Concordance**.



- 3. Click Reset....
- 4. Click **Yes** in the message box asking if you want to reset the activation code.
- 5. Follow the steps in the section above to Activate your new license.

Concordance Registry Keys

Registry key locations for Concordance versions 10.24 and onwards:

- HKEY_CURRENT_USER\Software\CloudNine\Concordance 10
- HKEY_LOCAL_MACHINE\SOFTWARE\CloudNine\Concordance 10 (32-bit)
- HKEY_LOCAL_MACHINE\Software\Wow6432Node\CloudNine\Concordance 10\Settings (64-bit)

Specific Registry Keys:

- Snapshot path key:
 HKEY_CURRENT_USER\Software\Concordance\Concordance
 10\Settings\AutoSave. An example snapshot for the current user is < drive>:
 \Documents and Settings\< username > \My Documents\Concordance
 10\autosave.snp.
- Allow bulk database conversion:
 HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\CloudNine\Concordan
 ce 10\Settings\EnableBulkConversion (a value of 1 enables this feature).

Registry key locations for Concordance versions before 10.24:

- HKEY_CURRENT_USER\Software\LexisNexis\Concordance 10
- HKEY_LOCAL_MACHINE\SOFTWARE\LexisNexis\Concordance 10 (32-bit)
- HKEY_LOCAL_MACHINE\Software\Wow6432Node\LexisNexis\Concordance 10\Settings (64-bit)

Specific Registry Keys:

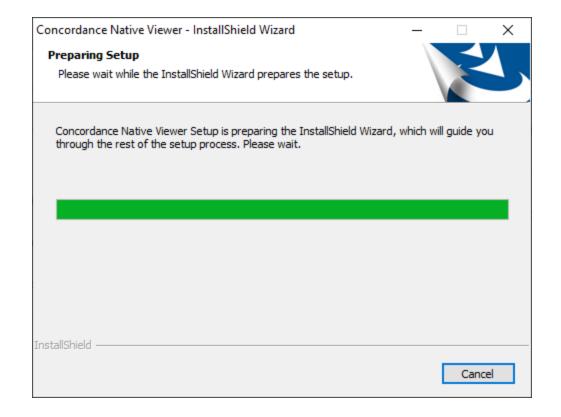
 Snapshot path key: HKEY_CURRENT_USER\Software\LexisNexis\Concordance 10\Settings\AutoSave. An example snapshot for the current user is <drive>: \Documents and Settings\<username>\My Documents\Concordance 10\autosave.snp.

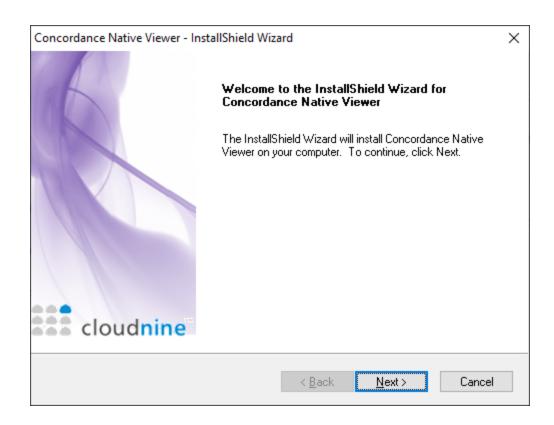
Installing Concordance Native Viewer



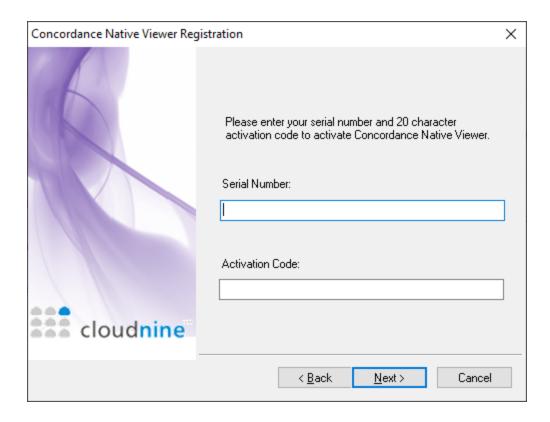
You will be prompted for a Serial Number and Activation Code during installation. Please have that information ready. You cannot install Concordance Native Viewer without them.

 Run the Concordance Native Viewer Installer as an administrator (rightclick > Run as administrator). You will see a Preparing Setup screen, followed by a Welcome screen. Click Next to proceed.

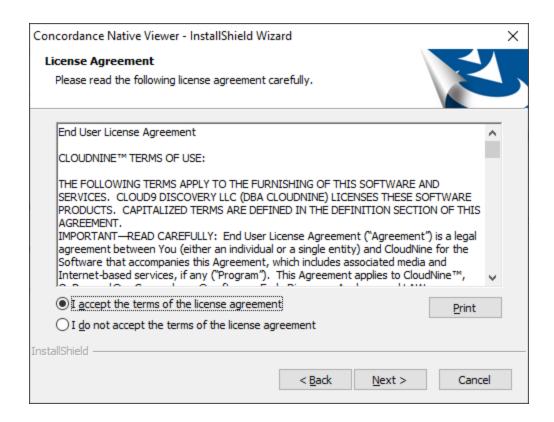




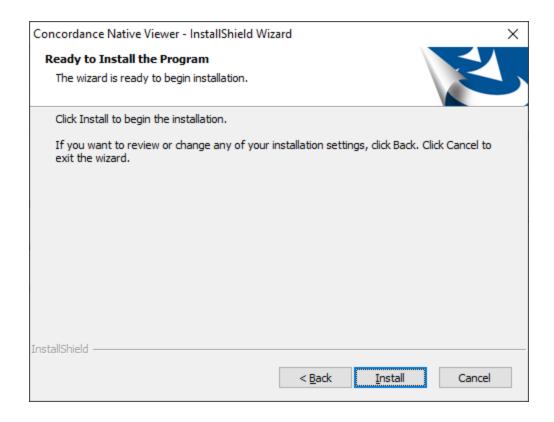
2. You will be prompted for a **Serial Number** and **Activation Code**. Enter those values, and then click **Next**.



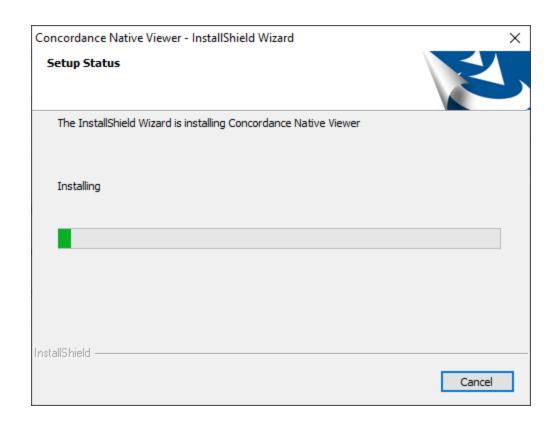
3. The License Agreement displays. Read the information, select I accept the terms of the license agreement, and then click Next.

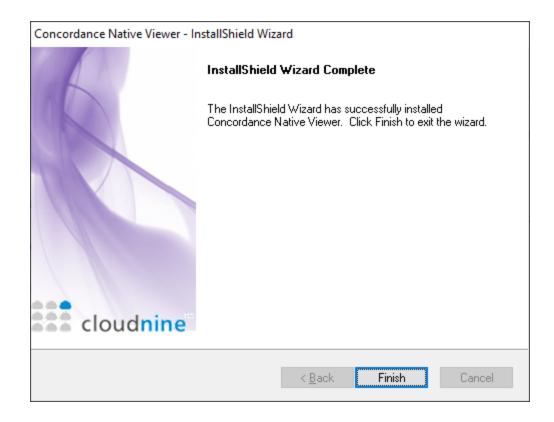


4. The **Ready to Install** screen displays. Click **Install** to begin the installation.



5. A progress screen for the installation will display. Once finished, you will see a completion message. Click **Finish** to exit the installer.





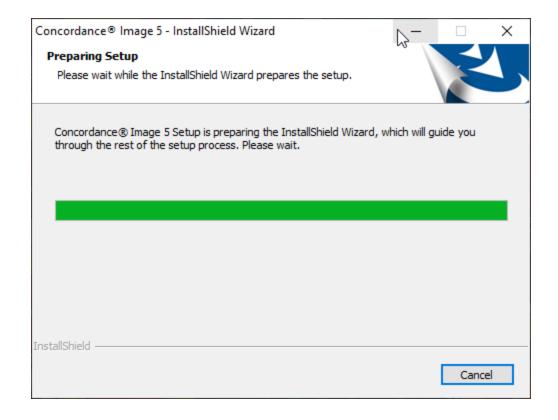
6. You can now use **Concordance Native Viewer** with **Concordance**.

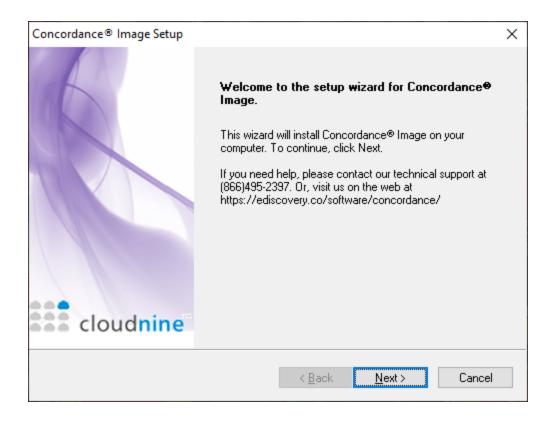
Installing Concordance Image



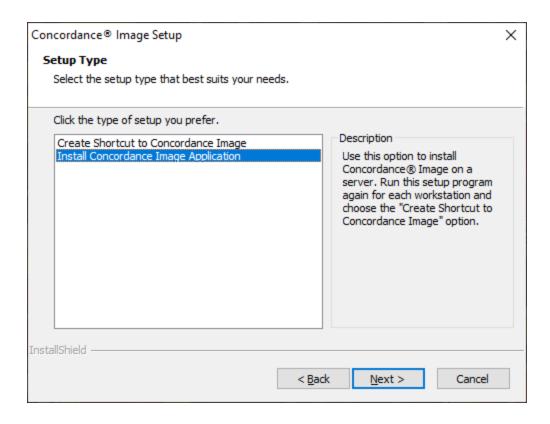
You will be prompted for a Serial Number and Activation Code during installation. Please have that information ready. You cannot install Concordance Image without a them.

Run the Concordance Image Installer as an administrator (right-click > Run as administrator). You will see a Preparing Setup screen, followed by a Welcome screen. Click Next to proceed.

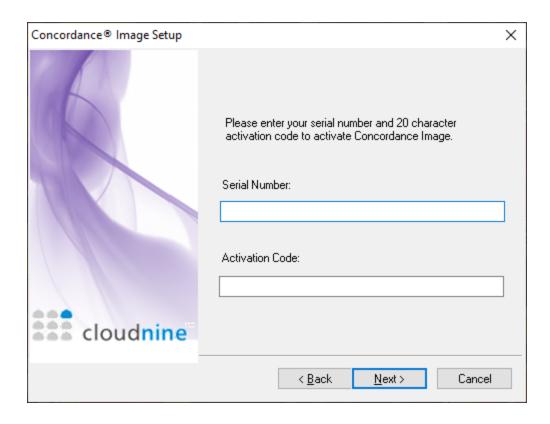




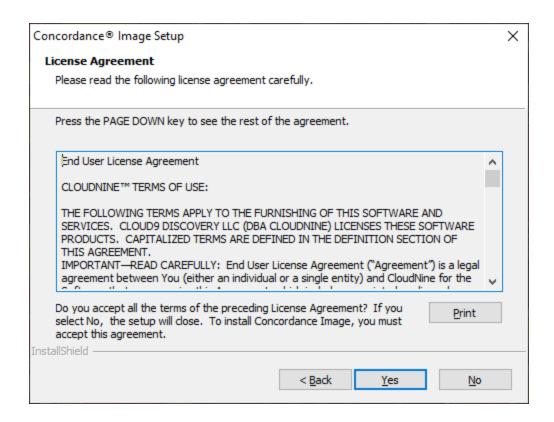
2. The **Setup Type** screen displays. Select **Install Concordance Image Application** from the list, and then click **Next**.



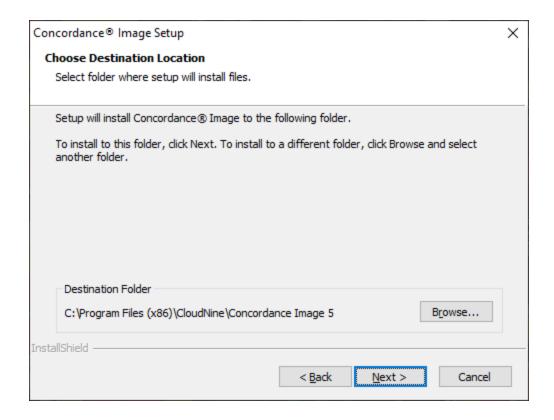
3. You will be prompted for a **Serial Number** and **Activation Code**. Enter those values, and then click **Next**.



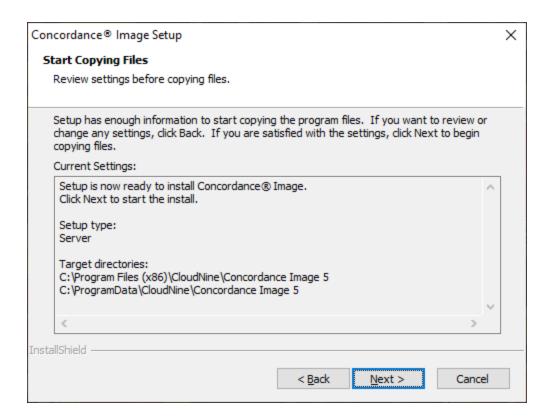
4. The **License Agreement** displays. Read the information, and select **Yes** to accept the license agreement.



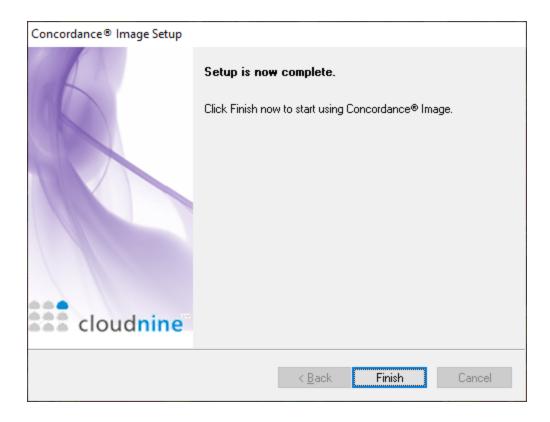
5. On the **Destination Location** screen, you can select a different install folder using the **Browse** button, or click **Next** to accept the default installation folder.



6. At the the **Start Copying Files** screen, you have one final chance to review your installation settings. Click **Next** to begin the installation.



7. A progress screen for the installation will display. Once finished, you will see a completion message. Click **Finish** to exit the installer.



8. You can now use **Concordance Image**.

Shortcut Installation

The Shortcut Installation option (also known as Concordance Image Workstation) installs files necessary to run Concordance Image locally from another server installation. Default registry settings are created on the local workstation and a workstation desktop shortcut is provided that is linked to the Concordance Image installation on your server. The actual Concordance Image software is not installed on the local workstation.

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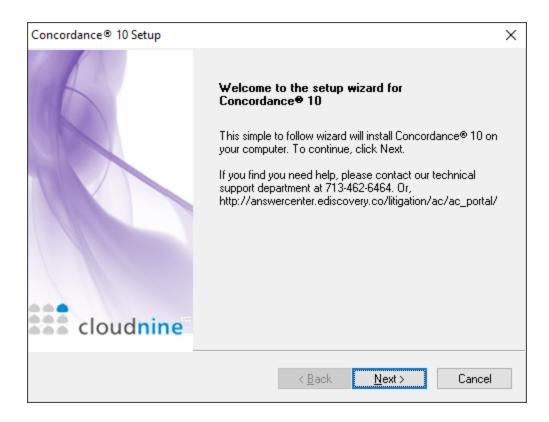
Be sure that Concordance Image is properly installed on the server before initiating a Shortcut Installation.

For Shortcut Installations of Concordance Image 5.05+, the program data folder on the Concordance Image server (*C*: *ProgramData**CloudNine**Concordance Image 5*) must be shared with the local workstation. Only the *Concordance Image 5* folder needs to be shared, not the entire root *ProgramData* folder.

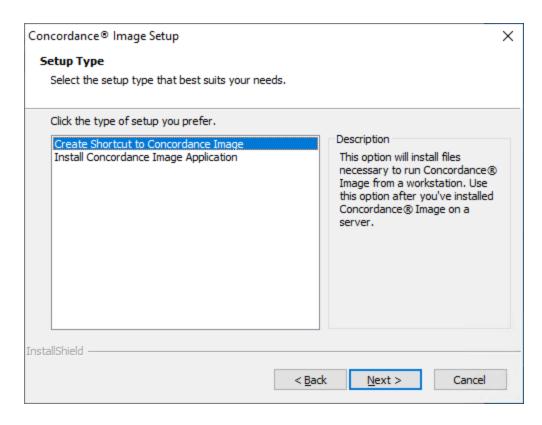


Do not install Concordance Image Workstation unless the server and/or workstation data has been backed up. Be sure to schedule backups with your IT group or administrator, and confirm that any Concordance files are not being used while a backup is performed.

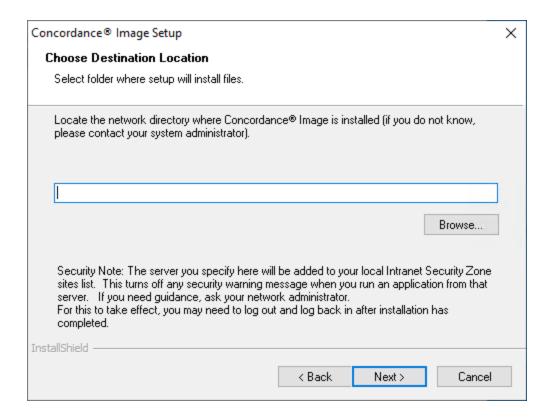
- 1. Confirm that the program data folder on the Concordance Image server has been shared with this local workstation.
- Run the Concordance Image Installer on the local workstation. You will see a Preparing Setup screen, followed by a Welcome screen. Click Next to proceed.



3. You will arrive at the **Setup Type** screen. For workstation shortcut installations, select **Create Shortcut to Concordance Image** from the list, and then click **Next**.



4. On the **Choose Destination Location** screen, click **Browse**. Navigate to the network location of the Concordance Image Server (for example \ \<Server>\Program Files (x86)\CloudNine\Concordance Image 5). Click **Next**.



- 5. On the second **Choose Destination Location** screen, click **Browse**. Navigate to the network location where Concordance Image (ALLUSERSPROFILE) files reside. This is the same location as the Concordance Image license file on the Concordance Image Server (usually \ \<Server>\ProgramData\CloudNine\Concordance Image 5). Click **Next**.
- 6. Review your installation settings. Click **Next** to begin the installation.
- 7. Click **Finish** to exit the installer.
- 8. You can now use **Concordance** on this local workstation by selecting the Concordance Image shortcut icon on the desktop.

Concordance Image Silent Installs

When you need to install and activate the full version of Concordance Image on numerous machines, you can save time by running silent installations. Silent installations use a **Setup.iss** (InstallShield® Silent response) file to automatically run installations without requiring any user input.

To install Concordance Image using a **Setup.iss** file, you will first need to create the file itself. This file only needs to be created once. When you are creating the **Setup.iss** file, you performing a normal Concordance Image installation, and record each step of the installation process. After the **Setup.iss** file is created, it can be used to install Concordance Image silently on any other machine.

- Please check to ensure you are not exceeding your License
 Agreement when you are creating the **Setup.iss** file for installing
 Concordance Image. Enterprise Client Licenses are the only licenses that allow installing full Enterprise Network Licenses on multiple servers or workstations.
- When upgrading to the latest version of Concordance Image, you must uninstall the older version before proceeding with the installation.

<u>Create a Setup.iss File for Installing Concordance</u> <u>Image</u>

- 1. Open a **Windows Command Prompt** by typing **cmd** in the Windows search bar and selecting the Command Prompt App.
- Enter the path to Concordance_Image_<version>_Install.exe followed by r and press Enter.
- 3. Complete all of the installation and activation steps.
- 4. Once the install completes, the **Setup.iss** file is created in the *C:\Windows* directory.
- 5. Create a network folder and add the following files to the folder:
 - Setup.iss
 - Concordance_Image_<version>_Install.exe

 ConcordanceImage.license (a hidden file found in the Concordance Image application data directory, normally found in C: \ProgramData\CloudNine\Concordance Image < version>)

Install Concordance Image Using a Setup.iss File

- 1. Open a **Windows Command Prompt** by typing **cmd** in the Windows search bar and selecting the Command Prompt App.
- 2. Navigate to the network path where your silent install files are located (see step 5 above).
- Type Concordance_Image_<version>_Install.exe -s -f1setup.iss and press Enter.
- 4. The installation runs silently. After it completes, you can view information about the installation in the **Setup.log** file, which can be found in the same folder as the **Setup.iss** file.
- Add a copy of the **ConcordanceImage.license** file to the directory where Concordance was installed (default is C: \ProgramData\CloudNine\Concordance Image < version >).

Concordance Image Registry Keys

Registry key locations for Concordance Image version 5.x:

- HKEY_CURRENT_USER\Software\CloudNine\Concordance Image 5 (32-bit)
- HKEY_LOCAL_MACHINE\SOFTWARE\CloudNine\Concordance Image 5 (32bit)
- HKEY_LOCAL_MACHINE\Software\Wow6432Node\CloudNine\Concordance Image 5\Settings (64-bit)

Registry key locations for Concordance Image version 4.x:

- HKEY_CURRENT_USER\Software\LexisNexis\Concordance Image
- HKEY_LOCAL_MACHINE\SOFTWARE\LexisNexis\Concordance Image

Registry key locations for Opticon version 3.x:

- HKEY_CURRENT_USER\Software\Dataflight Software, Inc.\Opticon
- HKEY_LOCAL_MACHINE\SOFTWARE\Dataflight\Opticon\3.0

Concordance

Installation Guide

References

Chapter

2

References

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Our sales team is committed to helping you to find the right products to suit your requirements. Contact us to learn more about the many flexible licensing options for Concordance® and Concordance Desktop, and to see how our related software and service offerings for litigation support — such as CloudNine™ LAW and CloudNine™ Explore — can help to integrate and accelerate your efforts to arrive at winning solutions.

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