

Concordance[®]

User Guide

Concordance 10.25.0.90



Concordance User Guide

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Concordance® 10.25.0.90

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Concordance

User 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.

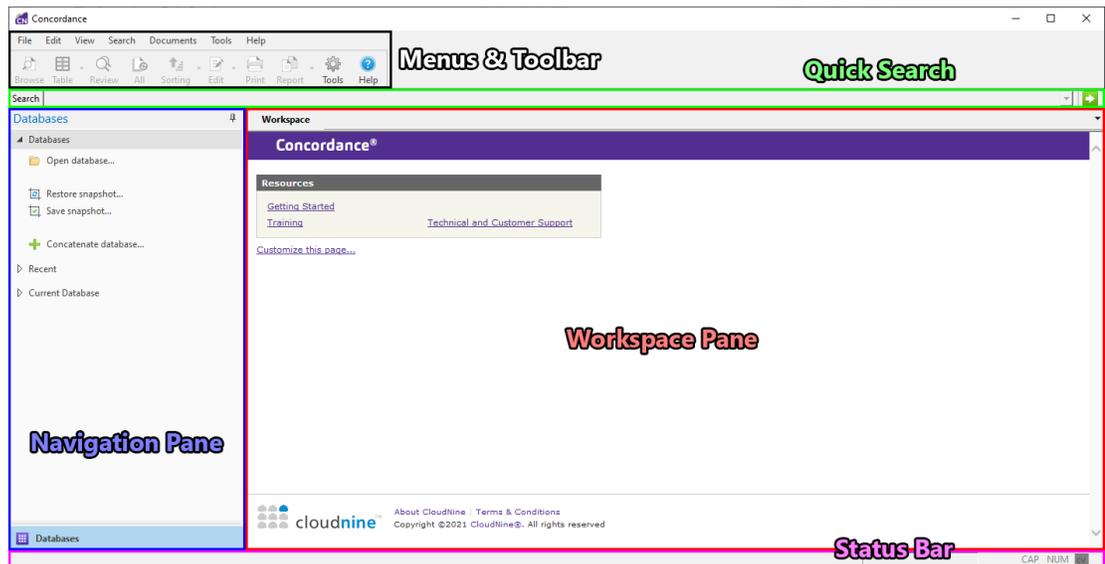
Here are some of the key benefits and features that Concordance offers:

- 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

Using Concordance

User Interface

Launch **Concordance** by right clicking on **Start** (Windows Key) > **CloudNine** > **Concordance 10** from the Windows Taskbar, and selecting **Run as administrator** from the More menu.



Menus & Toolbar

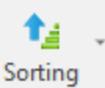
Menus

- **File** - Here you can create, maintain, and manipulate databases and/or the files used by these databases. You can also send data from Concordance to other applications, and edit or run Concordance programs.
- **Edit** - Contains commands that allow you to edit and set data validation options for documents in your databases.
- **View** - From here you can open images in your viewer, work with documents in the **Edit**, **Browse**, **Review**, or **Table** views, change data and field font sizes, split your screen, and select the status bar and toolbars.
- **Search** - Provides access to the **Simple Search** and **Advanced Search** panels in the Search Task pane, access to the **Form Search - Query by Example** dialog box, and the **Persistent Search** and **Find Attachments** commands. You can also save your query session to a file, re-execute a saved query session, clear all searches, and search for documents that have been edited or marked for deletion.

- **Documents** - Allows you to navigate documents and search results, and import, export, print, or create reports in your Concordance databases. Most Documents menu commands operate on the current query.
- **Tools** - Contains options for displaying empty fields, checking for duplicate records, managing list files, managing tags and issues, replication, production, and updating your preferences.
- **Help** - Provides a link to the online Concordance Help. You can also activate Concordance, and view your installed Concordance version number.

Toolbar

Button	Description
 Browse	<p>Opens the Browse view. The Browse view allows you to view the documents in the database. You can also add and edit tags, notes, and issues to documents in the Browse view, and send selected text to other programs. When you open the Browse view you will be viewing the first document in the current query or the first document in the database if no query has been entered.</p>
 Table	<p>Opens the Table view. The Table view displays documents from the current search in a tabular format, similar to a spreadsheet, with one document per row. In the Table view, you can add and edit tags to documents, define which fields are displayed in the view, the field order, and modify the style and color of the font displayed in the view.</p>
 Review	<p>Opens the Review view. The Review view displays all searches performed since the current database was opened, indexed, reindexed, or the search history was cleared. The Review view includes the search number, number of search hits, number of documents containing the search terms, and the search terms for each search.</p>

Button	Description
 All	<p>Selects the entire database and returns the sort order of all records to the order in which they were added to the database. This function is sometimes referred to as Zero Query. The document last displayed in the Browse view remains the active record. The documents that come before and after are the documents that physically precede and follow it in the database. When you want to return to the last query, simply click the All button again. Performing a search also resets the All button.</p>
 Sorting	<p>Opens the Sorting layouts dialog box. The Sorting layout feature provides additional tools to customize and save how records are sorted in the Browse view to display the desired result.</p>
 Edit	<p>Opens the Edit view. The Edit view allows you to edit the contents of the documents in the database. The Edit view also provides additional tools needed to create and save custom edit layouts that can be applied to display only the fields specified in the selected layout in the Edit view.</p>
 Print	<p>Opens the Print documents dialog box. In the Print documents dialog box you can print records located from a search. You can underline search terms and produce key-word-in-context reports. Printed output can be routed to your printer or to a file. You can select a range of documents within the current query and specify the fields within the database.</p>
 Report	<p>Opens the Report Writer dialog box. When you click the arrow next to the Report view button, you can open the Report Writer or Annotation Report dialog box. The Report Writer dialog box is used to create columnar reports for</p>

Button	Description
	database data. The Annotation Report dialog box is used to create the Annotation Report for transcript databases.
	Opens the Preferences dialog box. In the Preferences dialog box you can you to customize how you use Concordance, including customizing the Workspace tab, search hit color, title bar, issue coding, and indexing.
	Opens the Concordance Answer Center.

Quick Search

The Quick Search field is located below the **Menus & Toolbar** and can be used in any view. Quick Search allows you to enter basic one-word searches, as well as more complex combinations without having to open the Search Task pane.

Quick Search also stores your queries from your current Concordance session. Click the drop-down arrow on the right to edit and rerun a previous search easily.

Navigation Pane

The Navigation pane allows you to manage your case record review, control database access, and conduct your daily search, sort, and tagging tasks.

The Navigation pane contains multiple Task panes. Each Task pane is divided into work areas called panels. The Navigation pane is re-sizable based on your personal preference. Notice the pin icon in the upper right corner of the Navigation pane. By

clicking this icon, you can hide the Navigation pane on the left with the Toolbox tab. Click the Toolbox tab to view the Navigation pane again, and re-pin to make it visible at all times.

Task Pane	Description
Databases	Allows you to open and concatenate multiple databases, take a snapshot of a query session, quickly scan recently reviewed databases, and identify the current database you are reviewing and whether it needs updating.
Search	Allows you to perform simple to advanced queries with fast search results, save and reopen queries, clear search history, and access the dictionary and field lists.
Tags	Contains a menu tree for categorizing tag folders, adding new tags, and panels for running history and statistical tag queries.
Notes	Displays comments added to a document, allows you to sort by note or issue, and shows the properties for each file.

Workspace Pane

The Workspace pane is located on the right side of the Concordance interface, and displays database items in various views. When you open a database in Concordance, a tab is created for the database in the Workspace pane.

Status Bar

Document 2 [2] of 11 CAP NUM **CV**

The Status bar at the bottom of the Concordance window displays the current document number being edited, and the total number of documents in the current set. The bracketed number reflects the document's location in the physical database. The Status Bar also displays activation of the **Caps Lock** key and **Num Lock** lock key, and **CV** will display highlighted in green if you currently have a viewer active.

Additional document indicators are displayed here for documents that are tagged (TAG), marked for deletion (DEL), and/or locked (LCK) by another user. A document locked by another user cannot be saved. A locked document is displayed for editing so that you can copy the document data to another document or program. When a record is locked, the record is grayed out.

Dynamic Toolbars (not shown above)

Depending on the view that you are in, a dynamic toolbar appears in the lower left corner, just above the status bar. The available tools in the dynamic toolbar update automatically based on the current view.

Button	Name	Description
	First	Opens the first document in the current query in the Browse view, or opens the first document in the database if you are using zero query.

Button	Name	Description
	Previous	Opens the previous document in the Browse view.
	Next	Opens the next document in the Browse view.
	Last	Opens the last document in the current query in the Browse view.
	Go to	<p>Opens the Goto dialog box, where you can enter the number of the document you want to view from the current query. Concordance opens the document in the Browse view.</p> <p>For Transcripts, use the Goto dialog box to enter the number for the document, page, or line you want to view.</p>
	Previous Hit	Moves the cursor to the previous search hit in the Browse view. If the document was edited since the last re-index, the document containing the hit is displayed, but the search terms are not highlighted.
	Next Hit	Moves the cursor to the next search hit in the Browse view. If the document was edited since the last reindex, the document containing hit is displayed, but search terms are not highlighted. If

Button	Name	Description
		there isn't a next search hit to display, the next document is displayed.
	View Image	Displays the image associated with the current document. Once you click the View Image button, it automatically stays selected and displays the image associated with each record in the image viewer. Click the View Image button again to release the button. This button only works when images are enabled in Concordance.
	Copy	Opens the Copy dialog box, where you can copy document data from selected fields to the output destination you specify.
	Font	Opens the Font dialog box. When you modify the font in the Browse view, you are modifying the font for data displayed in the Browse view for the entire database. When you modify the font in the Table view, you are modifying the font for data displayed in the Table view for the entire database. If you are viewing a concatenated database, the font change only affects the database for the current selected record.
	Edit	Adds the search terms of a selected query to the Search task pane for

Button	Name	Description
		editing.
	Activate	Select a search in the Review view and click the Activate button to activate a previous search and make it the current search. Clicking the Activate button opens the documents in the Browse view.
	Fields	Opens the Fields dialog box, containing a list of all fields available for editing. Select a field from the list and click the Insert button to move your cursor to the selected field in the Edit view.
	Ditto	Opens the Duplicate dialog box, where you can copy field data from one record to another record or to another field in the current record.
	Delete	Marks and unmarks a record for deletion. Records marked for deletion are removed from the database when the database is packed.
	Undo	Opens the Edit Options dialog box, where you can undo edits, mark and unmark the record for deletion, or erase all content from the document.

Preferences

The **Preferences** dialog box contains settings used by both the administrator and reviewers. You can choose to prevent certain users from accessing the **Preferences** dialog box by applying security to this menu item. Most of the preferences are Microsoft Windows registry settings, but there are several options that allow you to apply selections to all databases.

Setting some of your viewing parameters helps to ease browsing by offering more record details onscreen, changing the red highlight color for keywords, and choosing default settings for the Concordance Image viewer application.

To open the **Preferences** dialog box, use the **Tools** menu from the User Interface.

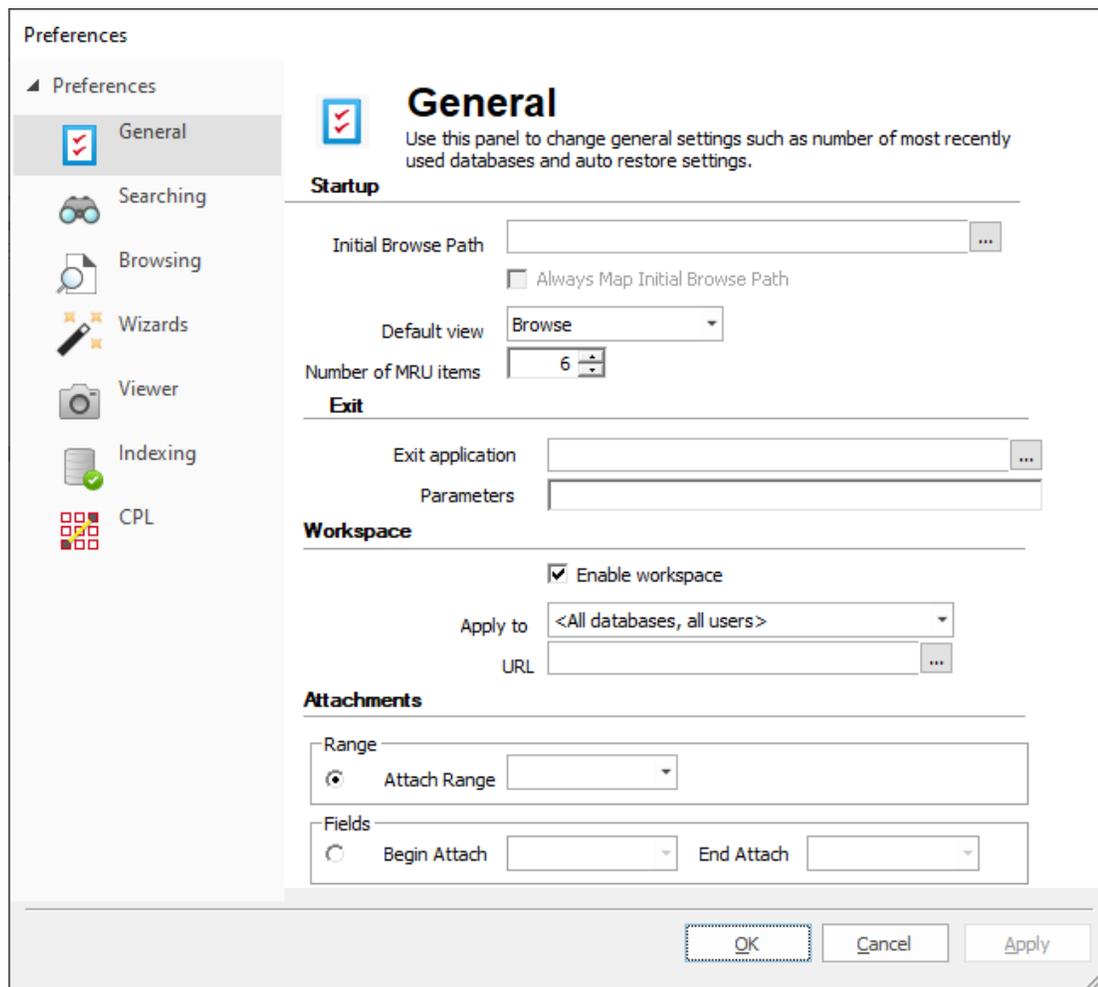
The Preferences dialog box contains seven tabs:

- **General** - settings used when starting and closing Concordance, enable/disable Workspace options, and assigning fields for attachments.
- **Searching** - settings for the default search behavior and search engine.
- **Browsing** - settings for the title bar field, default query field, and tag and issue options.
- **Wizards** - settings for enabling or disabling the import and export wizards.
- **Viewer** - settings for the default viewer application and View image (camera) button preferences.
- **Indexing** - settings for configuring the amount of memory allocated to indexing and reindexing.
- **CPL** - settings for CPLs, such as the CPL font selection.



Any setting changes made in the **Preferences** dialog box require you to close Concordance and restart the application before taking effect.

General Preferences



Startup	
Initial Browse Path	Determines the folder that first opens when browsing for a file or opening a new database. Use the ellipses button [...] to browse to and select the desired folder.

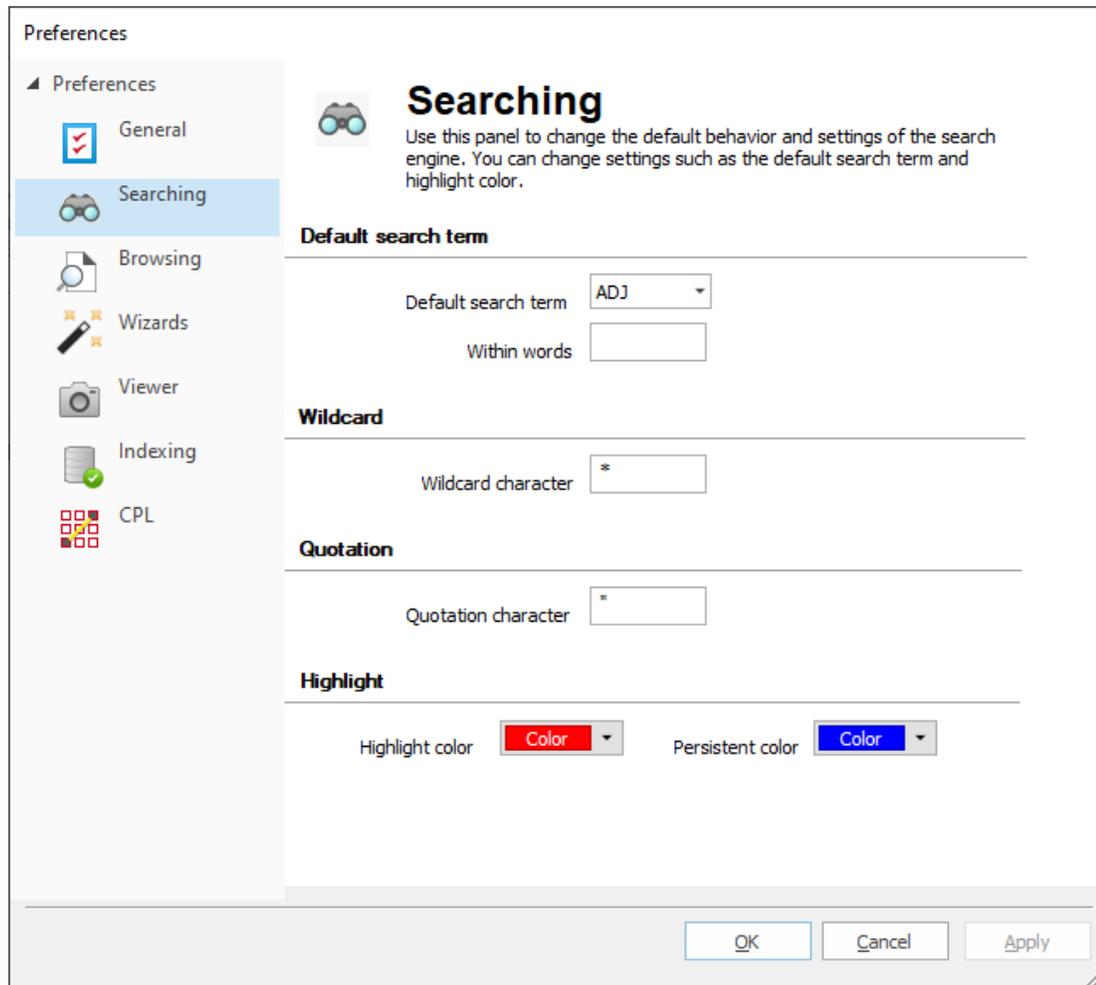
Startup	
	<p>During each Concordance session, the browse path is dynamic, so the last folder what was opened will be stored. The next time you browse for a file or select Open database, that stored folder location opens. However, when you close and restart Concordance, the browse path will be reset to the Initial Browse Path.</p>
Default view	<p>Select either Browse or Table to determine which view is displayed when you open a database in Concordance.</p>
Number of MRU items	<p>Determines the number of files listed in the most recently used (MRU) file list, which is displayed in the File menu and the Recent panel in the Databases task pane.</p> <p>The maximum number of files you can display is 9.</p>

Exit	
Exit application	<p>Allows you to set up an application to launch automatically once Concordance is closed.</p> <p>Use the ellipses button [...] to browse to the the desired executable application.</p>
Parameters	<p>Allows you to define launch parameters for the Exit Application.</p>

Workspace	
Enable Workspace	<p>Determines whether or not the Workspace tab in Concordance is displayed.</p>
Apply to	<p>Determines which users will be affected by changes made to the Workspace settings.</p>
URL	<p>Allows you to add a link to an external HTML webpage. Be sure to include <i>http://</i> or <i>https://</i> in this URL.</p>

Attachments	
Range	Allows you to specify an Attach Range field to use with the Find Attachments feature. You should select a paragraph type field.
Fields	Allows you to specify a Beg Attach and End Attach field to use with the Find Attachments feature. You should select paragraph type fields.

Searching Preferences



Default search item	
Default search term	Determines which search operator is used when two search terms are entered without an operator present between them.

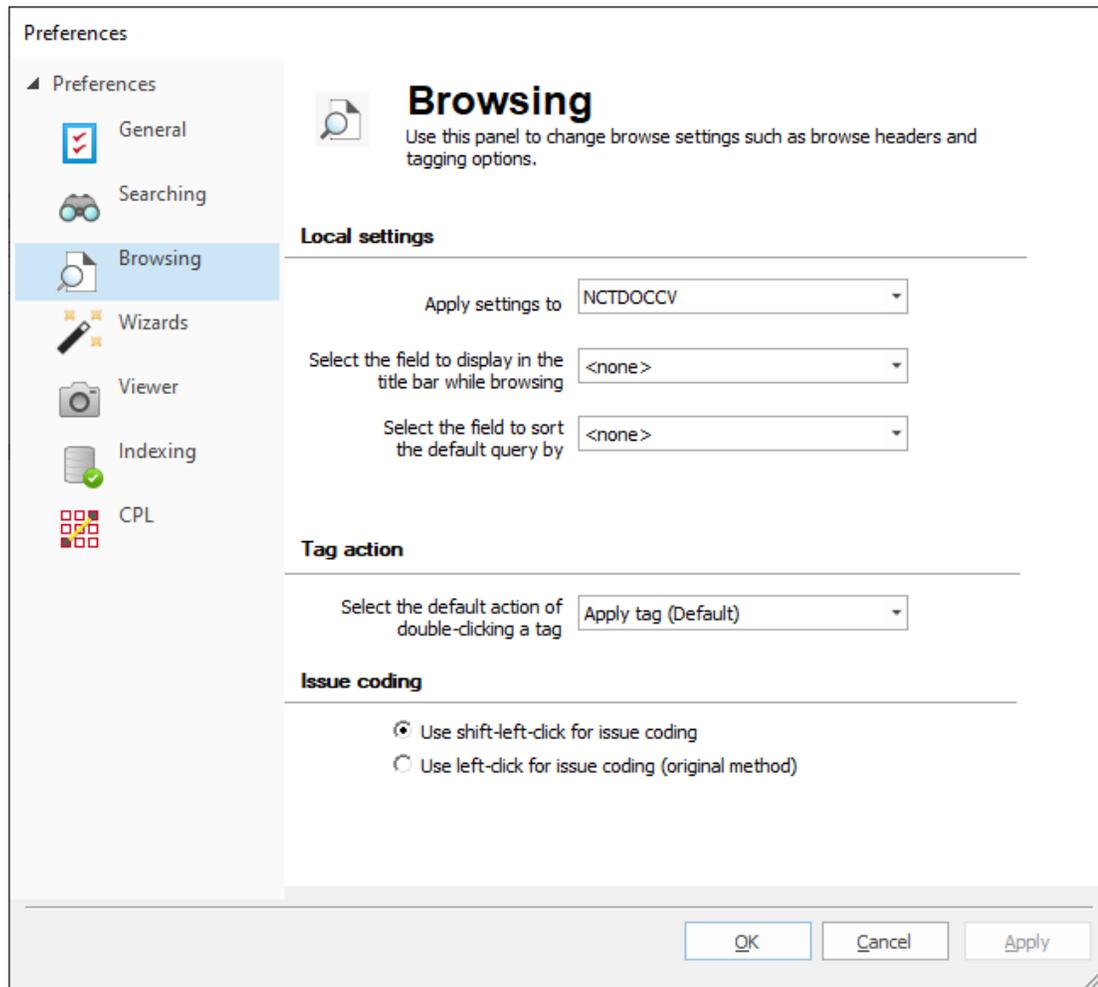
Default search item	
Within words	<p>Expands the allowed proximity between words within the search results.</p> <p>For example, a search for "Cloud Nine" will search for the word "Cloud" within 3 words of "Nine".</p>

Wildcard	
Wildcard character	<p>This character is used as a prefix or suffix mask when running a search. Must be a non-alphanumeric character.</p>

Quotation	
Quotation character	<p>This character is used to specify search strings, which is useful when your query includes numbers or special characters, such as periods, asterisks, and spaces.</p> <p>Must be a non-alphanumeric character.</p>

Highlight	
Highlight color	<p>Determines the color used to display search hits from searches performed using the Quick, Simple, Form, and Advanced Search features.</p> <p>It is best practice to choose a color that stands out against the Browse view background, and is different than the data or field font color.</p>
Persistent color	<p>Highlights terms found in the record from the list of terms in the <dbname>_Persistent.txt file when the Persistent Search feature is enabled.</p> <p>It is best practice to choose a color that stands out against the Browse view background, and is different than the data or field font color.</p>

Browsing Preferences



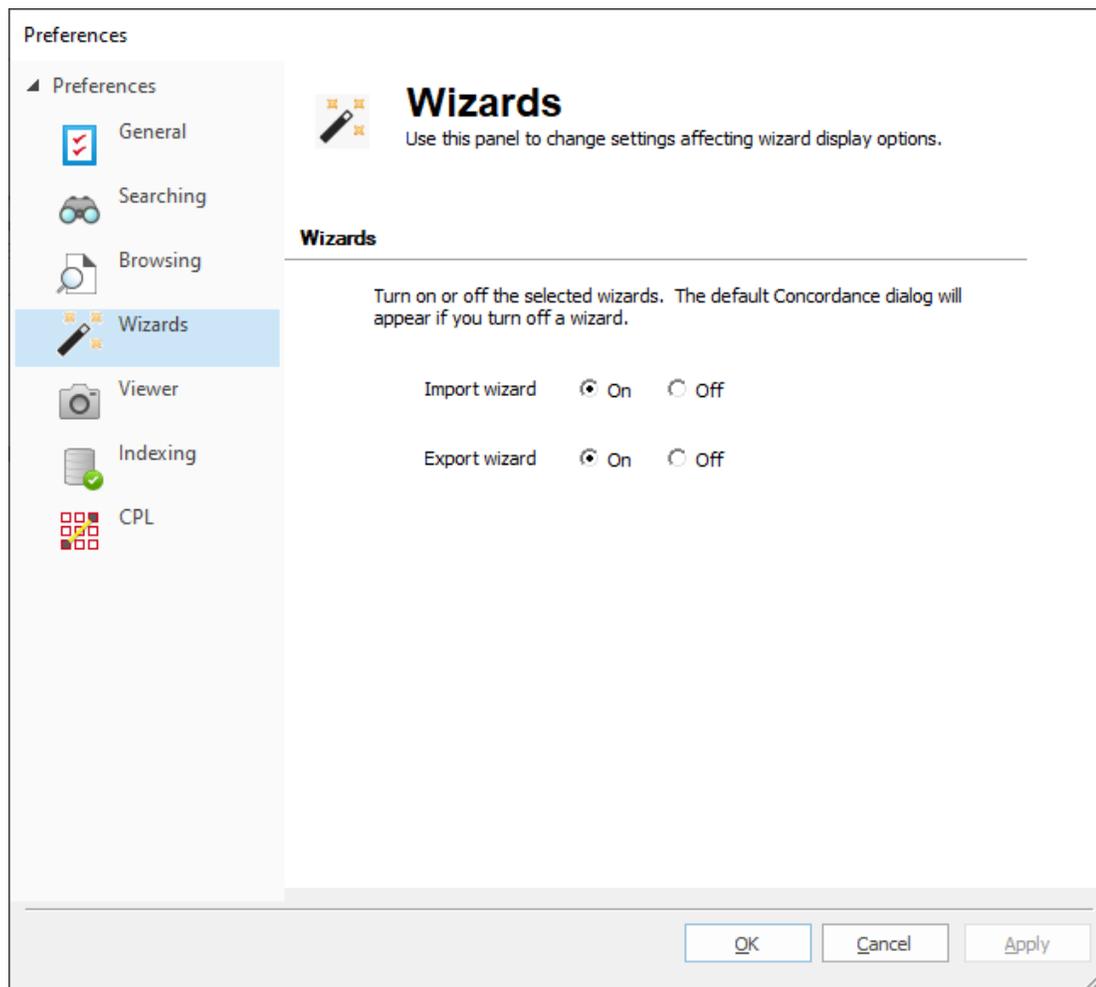
Local settings	
Apply settings to	Determines what database the Browse settings are applied to. Browse settings can be applied to any database in a group of concatenated databases.

Local settings	
Select the field to display in the title bar while browsing	<p>Determines which field will be displayed in the Concordance title bar for the current document in the Browse, Table, and Edit views.</p> <p>For transcript databases, Concordance automatically displays the name, date and volume of the current document in the Title bar.</p>
Select the field to sort the default query by	<p>Determines the sort order of a database when it's opened and before running a search, also known as the <i>default query</i>.</p> <p>This can be set to any field designated as a key field on the New or Modify dialog boxes. Selecting <none> sorts the database by document number.</p>

Tag action	
Select the default action of double-clicking a tag	<p>Specifies what happens when you double-click a tag. You can always access the tagging options menu in Concordance by right-clicking a tag.</p>

Issue coding	
Use shift-left-click for issue coding	Issues are applied to highlighted text in Concordance when shift-left-clicking.
Use left-click for issue coding (original method)	Issues are applied to highlighted text in Concordance when left-clicking.

Wizards Preferences



Wizards	
Import wizard	Enables or disables the wizard that guides you through the process of loading delimited text files into Concordance.

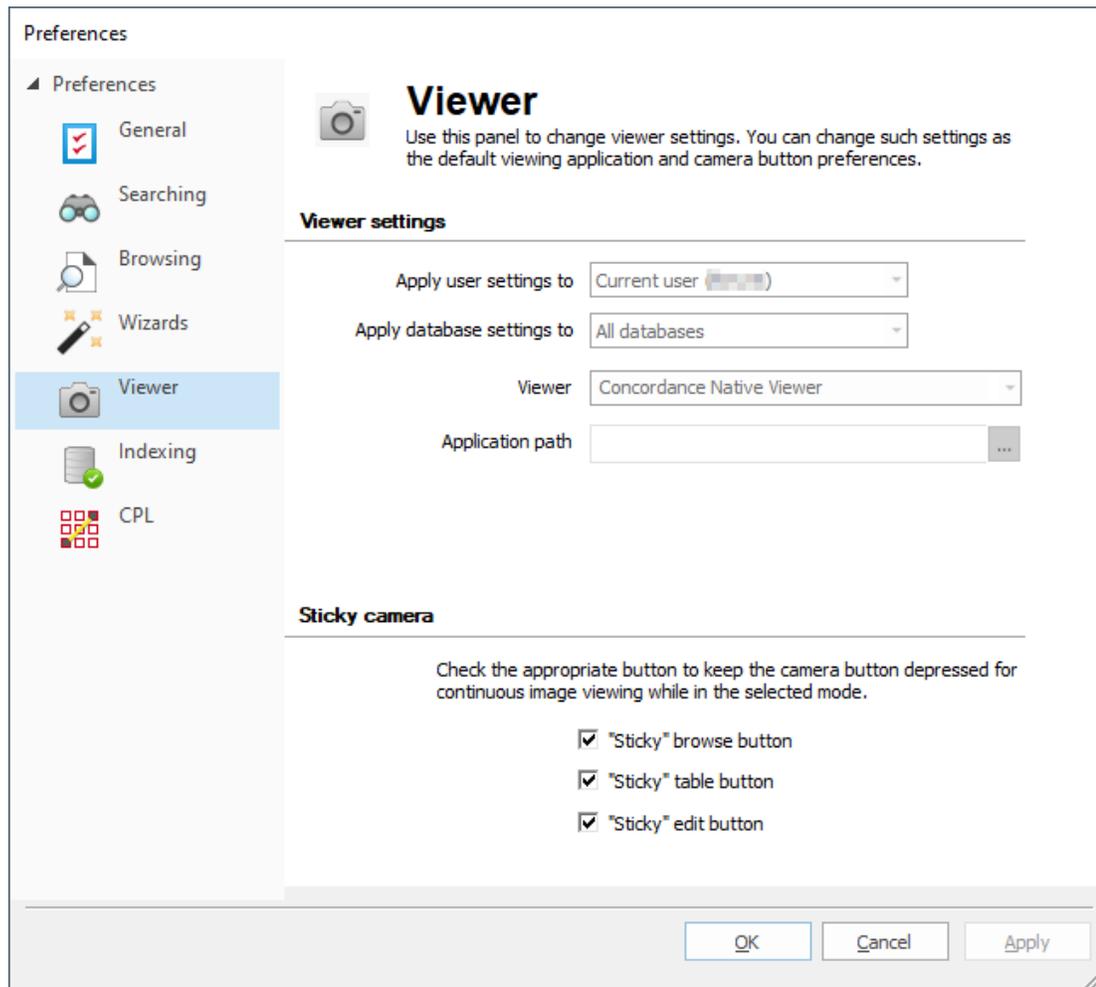
Wizards	
	When disabled, importing a delimited text file opens the Import Delimited Text dialog box rather than the Import wizard .
Export wizard	<p>Enables or disables the wizard that guides you through the process of exporting a Concordance database to a delimited text files.</p> <p>When disabled, exporting a delimited text file will open the Export Delimited ASCII dialog box rather than the Export wizard.</p>

Viewer Preferences

Viewer Settings can be defined at different levels - all users, the current user, or database. Settings at the lowest level take precedence. If you define viewer settings for all users and an individual database, when accessing that specific database the database settings will be used (not the all user settings).



Viewer settings for all databases are stored in the local user's registry settings and only apply to the local user. Viewer settings that are applied to a specific database are stored in the .ini file of the database and will impact all users that access that database.



Viewer settings	
Apply user settings to	Determines whether user settings apply to the Current user or All users .
Apply database settings to	Determines whether the database settings apply to the Current database or All databases .

Viewer settings	
Viewer	<p>Use this drop-down to select the application that you want to use as the default image viewer. Other fields may be displayed depending on the viewer chosen. The following options are available:</p> <ul style="list-style-type: none">• <u>Concordance Viewer</u>: This database will use the Concordance Viewer.• <u>Concordance Native Viewer</u>: Click the ellipses button to the right of Application path. In the file explorer window, navigate to the location of your <i>ConcordanceNativeViewer.exe</i> and click Open.• <u>Concordance Image (Option)</u>: Click the ellipses button to the right of Application path. In the file explorer window, navigate to the location of your <i>ConcordanceImage.exe</i> and click Open.• <u>CPL</u>: Click the ellipses button to the right of Viewer CPL. In the file explorer window, navigate to the location of the .cpl file to execute when you click the View Image button in Concordance, and click Open.

Viewer settings	
	<p>See more information below on using the CPL option.</p> <ul style="list-style-type: none">• <u>IPRO</u>: Click the ellipses button to the right of Application path. In the file explorer window, navigate to the location of <i>IPRO.exe</i> and click Open. Click the ellipses button to the right of Viewer CPL. Browse to and select the applicable <i>.cpl</i> file. You can download the CPL script from Ipro Tech. For more information about the IPRO viewer and setup options, see the IPRO documentation.• <u>IPRO Thin Client</u>: Enter the appropriate Alternate project name. For more information about the IPRO Thin Client viewer and setup options, see the IPRO documentation.• <u><none></u>: No viewer is defined for the user and/or database selected.• <u><Use Global Settings></u>: No specific viewer settings are defined for the user and/or database selected, global settings will be used.

Sticky camera	
"Sticky" browse button	The View Image button will automatically be selected in the Browse view.
"Sticky" table button	The View Image button will automatically be selected in the Table view.
"Sticky" edit button	The View Image button will automatically be selected in the Edit view.

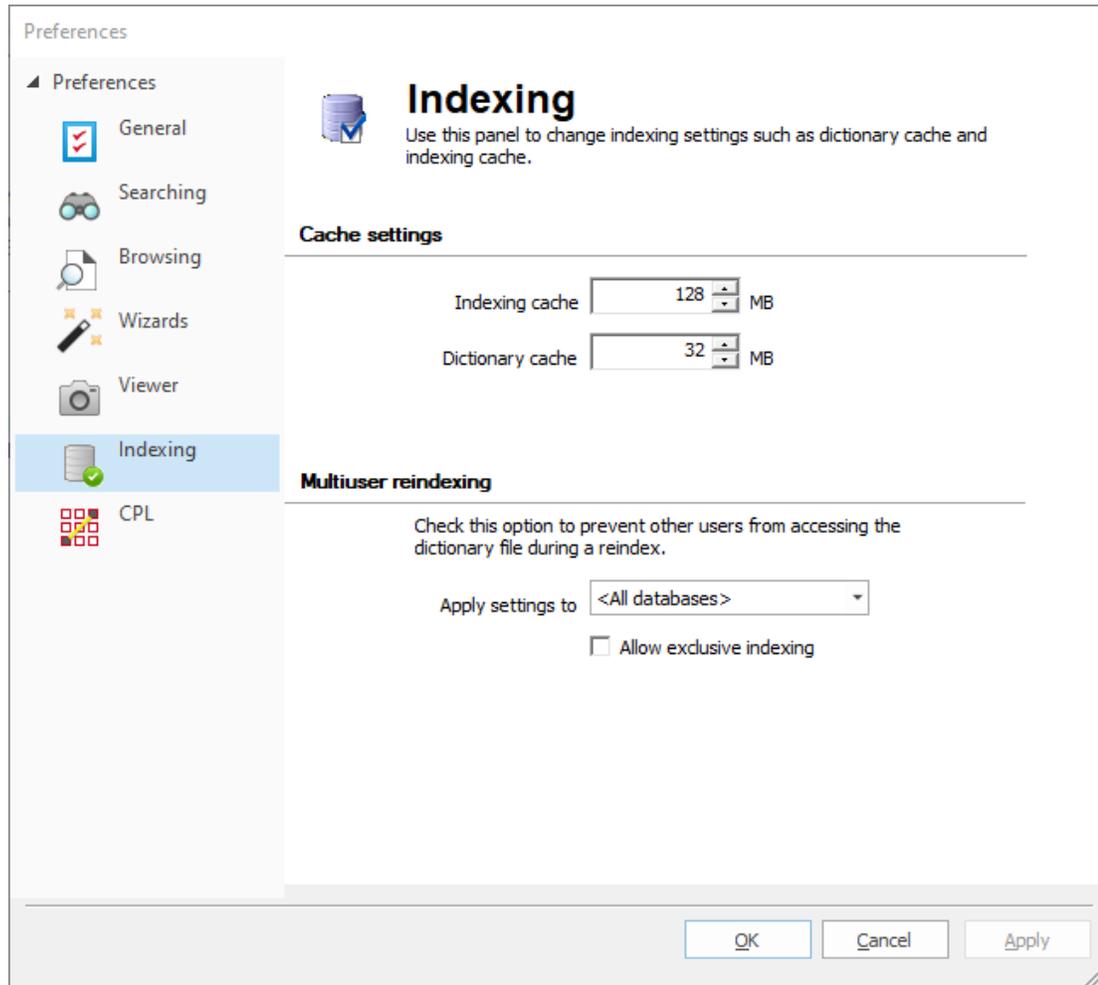
Using CPL Viewer

The CPL (Concordance Programming Language) viewer option is intended for programmers and systems integrators who have knowledge of programming languages and technical expertise. Concordance can execute a CPL program when clicking the View Image button in the Browse, Edit, or Table view, or right-clicking highlighted text and clicking View image. The CPL program can then pass the image key to another program through DDE or as a startup parameter.

The CPL program you select needs to take the appropriate action to bring up the viewer and the proper image. The CPL program should check the clipboard by using the paste() function. If nothing is in the clipboard, your program should use the data in the image-key field. You need to check the clipboard because the end user can highlight text in the Edit or Browse view and send it to your program with the right mouse button. Your program must not perform any screen displays. For information about DDE functions that may be useful to your program, see

[Developing with Concordance](#)⁴⁰⁰.

Indexing Preferences

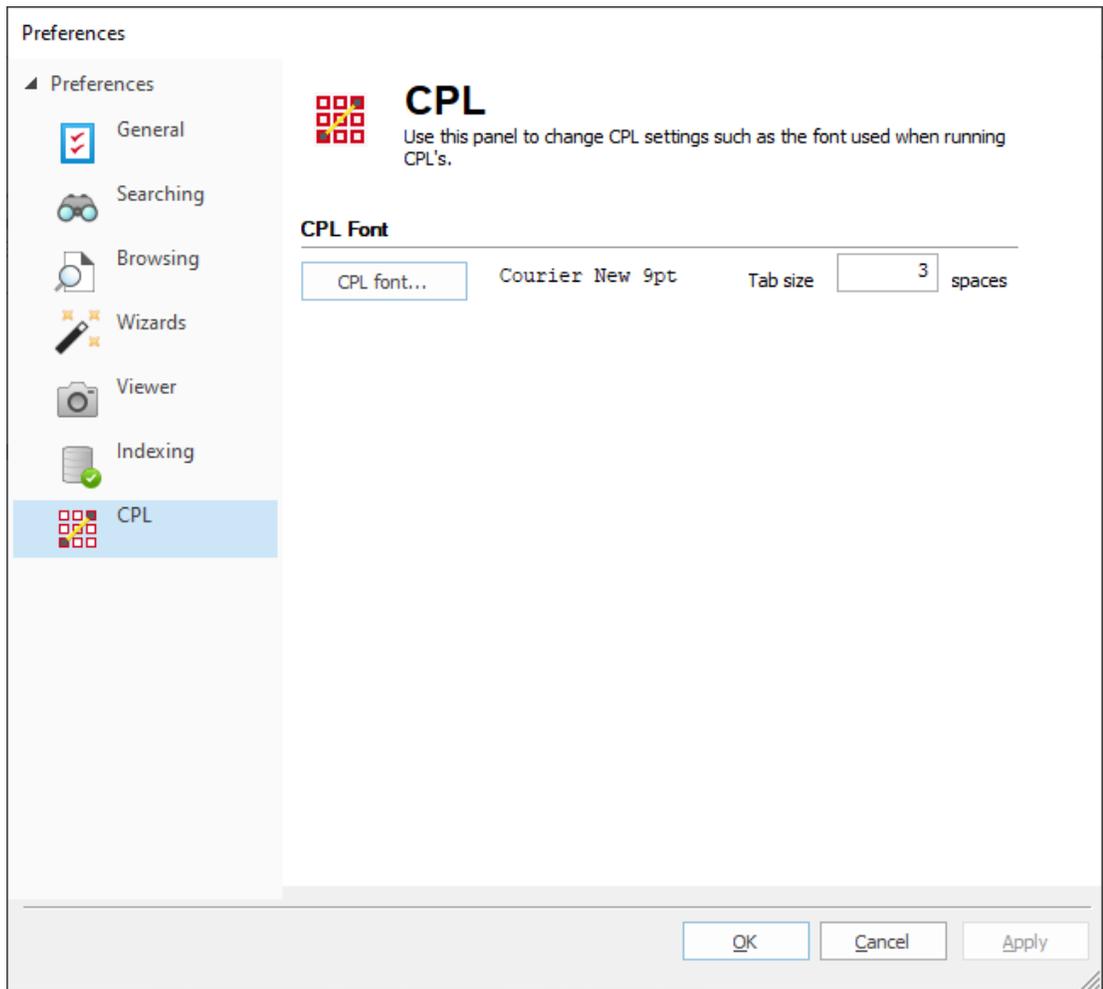


Cache settings	
Indexing cache	Determines the memory cache available for the indexing process. This cache is released back to the

Cache settings	
	<p>operating system when indexing completes.</p> <p>Larger caches result in faster database indexing. Be careful not to allocate more memory than your workstation can afford, and leave at least 128MB for the operating system. Concordance logs the allocation and indexing time in <i>Concordance_[version #].log</i>.</p>
Dictionary cache	<p>Determines the cache available for all list files, including the database dictionary, the database .key file, the stop-word files, files for spell-checking, miscellaneous .lst files, security and password files, etc. This cache is always in use, not just during indexing.</p> <p>Indexing also makes extensive use of the dictionary cache. Increasing the size of this cache will especially improve indexing performance on large natural language text and OCR databases.</p>

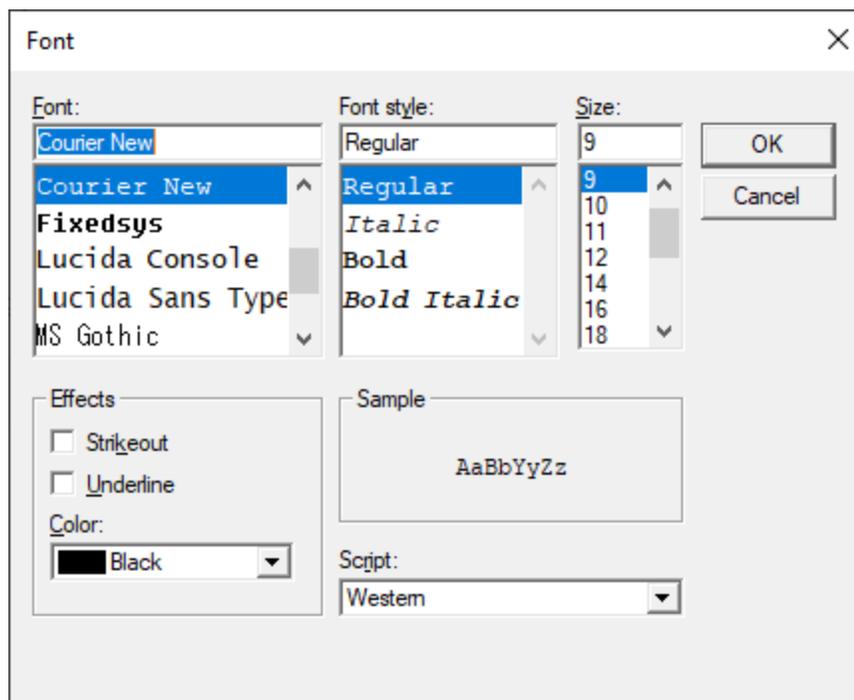
Multuser reindexing	
Apply settings to	Use this drop-down to determine whether <All databases> or just the current database will become unavailable for searching or dictionary functionality during indexing or re-indexing. This setting works in conjunction with the Allow exclusive indexing check-box.
Allow exclusive indexing	This will prevent searching and dictionary functionality during indexing or re-indexing for databases specified in the Apply settings to drop-down.

CPL Preferences



CPL Font	
CPL font...	Use this button to open the Font dialog (shown below), allowing you to adjust CPL font settings.

CPL Font	
Tab size	Enter a numeric value (number of spaces) to adjust the tab size.



Creating a Database

Concordance supports several different types of databases. It is important to understand the differences, and to properly prepare and plan for your database based on your data requirements.

If you are new to Concordance, please see the [Concordance Databases](#)³⁰⁹ information before creating a new database.

When creating a database, Concordance uses a wizard type interface that walks you through each step of the database creation process. The Wizard is for creating new databases only. The Wizard supports three types of databases: **Load File**, **E-Document**, and **Email and Attachments**.

Load File Databases

The New Database Creation Wizard for load files uses the header row of a delimited text file, an existing Concordance database structure, or a setting file that was saved from an existing database to create the fields and import the data. The database can be modified to fit your needs.

Keep the following in mind when using the wizard to create a Load File database:

- Field names longer than 12 characters will be truncated automatically.
- All OCR text files must be located within the same directory.
- Selecting a viewer and loading imagebase files is optional. If you do not create an imagebase, only multi-page OCR text files can be loaded (multiple OCR text files for a single database record will only have the first file loaded).
- If the viewer and imagebase options are selected, single-page OCR text files are grouped together into a single database record and separated in the specified OCR field using page tags (i.e. *****00010002*****).
- All image files are loaded from an OPT file, which contains the path and file name for each image.
- Only one OPT file can be loaded using the Wizard. If you have more than one OPT file, use the Imagebase Management tools.
 - For Concordance Viewer or Concordance Native Viewer, see OPT to CIB.
 - For Concordance Image, see Loading Image Files.
- Only TIF formatted files can be loaded for Concordance Image.

E-Document Databases

Concordance is able to create a database using a variety of native files (electronic documents), including text, Adobe Acrobat PDF, Microsoft Word, PowerPoint, and Excel.

When creating a database, Concordance automatically processes and normalizes the documents during import. Concordance OCRs all the native files and generates a .PDF near-native version of the document for viewing. The PDF near-native files are stored in the database folder in a separate Near Natives folder, and a copy of the native file is stored in a Natives folder. Documents are imported alphanumerically. The Temp folder contains files with the OCR text that was extracted from the document, and is cleared when the import process is complete.

Email and Attachment Databases

Using the wizard, Concordance imports .pst formatted files that are associated with a Microsoft Outlook profile located on your machine. You need to have Outlook or Microsoft Exchange Server 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 wizard to create an Email Database.

Concordance provides you with an E-mail and Attachments template, but you may also create your own. The E-mail and Attachments template includes typical metadata fields from Outlook, and takes care of the field mapping for you. The template also allows you to create and modify fields as needed.

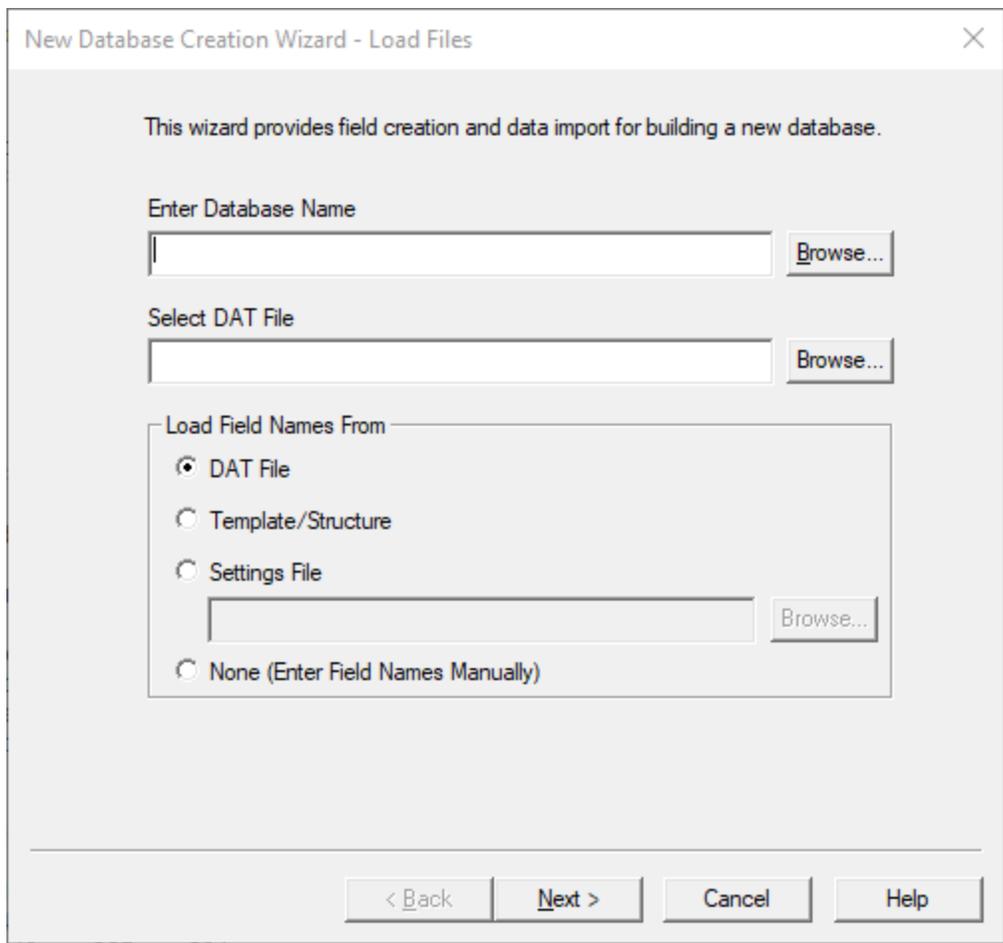
You may also want to consider how you are using Concordance in terms of production so that the content can be reviewed and redacted. If your organization is using:

- **Concordance Viewer** or **Concordance Native Viewer** - the *View emails in the viewer associated to this database* 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.

Creating a Load File Database

 It is recommended that you [review your load files](#)^[57] prior to creating a Load File Database.

1. From the the **File** menu in Concordance, click **New**.
2. At the prompt, select either **Yes** to use Concordance Viewer, or **No** for another viewer.
3. In the **New Database Creation Wizard**, click the **Load Files** button. The **Load Files** wizard displays.



New Database Creation Wizard - Load Files

This wizard provides field creation and data import for building a new database.

Enter Database Name
[Text Field] [Browse...]

Select DAT File
[Text Field] [Browse...]

Load Field Names From

- DAT File
- Template/Structure
- Settings File
[Text Field] [Browse...]
- None (Enter Field Names Manually)

< Back Next > Cancel Help

4. Click the **Browse** button next to **Enter Database Name**. Navigate to where you want to save the new database, type a File name for the database, and click **Save**.
5. Click the **Browse** button next to **Select DAT File**. Navigate to and select the .DAT file you want to load, and then click **Open**.



Only files with the .DAT file extension can be loaded through the Import Wizard for the **Select DAT file** option. If you have a .CSV, .TXT, or .ASC file, you must rename the file extension to .DAT to use it with the wizard.

6. In **Load Field Names From** select one of the following options:
 - Select **DAT File** to load the database field names from the DAT file header row you are importing. The field type settings are automatically set to Paragraph.
 - Select **Template/Structure** to import the field names and types from a template or existing database structure. In the **Load Database Structure** dialog box, click **Browse** to locate and select the template/database you want to load.
 - Select **Settings File** to import the fields names and field type settings from a Field Properties text file. Click **Browse** to locate and select the Field Properties file.
 - Select **None (Enter Field Names Manually)** to manually enter the field names.



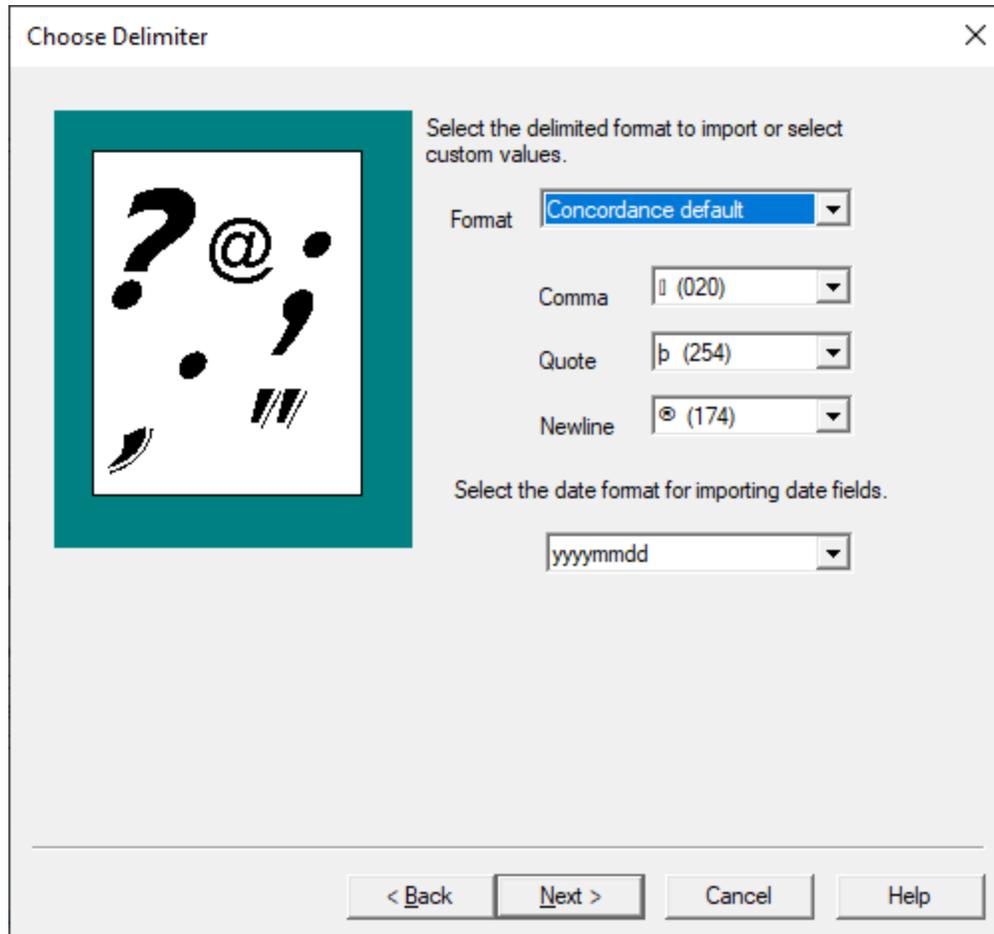
The Field Properties file is a text file that can be exported using the Save to File option in the Modify dialog box (File > Modify). The properties file lists the field names and type settings for the database structure.



Concordance requires that each field name be unique; therefore, if the imported settings file and/or DAT file contain duplicate fields,

the duplicate field names will be appended with a suffix of 01 up to the maximum number of characters allowed for field length.

7. Click **Next** to continue. The **Choose Delimiter** screen displays.



8. Select the appropriate delimiter and date format:

- Select the delimiter Format that works with your data. The **Format** defaults to **Concordance default**, which works for Concordance documents. You can also choose **Comma delimited**, **Tab delimited**, and **Custom**. Once you choose an item in the **Format** dropdown, the **Comma**, **Quote**, and **Newline** values will update to match your selection. For **Custom**, you can define whatever you want for these delimiters.

- **Comma** - separates one field from another. (Concordance Default is numeric value 20)
 - **Quote** - encloses text to differentiate it from field delimiters that may appear in the data. (Concordance Default is numeric value 254)
 - **Newline** - substitute for a carriage return. Some programs use this character to designate multi-level fields or fields within fields. For the data within a field, Concordance replaces all carriage returns or combinations of carriage return and linefeed with this newline code. (Concordance Default is numeric value 174)
- Select an appropriate value under the **Select the date format for importing date fields** drop down. This format should match the data in your delimited text file.
9. Click **Next** to continue. The **Modify** screen displays.

Field Name	Type	Length
BEGDOC	Paragraph	
ENDDOC	Paragraph	
PGCOUNT	Paragraph	
CUSTODIAN	Paragraph	
EDFOLDER	Paragraph	
BEGATTACH	Paragraph	
ENDATTACH	Paragraph	
RECORDTYPE	Paragraph	
DOCEXT	Paragraph	
DUPSTATUS	Paragraph	
FILENAME	Paragraph	
FILESIZE	Paragraph	
OCRPATH	Paragraph	

Status

Documents 0
Fields 13

Punctuation ',./'

Name BEGDOC
Type Paragraph
Length
Places
Format

Image Key Accession
 System Indexed

New Insert Delete Save To File Append Equivio Fields OK Cancel

10. Review and edit any field properties as needed. Select a field in the **Field Name** list on the left and edit the field properties on the right. Field names must begin with an alphabetic character. Only alphanumeric characters and underscore characters are allowed in a field name. Field names can be a maximum of 12 characters. The order of fields listed on the left will be the order in which they appear within Concordance.



If you selected to import the field names from a DAT file, the field names are created from the header row of the DAT file and the type property for each field is set to Paragraph by default.

11. Select a field and click **Delete** to remove any fields that are not needed.
12. Click **New** or **Insert** on the bottom-left to add any new fields as necessary. If you are creating database fields using an existing database template/structure or a settings file, make sure that the fields you define match the fields in the header row of the corresponding delimited text file being used to import the field data. Be sure to specify all appropriate parameters for the new fields as follows:

Field Type	Additional Parameter(s)	Notes
Text	Length is the number of characters allowed in the field. Text fields can have from 1 to 60 characters.	Sorting for text fields is alphanumeric so 1000 comes before 9 unless you zero-fill the text field (0009 comes before 1000).
Numeric	Length is the number of	The number 1234.56 would

Field Type	Additional Parameter(s)	Notes
	<p>characters allowed in the field. Numeric fields can have up to 20 characters, including the decimal place. Negative numbers use an extra character for the negative sign.</p> <p>Places is the number of decimal places in the numeric field.</p> <p>Format determines how numeric fields are displayed and printed. Select Plain, Comma, Currency, or Zero Filled.</p>	have a Length of 7 and Places value of 2.

Field Type	Additional Parameter(s)	Notes
Date MMDDYYYY		This field will be displayed in Concordance as month-day-year.
Date YYYYMMDD		This field will be displayed in Concordance as year-month-day.
Date DDMMYYYY		This field will be displayed in Concordance as day-month-year.
Paragraph		Paragraph fields are variable in length, and can hold up to 12 million characters. Concordance only sorts paragraph fields by the first 60

Field Type	Additional Parameter(s)	Notes
		characters in the first line of text.



The field length affects the column width and how the field name appears in Table View. You need to use the appropriate date format for a field when searching for dates or entering dates during data entry. Dates are always sorted correctly, regardless of the date format chosen.

13. For each field, verify the additional property check boxes on the lower right:

- **Image** - an image field is used to link Concordance with a viewer, such as Concordance Native Viewer, Concordance Image or Opticon. The Image check box should only be selected for one database field. It is best practice to select the Image check box for the BEGNO field or it's equivalent.
- **Key** - a key field performs a function similar to indexing, but does not require re-indexing. When fields are designated as key fields, Concordance creates a database .key file that is used to through them. Any field can be a key field, but most often they are fixed-length fields and/or date, numeric, and text fields that require searching. Key fields take up additional space for the key file, so it is best to not define too many key fields unless they are needed. Paragraph fields are normally NOT key fields - unless you specifically need to quickly locate empty paragraph fields.
- **Accession** - Accession numbers are unique serial numbers stored with each record and managed entirely by the database software. They do not change even if other records are deleted. Accession numbers cannot be edited - they can only be viewed. This check box should only be selected for ONE database field. It is best practice to select the Accession

check box for the ACCESSID field or its equivalent. The internal accession number for each record will be displayed in the accession field you create.

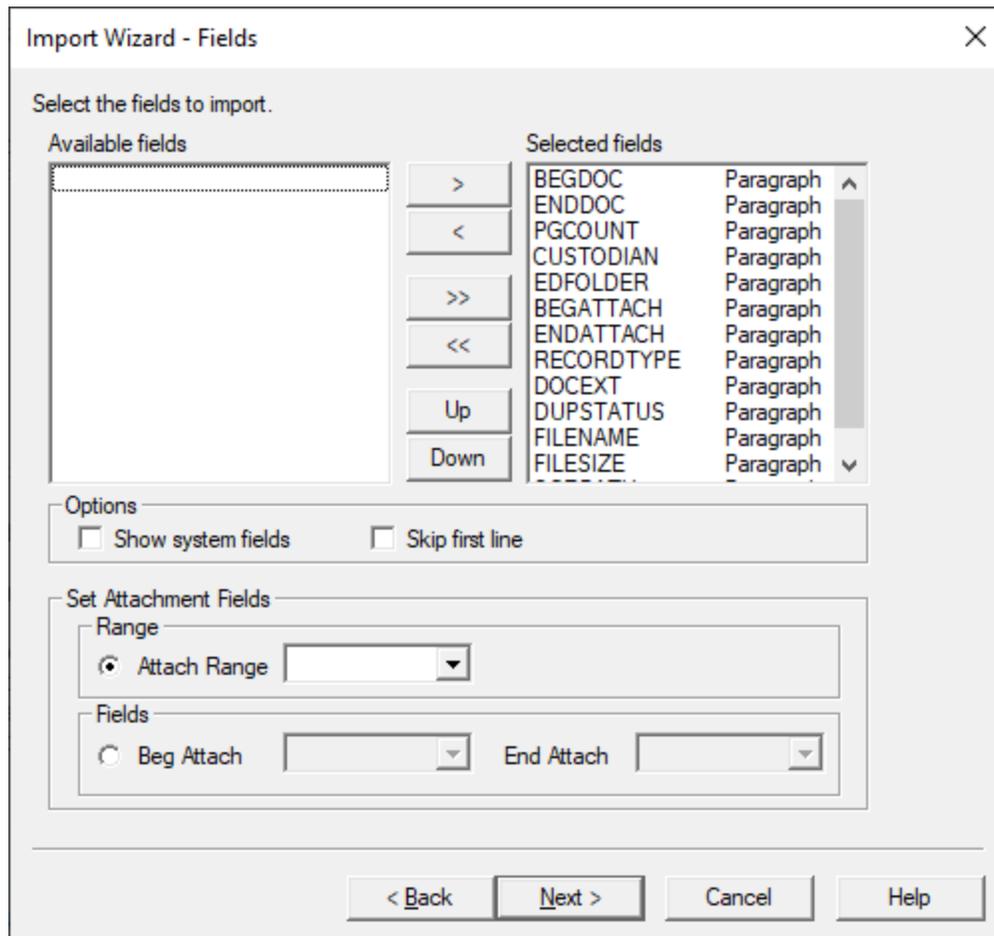
- **System** - These fields are created by Concordance and are hidden fields with no read or write privileges for end users. These fields should never be indexed, added, deleted, or modified by users.
- **Indexed** - A field must be Indexed in order to use Concordance full-text search capabilities. The Indexed check box is automatically selected for paragraph fields. You can modify the indexed setting at any time, but the dictionary files are not updated until the database is re-indexed.

14. The **Punctuation** field is used in full-text searching. Review the **Punctuation** field and add any other punctuation characters that are integral to your searches. See [Punctuation](#)³⁵⁹ for more details. The default is apostrophe, period, comma, and forward slash.

15. When you are finished editing information on the **Modify** screen click **OK**.

16. You will be prompted to verify that the **Image** field you set is correct. Click **Yes** to confirm, or **No** to re-open the Modify screen and update the Image field selected.

17. After confirming the Image field selection, the **Fields** dialog displays. This screen allows you to define which fields will be imported.



18. By default, all database fields are added to the Selected fields list. Use the buttons in the center of the screen to add and remove selected fields, and to change the field order. The field order must match the field order of your delimited text file. If the field structure and order in the Selected fields list does not match your delimited text files, then the data won't transfer into Concordance properly.

19. Select the **Options** that apply:

- **Show system fields** - check this box to display hidden system fields. System fields are used by Concordance to administer database functions, such as replication. They are generally not visible, but you can display and import them if you select the **Show system fields** check box.

- **Skip first line** - check this box to prevent Concordance from creating a database record for your field name row. The first line of a data file sometimes contains the field names for the records in the database. When this check box is selected, Concordance ignores that line of data during import.

20. If you want to setup attachment fields, update the **Set Attachment Fields** section. You can choose either an attachment range field, or both a beginning and ending attachment field. By default **Range** is selected, but no field is specified (effectively no attachment fields specified).

- To setup an attachment range field, select the radio option at the far left of the **Range** section. Select a field in the **Attach Range** drop down to use for storing attachment range data.
- To set up beginning and ending attachment fields, select the radio option at the left of the **Fields** section, then select a specific field in the **Beg Attach** and **End Attach** drop downs.



When using the Find Attachments feature, it is best practice to setup the fields as paragraph type fields to increase the performance and make sure to index/re-index the database. For more information see [Options](#)¹⁰⁷.

21. When you are finished editing information on the **Fields** screen, click **OK**. The **Load OCR Text/Tag List** screen is displayed.

22. To load OCR text:

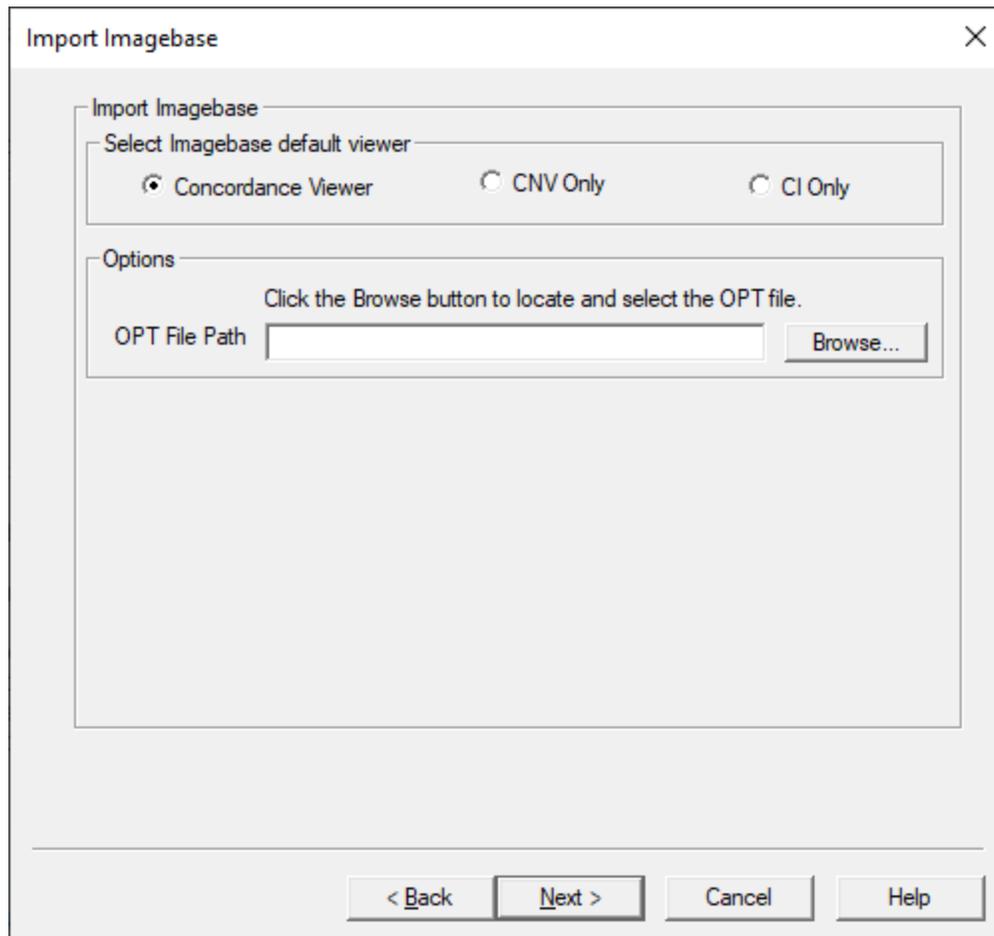
- Inside the **Load OCR Text** section, click the **Browse** button to navigate to and select the OCR directory that contains your OCR text files, and then click **Select Folder**.
- In the **OCR field** drop down, select the OCR field you want to use for OCR text. By default, the **OCR field** list contains all Paragraph type fields. To properly load OCR data, make sure OCR fields are numbered sequentially.

 The wizard can import both single or multi-page OCR text files. To import these files correctly, make sure that all the text files are located within the same directory.

23. To load a list of tags from a text file, in the **Load Tag List** section, click **Browse** to navigate to and select your tag file, and then click **Open**.

 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 contains an invalid character, you will be prompted to make corrections. For more information about tags, see the [Tagging](#)  topics.

24. When you are finished with OCR text and tag settings, click **Next**. The **Import Imagebase** screen displays.



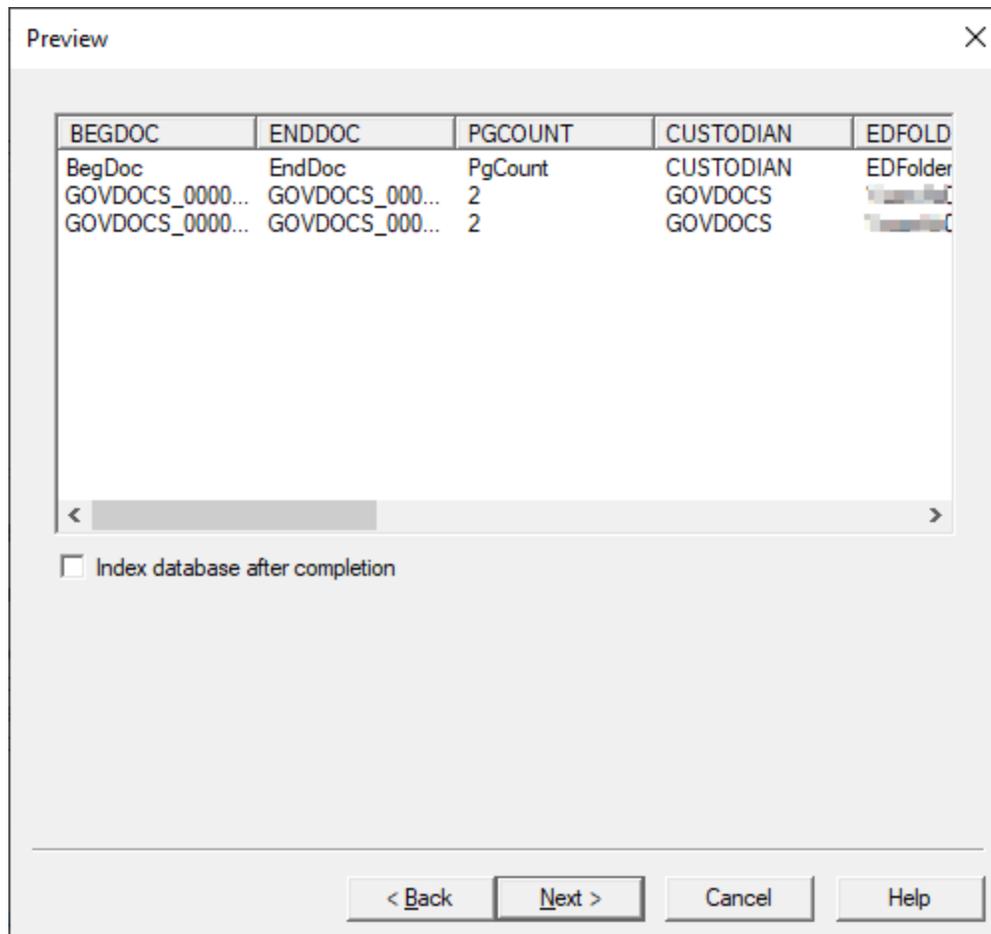
25. Choose your imagebase viewer in the **Select Imagebase default viewer** section. Depending on the viewer selected, the **Options** section will update accordingly.

- For **Concordance Viewer** or **CNV Only**, click the **Browse** button to locate and select the corresponding OPT file for the imagebase.
- For **CI Only**:
 - To scan images from a directory, select the **Scan Images** option and click **Browse** to locate and select the directory containing the image files.
 - To load an opt file, select the **Load OPT** option and click **Browse** to locate and select the corresponding OPT file for the imagebase.



When importing the image files using the **Scan Images** option, make sure that all the image files are located in the same directory.

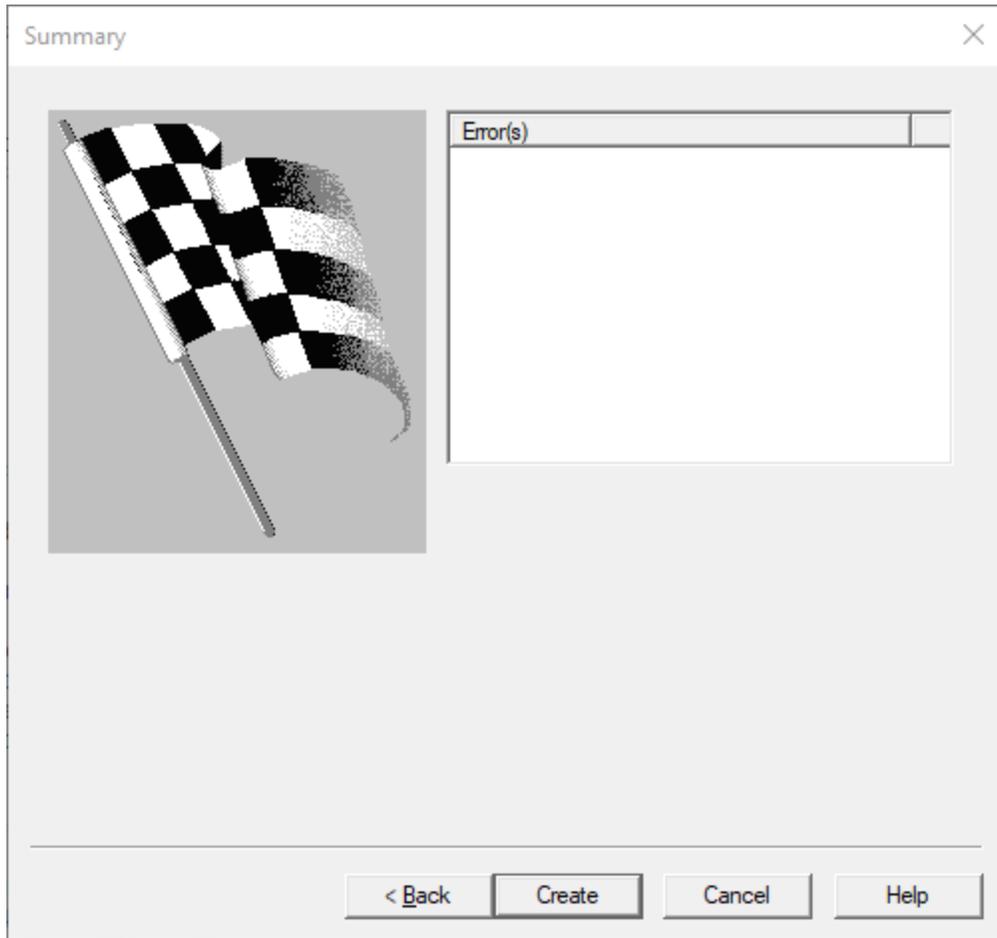
26. Click **Next** to continue. The **Preview** screen displays.



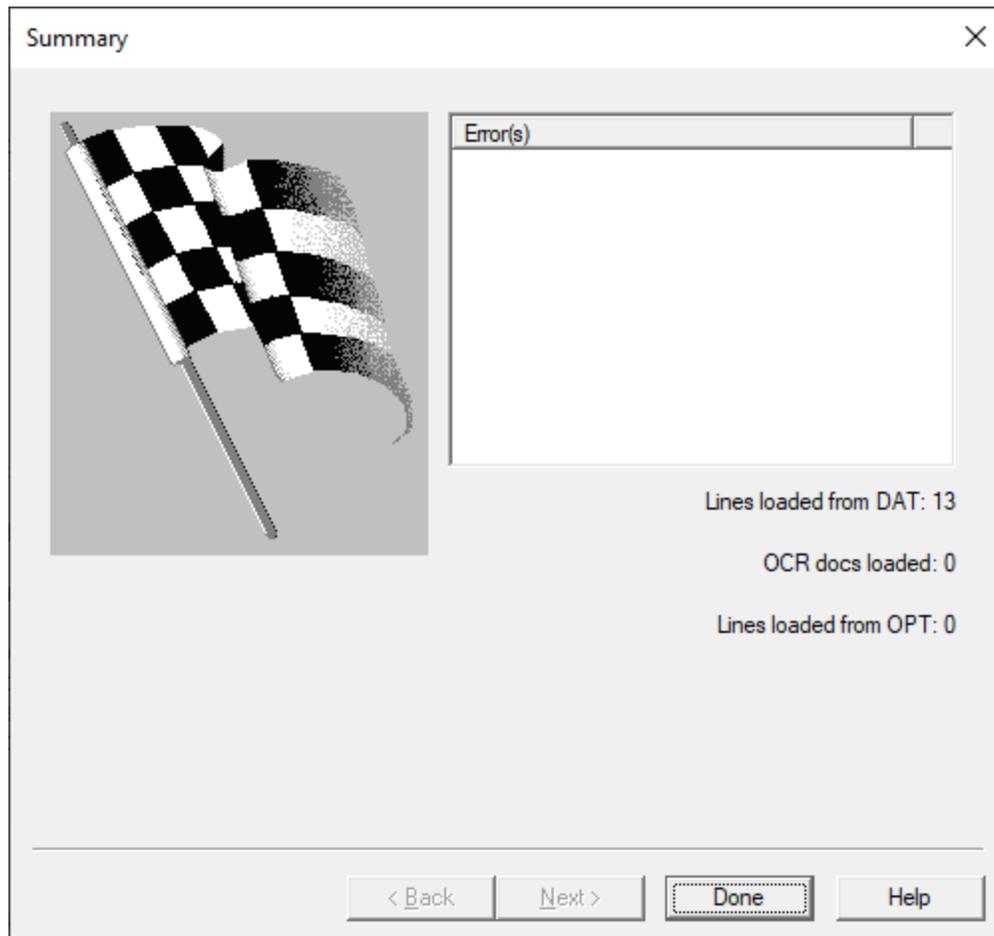
27. **Preview** shows the fields you have specified for the first three records. Verify that these fields contain the proper data. If not, go **Back** to previous wizard steps to make any necessary changes.

28. Select **Index database after completion** to automatically index the new database after it is created.

29. When you are satisfied with the information displayed on the **Preview** screen, click **Next**. The Summary screen displays.



30. Click **Create** to create the database and load the data. The Summary screen updates to display any Errors, along with information about the data that was loaded.



31. Click **Done** to exit the database wizard. You should now review the Concordance records to verify the data and imagebase loaded correctly.

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.

As an administrator, always make it a best practice to open and review delimited text files when you receive them, as the files are not always prepared perfectly and may need to be modified.

universal date format of YYYYMMDD and the mm-dd-yyyy date format with dashes.

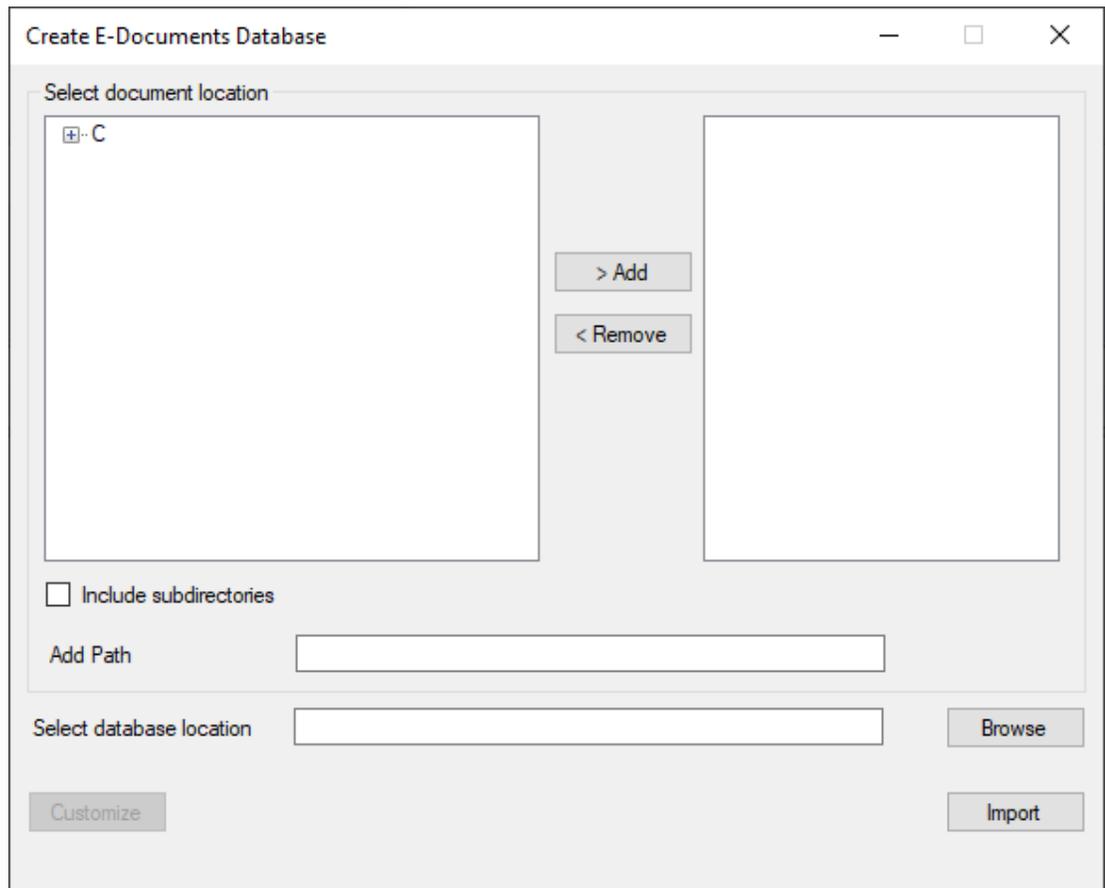
- Check the final line number for your last record to note the number of records expected to be added to the database. Subtract header row if the Skip first line option is checked during import.
- Is there a carriage return at the end of the record? If not, add a carriage return at the end of the record. Concordance will not load the last record if the carriage return at the end of the record is missing.



Concordance database field names do not support special characters. Therefore, if you are using the Delimited Text Database Creation wizard, make sure that the header row does not contain any special characters (i.e. #, \$, etc). Special characters will prevent the wizard from creating the fields properly.

Creating an E-Documents Database

1. From the **File** menu in Concordance, click **New**.
2. At the prompt, select **Yes** to use Concordance Viewer, or **No** for another viewer.
3. In the **New Database Creation Wizard**, click the **E-documents** button. The **Create E-Documents Database** dialog displays.



4. In the **Select document location** section, for each set of documents you want to import, do the following:
 - In the folder list on the left, expand a folder to browse to the folder location where the documents to import are located, select the folder name, and then click the **Add** button. Alternatively, you can type the full path to the location of the files you want to import in the **Add Path** text box and then click **Add**.
 - Check the **Include subdirectories** box if you want to include files in sub-directories underneath the folder you selected.
5. Click the Browse button to the right of **Select database location**, navigate to where you want to save the new database, type a File name for the database, and then click **Open**.

6. To customize the import settings, click the **Customize** button. The **Customize Import Settings** dialog displays.

Customize Import Settings

Choose Database Template

▼ Auto number documents	
Starting Number	0000001
Prefix	
▼ Bates Stamp	
Bates stamp documents	No
▼ Native file	
Copy original files	Yes
▼ Field mapping	
DOCID	Document Control Number(Doc ID)
TITLE	Title
SUBJECT	Subject
AUTHOR	Author
COMPANY	Company
CATEGORY	Category
KEYWORDS	Keywords
PRODUCER	Producer
CREATOR	Creator
COMMENTS	Comments
METADATA	Metadata
FILEPATH	File path
DATE	date
MODDATE	Modification date

Starting Number
Starting Number

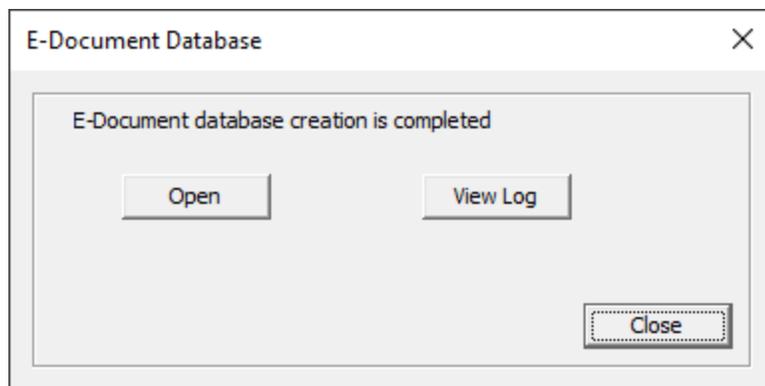
7. On the **Customize Import Settings** dialog, make any necessary updates as follows:
- To use an existing database template, click the **Browse** button, locate the database template to use, and then click **Open**.
 - Under **Auto number documents**, enter a **Starting Number** and **Prefix** for numbering the documents.

- Under **Native file**, specify either **Yes** or **No** to copy the original native files into the Native Files folder within the database.
- Under **Field mapping**, you can modify the mapping of imported data (document metadata) to Concordance fields by selecting the field and then selecting the appropriate data type from the corresponding list. When importing E-Documents, Concordance captures metadata when possible, including the document ID, author, creation date, and last modified date. Concordance also captures the metadata present in formatting such as font changes, bolding, underlining and highlighting. Each of the fields in the **Field mapping** section are automatically set to the default Concordance field mappings.



To make sure that the documents import properly, the field that is mapped to **Document text** must be an OCR paragraph field with an alpha prefix and numeric suffix, such as TEXT01.

8. When you are finished customizing the import settings, click **OK**. The **Create E-Documents Database** dialog displays again.
9. Click **Import** to create the database. Progress dialogs are displayed. Once completed, you will see the following screen:



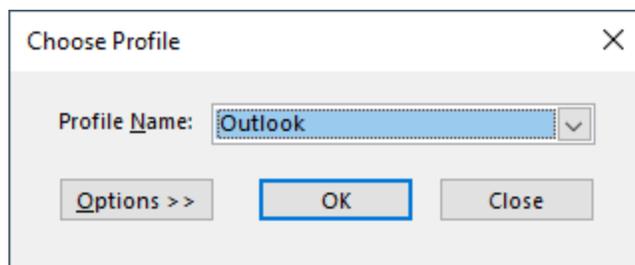
10. You can click **View Log** to review the import, or click **Open** to start working with the new database.

Creating an Email and Attachments Database

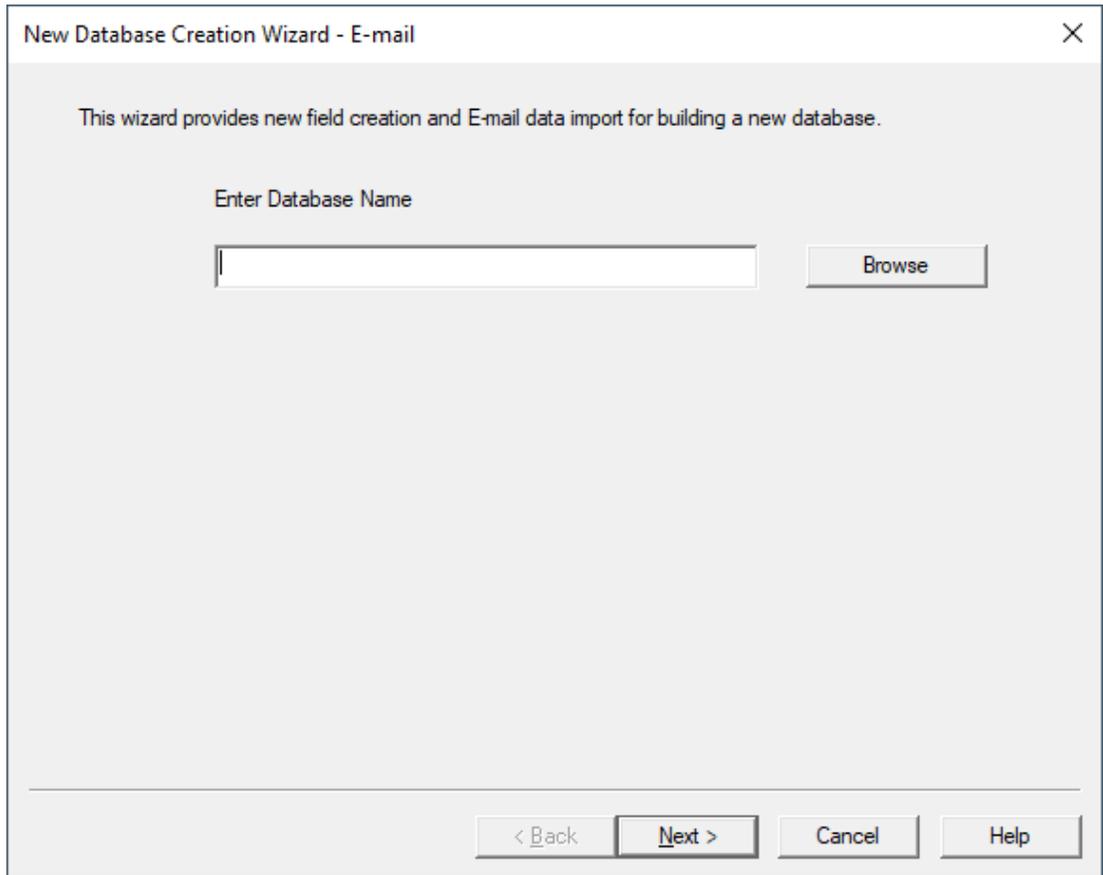


Prior to creating an Email and Attachments Database, you must have Outlook installed, and the Outlook Data File (.pst) you want to load opened in Outlook.

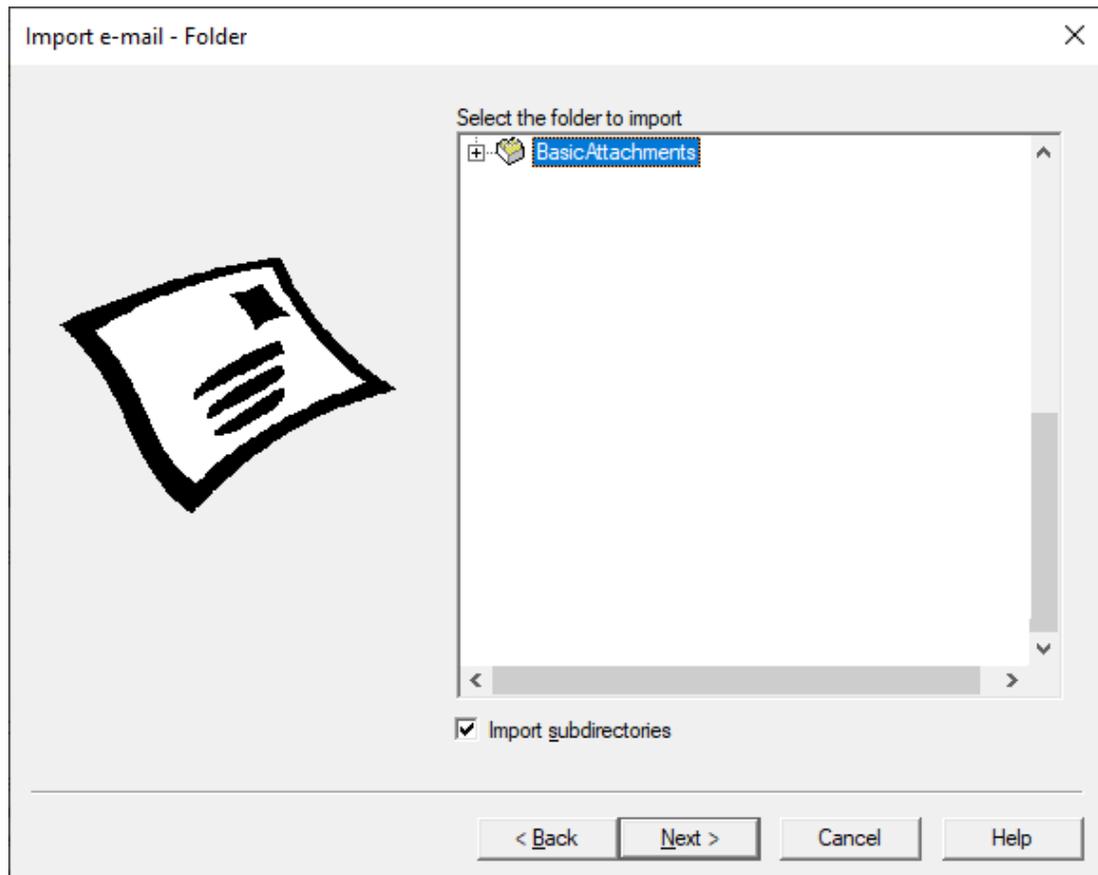
1. From the **File** menu in Concordance, click **New**.
2. At the prompt, select **Yes** to use Concordance Viewer, or **No** for another viewer.
3. In the **New Database Creation Wizard**, click the **E-mail and Attachments** button. The **Choose Profile** dialog displays.



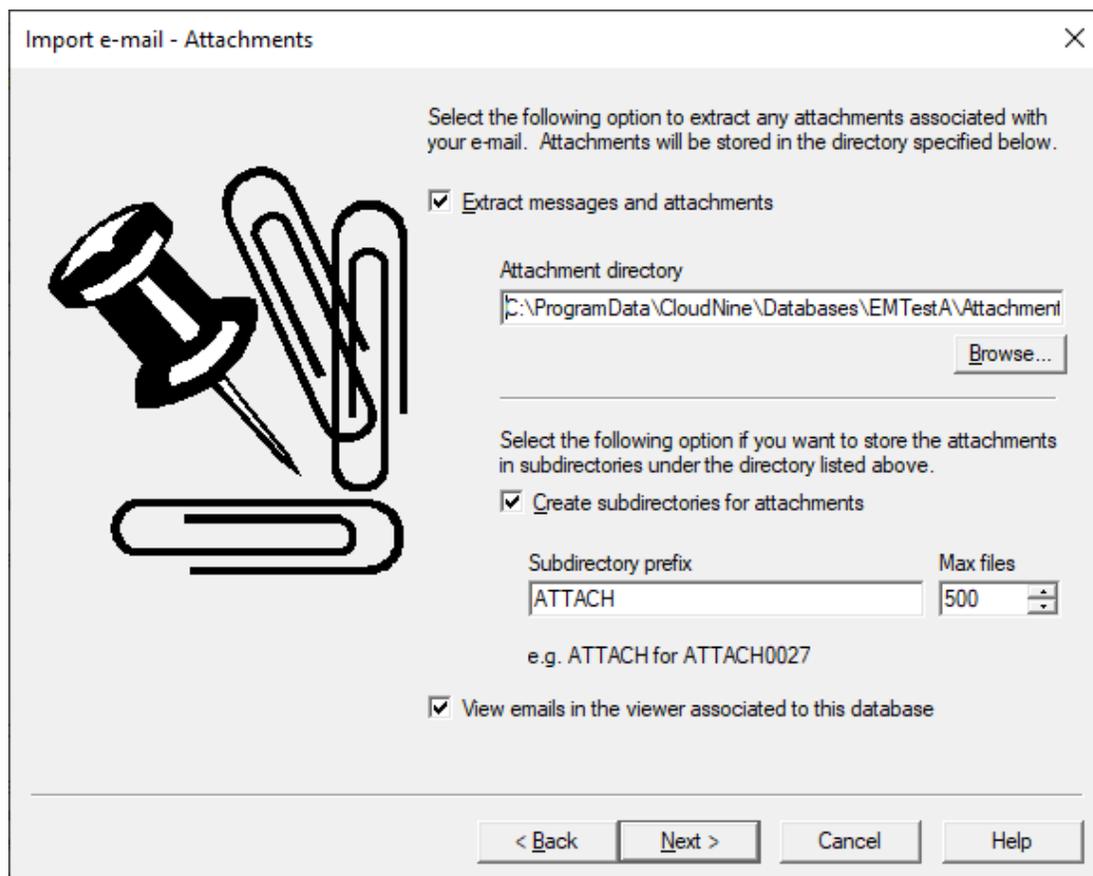
4. Select the **Profile Name** where the .pst file has been opened. For default local Outlook installations, choose **Outlook**.
5. Click **OK** to continue. The **New Database Creation Wizard - E-mail** dialog displays.



6. Click the **Browse** button to the right of **Enter Database Name**, navigate to where you want to save the new database, type a File name for the database, and click **Save**.
7. Click **Next** to continue. The **Import e-mail - Folder** screen displays.



8. Browse the list displayed under **Select the folder to import**. Select the Outlook Data File (.pst) top-level folder that you want to load. Alternatively you can select a subfolder if you want a smaller set of data. Select the **Import subdirectories** check box if you want everything underneath your selection to be loaded.
9. Click **Next** to continue. The **Import e-mail - Attachments** screen displays.



10. To extract the email attachments, select the **Extract messages and attachments** check box. Click **Browse** underneath the **Attachment directory** to navigate to a folder location where the attachments should be stored.
11. If your Outlook Data File contains a large number of attachments, you can also decide to save the attachments in multiple sub-directories. To do this, select the **Create subdirectories for attachments** check box. In **Subdirectory prefix**, specify the root name for the sub-directory. Select the number of attachments to put in each sub-directory under **Max files**. For the example shown above, the root attachment folder is C:
`\ProgramData\CloudNine\Databases\EMTestA\Attachments`. Attachments will be saved in sub-folders, starting with a folder named ATTACH0000 - where the first 500 attachments will be placed. The next 500 attachments will be found in sub-folder ATTACH0001, and so on.

12. Select **View emails in the viewer associated to this database** to be able to view e-mails in the previously selected viewer during review.
13. Click **Next** to continue. The **Import e-mail - Date range** screen displays.

Import e-mail - Date range

Select an option below. You can either select the option to import all e-mails from the selected folder(s) or import e-mails sent between specific dates.

Import all e-mails

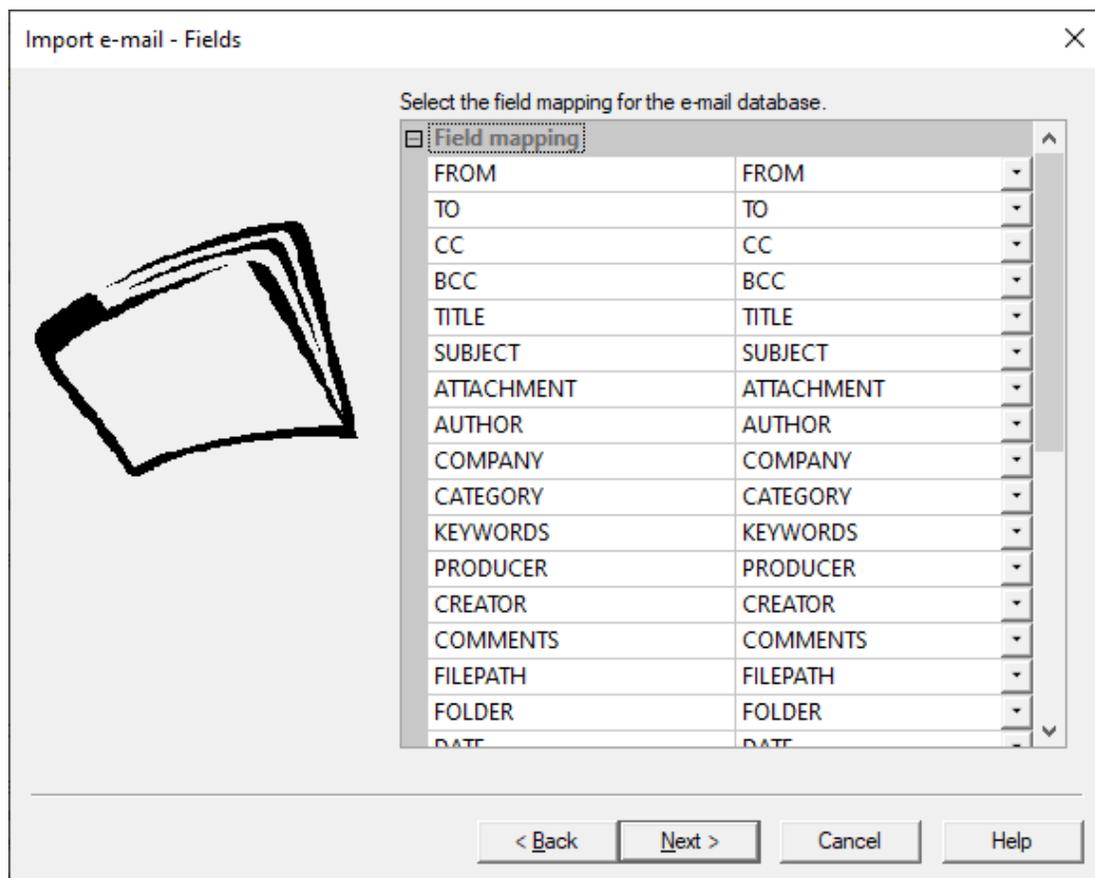
Import e-mails from a specific date range

Begin date: 1/ 1/1970

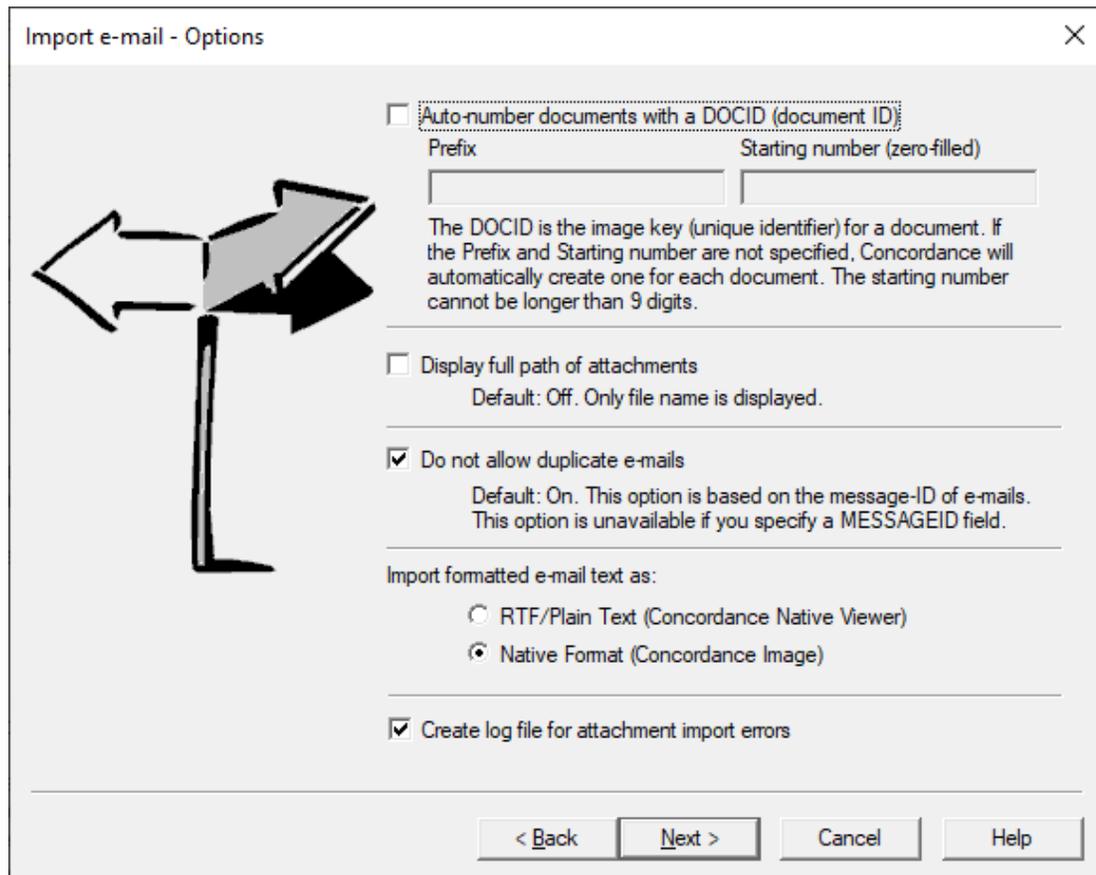
End date: 10/23/2020

< Back Next > Cancel Help

14. To import all e-mail messages from the Outlook Data file, select **Import all e-mails**. To narrow the e-mail message selection to a smaller time-frame, select **Import e-mails from a specific date range** and then pick an appropriate value for **Begin date** and **End date**.
15. Click **Next** to continue. The **Import e-mail - Fields** screen displays.



16. The Fields screen allows you to map specific e-mail fields to Concordance database fields. The left column displays the e-mail message fields, and the corresponding field on the right defines the associated Concordance database field. By default, e-mail databases are created using the E-mail and Attachments template, and fields are automatically mapped to the correct e-mail message fields. If your e-mail database did not use a template, you need to map your e-mail fields manually on this screen to load the data.
17. After verifying your field mappings, click **Next**. The **Import e-mail - Options** screen displays.

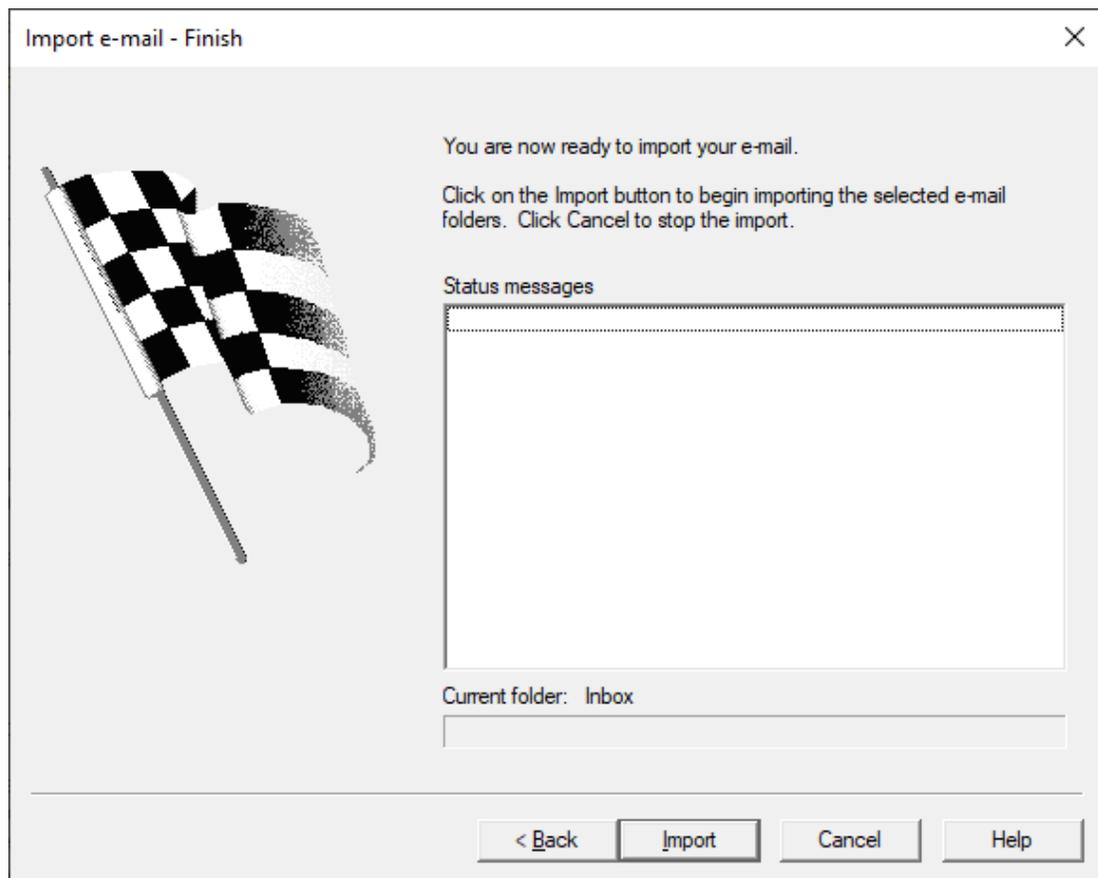


18. If you want to automatically number the imported e-mail messages, select **Auto-number documents with a DOCID**, and then enter the **Prefix** and **Starting number** you want to use. Auto-numbering provides a number for each e-mail message and any attachments, while also tracking family groups in a DOCID and PARENT_DOCID field.

 If you are using the Concordance Native Viewer with this database, the **Auto Number documents with DOCID** option must be selected to successfully view the documents.

19. Select **Display full path of attachments** to display the full path rather than just the attachment file name.
20. Select **Do not allow duplicate e-mails** if you want Concordance to ignore duplicate e-mails. Messages with the same MESSAGEID as an existing message will not be imported.

21. Select an option for **Input formatted e-mail text as**. Choose **RTF/Plain Text** if you are using Concordance Native Viewer, otherwise choose **Native Format**.
22. Select **Create log file for attachment import errors** if you want the wizard to generate an import error log.
23. After selecting your options, click **Next**. The **Import e-mail - Finish** screen displays.



24. Click **Import**. The **Status messages** updates with progress while the import is running. A final message will display the total number of emails that were imported. Click **Done** to close the import wizard.
25. The newly created database will be displayed in Concordance. In the Browse view, you can navigate through a few of the e-mail messages to verify they were imported properly. It is recommended to run a full index at this time.

Opening a Database

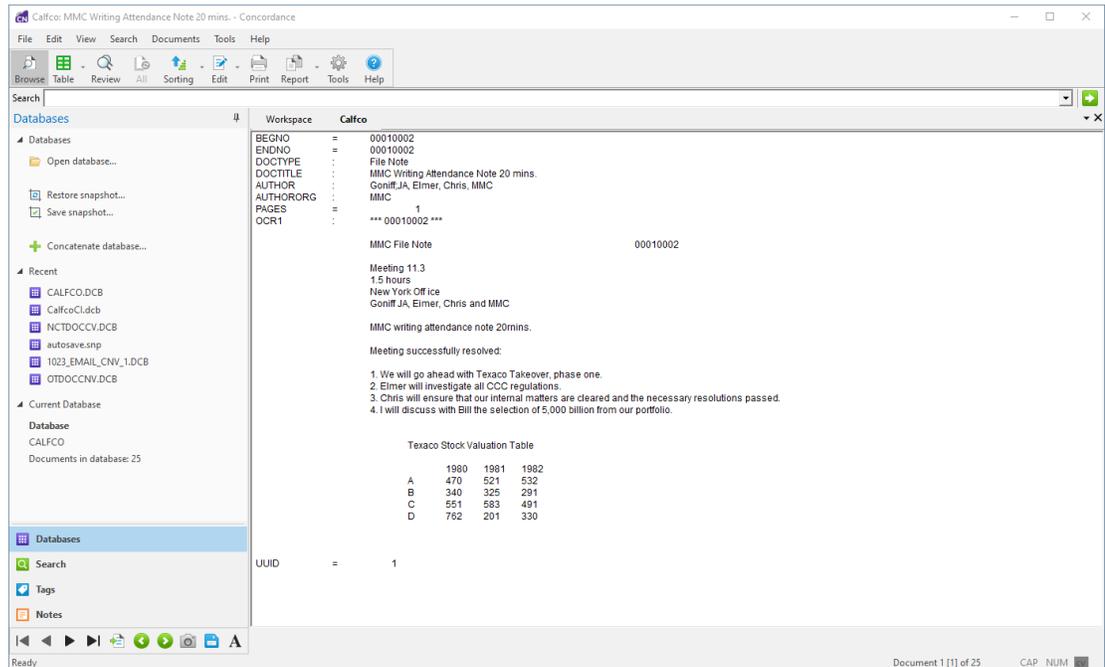


Due to the major database structure changes, all databases need to be converted to version 10 or later. When opening a 7.x, 8.x, or 9.x database, Concordance will prompt the user to convert the database to version 10.x. If the user chooses not to convert, the database will not open in Concordance version 10.x. See [Converting Databases](#)^[73] for more information.



If your Concordance administrator set up security requiring users to log in to the Concordance database you want to open, you will be prompted to enter your user name and password. The first time you log on, you will be prompted to create and confirm your password. You can change your password during login at any time.

1. From the **Menu** of the **Main User Interface**, select **File > Open**. You can also click **Open database** in the **Databases** panel of the **Navigation Pane**.
2. A browse window displays. Navigate to and open the .dcb or .fyi database file you want.
3. A new tab displays in the **Workspace Pane** on the right with your database. Opening a database displays additional panels in the **Navigation Pane**, and additional toolbars below. The **Status Bar** updates to display information for the currently selected database. The Concordance title bar at the top updates to provide information about the current database.



Concordance Title Bar



Concordance transcript databases automatically set the Title bar to the name, date and volume of the current document. For non-transcript databases, you can define the Concordance field you want to display by going to **Tools > Preferences > Browsing** and updating the **Select the field to display in the title bar while browsing** drop-down. The selected field displays in Browse View, Table View, and Edit View.

When reviewing standard records in the Browse, Table and Edit views, displaying a unique record number field like BEGNO on the Title bar can help you keep track of which record you are viewing in the database.

Converting Databases

After upgrading to the latest version of Concordance, databases from older versions of Concordance that you want to use need to be converted. You can convert an individual database, or you can run a bulk conversion to convert multiple databases at one time.



Database conversion is permanent. You cannot convert back to an earlier version. Be sure to make a backup copy of the databases before converting.

The conversion process to version 10.x includes a built-in step that checks the tag file contents for corruption and attempts to repair any detected issues. After conversion completes, Concordance generates a Conversion Report.



During bulk database conversion, the administrator is no longer prompted for a username and password for each database. To prevent this feature from being used inadvertently, the **Bulk Convert Databases to Current Version** menu item is disabled until it is enabled on your workstation with a specific registry key. See Concordance Registry Keys for more information.



The Default tag has been removed in version 9 and 10 databases. If the Default tag is not assigned to a document in a version 8 database, the tag will not appear in the converted version 10 database. If the Default tag is assigned to a document in a version 8 database, the tag will be converted and appear exactly the same in the converted version 10 database.

The following table indicates how each database file is handled during a database conversion:

File Type	Conversion Action
.dcb	Converted
.dct	Deleted
.dir	Not modified
.fyi	Not modified
.fzy	Deleted
.ini	Not modified
.ivt	Deleted
.key	Converted
.layout	Converted
.ndx	Converted
.sec	Converted
.tag	Converted

File Type	Conversion Action
.tex	Converted
.trk	Converted
.vol	Not modified

Converting a Single Database

1. Before converting a database, make a backup of all the files in the database.
2. Open the older database in Concordance using the **File>Open** or **Databases>Open** Database menu. A warning dialog displays notifying you that the database must be converted before it can be used. Click **OK** in the warning dialog.
3. Select **Convert Single Database** from the File>Administration menu.
4. In the Open dialog box, navigate to and select the database you want to convert, and then click **Open**.
5. A confirmation message displays. Click **Yes** to convert the database.
6. If the database has security applied, you will be prompted for the database administrator Username and Password. Enter that information and click **OK**.
7. The conversion process runs, and a conversion report is created. You can now open the converted database in Concordance.

Converting Multiple Databases

1. Before converting databases, make a backup of all the files in the databases.
2. Select **Bulk Convert Databases to Current Version** from the File>Administration menu.
3. Navigate to and select the folder containing the databases you want to convert. All databases in this folder and any sub-folders will be converted. Click **OK**.
4. A confirmation message displays. Click **Yes** to convert the databases.
5. The conversion process runs, and a conversion report is created for each converted database. You can now open any of the converted databases in Concordance.

Database Conversion Report

After database conversion completes, a database conversion report is created in the database's directory. The conversion report is a comma-delimited conversion log file, named *<database name>-<date>.csv*.

The conversion report contains the following information:

- Database name
- Path to database
- Original database version
- Date and time of database conversion
- Total number of documents before conversion
- Total number of documents after conversion
- For each converted database file:

- File name
 - For B-tree files, the number of records before and after conversion
 - For index files, the total number of dictionary words before conversion, and a note indicating that a full index needs to be run to gather the total number of words after conversion
 - For TRK files, the total number of tag names, total number of documents tagged before and after conversion, and the number of errors found during the TRK file conversion. When converting version 9.x databases to version 10.x, Concordance counts the distinct tag names and the number of tag-to-document assignments, and ignores tags that have no document assignments.
 - Error codes for errors found
- User ID of the user entered for Concordance security
 - Microsoft Windows User ID of the user converting the databases
 - Whether Concordance security is enabled
 - Whether Concordance login is required

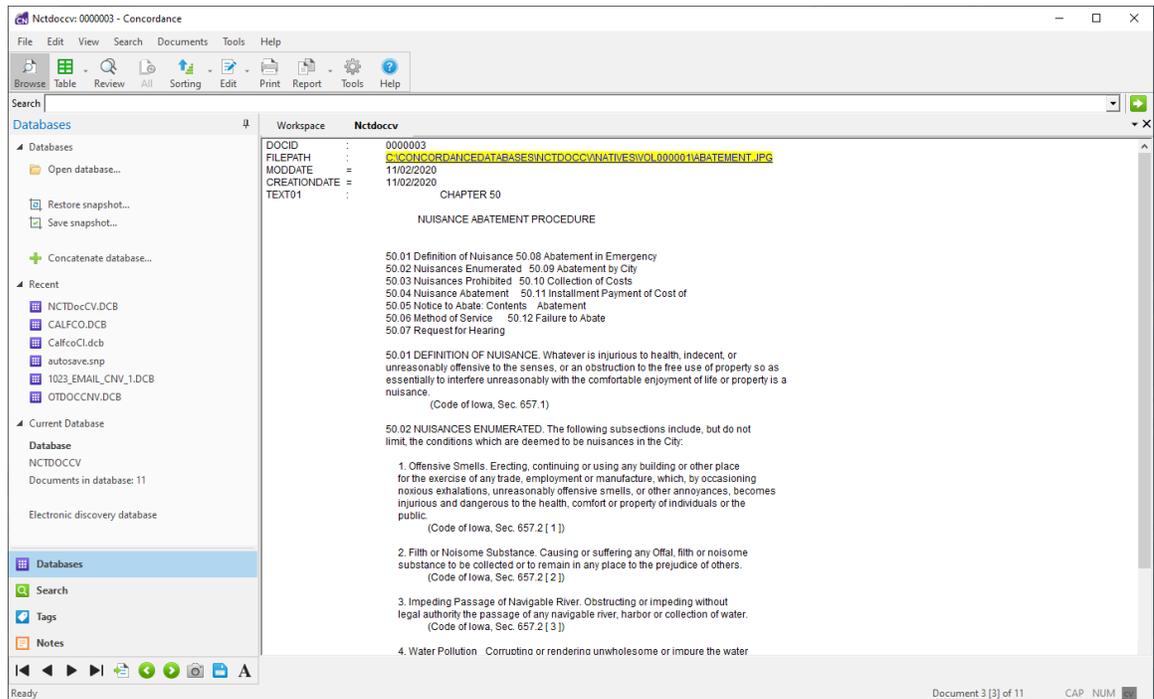
Working with Database Records

Viewing Records

There are three ways to display records in Concordance:

- **Browse View** - displays document content in a scrollable pane (default view)
- **Table View** - displays a list of documents in a spreadsheet format
- **Split Screen** - allows you to view both **Browse** and **Table** simultaneously (split vertical or horizontal)

Browse View



The Browse View (default) allows you to read an entire document summary. Use the **Dynamic toolbar** at the lower left to navigate between documents. The document number and record count display in the **Status bar**, and the document title displays in the window's title bar. Non-paragraph fields are preceded with an equal sign (=) and paragraph fields are preceded with a colon (:).

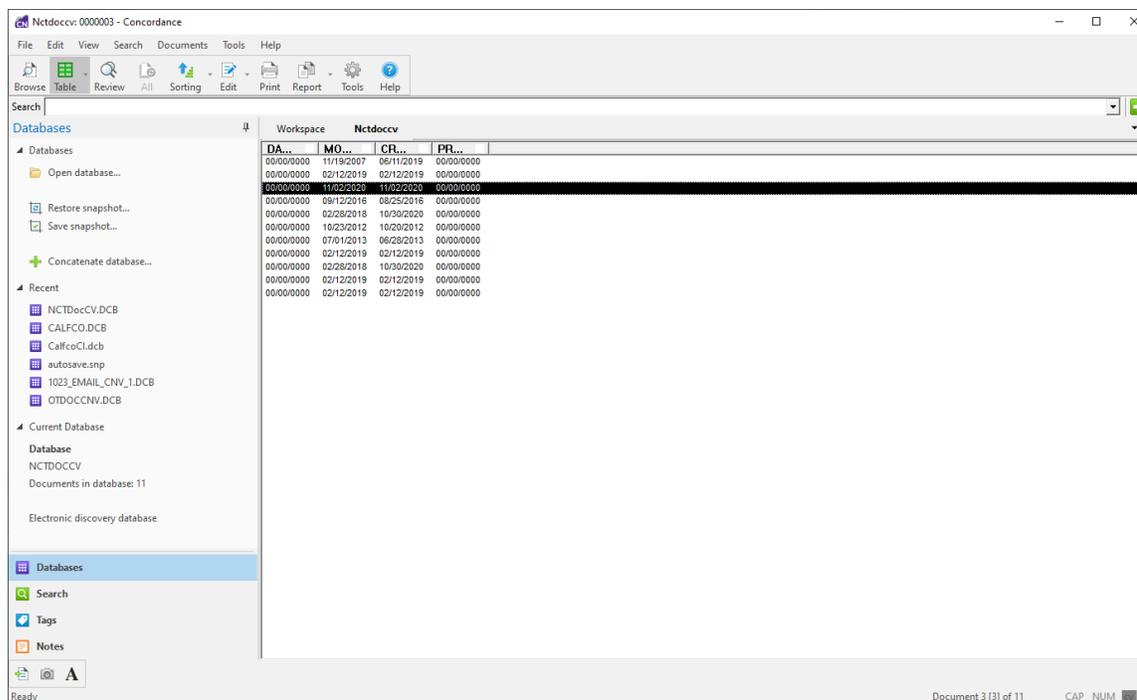
When you run searches in Concordance, any words located in a search (*search hits*) are highlighted in the Browse view. You can quickly navigate search hits using the **Previous Hit** and **Next Hit** buttons on the Dynamic toolbar.

When viewing records in the Browse view, you can use the **Empties** command on the Tools menu to hide fields without data, which can help tighten the screen view when reading records. A check mark next to the Empties command on the Tools menu indicates empty fields are hidden in the Browse view. If a field is not displayed in the Browse view, even when the Empties command is deselected, you may not have viewing privileges for the field. Contact your Concordance administrator for more information.

You can customize the font and color of the field and record text displayed in the view, unless the record contains rich-text format. Changing the text font and color does not affect the record's original text, which is stored as a rich text file (.rtf) to secure the original format. See [Customizing View Fonts](#)^[80] for more information.

You or your Concordance administrator can also customize the [Browsing Preferences](#)^[26]. Browsing Preferences are saved in your Microsoft Windows registry settings.

Table View



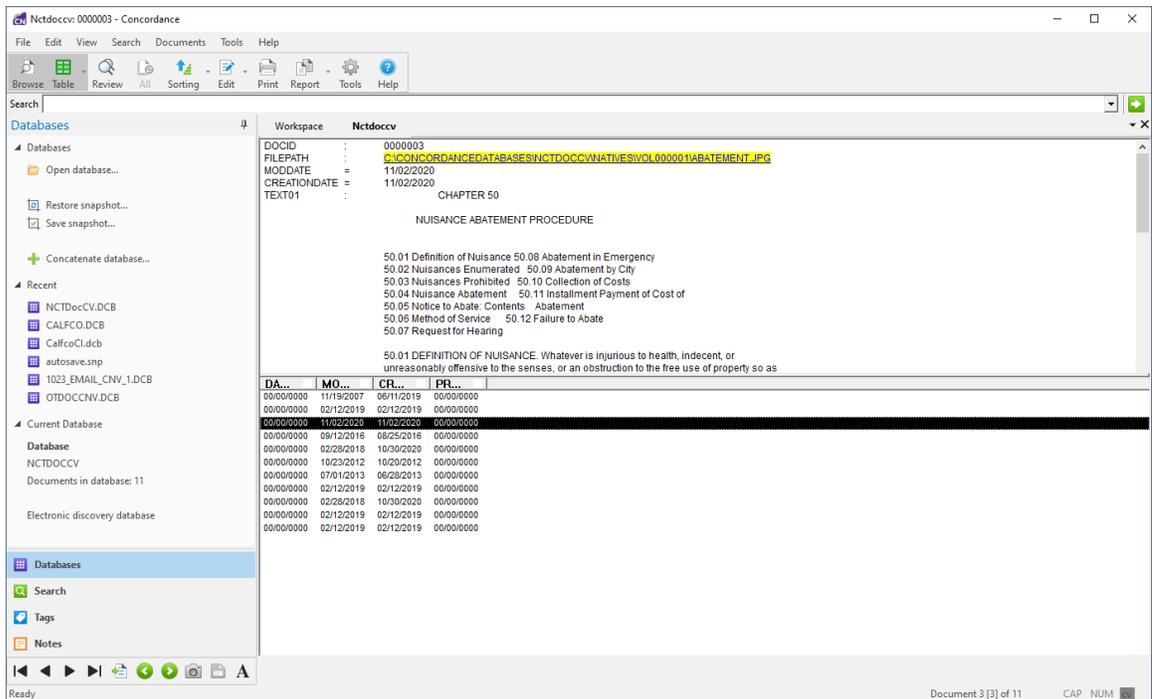
The Table view displays documents from the current search in a tabular format, similar to a spreadsheet, with one document per row. Use the **Dynamic toolbar** at the lower left to navigate records in the Table view. The view's default document sort order is the original import order for records entered into the system. Clicking a field column header will sort data in ascending or descending order. You can adjust the column widths by dragging the divider between columns.

You can customize which fields are displayed in the view, as well as the field order, by using the table layouts. You can create multiple custom table layouts for the Table view. See [Using Table Layouts](#)^[82] for more details.

You can also modify the font and color of the record text displayed in the Table view. Changing the text font and color does not affect the record's original text, which is stored as a rich text file (.rtf) to secure the original format. See [Customizing View Fonts](#)^[80] for more information.

To review the contents of a specific document in the Table view, double-click on the document to open that document in the Browse view.

Split Screen View



The Split Screen view allows you to display two views simultaneously. You can have the two views display from top to bottom or left to right. You can use the Split Screen for the Browse, Table, Review, and Edit views. The current views displayed in the Split Screen will be selected (highlighted in orange) on the Toolbar.

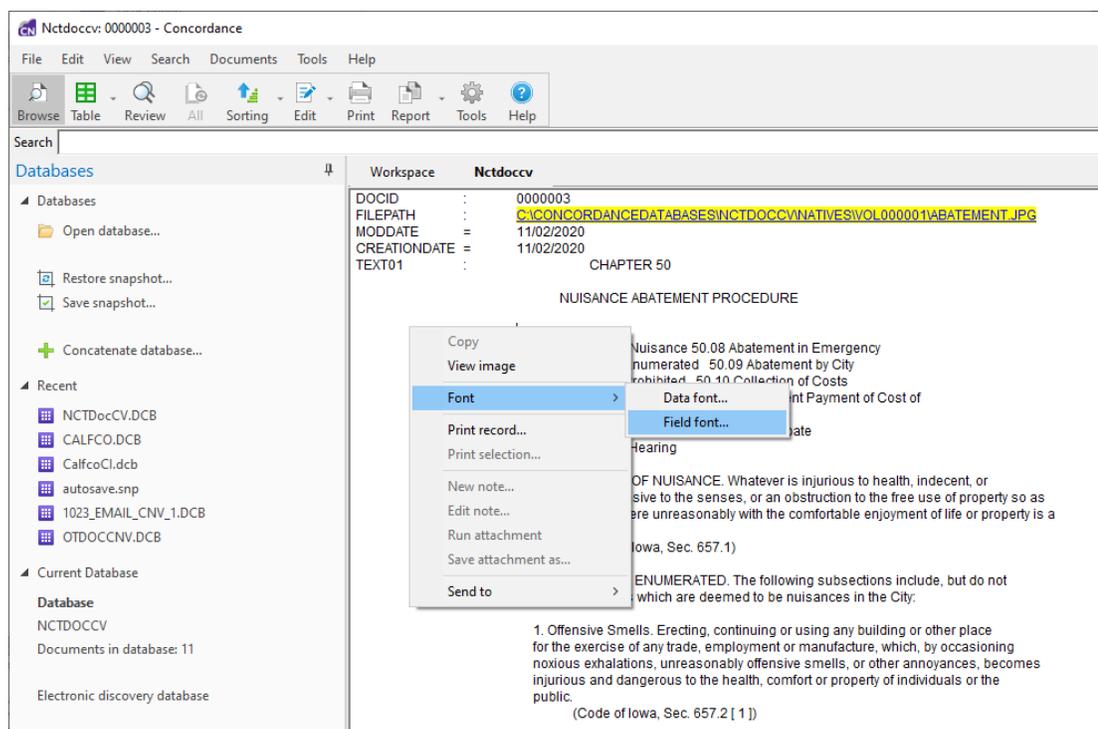
Enable or change the display mode of the Split Screen by selecting options in the **View | Split Screen** menu. The views displayed will update when you select individual views on the Toolbar.

In the **Browse** view, you can customize the font/color of the field and record text bring displayed, unless the record contains rich-text format. You can also modify the font/color of the record text displayed in the **Table** view. Changing the text

font and color does not affect the record's original text, which is stored as a rich text file (.rtf) to secure the original format.

When you change the text font and color in the Browse and Table views, the changes are applied to each database record displayed for the current database. For concatenated databases, you can customize the text font and color displayed in the Table view for each database in the concatenated set. This can help differentiate between the databases at a glance.

Change the Field Font in Browse View



1. Make sure you are in **Browse** View.
2. Right-click anywhere in the record text section and select **Font** > **Field font**. The **Font** dialog displays.
3. Modify the font settings as desired.
4. Click **OK** to save your changes. The new font settings apply to all field text displayed in Browse view.

Change the Record Font in Browse View

1. Make sure you are in **Browse** view.
2. Right-click anywhere in the record text section and select **Font > Data font**. The **Font** dialog displays.
3. Modify the font settings as desired.
4. Click **OK** to save your changes. The new font settings apply to all record text displayed in Browse view.

Change the Record Font in Table View

1. Make sure you are in **Table** view.
2. Right-click anywhere in the table section and select **Font**. The **Font** dialog displays.
3. Modify the font settings as desired.
4. Click **OK** to save our changes. The new font settings apply to all record text displayed in Table view.



If you are changing the font and color for a record in databases within a concatenated set, right-click any record in the database for which you want to change the font. This only changes the font for the records in that specific database.

The **Table** view uses table layouts to determine which fields are displayed, and order in which they are displayed. Table layouts can be used to customize viewing preferences or to support sort methods specific to a review.

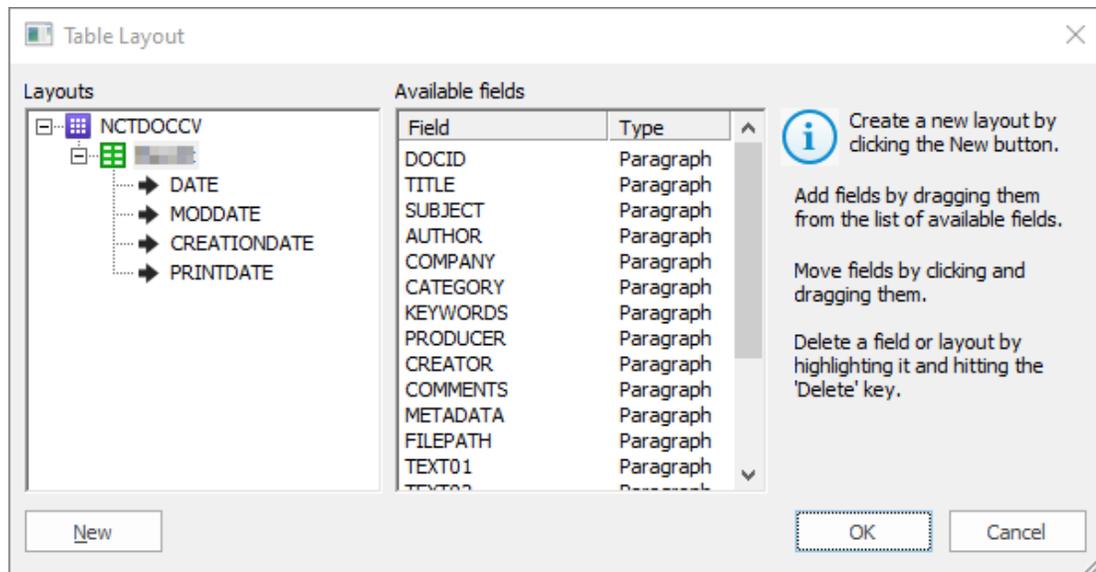
Table layouts are created and maintained using the **Table Layout** dialog. For each database, each user has one private layout that is accessible only to that user. Any

additional layouts created for a database are public and accessible to everyone using the same database. A database's public layouts can be created, edited, or deleted by anyone with access to the database.

If you are using Table View to display long documents, such as depositions or resumes, you can get much faster performance if you do not display full text Paragraph fields. If necessary, add fixed length fields to your database, which have identifying information such as a name, date and serial or volume number, and then use those fields for Table View.

If you have a table layout design that works well in other databases, you can copy and paste the .layout file into other database directories, and then rename the file with the new database name.

To display records in Table view using a table layout, select the desired layout from the list by clicking the arrow to the right of the **Table** button on the Toolbar.



Create a Table Layout

1. Click the arrow to the right of the **Table** button on the Toolbar, and then click **Table layout**. The **Table Layout** Dialog displays.

2. Click **New**. A new *Untitled* table layout will appear in the **LAYOUTS** box on the left.
3. Update *Untitled* to provide a name for the new layout.
4. To add fields to the layout, drag fields from the **Available fields** list into the table layout. You can reorder fields in the layout by selecting and moving them in the list.
5. When you have finished defining the layout, click **OK**.

Modify a Table Layout

1. Click the arrow to the right of the **Table** button on the Toolbar, and then click **Table layout**. The **Table Layout** Dialog displays.
2. In the **LAYOUTS** list, your private table layout will show a green box with your user ID at the top level.
3. Expand the layout that you want to modify.
4. Select fields to **Delete**, add new fields from the **Available fields** list, or modify the order of the fields in the layout by selecting and moving them.
5. Click **OK** to close the **Table Layout** dialog box and apply your changes to the Table view.

Delete a Table Layout

Only public table layouts can be deleted in Concordance. When you delete a table layout, it is deleted for all users using the same database. You cannot delete your private table layout or the table layout currently displayed in the Table view.

1. Click the arrow to the right of the **Table** button on the Toolbar, and then click **Table layout**. The **Table Layout** Dialog displays.
2. Right click the layout you want to delete in the **LAYOUTS** list and click **Delete**.



The Table layout is not applied to the current view if you currently have sorting applied. Applying a sort automatically generates a Zero query, returning all documents and sorting the records based on the specified sorting layout.

Sorting Records

The results of any search are sorted in the order that documents were added to the database. You may sort your documents chronologically, by author, by document type, or by any other field you have in your database to help speed up your review.

When you are sorting, you need to remember that it only affects your current search results.

In order to sort your documents by a field, click on a column heading in **Table** view. Documents are sorted in ascending order by the selected field. To sort in descending order, click the column heading a second time. You can also sort documents by multiple fields using [Sorting Layouts](#)⁸⁵.

Returning All Records

After sorting and reviewing your records, you can refresh the sort order to its original state using the **All** button on the Toolbar. The **All** button will quickly return all records to the sort order in which they were added to the database. You can also toggle the **All** button to switch between your current query or viewing all records in the database.

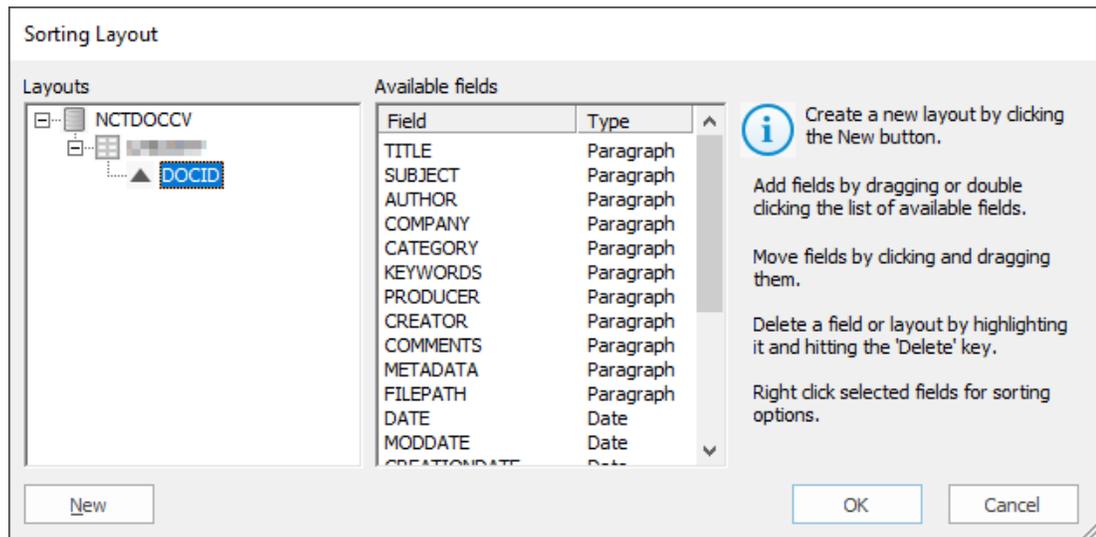
The **Sorting** feature in Concordance determines the display order for records in the **Browse** view. The fields selected in the **Sorting Layout** dialog box determine the order that records are returned for viewing. You can also choose to sort in ascending or descending order.

Sorting layouts are created and maintained in the **Sorting Layout** dialog box, and are saved as .Sortlayout files in the same directory as the database. There are no limits to the number of sort layouts that can be created and saved; however, sort layouts are specific to the database and user for which they were created. Therefore, if you are working in a database and using a sorting layout that you created, and another user accesses the same database, the sorting layout you are using is not affected by the other user or their sorting layout.

Sorting layouts are compatible with concatenated databases. The fields available in the Sorting Layout dialog box are those associated with the primary database. When creating sorting layouts for concatenated databases, keep the following in mind:

- All databases in a concatenated set are sorted according to the sorting layouts for the primary database when accessed from the concatenated set.
- Database fields in a concatenated set other than the primary will not appear in the Sorting Layout dialog box unless they are opened separately.
- If the field structures for the primary database do not completely match the field structure of concatenated databases, the sorting layout may not sort the concatenated databases as expected.
- In order for field structures of concatenated databases to match, they must have identical field names and field types and be listed in the same order.
- Each sorting layout is limited to four fields.

To display records in Browse view using a sort layout, select the layout from the list by clicking the arrow to the right of the **Sorting** button on the Toolbar.



Icon	Description
Single Database and Compatible Concatenated Databases	
	Primary database
	Available sort layout
	Field sort order - Descending
	Field sort order - Ascending
Incompatible Concatenated Databases	

Icon	Description
	Available sort layout containing fields that are not compatible with the concatenated set of databases
	Field sort order - Descending (inconsistent layouts may appear for each concatenated database)
	Field sort order - Ascending (inconsistent layouts may appear for each concatenated database)

Create a Sorting Layout

1. Click the arrow to the right of the **Sorting** button on the Toolbar, and then click **Sort layout**. The **Sort Layout** Dialog displays.
2. Click **New**. A new *Untitled* sort layout will appear in the **Layouts** box on the left.
3. Update *Untitled* to provide a name for the new layout.

4. To add fields to the layout, drag fields from the **Available fields** list into the sort layout. You can reorder fields in the layout by selecting and moving them in the list. You can also choose to sort each field **Ascending** or **Descending** using the right mouse menu.
5. When you have finished defining the layout, click **OK**.

Modify a Sorting Layout

1. Click the arrow to the right of the **Sorting** button on the Toolbar, and then click **Sort layout**. The **Sort Layout** Dialog displays.
2. Expand the layout that you want to modify.
3. Select fields to **Delete**, add new fields from the **Available fields** list, or modify the order of the fields in the layout by selecting and moving them. Update the sort order for each field to be **Ascending** or **Descending** using the right mouse menu.
4. Click **OK** to close the **Sort Layout** dialog box and apply your changes to the Browse view.

Delete a Sorting Layout

1. Click the arrow to the right of the **Sorting** button on the Toolbar, and then click **Sort layout**. The **Sort Layout** Dialog displays.
2. Right click the layout you want to delete in the **Layouts** list and click **Delete**.



The default user sort layout is automatically created when the database is opened. This sort layout cannot be renamed.

Editing Records

Concordance is fully equipped to handle a rolling production environment with features that allow editing and adding records as needed. Attorneys find the editing tool useful for adding comments directly to a document record during the case review. Administrators can add Attorney Note fields to the database for this purpose.

Reviewers rarely need to create new records in Concordance. However, as new documents roll in after the initial collection phase, these new records need to be added to the database too. It may not be cost-effective to send a handful of documents out to be processed when a paralegal can manually add them into Concordance by dropping the file on the Concordance workspace.

Editing existing records is most often done when records are added to Concordance yet are still missing key information that needs to be captured in the system for identification, such as the document title, author, and date it was created.

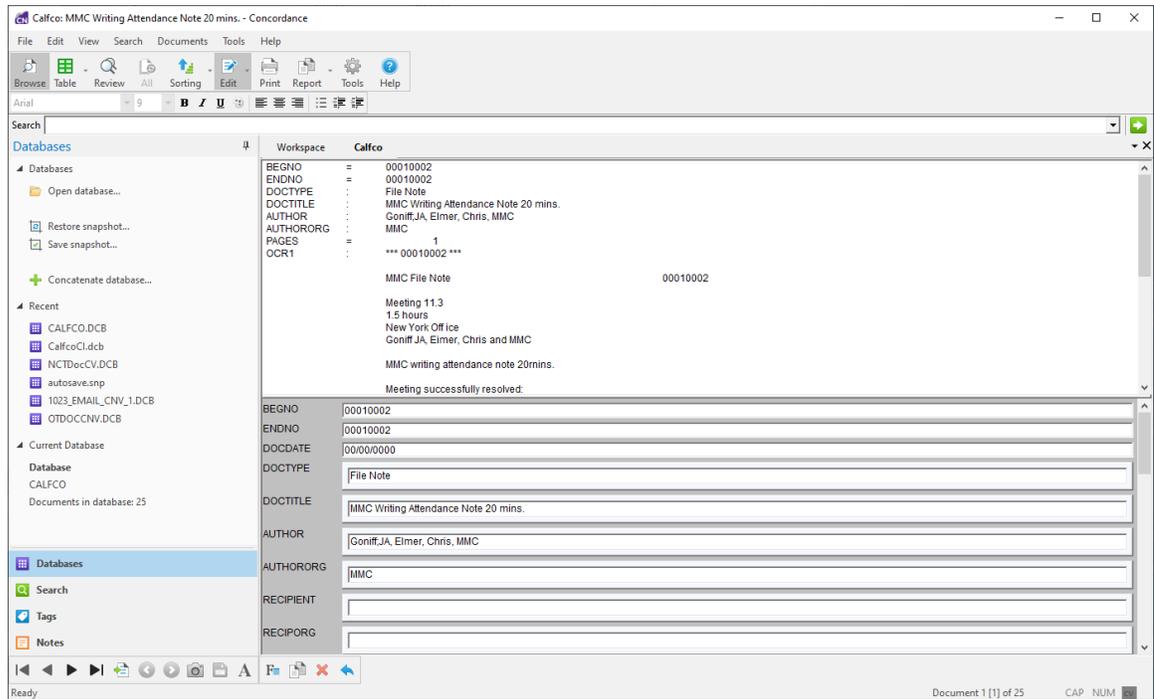
If you are an attorney entering summary notes or a paralegal adding missing data to records, you are only able to access fields that you have permission to edit. Fields that can't be edited are displayed in gray. Other data entry restrictions may be placed on fields by your Concordance administrator. You can use an Edit Layout to customize the view and display only those fields you want to edit - in the order you want to see them.

Each time you edit a record, changes are saved when you navigate to another record or change your view in Concordance. New information is not full-text search-able until the database is re-indexed to refresh the dictionary.

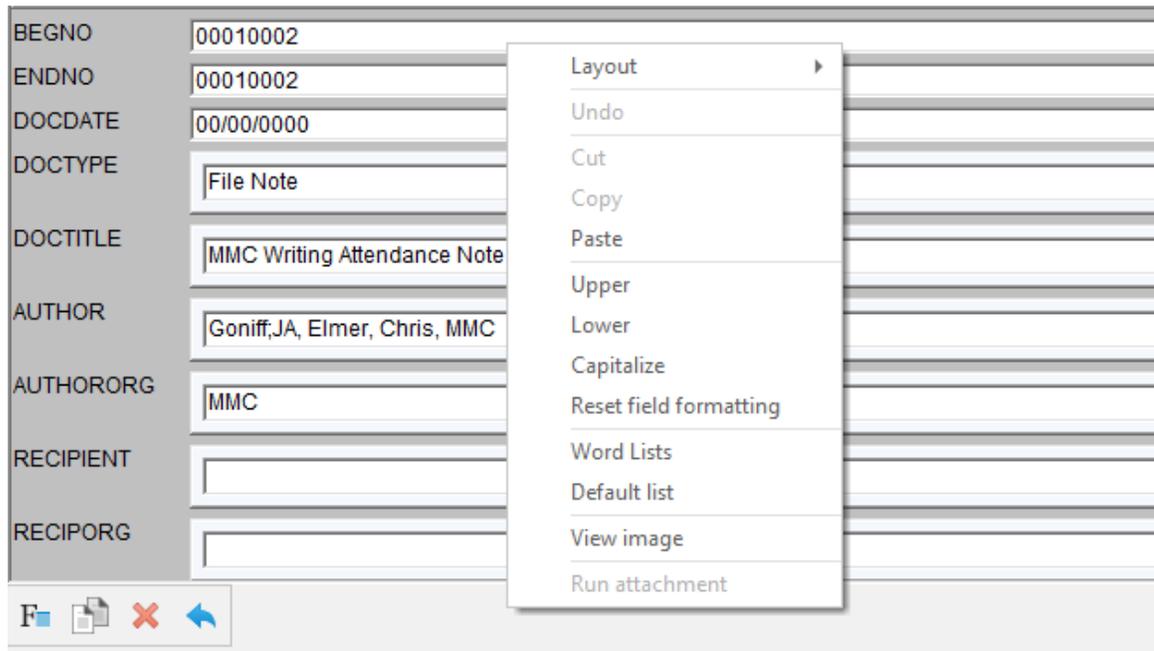
If you try to edit a record that someone else has open for editing, the record will be locked as read-only, with gray fields and a **LCK** notification displayed in the Status Bar.



Editing = coding. Use caution when working in the Edit view. You can spoliage documents if you are not careful, damaging the integrity of your original database records and impacting the search results of others.



The **Edit** View is displayed by clicking the **Edit** button on the Toolbar. When the Edit view is open, the Dynamic Toolbar at the bottom updates to show the Edit tools. Additionally, the Rich Text toolbar displays underneath the standard Toolbar, allowing you to adjust font details for edit form fields. Only fields you have full rights for can be edited.



Right-clicking in the contents of a field will display additional formatting options you can use while editing the field.

To query the database for any documents that have been edited, use the **Search for edited documents** command. All documents that have been edited since the last database re-index/index are displayed in Browse or Table view. This feature is available on the **Search** menu.

You can also query the database for any documents that have redactions (applied during Content Review). On the **Search** menu, select the **Search for documents with redactions** command. All documents that have been redacted are displayed in Browse or Table view.

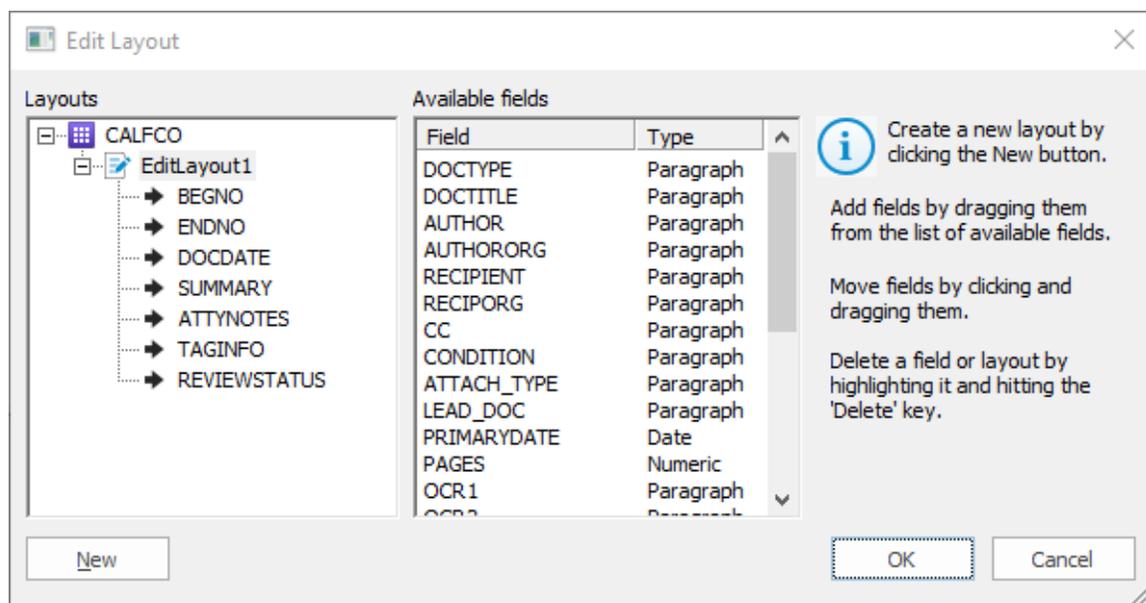
To make editing easier, Concordance provides the ability to select specific fields and change the order they are displayed in the **Edit** view. Changing field display settings only affects your view of the fields - it does not affect field display for other users. These field settings apply to all records within the database.

Concordance uses edit layouts to determine the which fields are displayed, and order in which they are displayed. Edit layouts are created and maintained on the

Edit Layout dialog box, and are stored in <dbname>.Editlayout files. An edit layout can be created or edited by anyone in the database. However, only the Concordance Administrator or person who created the layout has permissions to delete it.



When creating an Edit Layout for a concatenated set, only the fields of the primary database are displayed in the Available Fields list for non-identical concatenated databases.



Create an Edit Layout

1. Click the arrow to the right of the **Edit** button on the Toolbar, and then click **Edit layout**. The **Edit Layout** Dialog displays.
2. Click **New**. A new *Untitled* edit layout will appear in the **Layouts** box on the left.
3. Update *Untitled* to provide a name for the new layout.

4. To add fields to the layout, drag fields from the **Available fields** list into the edit layout. You can reorder fields in the layout by selecting and moving them in the list.
5. When you have finished defining the layout, click **OK**.

Modify an Edit Layout

1. Click the arrow to the right of the **Edit** button on the Toolbar, and then click **Edit layout**. The **Edit Layout** Dialog displays.
2. In the **Layouts** list, expand the layout that you want to modify.
3. Select fields to **Delete**, add new fields from the **Available fields** list, or modify the order of the fields in the layout by selecting and moving them.
4. Click **OK** to close the **Edit Layout** dialog box and apply your changes to the Edit view.

Delete an Edit Layout

Only the Concordance Administrator, or the person who created the layout, has permissions to delete it.

1. Click the arrow to the right of the **Edit** button on the Toolbar, and then click **Edit layout**. The **Edit Layout** Dialog displays.
2. Right-click the layout you want to delete in the **Layouts** list and click **Delete**.

In most document databases, some data entry work is unique (such as attorney review comments), but much of it is repetitive. Having these repetitive words available in word lists allows you to insert them easily into database fields, reducing data entry errors. For example, you can pick Schenectady from a list instead of having to remember how to spell it each time you need to enter it into a field.

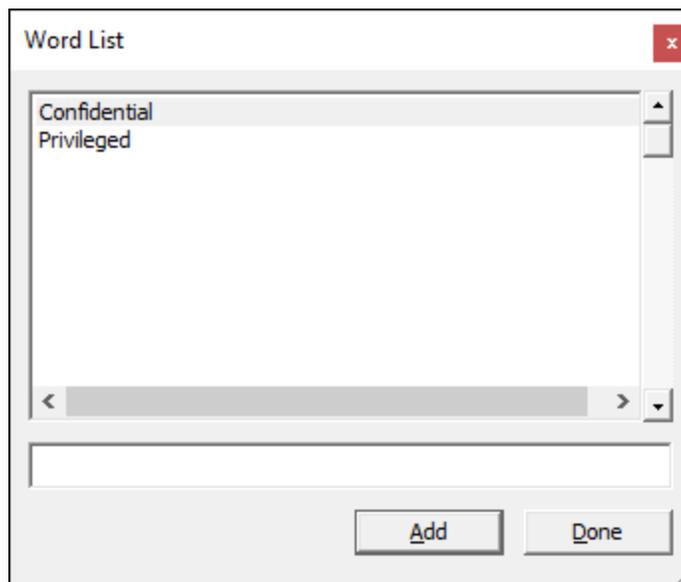
You can use word lists by manually selecting the list when editing fields, but a better practice is to define a word list to use when validating entries in a specific field. See [Data Validation](#)³⁵⁶ for more details.

Word lists are set up by your Concordance administrator. If you want a word list added to a particular field, contact your Concordance Administrator.

You can only open a word list when you are in the Edit view.

Edit a Record by Selecting from a Word List

1. In the Browse or Table view, select the record you want to edit.
2. Click the **Edit** button on the Toolbar to open the Edit view.
3. Right click in the field and choose **Word Lists**.
4. Browse to and select the word list file you want to use, and then click **Open**.
5. The Word List dialog displays.



6. Select the word you want to add to the field in the list, and then click **Add**.

7. The Concordance field is updated with the word you selected from the word list.

You can format individual field text in the **Edit** view by changing the text's case, or editing other font attributes. When you modify text formatting for a field in the Edit view, the formatting only applies to the field text for the current record.

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.

To Format Text in Edit View

1. In the Browse or Table view, select the record you want to edit.
2. Click the **Edit** button on the Toolbar to open the Edit view.
3. Select the text you want to edit.
4. If desired, right-click and select one of the formatting options:
 - **Upper** - each selected letter will be changed to upper case.
 - **Lower** - each selected letter will be changed to lower case.
 - **Capitalize** - the first letter of each word in the selected text is changed to upper case.
5. You can also use any of the options available in the Rich Text toolbar at the top to modify the font attributes for the selected text.
6. Navigate to another record to save your changes.

If you want to remove the text formatting that was applied, you can right click in a field and select **Reset field formatting** to reset the field to plain text.

When you are creating new records in the Edit view, each new record added is automatically saved at the end of the existing records list. New records are not full-text search-able until a re-index is performed to refresh the dictionary. If you are adding a lot of new records, coordinate with your Concordance administrator to ensure that the re-indexing process coincides with your schedule in order to keep the database dictionary up-to-date.

There are two ways to create new records in the Edit view:

- Using the **Append** command to create a new blank record.
- Using the **Ditto** feature to create a new record with data from another document.



The Append and Ditto features are not available for E-Document databases. E-document databases have automatic document numbers that prohibit using Append and/or Ditto.

Append a New Blank Record

1. While in **Edit** view, select **Edit > Append**. A new record is displayed in **Edit** view. Some fields may be gray because you do not have permission to edit these fields.
2. Fill out the applicable fields for the new record.
3. Click **Edit** on the Toolbar to turn off edit mode and save your record. Concordance automatically saves the new record as soon as you close the **Edit** view or navigate to another record. Changes are immediately viewable. In order to search the records, the database must be re-indexed.



To ensure that your edits are search-able, coordinate with your Concordance administrator regarding the re-indexing schedule. If any edits are made that require a re-index, a check mark displays on the File menu next to Reindex.

Using Ditto

Another tool for repetitive data entry is the **Ditto** feature. The Ditto feature copies fields of data from one record to another, minimizing data entry errors. The Ditto feature is only available in the Edit view. Both the Ditto button on the Dynamic toolbar in the Edit view and the Ditto (Edit View) command on the Edit menu open the **Duplicate** dialog box.

The Duplicate dialog box offers the following options:

- **Append new** - copies data from the current document into a new document.
- **Copy previous** - copies data from a previous document into a new or edited document.
- **Copy from another** - copies data from another document into a new or edited document.



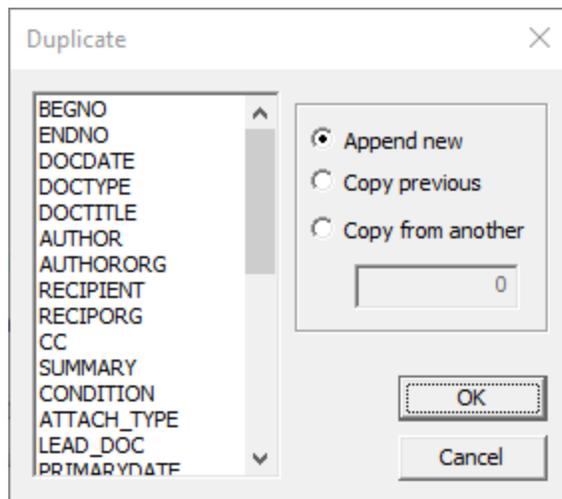
If you are copying field data from another document, when you select **Copy previous** or **Copy from another**, the selected field data from the current document is overwritten by the data from the other document.



For concatenated databases, only documents in the primary (first) database can be used for copying data.

Ditto a Record to Another

1. In the **Browse** or **Table** view, select the record containing the field data you want to use.
2. Click the **Edit** button on the Toolbar to open the **Edit** view.
3. Select **Edit > Ditto (Edit View)**, or click the **Ditto** button in the Dynamic Toolbar. The Duplicate dialog displays.



4. From the field list, select the fields that contain the data you want to copy.
5. Select **Append new** and click **OK**. A new record containing the fields you selected is created and opened in the **Browse** or **Table** view.
6. Update any fields as needed.
7. Click **Edit** on the Toolbar to turn off edit mode and save your record. Concordance automatically saves the new record as soon as you close the **Edit** view or navigate to another record. Changes are immediately viewable. In order to search the records, the database must be re-indexed.

The Duplicate dialog offers three different options:

- **Append new** - copies data from the current document into a new document.
- **Copy previous** - copies data from a previous document into a new or edited document.
- **Copy from another** - copies data from another document into a new or edited document.



If you are copying field data from another document, when you select **Copy previous** or **Copy from another**, the selected field

data from the current document is overwritten by the data from the other document.



For concatenated databases, only documents in the primary (first) database can be used for copying data.

You can mark records for deletion one at a time using the tools available on the Dynamic Toolbar when the Edit view is open. You can also mark multiple records for deletion at one time. When a record is marked for deletion, DEL is displayed in the status bar. Concordance administrators can review and retrieve these documents before removing them permanently from the database.

Records are not permanently removed from the database until your Concordance Administrator removes them.

Mark Individual Record for Deletion

1. In the **Browse** or **Table** view, select the record you want to mark for deletion.
2. On the Toolbar, click the **Edit** button to open the **Edit** view.
3. On the Dynamic Toolbar click the **Delete** button. The record is marked for deletion and the Status Bar now shows **DEL** for the deleted record. The record will not be permanently deleted until your Concordance Administrator removes it.

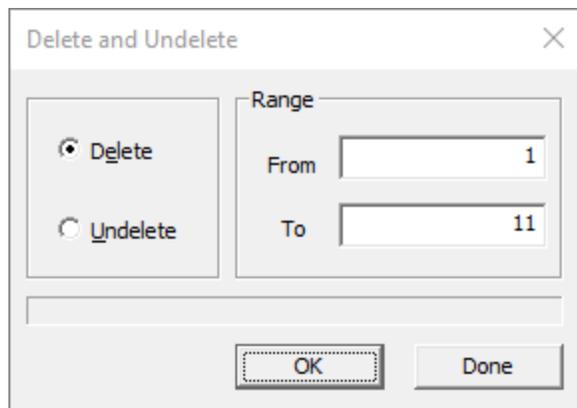
Unmark Individual Records for Deletion

1. In the **Browse** or **Table** view, select the record you want to unmark for deletion.
2. On the Toolbar, click the **Edit** button to open the **Edit** view.

3. On the Dynamic Toolbar click the Undo button. Select **Undelete document** in the **Edit Options** dialog and click **OK**. The record is no longer marked for deletion and the Status Bar no longer displays **DEL** for the record.

Mark Multiple Records for Deletion

1. Run a search for a batch of records that you want to mark for deletion, or a zero search to be able to select a specific range of records from the entire database.
2. Verify that the desired records appear in **Table** view.
3. On the **Edit** menu, click **Delete and Undelete**. The **Delete and Undelete** dialog displays.



4. In the **Range** field, confirm the range of records to mark for deletion, and then click **OK**. The selected records are marked for deletion and each of those records will display **DEL** in the Status Bar.



If you accidentally mark records for deletion that should not be deleted, follow the procedures above for deleting multiple records but select **Undelete** instead of **Delete** in the **Delete and Undelete** dialog. You can also remove the delete status from the individual records using the Delete or Edit buttons on the Dynamic toolbar. Be sure to verify that the DEL status no longer appears for the appropriate records.

Searching

Concordance search tools sort through vast amounts of information quickly using two search methodologies:

- **Full-text Searching** - Full-text searching is fast and produces results quickly because it searches for words based on index entries created when building the database. The index provides directions to words in the database dictionary and records are gathered for you to review based on search criteria.
- **Relational Searches** - Relational searches scan every word of every record in a database and take longer than full-text searches, because Concordance must read every record to locate your entries and does not use an index. Relational searches are great for locating dates and numbers, whereas full-text searches are optimal for word searches.

See [Advanced Searching](#)¹²⁴ for more details about searching in Concordance.

When your Concordance administrator builds your record databases, the information is indexed for full-text searching capabilities. Once a record collection is indexed, a dictionary is created with additional filters that weed out unnecessary words, common English words, and even some punctuation, to improve search processing time. When reviewers make edits, redactions, or add new records to the database, the administrator must perform a reindex in Concordance to update your record collection. It is recommended to perform indexing when reviewers are not working in Concordance.

To more effectively execute full-text searches, it is important to understand the search concepts below.

Indexing and Re-indexing

When Concordance databases are built, the index and dictionary are generated from your document contents. The index contains location information for every word or character string in the database. The dictionary contains a list of every

word or string of characters in your record collection, except words, punctuation, and/or field content your administrator specifically excludes from the dictionary.

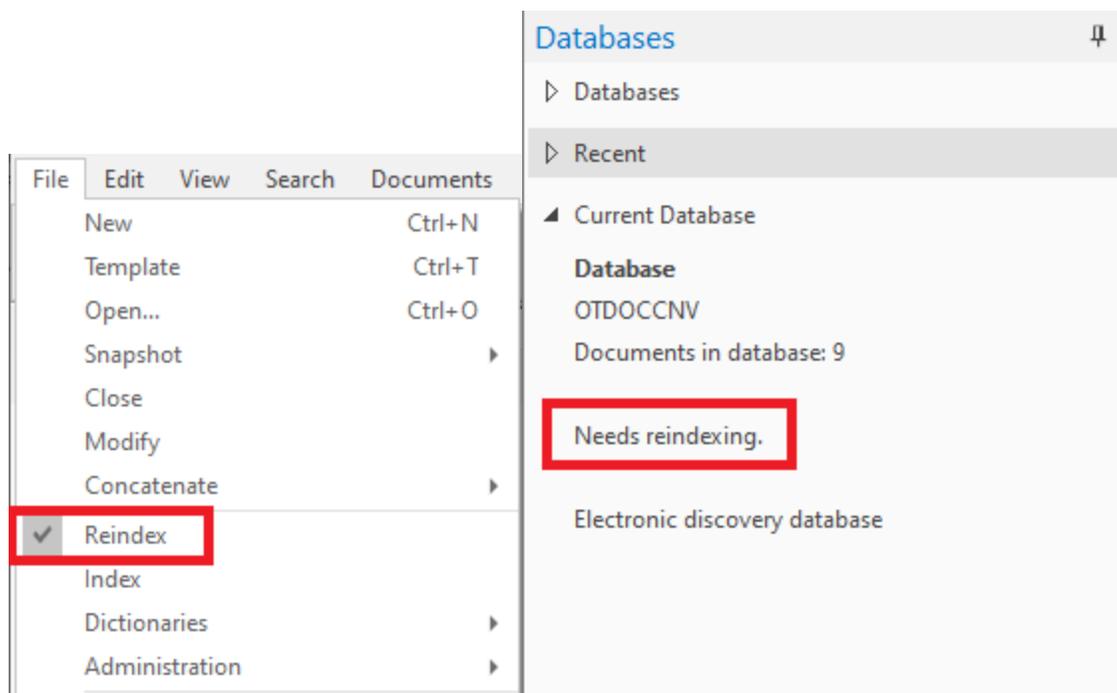
A word is simply defined as any string of letters and/or numbers. Both *airforce1* and *ABC000001* could be words in the Concordance index.

Spaces break characters into multiple words, so a space between *airforce* and *1* would result in two separate words in the index.

In Concordance, updating the index is called a reindex. Reindexing updates the database dictionary and its corresponding index. Actively used databases need frequent reindexing to keep the index and dictionary entries current for searches.

Administrators are usually responsible for indexing or reindexing databases due to the sensitivity involved in running these processes. Concordance administrators must ensure that all data is reviewed and proper backups are made before indexing or reindexing a database.

When updates have been made to a database and your database dictionary is no longer current with the latest updates, Concordance indicates that the database needs reindexing. On the file menu a check mark is displayed next to the Reindex command and Needs Reindexing is displayed in the Databases task pane under Current Database. If you do not have reindexing privileges, the Reindex command is not visible on the File menu.



Stopwords

Concordance comes with a pre-defined list of stopwords for each database. Stopwords are words that are automatically excluded from a database's index. The stopword list includes the most common words in the English language (for example: *and*, *but*, *is*, and *the*). Stopwords are words you normally would not search for. Eliminating these words from the index ensures that searches run faster and more efficiently. You can see the stopwords list for your database by going to **File > Dictionaries > Stopword** list.

Punctuation

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

You can search for words with punctuation if both of the following things are true:

- The punctuation character is defined by your administrator to be indexed in Concordance

- The punctuation is part of a string surrounded by two other characters

To see what punctuation your administrator defined to be indexed, go to **File > Properties**.

The screenshot shows the 'Edtesta V10' Properties dialog box. The 'Concatenated databases' list contains 'C:\PROGRAMDATA\CLOUDNINE\DATABASES\EDTESTA\EDTESTA'. The 'Description' field contains 'Electronic discovery database'. The 'Punctuation' field is circled in red and contains '.,/'. Other fields include 'Documents' (7), 'Dictionary words' (6,723), 'Stopwords' (141), 'Operator' (ADJ), 'Quote' (*), 'Wildcard' (*), 'Empties' (Hide), and 'Memory' (2,147,483,647). The 'Home directory' field is empty with a 'Browse...' button. The 'Users logged in' field is empty with an 'OK' button.

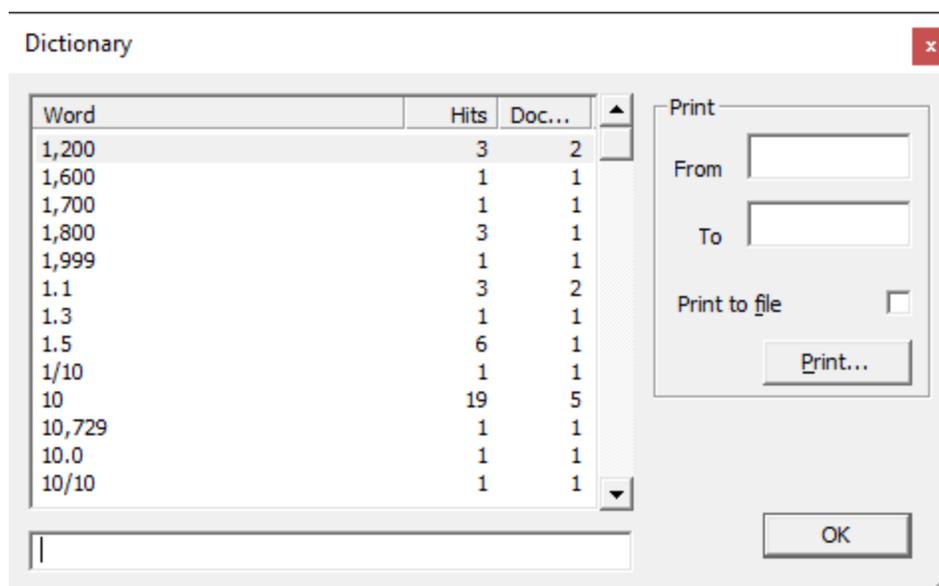


When using punctuation characters in your search term, at least one non-punctuation character needs to be inserted between the punctuation characters. For example: *joe&i@email.com*. Using two or more punctuation characters together will not work (*joe&@email.com*).

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 depending on your settings. You can view your dictionary by going to

File>Dictionaries>Database Dictionary. The **Dictionary** dialog box provides a complete listing of all words included, the number of documents it appears in, and how many word hits there are.



Quick Search

Quick Search appears immediately below the Concordance Menus and Toolbars. You can use Quick Search to find information quickly in the Browse or Table views without having to open the Search Panel in the Navigation Pane. You can toggle between viewing all case records or those in your current search by selecting the All button on the Toolbar.

To Run a Quick Search

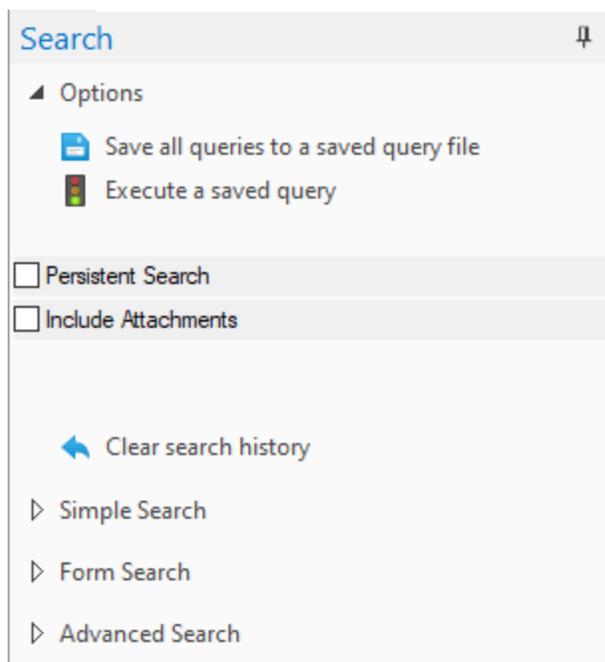
1. In the **Quick Search** field, type your search string. You can enter up to 255 characters.
2. Click the **Go** (green arrow) button on the right or press Enter to run the search.
3. Depending on which views you have displayed, records containing the search you entered are displayed in Table View, and the first record is displayed in the

Browse View. Each occurrence (hit) of your search is highlighted in red in the Browse View.

4. To navigate to the next occurrence of your search string, click the **Next Hit** button in the toolbar on the lower left. The **Status Bar** at the bottom updates to show you what search result document you are currently viewing. For example, *Document 2 [3] of 4* indicates you are viewing the second search result of four total results, and this document is the third document in the database.
5. The **Quick Search** field stores your recent quick searches. To access a previous **Quick Search**, click the drop down arrow on the right, and select the query. To rerun the search, click the **Go** button or press Enter.

Options

Options provides the ability to define a persistent search and include attachments in your searches. **Options** is available in the **Search Panel** in the **Navigation Pane**.



There are several reasons to save your search queries. A benefit to saving queries is that once stored, they will collect new data on future executions. The next time you open the query file, Concordance automatically reruns all previous query criteria and includes them in the current session's list of searches. This provides you with a foundation of queries to build upon in your advanced search efforts and saves you data entry time.

Queries are saved as .qry files. These are editable text files containing only the search string. Re-running a saved query file reprocesses all searches for the file. This process can take extra time since Concordance is re-executing all of the searches. You can execute a .qry file on other databases. If you re-execute it in another database, remember that you will need to resolve any field discrepancies between them by editing the search strings or by making a copy of the search and editing it. For example, the To and From fields in one database may be titled Author and Recipient in another one.

If you don't need to re-execute a .qry file, then you can save queries as .txt files by right-clicking on a query in the **Review** view and selecting **Save**. Unlike a saved .qry file, which only stores your search clause, a saved text file also stores the number of hits and documents for that query. Saved search .txt files are useful in referencing search history.

Save All Queries

1. On the Toolbar, click the **Review** button.
2. Open the **Options** section of the **Search Panel** in the **Navigation Pane**.
3. Click **Save all queries to a saved query file**. The **Keep Queries** dialog displays.
4. Navigate to and provide a file name for the query file. Click **Save**.
5. Once you have saved your queries you can clear the queries from Review view by clicking **Clear search history** in the **Options** section of the **Search Panel**.

Execute a Saved Query

1. On the Toolbar, click the **Review** button.

2. Open the **Options** section of the **Search Panel** in the **Navigation Pane**.
3. Click **Execute a saved query**. The **Open** dialog displays.
4. Navigate to and select a query file name containing the queries to execute. Click **Open**.
5. Concordance runs all searches in the query file. The search results display in Review View as soon as they are executed.

Persistent Search

A Persistent Search remains active even after the results are returned. The search terms for a Persistent Search are saved in a file with the database (<database name>_Persistent.txt). To add search terms to the Persistent Search file, contact your Concordance Administrator.

When new records are added to a database, and Persistent Search is enabled, the Persistent Search will automatically be run whenever the database is reindexed.

A Persistent Search may be run in conjunction with Quick, Simple, and Advanced Search queries to refine search results even further. When combining Persistent Search and other searches, make sure that the Persistent Search option is enabled before running any additional queries. Persistent Search is automatically disabled after executing the Find Attachments command.

To enable Persistent Search, either:

- Open **Options** inside the **Search Panel** of the **Navigation Pane** and select the **Persistent Search** check box.
- Click **Search>Persistent Search**.

When **Persistent Search** is enabled, the Status Bar updates to show the word PERSISTENT.

When a search is executed while **Persistent Search** is enabled, Concordance returns all the records that contain both the terms in the search and the **Persistent**

Search. If you want to return to just the **Persistent Search** results, type 0 (the number zero) in the **Quick Search** field and press Enter.

When combining search queries a maximum number of 255 characters is allowed. If **Persistent Search** is activated and then a search is performed, make sure that the total number of characters does not exceed 255 to ensure the correct results are returned.

Each persistent search can define a different color to use for highlighting terms found matching the search. See [Searching Preferences](#)^[23] for more information.



If you click the All button on the standard toolbar, all the records in the database are returned and Persistent Search is automatically disabled. Click the All button a second time to reactivate the Persistent Search.

Include Attachments

When paper documents are scanned to TIFF formatted files and loaded into Concordance, parent documents and their attachments may be broken into separate records. If a document and its attachments are scanned as one document, there may be only a Begin and End Bates number field for each record in the database that reflects whole documents. If parent documents and attachments are separate records there may be a Begin and End Bates number as well as a Begin and End Attachment field or Attachment Range field in the database for each record.

When native e-mail files are processed, they may be converted to TIFF formatted files, in which case, they could be treated the same as paper document TIFF formatted files, in terms of the Begin and End Bates number and Attachment number fields in the database. If they are not converted to .tiff files and were reviewed in native format, document ID fields are used to assign a unique identifier to each document and attachment. A document ID is a document level identifier, rather than a page level identifier.

When searching a database that has documents and attachments, the search results may return some of the attachments for a document but not the parent

document, or just the parent and not the attachments, etc. If it is important to produce the entire document set (parent and all attachments related to those document that returned as the result of a search), it may be necessary to run the Find Attachments command to gather the related parents and attachments.

The Find Attachment command gathers related parent and attachment documents in a database based on the fields containing the attachment information for an active query. The Find Attachments command looks for attachments where the attachment ranges are stored in a single field or two separate fields. The Find Attachments can be set up when creating a database using the New Database Creation wizard, or using the preferences. For concatenated databases, only the primary database settings will work for all other databases in concatenated set, even if non-primary databases have different settings.



When using the Find Attachments feature, it is best practice to setup the fields as paragraph type fields to increase the performance. Be sure to index the database prior to running the Find Attachments command.

To Locate Documents and Related Attachments

1. Run the appropriate search to locate the documents for review. The search results are returned.
2. To find related attachments, on the **Search** menu, click **Find Attachments**.
3. When finished, press **Enter**.

To Run a Query and Include all Documents and Attachments

1. In the **Search** field, type the query to locate the documents and attachments.
2. In the **Navigation** pane, click the **Search** tab.
3. In the **Options** section, click the **Include Attachments** check box.

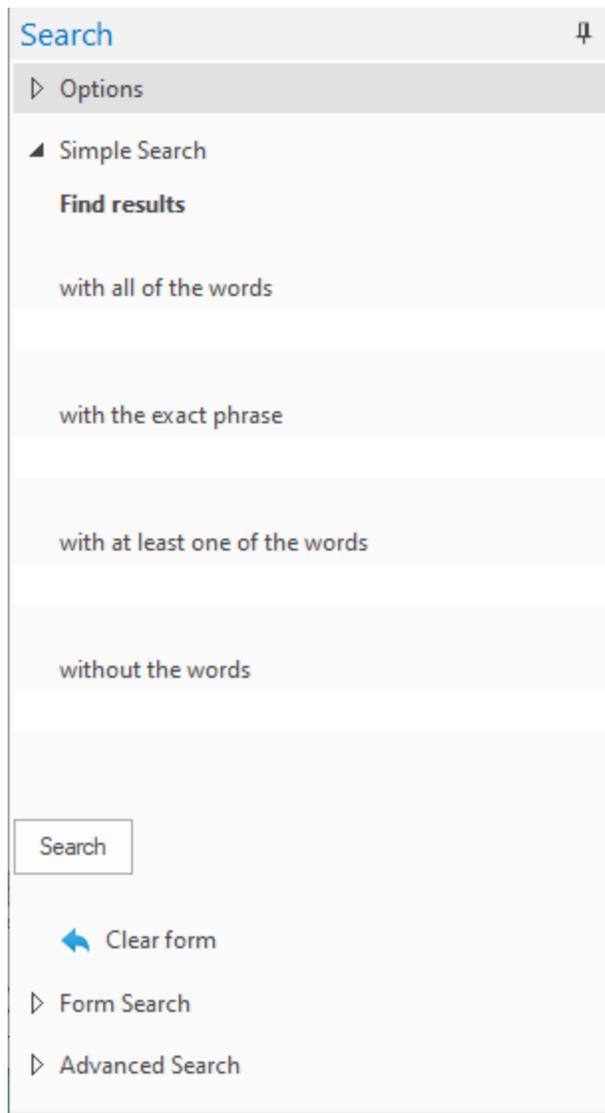
4. On the **Search** toolbar, click the **Go** button.



The Include Attachments option on the search panel does not work with Tag Queries. Use the Find Attachments option on the Search menu after running a Tag Query to find additional email and attachment family members or use the tagging option to Tag Query & Attachments.

Simple Search

Simple Search allows you to search records easily using provided parameters without having to learn about search operators. **Simple Search** is available in the **Search Panel** in the **Navigation Pane**.



When using features in the Navigation Pane, you may want to expand the width of the pane by dragging the divider between the Navigation Pane and the Workspace Pane to the right.

To Run a Simple Search

1. Open **Simple Search** inside the **Search Panel** of the **Navigation Pane**.
2. Enter your search criteria:

- **with all the words** - conducts an *and* search to find document records containing all terms listed
 - **with the exact phrase** - conducts an *adjacent* search to find document records containing terms found together
 - **with at least one of the words** - conducts an *or* search to find document records containing any of the words listed
 - **without the words** - conducts a *not* search to find document records that do not contain any of the words listed
3. Click the **Search** button to run the query.
 4. Depending on which views you have displayed, records containing the search you entered are displayed in Table View, and the first record is displayed in the Browse View. Each occurrence (hit) of your search is highlighted in red in the Browse View.
 5. To navigate to the next occurrence of your search, click the **Next Hit** button in the toolbar on the lower left.
 6. The **Status Bar** at the bottom updates to show you what search result document you are currently viewing. For example, *Document 2 [3] of 4* indicates you are viewing the second search result of four total results, and this document is the third document in the database.

Form Search

Form Search allows you to search records easily by helping to provide search syntax for you. The search performs the same full-text and relational searches that can be manually entered. Clicking **Form Search** in the **Search Panel** in the **Navigation Pane** will bring up the **Query by Example** dialog.

The screenshot shows a 'Search' menu with four options: 'Options', 'Simple Search', 'Form Search' (highlighted with a red box), and 'Advanced Search'. Below the menu is the 'Query by Example' dialog box, which contains a table for building search queries. The table has four columns: 'Connector', 'Where to look', 'How to look', and 'Look for'. The first row is pre-filled with '*New*', '*Any Full Text*', 'CO Contains', and an empty text box. Below this are five more rows, each starting with 'adj' in the 'Connector' column and '*Any Full Text*' in the 'Where to look' column. The 'How to look' column for all rows is 'CO Contains'. The 'Look for' column contains empty text boxes. At the bottom of the dialog box are several buttons: 'Dictionary', 'Notes' (with a checkbox), 'Search then Browse', 'Search then Table', 'Search', and 'Done'.

Connector	Where to look	How to look	Look for
New	*Any Full Text*	CO Contains	
adj	*Any Full Text*	CO Contains	
adj	*Any Full Text*	CO Contains	
adj	*Any Full Text*	CO Contains	
adj	*Any Full Text*	CO Contains	
adj	*Any Full Text*	CO Contains	

Notice each of the column headers at the top. Your first search will always start with *New* as the **Connector**. You then need to specify **Where to look**, **How to look**, and what word you want to **Look for**. You can continue to build out a more complex query by filling out another row, starting with another **Connector**.

The **Look for** field can be a maximum of 85 characters. The total of all fields can be a maximum of 255 characters.

You can determine whether the row in the form search will be run as full-text or relational by inspecting **Where to look**. If you want to use form search to build

complex queries, remember to put full-text searches before the relational searches in the Query by Example dialog.



The Query by Example dialog box is limited to ensure it remains simple to use. For more complex or longer searches, you can use the Advanced Search panel.

Query by Example ✕

Connector	Where to look	How to look	Look for
New	*Any Full Text*	CO Contains	skill
and	CREATIONDATE date	GE Is greater or equal	??/??/2012
adj	*Any Full Text*	CO Contains	
adj	*Any Full Text*	CO Contains	
adj	*Any Full Text*	CO Contains	
adj	*Any Full Text*	CO Contains	

"skill" and CREATIONDATE GE ??/??/2012

49 hits in 3 documents

Dictionary
 Notes
Search then Browse
Search then Table
Search
Done

To Run a Form Search

1. Click **Form Search** in the **Search Panel** in the **Navigation Pane**. The **Query by Example** dialog displays.
2. Define the term and/or connector for your search in the first row:
 - Leave **Connector** set to ***New***.

- Select a field to search, or ***Any Full Text*** to search all text, in **Where to look**.
 - The How to look updates based on your Where to look choice. Select an appropriate operator.
 - Select the value you want in Look for.
3. Fill out any additional rows in the Query by Example dialog following step 2, until you have specified your entire search.
 4. Do one or more of the following:
 - Select the **Notes** check box to run your search on any note content as well.
 - Click **Search** to display the full search string in the text box, and see the number of hits/documents found using the search. You can edit the search string directly in the text box if needed.
 - Click **Search then Browse** to display the search results in **Browse View**.
 - Click **Search then Table** to display the search results in **Table View**.
 - Click **Dictionary** to display the **Dictionary** dialog and select a word from your dictionary to **Add** to your search string. The word will be added following an OR operator.
 5. Click **Done** to exit the **Query by Example** dialog.



You can use Form Search to add to a query. By changing the first Connector chosen to something other than *New*, the Form Search will be added to the previous query.

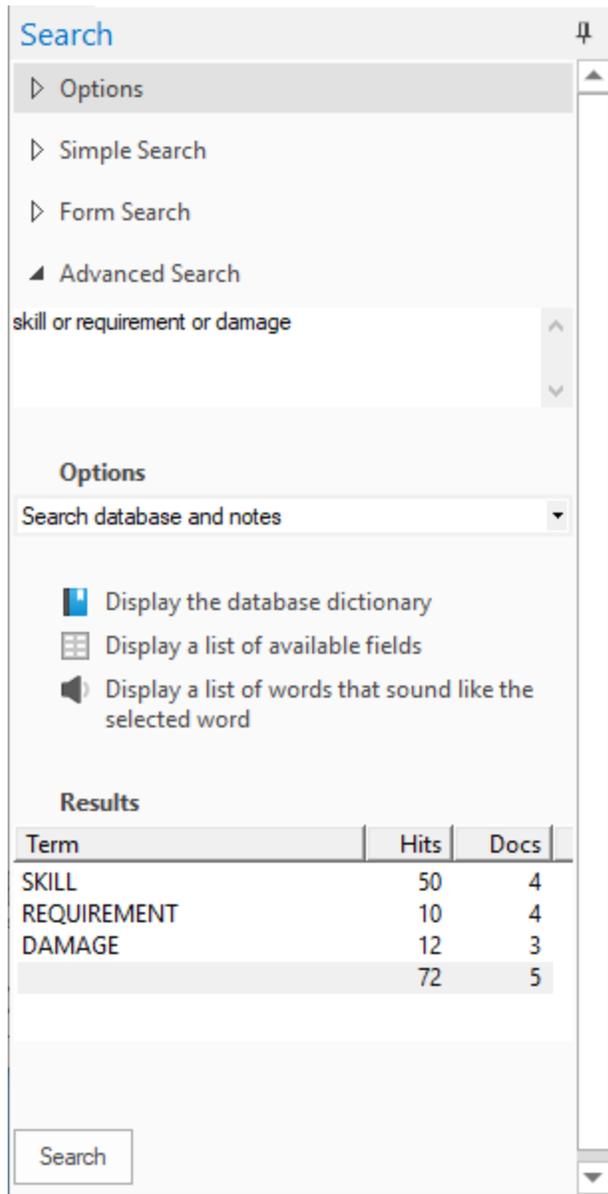
Advanced Search

Advanced Search allows you to type longer, more complex search strings. After executing the search, **Advanced Search** displays **Results** for each of the terms in your search - along with the number of hits and documents. The total

number of hits and documents is shown at the bottom of the **Results** list (highlighted in gray).

Double-clicking a term in the **Results** field narrows your search to only those documents containing the term. The search results are displayed in Table View. The first document in the search results is displayed in the Browse View.

Advanced Search is available in the **Search Panel** in the **Navigation Pane**.



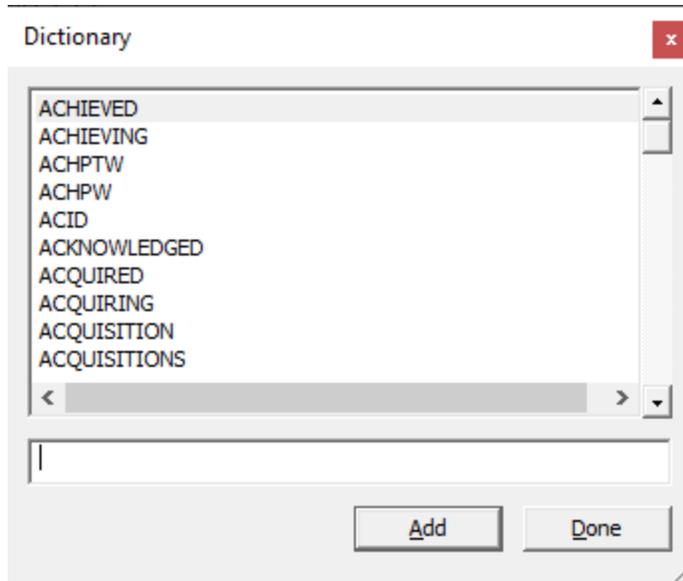
The screenshot shows the Search panel with the following content:

- Search** (title)
- Options** (expanded menu)
- Simple Search
- Form Search
- Advanced Search (selected)
- Search query: skill or requirement or damage
- Options** section:
 - Search database and notes (dropdown)
 - Display the database dictionary (checkbox)
 - Display a list of available fields (checkbox)
 - Display a list of words that sound like the selected word (checkbox)
- Results** section:

Term	Hits	Docs
SKILL	50	4
REQUIREMENT	10	4
DAMAGE	12	3
	72	5

Search button at the bottom.

Display the Database Dictionary



Use your database dictionary to search for keywords and also to add words directly to a search string in the **Advanced Search** panel. You can also use your dictionary to see if a word already exists (has already been indexed). If a word is not in the dictionary, use relational searching.

To open the **Dictionary** dialog, in the **Advanced Search** Panel of the Navigation Pane, click the **Display the database dictionary** link. This list contains every word, other than stopwords, in the database since the last index or reindex. If the database is concatenated, the list displays only words in the primary database.

While the **Dictionary** dialog is open you can:

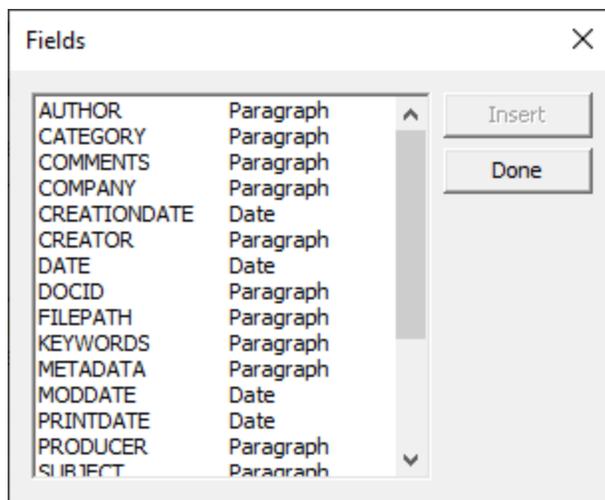
- Select a word and click the **Add** button to add it to the search string in the **Advanced Search** panel. The **Dictionary** dialog closes.
- Double-click a word to add it to the search string without closing the Dictionary dialog. You can then pick additional words to add. Additional words will be added separated by OR in the search string. Click **Done** when you are finished specifying the OR phrase.

You can add words to your search string directly from the **Dictionary** list by selecting a word and clicking **Add**.



The maximum length of a dictionary word is 64 characters. Only the first 64 characters of a word longer than 64 characters are included in the dictionary.

Display the Fields List



Use your fields list to view available fields in a database and add fields directly to a search string in the **Advanced Search** panel.

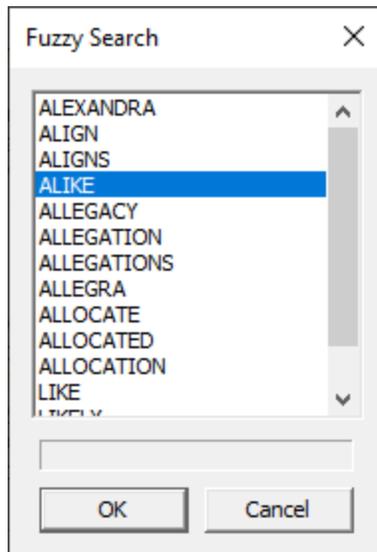
To open the **Fields** dialog, in the **Advanced Search** Panel of the Navigation pane, click the **Display a list of available fields** link.

While the **Fields** dialog is open you can:

- Select a field and click the **Insert** button to add it to the search string in the **Advanced Search** panel. Click **Done** to close the **Fields** dialog.
- Double click on a field to add it to the search string in the **Advanced Search** panel. Click **Done** to close the **Fields** dialog.

If the field you add is type Paragraph, Concordance automatically inserts field limiters into the search string, and separates adjacent Paragraph fields by commas.

Displaying Sound Alike Words



You can use a fuzzy search to find misspelled words. A fuzzy search looks for homonyms in the dictionary - finding words that look similar or sound like the word you want to find.

To open the **Fuzzy Search** dialog, type a word in the **Advanced Search** pane search terms box and click the **Display a list of words that sound like the selected word** link.

While the Fuzzy Search dialog is open you can select one or more words, then click **OK**. The words will be added to the search string in the Advanced Search panel (multiple words are separated by OR).

When you perform a search for a word, Concordance automatically searches for any synonyms associated with that word in the the database dictionary. Synonyms are created and managed in the Synonyms dialog box.

Synonyms can be based on words already entered in your database dictionary, creating a permanent link between them, or other search terms in Concordance. You can also create synonyms from the fuzzy words list, to include homonyms or

words that “look like” and “sound like” those already in your dictionary and synonyms listings. Fuzzy words provide a 65% character match on search terms, but fuzzy searches can miss words longer than the search term.

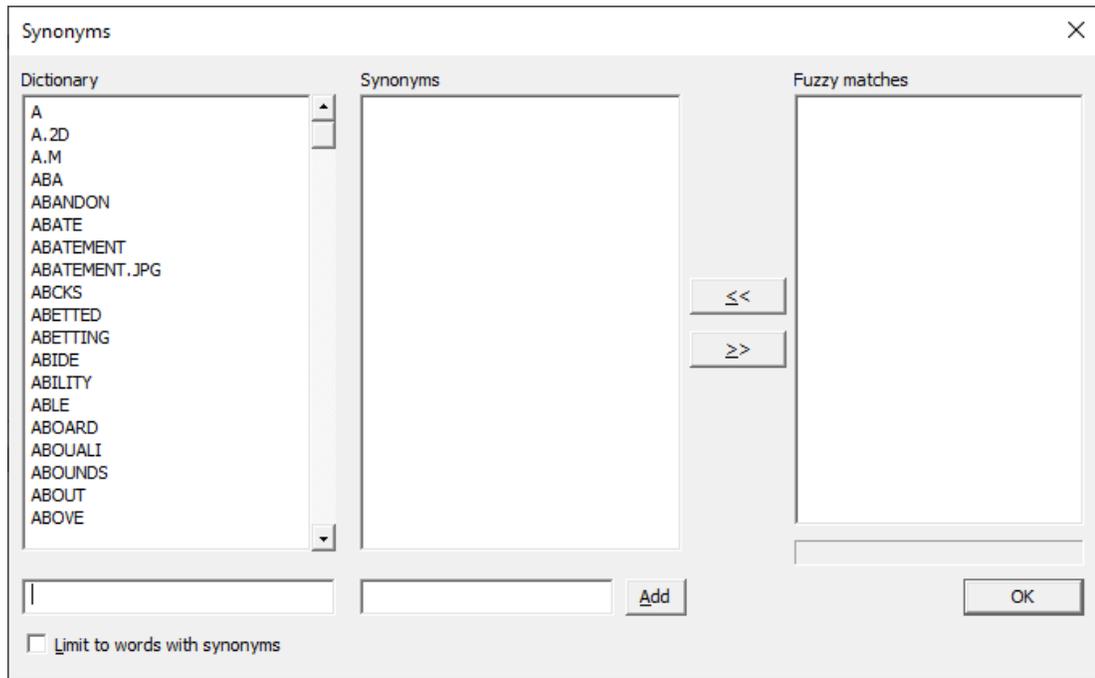
Synonyms are stored in the .syn file and fuzzy words are stored in the .fzy file. Both files are located in the same directory folder as the primary database.

Here are some examples of synonyms you can create:

- Common American English and UK English spellings, such as color and colour
- OCR errors and misspellings
- Acronyms
- Associating generic drug names with brand name medications
- Associating e-mail messages to a person’s name
- Capturing misspellings of a person’s name

To Create a Synonyms List

1. Click **File>Dictionaries>Synonyms**. The **Synonyms** dialog displays.



2. In the **Dictionary** list, click the word you want to link to synonyms.
 - To search for a word in the **Dictionary** list, type or select part or all the word you are looking for in the field below the **Dictionary** list.
 - If you only want the **Dictionary** list to display words already associated with synonyms, select the **Limit to words with synonyms** check box. If you want the **Dictionary** list to display each word in the dictionary, clear the **Limit to words with synonyms** check box.
 - You can manually add words to the synonym list or add words to the synonym list from the **Fuzzy matches** list. You can associate multiple synonyms with a dictionary word.
3. To manually add a word, in the field at the bottom of the **Synonym** list, type in the corresponding synonym and click the **Add** button. Clicking the **Add** button adds the word to the **Synonyms** list. Repeat this step for each of the synonyms you want to associate with the selected dictionary word.
4. To add a word from the **Fuzzy matches** list, in the **Fuzzy matches** list, click the word and click the double arrows << button.
5. When finished, click **OK**.

When you run a search for a word in the **Advanced Search** inside the **Search Panel** in the **Navigation Pane**, you should see synonyms listed as hits in the Results list since they are linked to the word in the dictionary.

Advanced Searching

Full-text and relational searches each have different pros and cons. It is important to understand when to use each. You can combine full-text and relational searches together - allowing you to search free-text paragraph fields and fixed fields at the same time to maximize your query potential.

Comparison of Full-Text versus Relational Searches

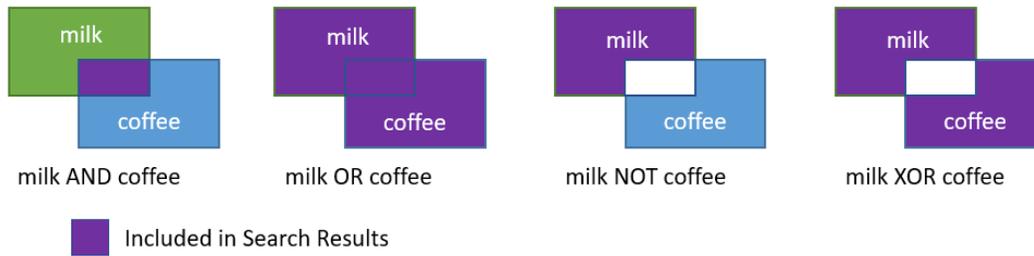
Full-Text	Relational
Searches the dictionary, uses index to display words from dictionary search	Searches the database in real time
Very fast	Slower (depending on size of database)
Hit highlighting in red	No hit highlighting
Can only search indexed fields	Can search any field, indexed or not
Easy to search multiple fields at once	Searches one field at a time (unless fields groups are established in the .INI file)

Full-Text	Relational
Used more often to find words	Used more often to find dates, numbers, ranges, comparisons
Cannot be used on date fields	Can find specific dates or a range of dates within limits or outside limits
Often used on paragraph fields	Normally used on paragraph fields only to find empty/not empty fields
Cannot be used until the database has been indexed. Will not find new data until database has been reindexed.	Can be used whether or not the database has been indexed
Cannot be used to find stopwords, since they are not in the dictionary	Can be used to find stopwords
<p>Uses the * wildcard character.</p> <p>Can be used before or after the word.</p>	<p>Uses the * wildcard character only at the end of a word. Use the ? wildcard character, to replace a single character in the middle of a word and in data searches.</p>
Always searches the complete contents of paragraph fields	Only searches the complete contents of paragraph fields when using CO and NC operators

Boolean (Document Level)

Boolean operators provide basic true or false results. In Concordance, Boolean operators search at the document level. The operators are not case-sensitive.

Boolean Operators			
Operator	Descripti on	Query Example	Results
AND	contains both words	milk AND coffee	documents with both the words "milk" and "coffee"
OR	contains either word	milk OR coffee	documents with either "milk" or "coffee", or both
NOT	contains first word, but not second	milk NOT coffee	documents with "milk", but not "coffee"
XOR	contains either word but not both in the same record	milk XOR coffee	documents with "milk" or "coffee", but not both words



Context (Field Level)

Context operators search at the field level and are combinations of field limiters and qualifiers. Field limiters specify the field(s) to search, and qualifiers allow you to search for multiple terms. Context operators are not case-sensitive. Take care to not put spaces between the periods in the field limiters and the field names.

Context Operators and Qualifiers		
	Query Example	Results
<code>.<fieldname>.</code>	<code>milk.DOCTITLE.</code>	documents that have the term "milk" in their DOCTITLE field
<code>..<fieldname>.</code>	<code>milk..DOCTITLE.</code>	documents that have the term "milk" in any field other than DOCTITLE

Context Operators and Qualifiers		
SAME	coffee SAME milk.DOCTITL E.	documents that have the term "milk" in their DOCTITLE field, and also have the term "coffee" in that same field
SAME	coffee SAME milk..DOCTIT LE.	documents that have the term "milk" in any field other than DOCTITLE, and also have the term "coffee" in that same field
NOTSA ME	coffee NOTSAME milk.DOCTITL E.	documents that have the term "milk" in their DOCTITLE field, and also have the term "coffee" in a field other than DOCTITLE
NOTSA ME	coffee NOTSAME milk..DOCTIT LE.	documents that have the term "milk" in any field other than DOCTITLE, and also have the term "coffee" in a field different than the field where "milk" is located

Proximity (Word Level)

Proximity operators search at the word level within a document. These operators allow you to locate a search term within a certain distance of another. The maximum range of words is 255, and it does not include stopwords.

Proximity Operators and Qualifier		
Operator	Query Example	Results
ADJ	milk ADJ coffee (same as a search for "milk coffee")	documents that have "milk" and "coffee" immediately next to each other and in the order specified
NEAR	milk NEAR coffee	documents that have "milk" and "coffee" within close range of each other, regardless of order
<word range> can be a number between 0 and 255	milk ADJ5 coffee milk NEAR5 coffee	documents that have "milk" within 5 words of "coffee", in that order documents that have "milk" within 5 words of "coffee", in any order

Wildcard (Field and Character Masking)

Wildcard characters help when searching for more complicated strings where misspellings or variations can occur.

As an example, names in documents are also easily misspelled and could be overlooked if apostrophes and initials are combined in records. Using a wildcard as a substitute for a character or series of characters leads to a broader search with stronger results.

Wildcards		
	Query Example	Results
Asterisk (*) Can be used at the beginning or end of a search string or fieldname	*count*	documents that have the characters "count" within any word, with 0 or more characters before and after "count" includes minimally documents with these words: account, accountant, country, countries, discount
	milk.TEXT0*.	documents that have the term "milk" in the TEXT01, TEXT02, TEXT03, etc. fields

Relational searches query the entire database in real time, searching a specified field for a specified value. Relational searches are primarily used to search fields with unique values such as Bates numbers or dates, and other short fields.

Relational searching does not require an index. You can also search on all punctuation and stopwords in the database. Because Concordance is searching the actual database data in real time without an index, relational searching can take longer than full-text searching.

Relational searches can be done on full-text fields, but it is best practice to use full-text searching for full-text fields when you can to save time. Relational searches can run faster if you combine them with a full-text search.

Like full-text queries, relational searches are not case sensitive. You may enter your search in upper, lower, or mixed-case letters.

Relational search results are not highlighted in red. Instead, you receive a list of records containing your query results in the Table view.

Relational Search Syntax

Relational search requests are entered in a structured query format. Each query contains at least three elements:

- the fixed field name to search
- a relational operator
- the data value or selection criteria

Relational Operators

There are ten relational operators available in Concordance. Most of the relational operators have both a symbol and an abbreviation - they may be used interchangeably. Be sure to include spaces between words and symbols or abbreviations so your search can be interpreted correctly.

Search for several values at once by separating them with commas. Spaces between the values are optional.

If you are searching for a value that itself has a comma, space, or operator symbol in it, then the value must be placed in quotes.

Concordance searches numbers and dates in sequential order. It is best to enter the smaller number or date first, then the bigger number or date when specifying a range.

Relational Operators			
Sy mb ol	Ab bre via tio n	Descripti on	Additional Info
=	EQ	equals	
<>	NE	not equal to	
>	GT	greater than	
<	LT	less than	

Relational Operators			
>=	GE	greater than or equal to	
<=	LE	less than or equal to	
\$	CO	contains	Only valid when searching text or paragraph fields. If used on numeric or date fields, Concordance processes as if you entered EQ.
!	NC	does not contain	Only valid when searching text or paragraph fields. If used on numeric or date fields, Concordance processes as if you entered NE.
(no symbol)	WL	within limits, includes stated values	two values are required to specify a range, separated by a comma
(no symbol)	OL	outside limits, excludes stated values	two values are required to specify a range, separated by a comma

Use relational searching to search for empty or populated fields.



- <fieldname> EQ "" - locates records where <fieldname> is empty
- <fieldname> NE "" - locates records where <fieldname> is populated with any value

Wildcard Characters

When Concordance reads a relational search, it views each individual character. Individual or multiple characters can be masked using wildcard characters in order to accept zero or more characters in that position.

Only the question mark wildcard can be used in dates. For relational date searches, be sure to include the slashes when constructing the date string based on the date format for the field you are searching.

Wildcard Characters			
Character	Description	Query Example	Results

Wildcard Characters

* (a s t e r i s k)	m a s k s m u l t i p l e c h a r a c t e r s (z e r o r m o r e	TEXT05 = woman*	all records containing words starting with "woman" in the TEXT05 field (including "woman", "womanhood", "womankind", etc.)
---	---	--------------------	--

Wildcard Characters			
) a t t h e b e g i n n i n g o r e n d o f a w o r d		
? (q u e s	m a s k s a	TEXT05 = ?og	all records containing three letter words ending in "og" in the TEXT05 field (for example: "dog", "log", "fog", etc.)

Wildcard Characters			
t i o n m a r k)	s i n g l e c h a r a c t e r		

Sample Searches	
Search	Results
ISBN = 0-477-01-482-8	documents that have "0-477-01482-8" in their ISBN field

Sample Searches	
milk and DATE >= 4/22/1990	first Concordance finds documents that have the term "milk", then from that result set - any documents whose DATE field is greater than or equal to "4/22/1990"
AREACOD E = 513, 719	documents that have either "513" or "719" in their AREACODE field
OCR CO side	documents that have the characters "side" within their OCR field - even within a word (for example the words "inside", "outside", "considered", "presides", and others)
CREATION DATE WL 6/10/2019 , 6/15/2019	documents that have their CREATIONDATE field greater than or equal to "6/10/2019" AND less than or equal to "6/15/2019"
CREATION DATE OL 2/12/2019 , 6/11/2019	documents with a CREATIONDATE prior to 2/12/2019 or after 6/11/2019
CREATION DATE = ??/??/20 12	documents with a CREATIONDATE in the year 2012 - with any day and month

Sample Searches

TEXT03 = "\$5,000"	documents with the TEXT03 field containing the string \$5,000
-----------------------	---

A complex clause search is a search string containing multiple search clauses, and can include either or both full-text and relational search clauses. Full-text search clauses should appear first, then relational clauses - to make your searches efficient and result in a distinct outcome.

Remember the order of fields and operators for full-text and relational search clauses:



- full-text clauses - the fieldname is typed last (ex. *smit*.recipient.*)
- relational clauses - the fieldname is typed first (ex. *CREATIONDATE = ??/??/1990*)

To combine search clauses together, simply join the clauses using Boolean, context, or proximity operators. When combining search clauses it is important to understand the operator precedence. You can add parentheses to override the operator precedence or make your search string easier to read. Parentheses have the highest precedence and can be nested up to 50 levels deep. Be careful when using spaces, since field limiters (. and ..) cannot have spaces.

The following table shows the operator precedence order for Concordance searches, highest at the top.

Operator Order of Precedence	
Operator	Description

Operator Order of Precedence	
ADJ	Locates words that are immediately adjacent, and you can specify a range of intervening indexed words from 0 to 255
NEAR	Locates words that are near each other, and you can specify a range of intervening indexed words from 0 to 255
SAME	Finds words within the same field
NOTSAME	Finds words that do not occur in the same field
AND	Combines words and search results that occur in the same document
NOT	Combines words and search results if they do not occur in the same document
OR	Combines words and search results, whether they occur in the same documents or not; Concordance doesn't care

Operator Order of Precedence

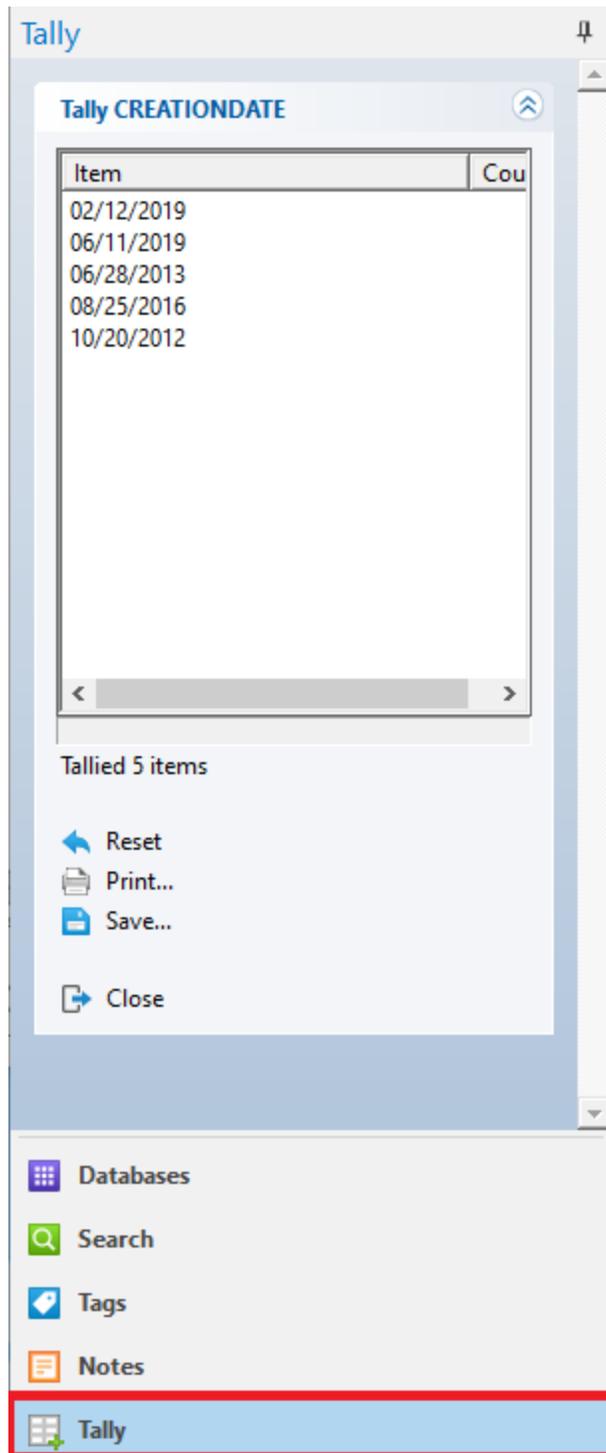
XOR	Finds documents that contain one of two search terms, but not both
-----	--

Sample Complex Searches

Search	Results
milk AND sugar NEAR25 coffee	NEAR has a higher precedence. This is evaluated as <i>milk AND (sugar NEAR25 coffee)</i> . Results are documents that have <i>sugar</i> within 25 words of <i>coffee</i> . Then those results are searched to find documents containing <i>milk</i> for the final query results.
board ADJ report NOT financial ADJ report	This can be translated to <i>board report NOT financial report</i> . The results are documents that don't have both <i>board report</i> and <i>financial report</i> .
milk.DOCTIT LE. AND CREATIOND ATE = ??/??/201 2	Results will be documents with <i>milk</i> in the DOCTITLE field that also have a CREATIONDATE in the year 2012.

Tally is a great tool for gaining an item count for a specific field to help you organize your document collection and for quality assurance checks. Perhaps you need to quickly determine how many contracts are currently in your caseload or verify if any new ones have been added to the database since you started your review. Or, find out how many times a key witness is mentioned by tallying the Author field. A Tally count itemizes this information for you so you can perform internal quality assurance checks in your case review, organize documents by field type, or narrow your searches to a reduced set of records.

The Tally feature is only accessible from the **Table** view, and runs a query on the selected field column. Once a Tally has been executed in **Table** view, you can open the **Tally Panel** by clicking the **Tally** button that appears in the lower section of the **Navigation Pane**.

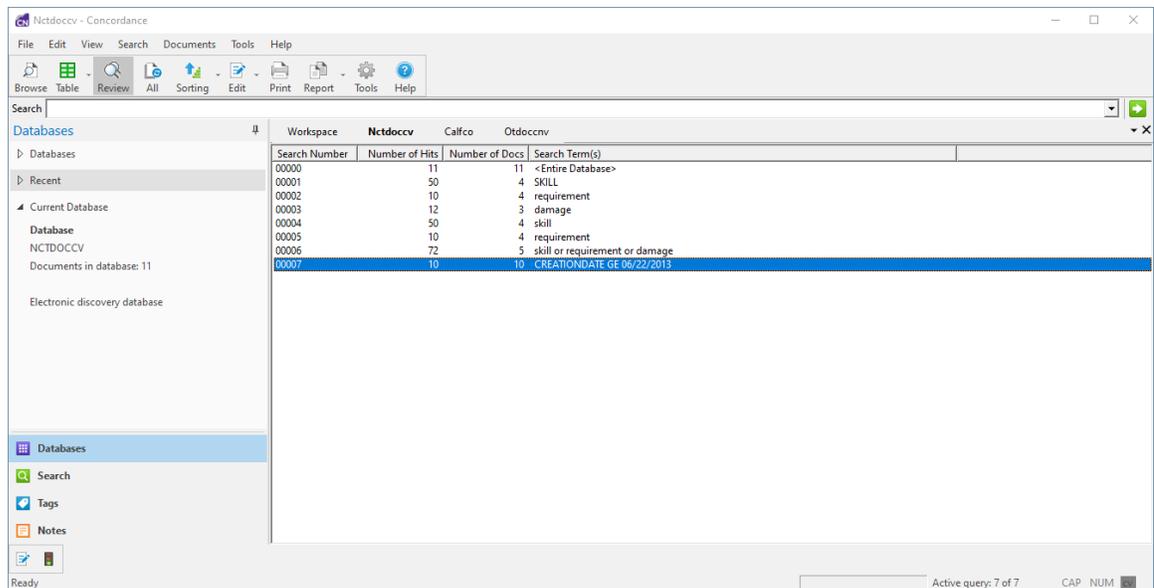


Run a Tally in Table View

1. In the **Table** view, right-click in a field column.
2. Select **Tally <field name>**.
3. The tally results are displayed in the **Tally Panel** of the **Navigation Pane**.
4. Double-click an item in the tally list to display the associated records in the **Table** view and the first corresponding record in the **Browse** view.

Reviewing and Re-running Searches

The Review View provides a complete, numerical listing of all searches conducted since you opened Concordance or it was last reindexed. The Review View can be displayed by clicking Review on the Toolbar.



Because each search query is numbered sequentially, you can easily combine 2 or more searches together using the search number. Referencing the search number is much faster than re-typing the search. For example, type **3 OR 6** in Quick Search at the top to combine query number 3 and query number 6. The result for this example, based on the information above, would be a search for *weapon OR skill OR SASCHA*.

Selecting the Edit icon on the Dynamic Toolbar on the lower left will put the search terms for the currently highlighted search into the Advanced Search pane on the left so you can modify them. You can also select the Activate icon on the Dynamic Toolbar to re-run the selected search.

Zero Search

The easiest way to return all records for the entire database after running several queries is to run a Zero Search by typing a zero (0) in Quick Search.

The Zero Search is always the first search run when opening a database in Concordance.

The Activate button can be used with the Persistent Search option. If the Persistent Search option is enabled in the Search pane and then the Activate button is selected, Concordance returns all the records that contain both the terms in the query and the Persistent Search text file.

To Copy a Previous Search Query

1. In the Review view, do one of the following:
 - Right-click the search query, click **Copy Query**, and then right-click in a search field and click **Paste**.
 - Select the search query, and then on the **Dynamic** toolbar, click **Edit**.
 - Right-click the search query, and then click **Edit**.
2. The query displays in the Advanced Search panel, where you can add or edit the search logic for a new query.

Tagging

Tagging records is a critical step in the discovery process. Tagging allows you to categorize your documents during document review by privilege, review status, or other criteria that are important to your organization.

To help you manage the case review process, your Concordance administrator typically builds a set of tags for case review that include standard naming conventions, such as privileged, responsive, non-responsive, etc. Tags can also be added in the Tags task pane and can be removed at any time. There are no limits on tagging. You can tag as many documents as you want, with as many tags as you want.

Once tags are applied to document records, the tags become searchable, allowing a user or administrator to easily retrieve all documents with a particular tag.

The following tag list provides some tag examples to consider. Make sure your tags can cover both high-level review and specific research for your case. Collaborate with your Concordance administrator so appropriate tags can be set up in advance.

- **Responsive or Non-Responsive** - identify responsive documents that must be produced as part of the discovery process
- **Privileged** - identify documents containing information that should not be produced
- **Witnesses** - identify documents for witness kits or binders used in depositions or trials
- **<Reviewer>** - create tags for each individual reviewer
- **Exhibits** - identify documents that will be used as exhibits
- **Issues** - identify documents related to key legal issues in the case
- **Keywords** - identify documents containing important terms in the case

In order to gain the most benefit from tag use, please consider the following:

- Determine how your database will be used by reviewers, so tags can be created in advance.

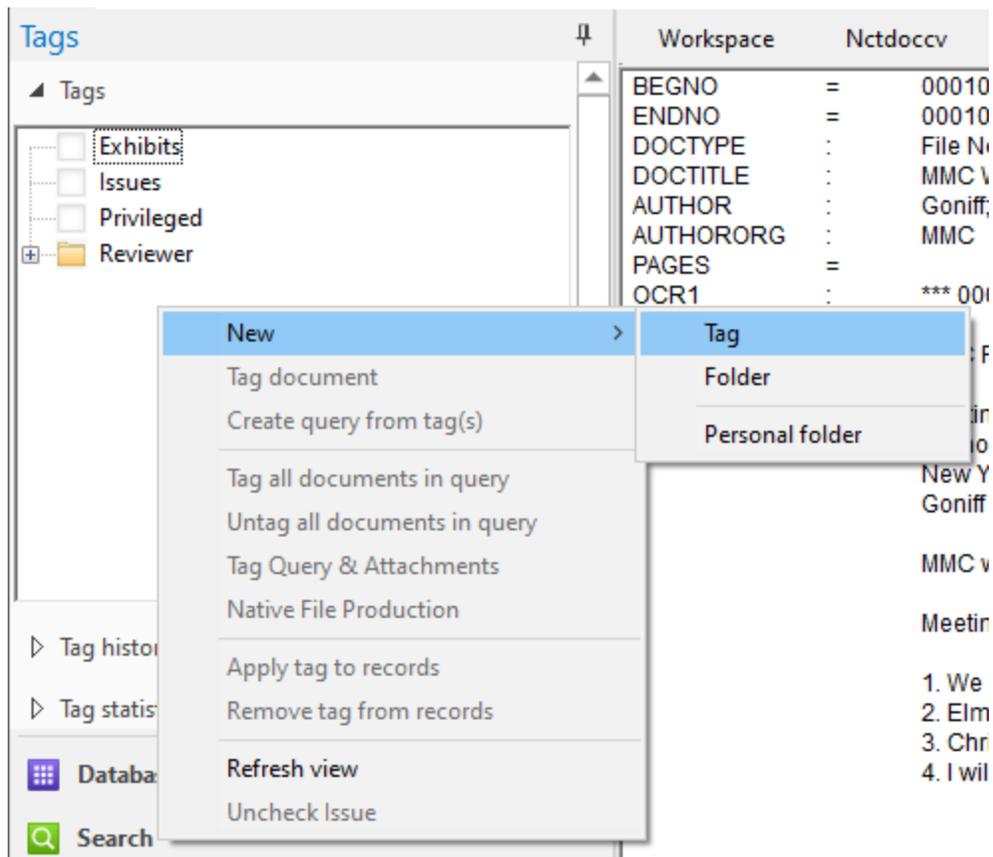
- Use consistent tag and folder names for better organization.
- As a general rule, search first, tag second. This method allows you to focus on documents containing key terms or other search criteria, which limits the number of documents that need to be reviewed.
- For field-level tags, once all documents are tagged with a particular tag, consider adding a field value to the database to permanently categorize these documents.

You can quickly see the **Tags** that are currently defined for your database by opening the **Tags Panel** in the **Navigation Pane** on the left.

The screenshot shows the Concordance software interface. On the left, the **Tags Panel** is open, displaying a tree view with folders like **Exhibits**, **Issues**, **Privileged**, and **Reviewer**. Below this, there are sections for **Tag history**, **Tag statistics**, **Databases**, **Search**, **Tags** (selected), and **Notes**. The main window displays a document titled "Calfoo: MMC Writing Attendance Note 20 mins. - Concordance". The document content includes metadata fields (BEGNO, ENDNO, DOCTYPE, DOCTITLE, AUTHOR, AUTHORORG, PAGES, OCR1), a title "MMC File Note", a date "00010002", a meeting description "Meeting 11.3", and a list of agenda items. At the bottom, there is a table titled "Texaco Stock Valuation Table".

	1980	1981	1982
A	470	521	532
B	340	325	291

Creating Tags



Tags can be easily created by right-clicking in the **Tags Panel**. Select **New > Tag**. A new tag entry will appear in the **Tags Panel** that you can edit with the name you want. By default, when you add a new tag it is automatically selected for the current document, so be sure to unselect the new tag if it doesn't apply to the currently displayed document.

New tag folders can be created in a similar fashion. Right-click in the **Tags Panel** and select **New > Folder**. When you create a new tag folder, you also need to add at least one tag to that folder. Empty tag folders will not be saved.

You can easily organize tags into folders directly in the **Tags Panel**. Simply select the tag and drag to the folder. You can also select multiple tags and move them at the same time.



If you need to remove a folder or tag, contact your Concordance administrator.

Personal Folders and Tags

You can create a personal folder and custom tags specific to your own review needs. When you create personal folders, they are not visible in the **Tags Panel** for other users, however, personal folders and tags are viewable by your Concordance administrator. Create a personal folder first by right-clicking in the **Tags Panel** and selecting **New > Personal folder**. Then create a new tag in your newly added personal folder.

Tagging Records

Before you begin tagging records, it is best practice to run a search to limit the number of documents you have to review. Tags can be applied and removed by any user, at any time.

To Apply or Remove a Tag from a Document

1. Select the document you want to tag or untag in either the Browse View or Table View.
2. Open the **Tags Panel**.
3. Select or unselect the check box next to the tag you want to add to or remove from the current document.

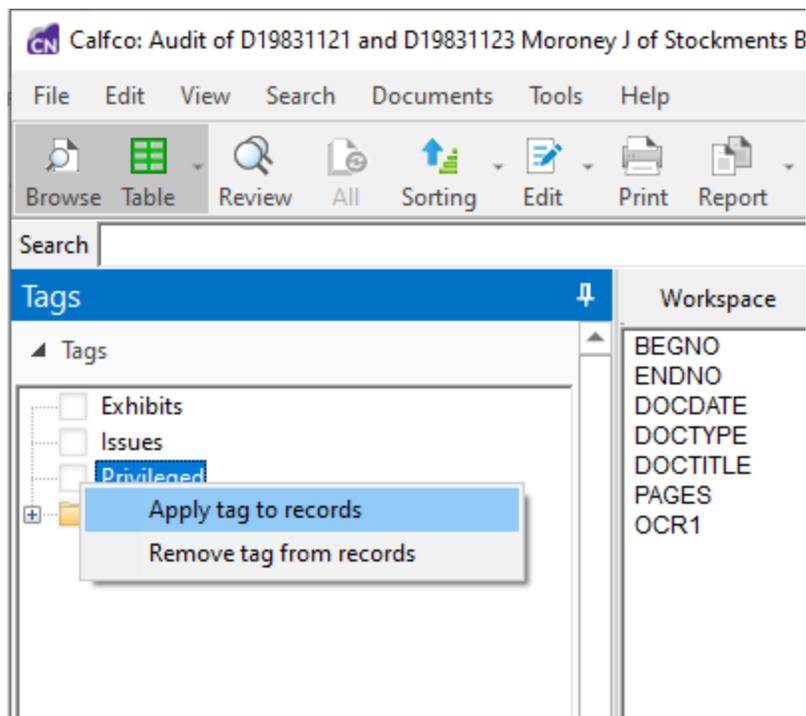


When you are viewing a document in Browse View or Table View, the Status Bar at the bottom of Concordance will display TAG if the document has one or more tags applied.

Tagging Multiple Documents

You may want to conduct searches and tag all the results of that search for later review. This method is often referred to as bulk tagging.

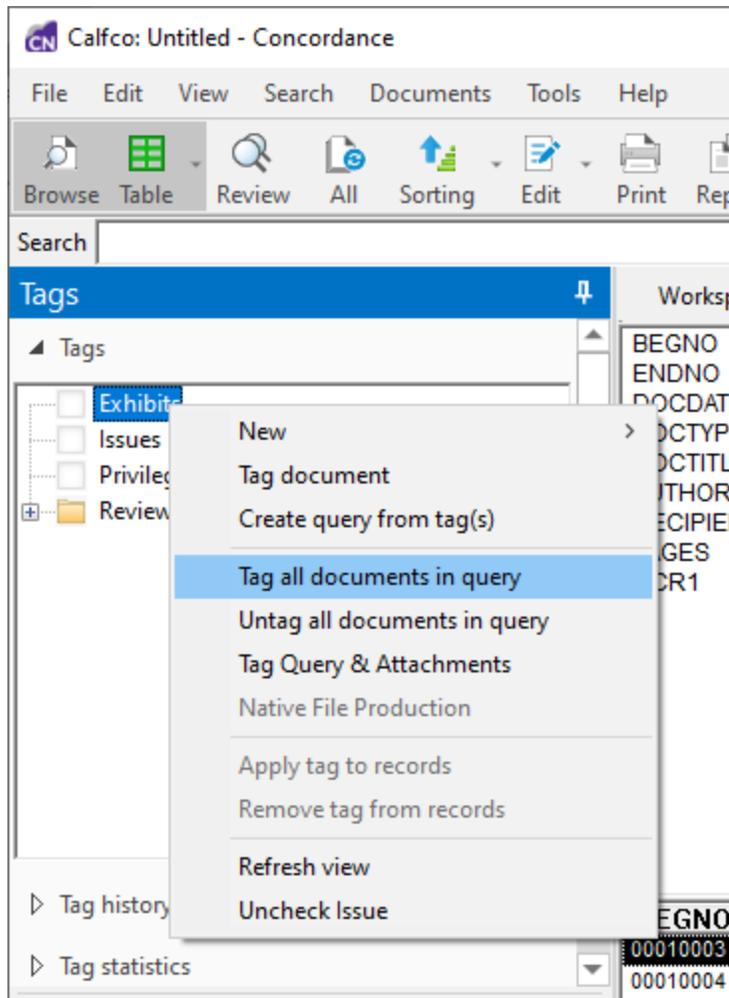
1. Run a search to generate a list of documents.
2. Select Table View from the toolbar.
3. In the Table View, select all the documents you want to tag.
4. Open the **Tags** Panel.
5. In the **Tags** pane, click a tag's check box. A menu will display where you can Apply or Remove the selected tag from the records you have selected in Table View.



6. Choose the appropriate menu option. A confirmation dialog will display. Click **Yes** and the tag will be applied or removed from the selected records.

Tagging All Results from a Query

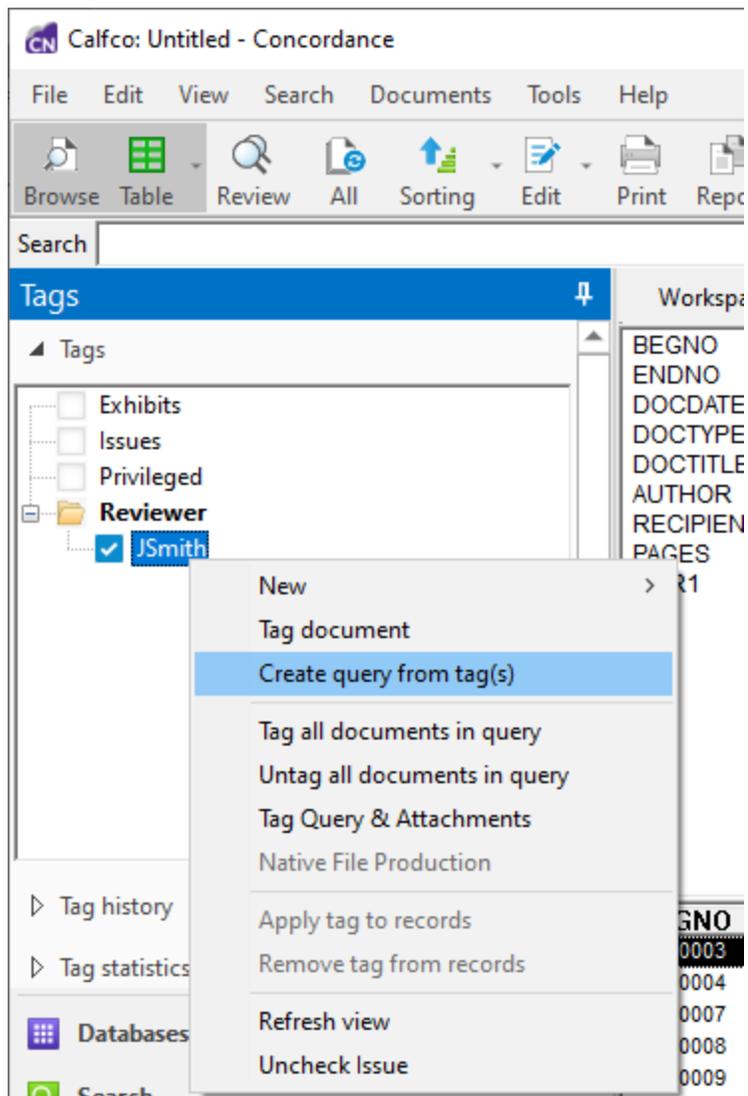
1. Run a search to generate a list of documents.
2. Open the **Tags** Panel.
3. In the Tags pane, right click on a tag name (not the check box). A menu will display.



4. Select **Tag all documents in a query**. A confirmation dialog will display. Click **Yes** and Concordance will apply the tag you selected to all the results of the most recent query.

Tag Queries

If you need to identify which documents have a specific tag applied to them, you can easily do so by creating a query from a tag.



To Create a Query from Tags

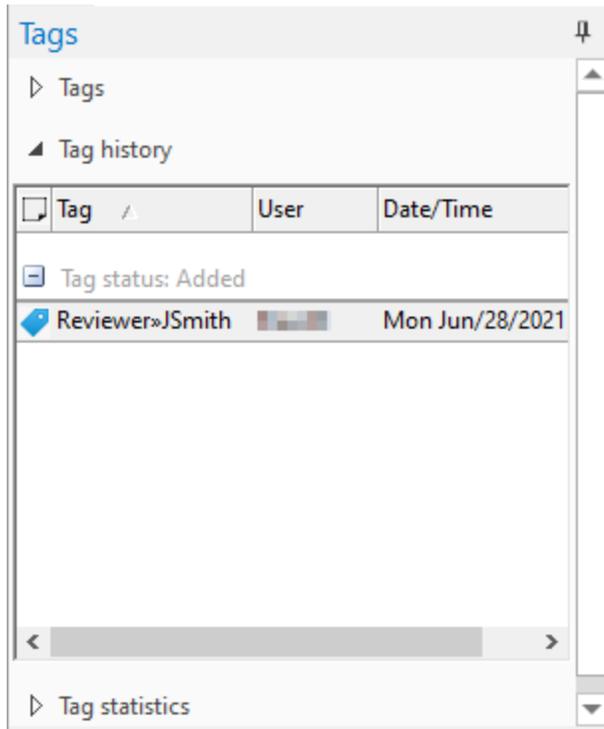
1. Open the **Tags** task pane.
2. In the **Tags** task pane, select the tag you want to query. You can select multiple tags by pressing the Ctrl key while selecting multiple tags.
3. Right-click the selected tag and select **Create query from tag(s)**.
Concordance runs a query for all documents with the selected tag. You can see the results in Browse View or Table View. If you select multiple tags for the query, the results will include any documents with any selected tags (this is

an OR search - tag1 OR tag2) Your search history also updates to show the tag query.

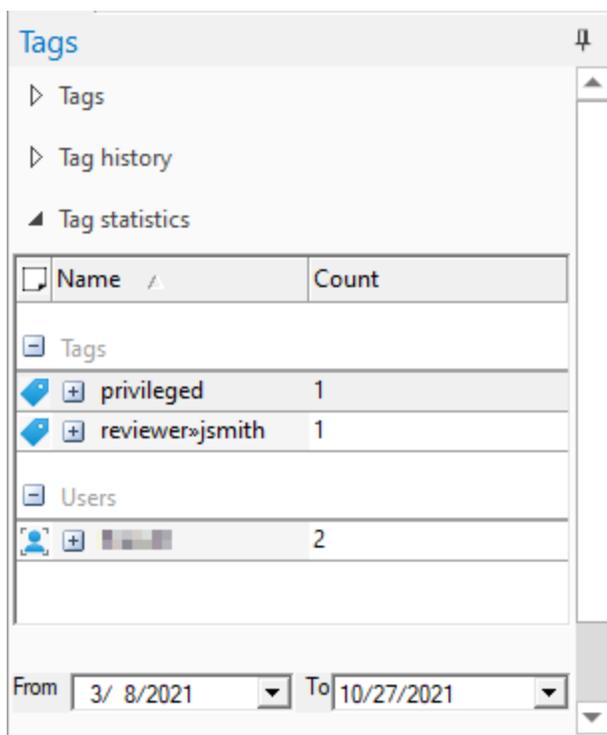
You can also execute Create query from tag(s) from a tag folder. In the example above, if you create a query from the Reviewer tag folder, the results will display for documents that are tagged with any tag inside that folder (BJones and SSmith).

Tag History and Statistics

The **Tags Panel** in the **Navigation Pane** on the left contains two additional panes with Tag information.



As you navigate through your database records, the **Tag history** updates to display details for tags that have been added or deleted from the currently selected document. The history details include who applied or removed the tag, and when.



Name	Count
Tags	
privileged	1
reviewer»jsmith	1
Users	
	2

The **Tag statistics** section of the **Tags Panel** allows you to review the history of all tags applied to the current database. You can select a date range at the bottom, to see what tag activity occurred during that timeframe. This feature is useful for monitoring review progress. If you are not seeing the most recent tag activity, click the **Refresh** button at the bottom to update the display.

Transcripts

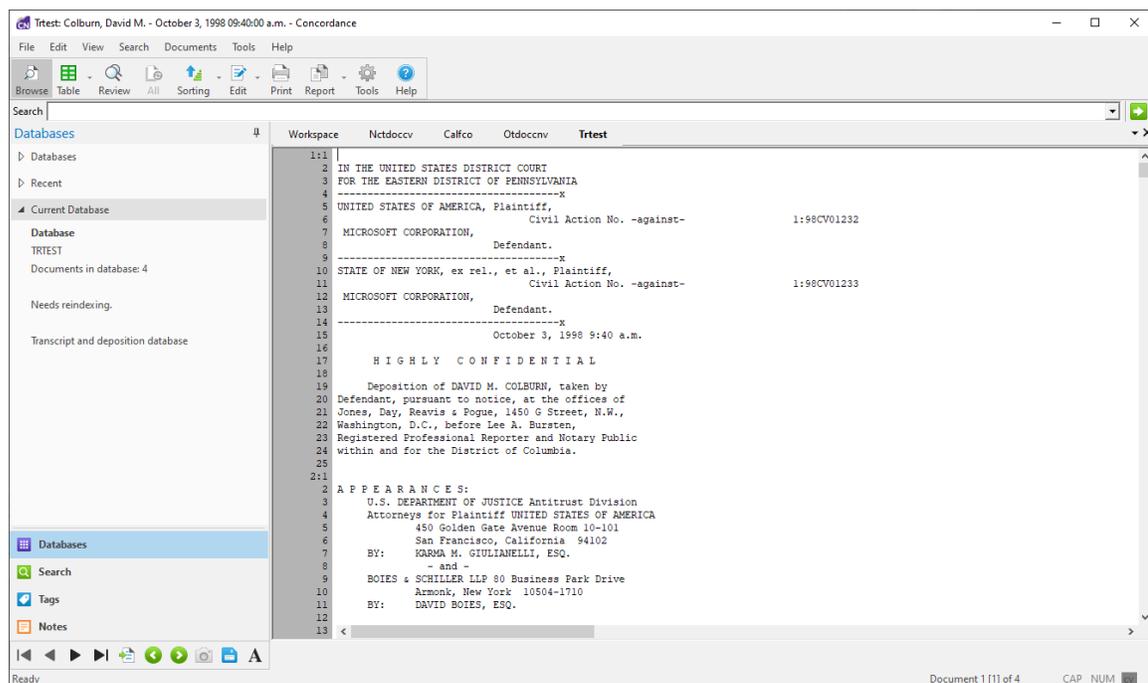
With Concordance you get the benefit of managing your transcripts within the same application as your documents. As a transcription management tool, Concordance provides you with additional review and annotation features necessary for working with transcripts. You can also join a transcript database with other discovery databases to search across all documents and transcripts at once.

Like other Concordance databases, transcripts are searched using full-text operators. You can narrow your search to a specific deponent, transcript date, or volume number. Specific fields are used in transcript databases to capture that information.

You can create a Transcript database by using a template that is provided with Concordance. See [Database Templates](#)³⁵⁷ for more information.

Concordance displays transcripts in a traditional format familiar to most attorneys and paralegals. Transcripts are reviewed in the Browse view with the database listing of individual transcripts in the Table view.

A transcript database has name, date, and volume fields with the full-text of the deposition stored in the text field. These fields are not visible in the Browse view, but you will see them in the Table and Edit views. In a transcript database, you can mark transcripts by line, add notes and issues, and add file attachments or hyperlinks.



A Quick Mark is highlighting applied on the left side of a transcript denoting the page and line number. Simply click on a line number during a cursory review. This is a great way to remind yourself there may be content worthy of a note or issue tag, or simply marks the place where you may want to return in the future.

14) Defendant.)
15	
16	H I G H L Y C O N F I D E N T I A L
17	DEPOSITION UPON ORAL EXAMINATION
18	OF
19	EDWARD FELTEN, Ph.D. _____
20	



Quick Marks made in West® LiveNote® are retained if the transcript is imported from that application into Concordance.

Transcript Notes

Creating notes within a transcript is an ideal way to create a reminder of relevance for case arguments. When you need to find these comments later, you can search the entire transcript database, locate notes attached to a particular transcript, or find both at the same time.

There is no limit to the number of notes you can apply per transcript. The first lines of your notes are displayed in the Notes task pane and are also displayed as floating text when you move your cursor over a highlighted note. Notes disappear the instant you delete them, but are not physically removed from the database until your Concordance administrator removes them.

Once transcript notes are applied, there may be times when you need to search for them in a lengthy transcript. You can search transcripts notes using:

- Advanced Search panel - enter words found in the notes
- Notes pane - review notes and jump to a specific note within the transcript

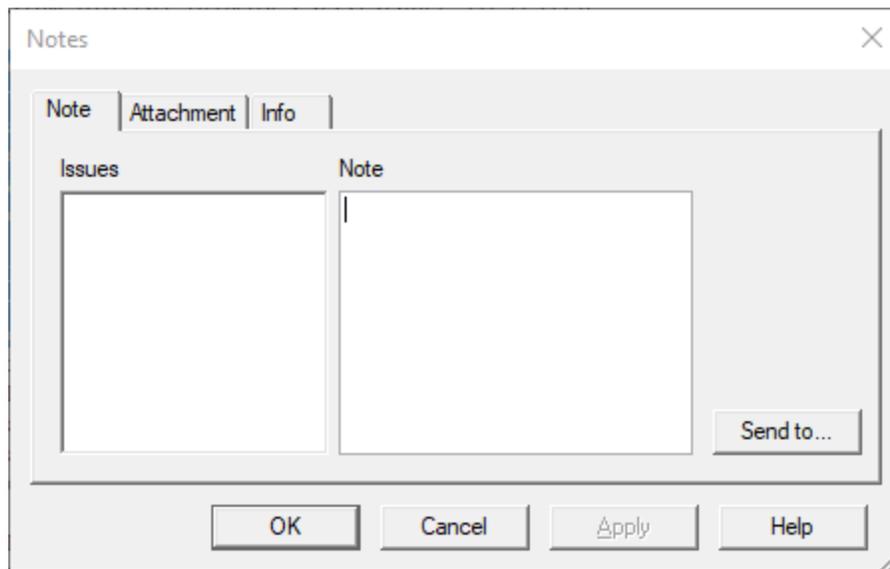


The database must be reindexed after notes are added in order to search those notes.

Workspace	Calfco	Trtest
24	A.	No.
25	Q.	What is Elysium Digital LLC? MANHATTAN REPORTIN
7:1	A.	This is a company that performs a variety of services.
2		I'm not aware of all of them, but one of them is software consulting services.
3		
4	Q.	What is the relationship between Elysium Digital LLC and Felten Consulting, Inc., if any?
5		
6	A.	There's a consulting contract related to work in this case. Elysium Digital provides assistance to Felten Consulting in relation to the work on this case.
7		
8		
9	Q.	Who is Peter Creath?
10	A.	Peter Creath is one of the principals of Elysium Digital.
11	Q.	What is his background with respect to computer programming?
12		
13	A.	He has a bachelor's degree from Princeton University in computer science, and I know he has a variety of experience in software development, but I don't know more specifically than that.
14		
15		
16		
17	Q.	Was he a student of yours at Princeton?
18	A.	Yes, he took at least one course.
19	Q.	Who is Christian Hicks?
20	A.	He is another principal of Elysium Digital.
21	Q.	What is his background with respect to computer programming?
22	A.	He also has a bachelor's degree from Princeton University in computer science, and I know he has a variety of experience.
23		
24		
25	Q.	Where is this firm based?
8:1	A.	In Somerset, New Jersey.
2	Q.	Do you know who the clients are other than Felten Consulting, Inc.?
3		
4	A.	No.
5	Q.	Do you believe that Elysium Digital has other clients other than Felten Consulting, Inc.?
6		
7	A.	Yes, they do. They have other clients.
8		
9	Q.	Do you know if Elysium Digital has other clients other than the following companies that I'll list: Sun
10		

Add Transcript Notes

1. In the **Browse** view, use your mouse to select the transcript text or region where you want to apply a note.
2. Right-click the selected text and select **New note**. The **Notes** dialog displays.



3. On the **Note** tab, type the applicable comments in the **Note** text box.
4. Click **OK** to save the note. The **Notes** dialog closes and the area you selected is highlighted and underlined to show a Note has been added.

Changes are immediately viewable. In order to run full-text searches on new notes in the record, the database needs to be reindexed.

Delete a Note

1. In the **Browse** view, right-click the note with your mouse and select **Edit note** to open the **Notes** dialog.
2. Click the **Delete** button, and then when prompted click **Yes** to verify that you want to delete the note.
3. The note is removed from the database and the next note displays in the Notes dialog.
4. Click **OK** to close the **Notes** dialog.

Notes disappear immediately after deletion, but are not physically removed from the database until your Concordance administrator removes them.

Search Transcript Notes Using Advanced Search

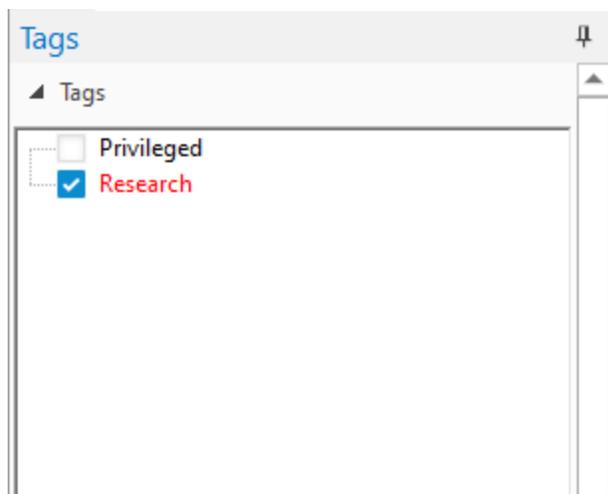
1. Open **Advanced Search** in the **Search Panel** in the **Navigation Pane**.
2. In the **Options** drop down, select **Search notes only**.
3. Type the search string in the **Advanced Search** text box.
4. Click **Search** to run the query.
5. Results updates to show the search hits. You can also select the Notes Panel to review the Notes that match the search.

Transcript Issue Tags

Tags work well for categorizing documents, because tags mark or categorize an entire document. Transcripts are handled differently than documents in Concordance. Instead of marking the entire transcript, you are marking a section of text within a transcript. An Issue Tag is a tag applied to a section of transcript text. When you're adding Issue Tags to transcripts, you can also enter comments with the Issue Tag for further distinction.

You can apply Issue Tags to transcripts from both the **Tags** Panel in the **Navigation Pane** and the **Notes** dialog.

In the Tags Panel, Document Tags appear in black text and Issue Tags appear in red text.



Add an Issue Tag from the Notes Dialog Box

1. In the **Browse** view, use your mouse to select the transcript text or region where you want to apply a note.
2. Right-click the selected text and select **New note**. The **Notes** dialog displays.
3. In the **Issues** list on the left, select the Issue Tag that you want to apply. The Issue Tag will update with a check mark to show it has been selected.
4. Click **OK** to save the Issue Tag and close the **Notes** dialog.

Add an Issue Tag from the Tags Task Pane

1. In the **Browse** view, use your mouse to select the transcript text or region where you want to apply a note.
2. Open the **Tags** Panel in the **Navigation Pane**.
3. Hold the **Shift** key and select the check mark next to the Issue Tag you want to apply. The Issue Tag will update with a check mark to show it has been selected.



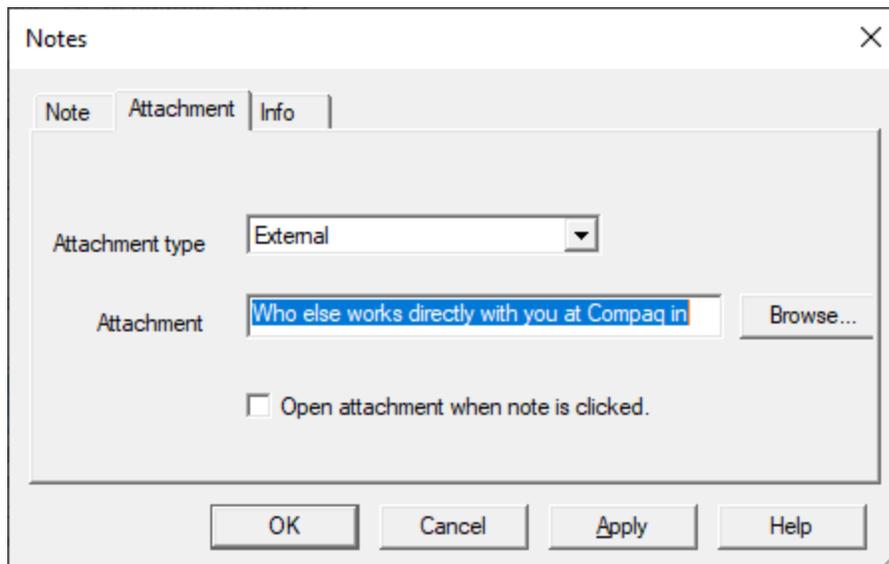
Some people find that they highlight and select text as they read documents and transcripts. Doing so may cause accidental issue tagging if you are using a single left click to add issue tags. For those users in this scenario, it is best to train yourself to add issue tags using only the right-click menu option. When applying document tags to an entire document record, make certain that no text in the record is highlighted.

Transcript Attachments

Transcripts often reference exhibits and evidence. The ability to view that evidence as you are reading a transcript is useful in your review. Exhibits attached directly to a transcript excerpt are an easy way to refer back to those exhibits.

Add Attachment to a Transcript

1. In the **Browse** view, use your mouse to select the transcript text or region where you want to add an attachment.
2. Right-click the selected text and select **New note**. The **Notes** dialog displays.
3. Click on the **Attachment** tab.



4. Select the appropriate **Attachment type**:
 - **External** - to attach an external file or link to a web site
 - **Viewer** - to attach a document image from a Concordance database
 - **Clipboard** - to copy the highlighted text to the Microsoft Windows clipboard
 - **Internal** - used by the system only
5. Click **Browse** to navigate to and select the applicable file or web site for the attachment. Click **Open**.

6. Select **Open attachment when note is clicked** if you want to automatically open the file or web site when clicking a note in Concordance.

You can save a copy of the attachment by right clicking the highlighted text and selecting **Save attachment as**.

Reviewing Transcript Notes

The screenshot shows a 'Notes' panel with a list of notes. The first note is 'Research details of relationship between ICT and Finjan.' followed by '<empty>' and 'Investigation needed on other parties'. Below the notes are two radio buttons: 'View by notes' (selected) and 'View by issues'. Underneath is a 'Properties' section with 'Page/Line' (Page 21 : Line 6), 'Issues' (Research), and 'Attachment' (<No attachment>).

A quick review of a transcript notes and issues can be done in the Notes panel. Select a specific note in the Notes list and the Properties pane updates to display the details for that note.

To Review Notes and Issues in a Transcript

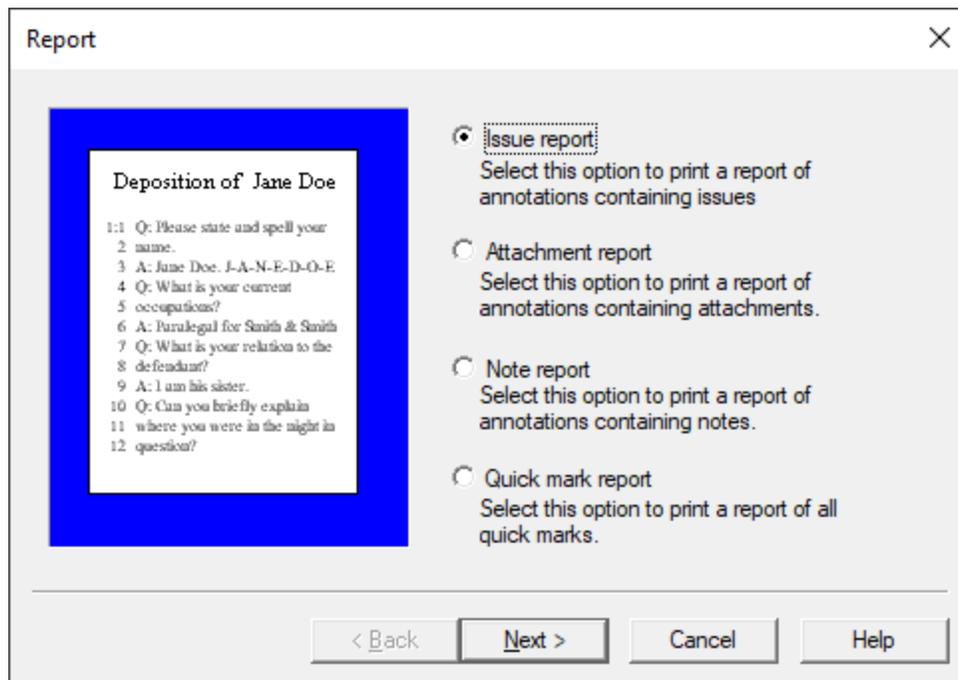
1. Open the transcript in the **Browse** view.
2. Open the **Notes** task pane.
3. In the Notes panel, select either **View by notes** or **View by issues** to display the list of notes or issues. Notes and issues display in the order they appear in the transcript, not the order applied.
4. Select a note or issue in the Notes pane. The selected note or issue will be highlighted and displayed in the transcript on the right. The Properties pane updates to display the location, plus attachment information.
5. You can also double-click a note or issue in the transcript to open the **Notes** dialog and edit the note, issue, and/or attachment.

Annotation Report Writer Wizard

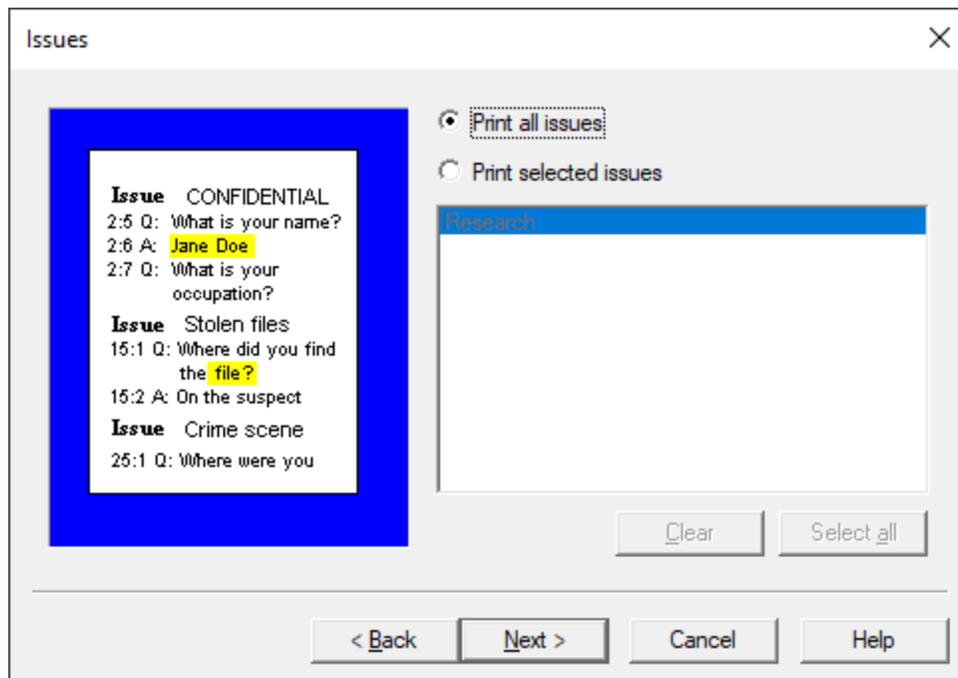
Because your transcripts are unique documents with added notes, highlights and attachments, Concordance offers an Annotation Report Writer tool for customizing reports for your transcript database.

Depending on your needs, each annotated report created in the wizard may include several types of annotations and the text included in the annotations.

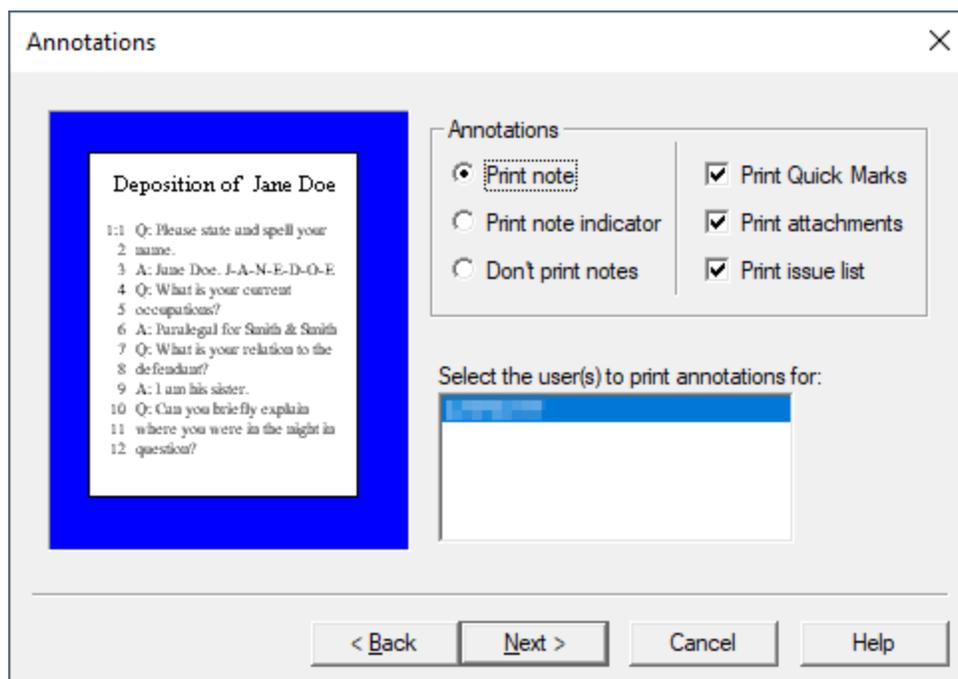
1. In Concordance, open your transcript database.
2. On the Toolbar, click the arrow next to the **Report** button and select **Annotation report writer**.
3. In the **Annotation Report** dialog box, select **Annotation Report Wizard** and click **OK**. The **Report** dialog displays.



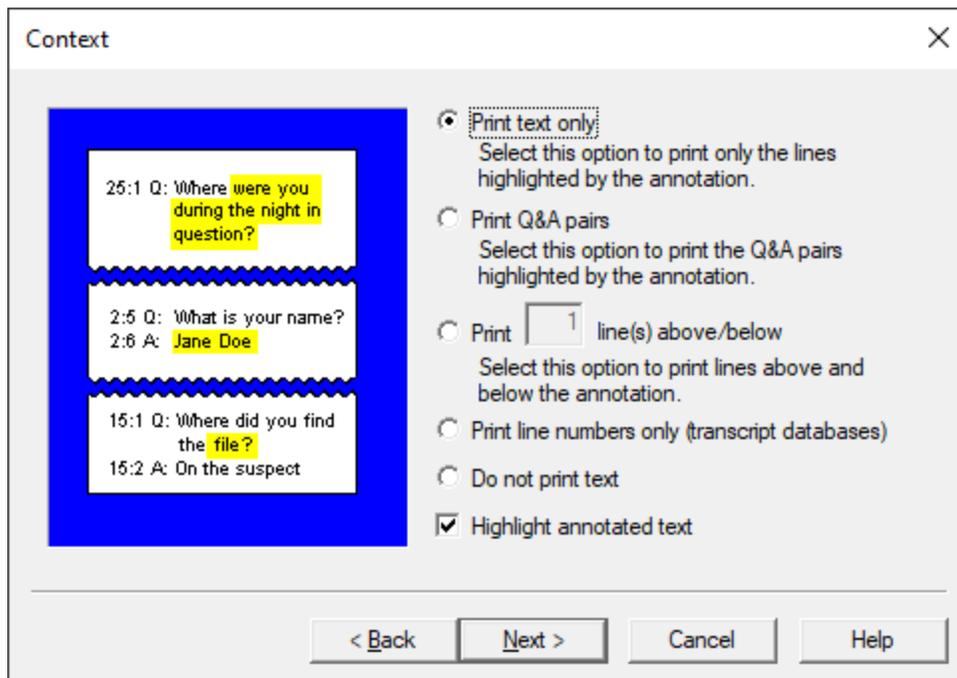
4. Select the type of annotated report you want to print:
 - **Issue report** - prints an issues report
 - **Attachment report** - prints a report of annotations containing attachments
 - **Note report** - prints a report of annotations containing notes
 - **Quick mark report** - prints a report of all transcript line number highlights
5. Click **Next**. The **Issues** dialog displays.



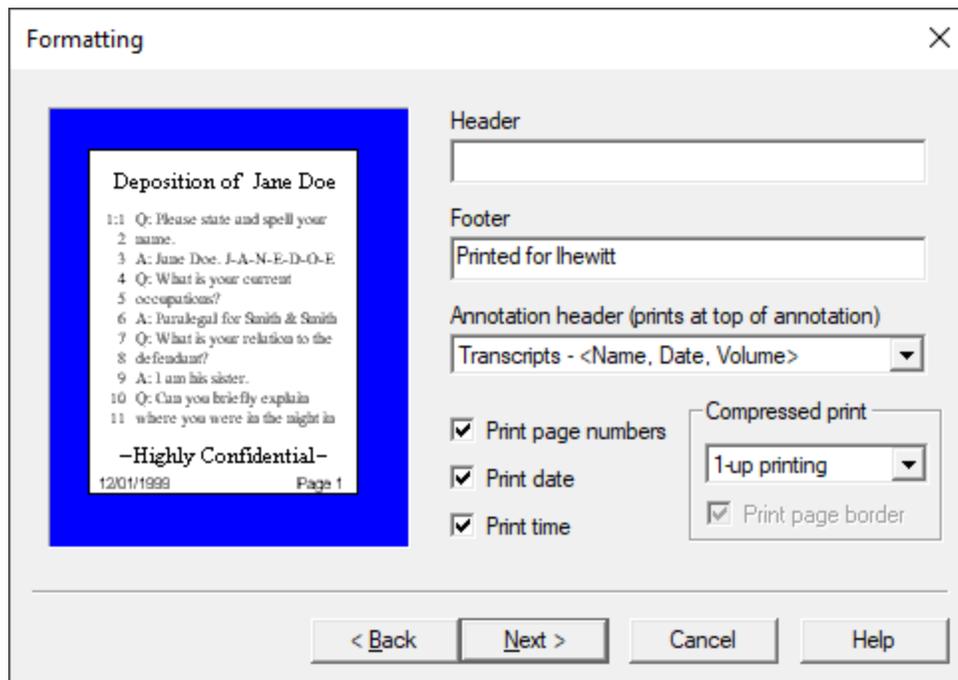
6. If you selected Issue report, choose either **Print all issues** or **Print selected issues** and select the issues to print from the list box.
7. Click **Next**. The **Annotations** dialog displays.



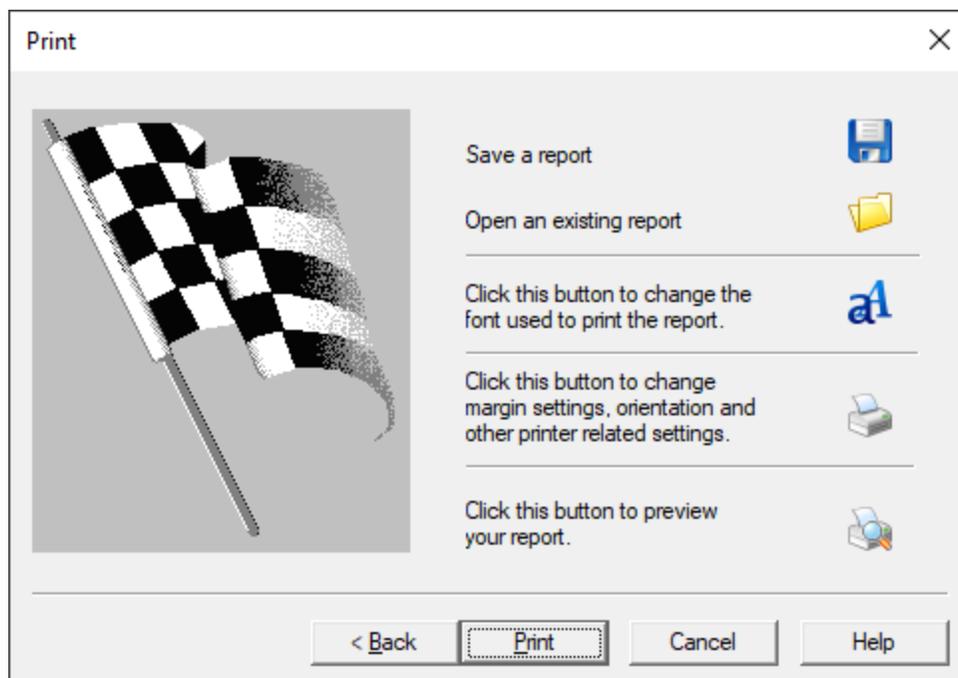
8. In the **Annotations** section, select the options you want. You can also select specific **users** in the list box on the bottom right.
9. Click **Next**. The **Context** dialog displays.



10. Select the **Context** options you want. Click **Next**. The **Formatting** dialog displays.



11. If desired, add a custom header and/or footer to the report by filling out the **Header** and **Footer** fields. Specify any additional formatting options you need. Click **Next**. The **Print** dialog displays.



12. Define your final print options in the **Print** dialog box, like customizing the font and page layout, and whether to print a hard copy or save to a file. It is

recommended to preview your report before printing a hard copy or saving to a file.

13. Click **Print** to print the report.

Content Review

Document content review is done using one of the viewers available for Concordance: Concordance Viewer, Concordance Native Viewer, or Concordance Image. You can magnify the original document image for clarity and inspection, markup the document with tools specifically designed for handling privileged content and trial preparation. Once you have reviewed and annotated the content, the information is saved and changes secured.

The viewers open in a secondary window, which can be resized and viewed alongside the main Concordance application - allowing you to see the Browse and Table Views while reading the full document content.

When you create a new database using the wizard, you have the option to specify whether you will use the Concordance Viewer or not. You can also specify the viewer to use with a database via the Viewer Preferences.

The table below provides a guide to which viewer works best with which database type.

Datab ase Type	Conco rdance Viewer	Conco rdanc e Native Viewe r	Conco rdanc e Image
Load Files	YES	YES	YES
E- docume nts	YES	YES	NO
E-mail and Attach ments	YES	YES	NO
Transcri pts	NO	NO	NO

Converting from Concordance Native Image to Concordance Viewer

Converting single or concatenated databases to Concordance Viewer is permanent and not backwards compatible. Make sure that you backup all database files prior to conversion.



If you want to convert newly concatenated databases, be sure to save the concatenated file set. Then close and reopen the concatenated file set before attempting a conversion.

Highlight, Image, and Underline markups are not supported for conversion from Concordance Native Viewer to Concordance Viewer.

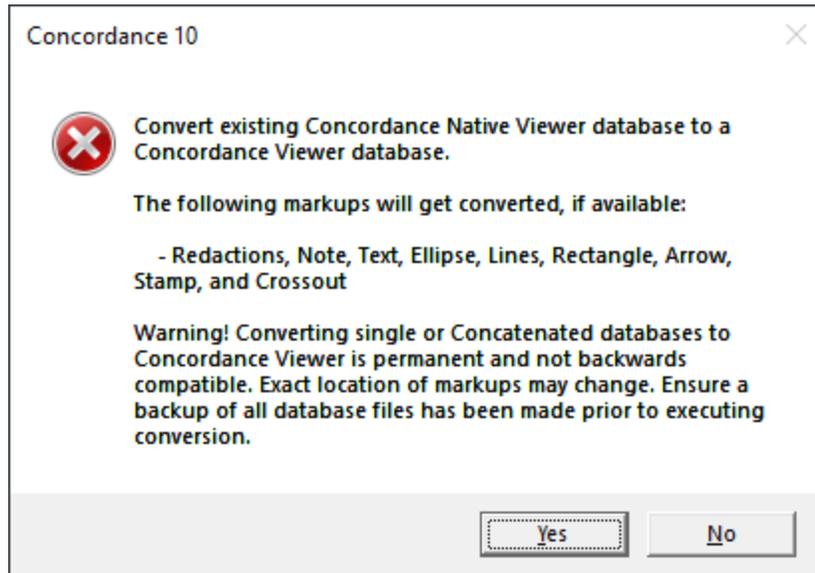


Unsupported markups will not exist in the converted Concordance Viewer database. Other markups will be converted, but some markup locations may change slightly during the conversion process. You should review your markup content after conversion.

You have the option to update an existing Concordance Native Viewer database to use the latest Concordance Viewer for review. This requires a two step process:

1. Update your Viewer Preferences for the database.
 - a. Open the Concordance Image or Concordance Native Image database.
 - b. From the **Tools** menu, open the **Preferences** dialog and go to the **Viewer** tab.
 - c. In the **Apply user settings to** drop down, select **All users**.
 - d. In the **Apply database settings to** drop down, select **Current database**.
 - e. In the **Viewer** drop down select **Concordance Viewer**.
 - f. Click **Apply** in the **Preferences** dialog, and then **OK** to close the window.
2. Open the viewer.

- a. Select **Image** from the **View** menu or click the **View Image** button on the toolbar.
- b. You will be prompted to confirm that you want to proceed with conversion.



- c. Click **Yes**.
- d. The **Native Conversion** window displays and shows you the status while the conversion is running.

Converting from Concordance Image to Concordance Viewer



Converting single or concatenated databases to Concordance Viewer is permanent and not backwards compatible. Make sure that you backup all database files prior to conversion.

If you want to convert newly concatenated databases, be sure to save the concatenated file set. Then close and reopen the concatenated file set before attempting a conversion.



All markup history is lost when converting from Concordance Image to Concordance Viewer. The newly converted Concordance Viewer database will have history, but that history will contain a list of markups that were converted, each with the date/time that the conversion was completed.



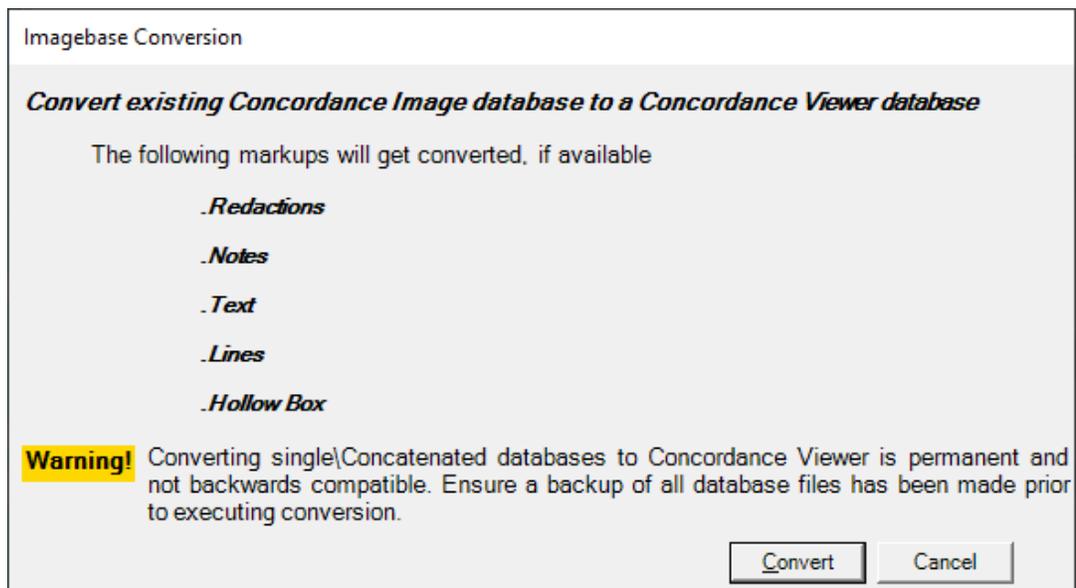
Highlight, Hollow Ellipse, and Solid Ellipse markups are not supported for conversion from Concordance Image to Concordance Viewer.

Unsupported markups will not exist in the converted Concordance Viewer database. Other markups will be converted, but some markup locations may change slightly during the conversion process. You should review your markup content after conversion.

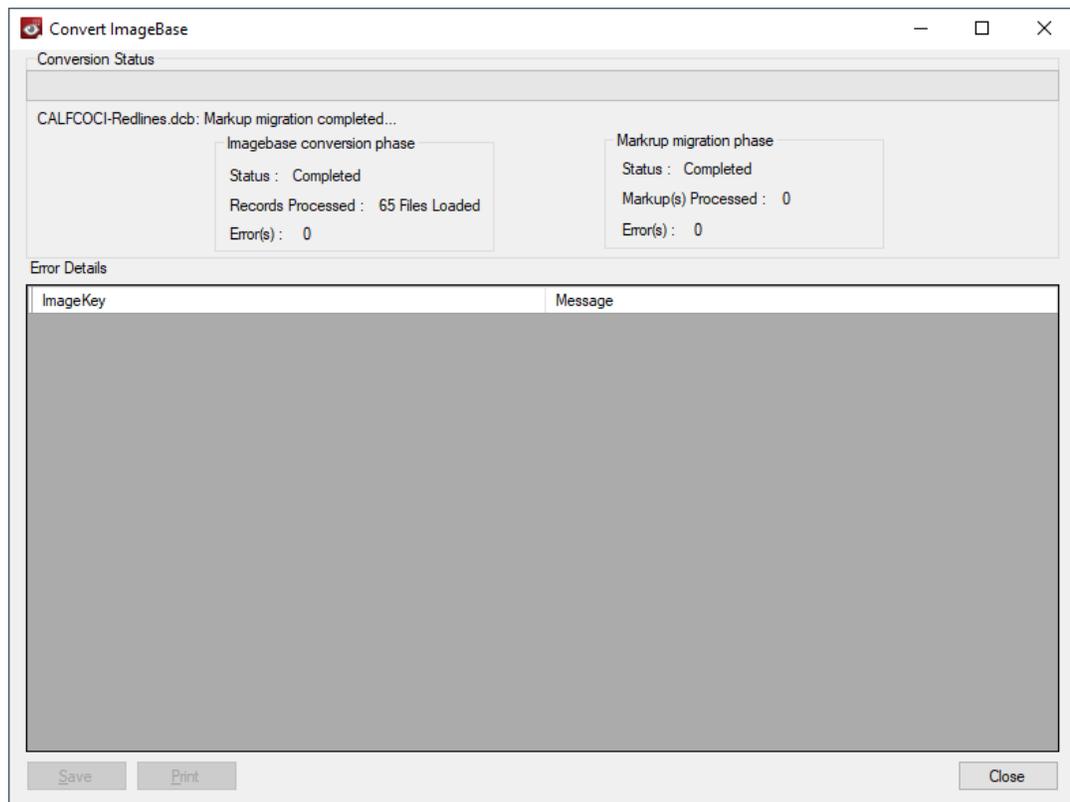
You have the option to update an existing Concordance Image database to use the latest Concordance Viewer for review. This requires a two step process:

3. Update your Viewer Preferences for the database.
 - a. Open the Concordance Image or Concordance Native Image database.

- b. From the **Tools** menu, open the **Preferences** dialog and go to the **Viewer** tab.
 - c. In the **Apply user settings to** drop down, select **All users**.
 - d. In the **Apply database settings to** drop down, select **Current database**.
 - e. In the **Viewer** drop down select **Concordance Viewer**.
 - f. Click **Apply** in the **Preferences** dialog, and then **OK** to close the window.
4. Open the viewer.
- a. Select **Image** from the **View** menu or click the **View Image** button on the toolbar.
 - b. You will be prompted to confirm that you want to proceed with conversion.



- c. Click **Convert**.
- d. The **Convert ImageBase** window displays and shows you the status while the conversion is running.



- e. Click **Close** to dismiss the **Convert ImageBase** window and open **Concordance Viewer**.

Review with Concordance Viewer

The Concordance Viewer allows you to magnify the original document image for clarity and inspection, and provides a variety of markup tools specifically designed for privileged content and trial preparation. Once you have reviewed and annotated the content, especially redacting key information, the document markings are automatically saved and the changes secured.

Concordance Desktop stores references to all native documents and image information in a single Concordance Desktop Image Base database (.cib) file. The .cib file is located in the same folder as the associated Concordance Desktop database (.dcb).



Imported eDocs and eMails are automatically converted to near-native PDF files for viewing with Concordance Viewer. For load file

imports, there is an option to convert to PDF for near-native viewing during database creation. If the load file has unsupported file types, they can be converted at import or converted later using the optimize feature on a document, a query, or the entire database.

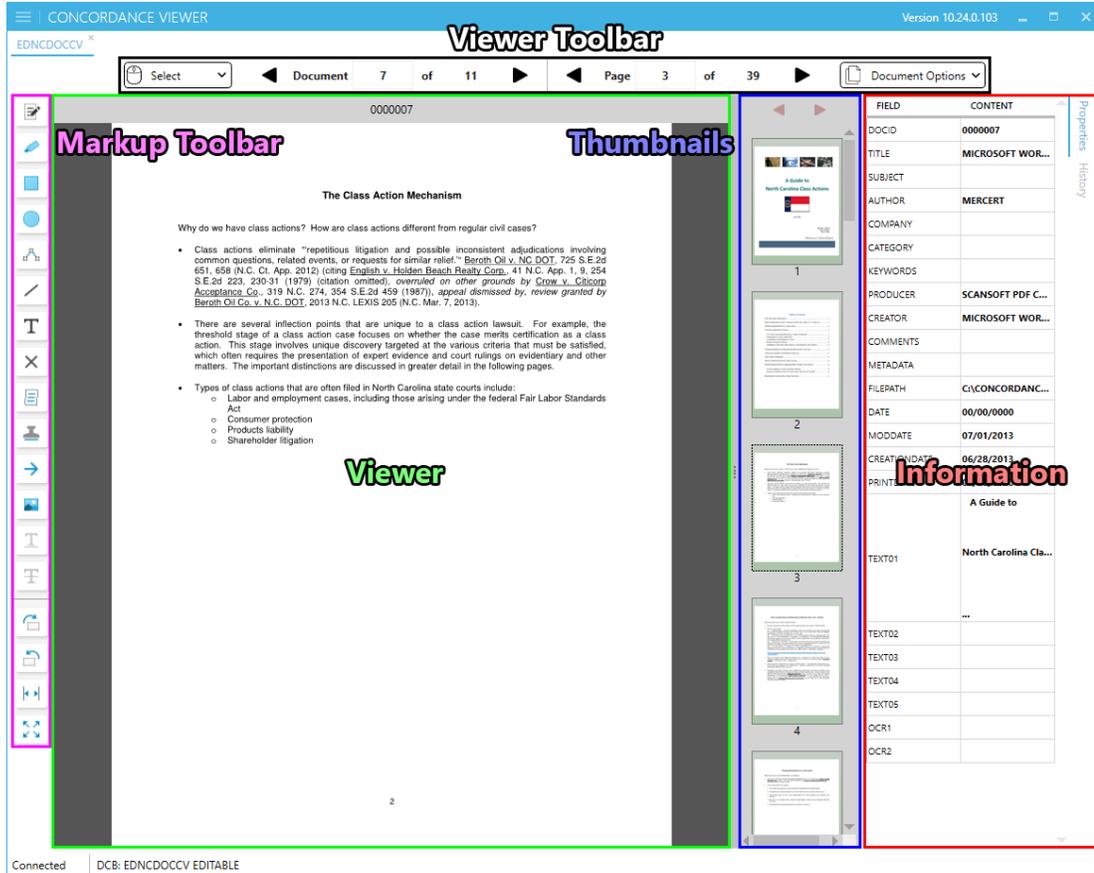
Supported Files

Concordance Viewer works with the following file types:

File Type	Description
*.tif, *.tiff	Tagged Image File
*.jpg, *.jpeg	Joint Photographic Experts Group
*.pdf	Adobe Portable Document Format

The Concordance Viewer displays the image or near-native file associated to the record currently open in Concordance. Using the tools in Concordance Viewer you can review documents, navigate between records, apply markups (annotations), and adjust the display of the documents.

From an open database in Concordance, you can launch Concordance Viewer by selecting the **View Image** (camera) icon on the Dynamic Toolbar.



Viewer Toolbar

Tool	Name	Description
	M o u s e M o d e	Determines how the mouse use will function while performing various actions: <ul style="list-style-type: none"> • P a n / Z o o m -

Tool	Name	Description
		mouse wheel zooms in/out on the desktop

Tool	Name	Description
		played image <ul style="list-style-type: none">• Area Zoom• Magnifier

Tool	N a m e	De scr ipt io n
	D o c u m e n t N a v i g a t i o n	Allo ws you to naviga te to the prev ious or next doc ume nt, or go to a spec ific doc ume nt in the data bas e

Tool	Name	Description
	<p>P a g e N a v i g a t i o n</p>	<p>Allows you to navigate to the previous or next page, or go to a specific page in the document</p>
	<p>D o</p>	<p>Provide</p>

Tool	N a m e	De scr ipt io n
	c u m e n t O p t i o n s	s addi tion al vie wer beh avio r opti ons: <ul style="list-style-type: none">• S t i c k y M a r k u p - w h e n

Tool	Name	Description
		selected, the viewer retains the

Tool	Name	Description
		a s t s e l e c t e d m a r k u p a l l o w i n g m u l t

Tool	Name	Description
		i p l e a p p l i c a t i o n s o f t h e s a m e m a r k

Tool	Name	Description
		up with out h a v i n g t o s e l e c t t h e t o o

Tool	Name	Description
		I a g a i n • S t i c k y R o t a t e - w h e n s e l e c t

Tool	Name	Description
		ed, therotations settings are retained

Tool	Name	Description
		index as you page through a document

Tool	Name	Description
		<ul style="list-style-type: none">• Dual Page View - when selected, will

Tool	Name	Description
		I d i s p l a y m u l t i p l e p a g e s o f t h e d o c

Tool	Name	Description
		u m e n t s i m u l t a n e o u s l y s i d e - b y - s i

Tool	Name	Description
		de

Markup Toolbar

Tool	Name	Description
	Redact	Blocks out areas on the page that are considered confidential or sensitive from being viewed or copied after production
	Highlighter	Highlights the selected text
	Rectangle	Draws a rectangle around the selected area on the page

To ol	Na me	Description
	Ellip se	Draws an ellipse around the selected area on the page
	Conn ecte d Line	Draws a jointed line on the page
	Line	Draws a straight line on the page
	Text	Places a box that contains text on the page
	Cross out	Draws an X on the page
	Note	Places a box on the page to hold short notes
	Stam p	Places a predefined stamp on the page
	Arro w	Draws a line with an arrow

Tool	Name	Description
	Image	Places an external image (jpg, bmp, or png) on the page
	Underline	Draws an underline under the selected text
	Strikethrough	Draws a strikethrough line over the selected text
	Rotate (clockwise)	Rotates the document 90 degrees clockwise
	Rotate (counterclockwise)	Rotates the document 90 degrees counterclockwise
	Fit to Width	Adjusts the zoom so that the entire width of the document appears in the Viewer Pane

Tool	Name	Description
	Best Fit	Adjusts the zoom so that the entire width and height of the document appear in the Viewer Pane



Underline and Strikeout are only available if the document contains selectable text and text is selected.

Viewer Pane

The Viewer Pane displays the current page of the current document. The document number is displayed at the top.

Thumbnails Pane

The Thumbnails pane displays small images of the pages within the current document. You can hide or show the Thumbnails pane by clicking Expand Thumbnails (4 dots) to the right of the Viewer Pane.

If a page contains markups, it will display with a red box surrounding the thumbnail image. You can navigate to the next or previous page with markups by using the red navigation arrows at the top of the Thumbnails Pane.

Select a specific page in the Thumbnails Pane to display it in the Viewer Pane.

Information Pane

The Information Pane contains additional information about each document. The Information Pane can display two different tabs:

- Properties Tab - displays numeric, text and paragraph data, up to 40 characters, from the document's Concordance fields.
- History Tab - displays the markup history, in descending page order, of all markup additions, modifications, and deletions that have been made to the current document.

Status Bar

The Status bar at the bottom of Concordance Native Viewer displays information about the current database being viewed, including whether the database is editable or not.

Concordance Viewer is synchronized with Concordance. Each separately opened database has a tab at the top of Concordance Viewer that displays the database name. The name of the currently viewed database will be underlined. You can have up to 16 databases open in Concordance Viewer at the same time.

Documents may consist of multiple pages. You can always determine what page you are currently viewing by looking at the page information in the lower right corner (on the Status Bar).

Use the Viewer Toolbar at the top to move between documents, and move to different pages within a document. You can also navigate pages by selecting a page in the Thumbnails Pane.

You can close a specific database in Concordance Viewer by clicking the X in the upper right corner of that database tab at the top.

Concordance Viewer provides a variety of tools that you can use to annotate documents or images during review. Applying markups includes redacting information and adding notes. You can also apply color markings to highlight or underline text and add a circle or box to emphasize a block or region of key content. All of these elements can easily be edited, moved, or resized.

There is no limit to the number of markups you can add to a document. As a best practice, use some restraint and stick to the internal review guidelines for your organization, ensuring all annotation marks are sensibly applied and records are kept clean for other reviewers.

Markups for the current document are displayed in the Information Pane on the right side in the Concordance Viewer. The markup history includes markup type, author, date, and time. Markup history is also saved in the .CIB file.

When you select a Markup Tool, the top of the Viewer Pane updates to display an appropriate toolbar to use for adding or editing that markup. You can change the appearance, size, and location of markups after you add them. All changes are tracked in the History tab of the Information Pane.

The Markup Properties Toolbar

Tools	N a m e	D e s c r i p t i o n
	C o l o r	D e f i n e s t h e c o l o r t o u s

Tools	N a m e	D e s c r i p t i o n
		e f o r a m a r k u p
<p>Reason Redacted ▼</p>	R e d a c t	U s e d w i

Tools	N a m e	D e s c r i p t i o n
	i o n R e a s o n	t h t h e R e d a c t i o n T o o l t

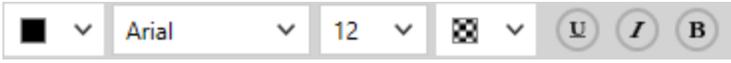
Tools	N a m e	D e s c r i p t i o n
		o s p e c i f y a R e d a c t i o n R

Tools	N a m e	D e s c r i p t i o n
		e a s o n
	L i n e F o r m a t	I n c l u d e s L i n e

Tools	N a m e	D e s c r i p t i o n
		W i d t h a n d L i n e S t y l e

Tools	N a m e	D e s c r i p t i o n
	F i l l B a c k g r o u n d	D e f i n e s h o w t h e b a c k g r

Tools	N a m e	D e s c r i p t i o n
		o u n d o f a n a r e a s h o u l d b

Tools	Name	Description
		e f i l l e d
	Text Format	I n c l u d e s F o

Tools	N a m e	D e s c r i p t i o n
		n t C o l o r , F o n t N a m e , F o

Tools	N a m e	D e s c r i p t i o n
		n t S i z e , B a c k g r o u n d C o

Tools	N a m e	D e s c r i p t i o n
		l o r , a n d T e x t A t t r i b u t

Tools	N a m e	D e s c r i p t i o n
		e s (U n d e r l i n e , l t a l i c

Tools	Name	Description
		, Bold)

Add Text Markup

1. On the Markup Toolbar, click the **Text** tool.
2. Adjust any text markup attributes you want in the Markup Properties Toolbar.
3. Use your mouse to draw a text box in the document.It'
4. Double click inside the text box and type the text you want to add.
5. Click outside the text box or navigate to another document to save the markup.

Add a Note

1. On the Markup Toolbar, click the **Note** tool.
2. Adjust any note markup attributes you want in the Markup Properties Toolbar.
3. Use your mouse to draw a note box in the document.
4. Double click inside the note box to enter your note text.
5. Click outside the note box or navigate to another document to save the markup.



A Note is created with the text "Short Text" by default.

Add a Line or Shape Markup

1. On the Markup Toolbar, select the line or shape tool you want to add.
2. Adjust any markup attributes you want in the Markup Properties Toolbar.
3. Use your mouse to draw the line or shape on the document.
 - For a Connected Line, click the mouse to start and end a line segment. Double click the mouse after drawing the final line to finish.
 - For a Line, click and hold the mouse while drawing the line, then release the mouse to complete the line.
 - For a Rectangle or Ellipse, click the mouse then drag the mouse to form the rectangle or ellipse in the shape you want.
4. Click outside the line or shape, or navigate to another document to save the markup.

Selectable Text Markups

When a document contains selectable text, the Strikeout, Underline, and Highlight tools become available.

1. In the document, use your mouse to select the text to apply the markup to.
2. On the Markup toolbar, select the **Strikeout**, **Underline**, or **Highlight** tool.
3. For a Highlight, in the Markup Properties toolbar, select the highlight color you want to use.
4. Click outside the applied markup, or navigate to another document to save the markup.

Editing a Markup

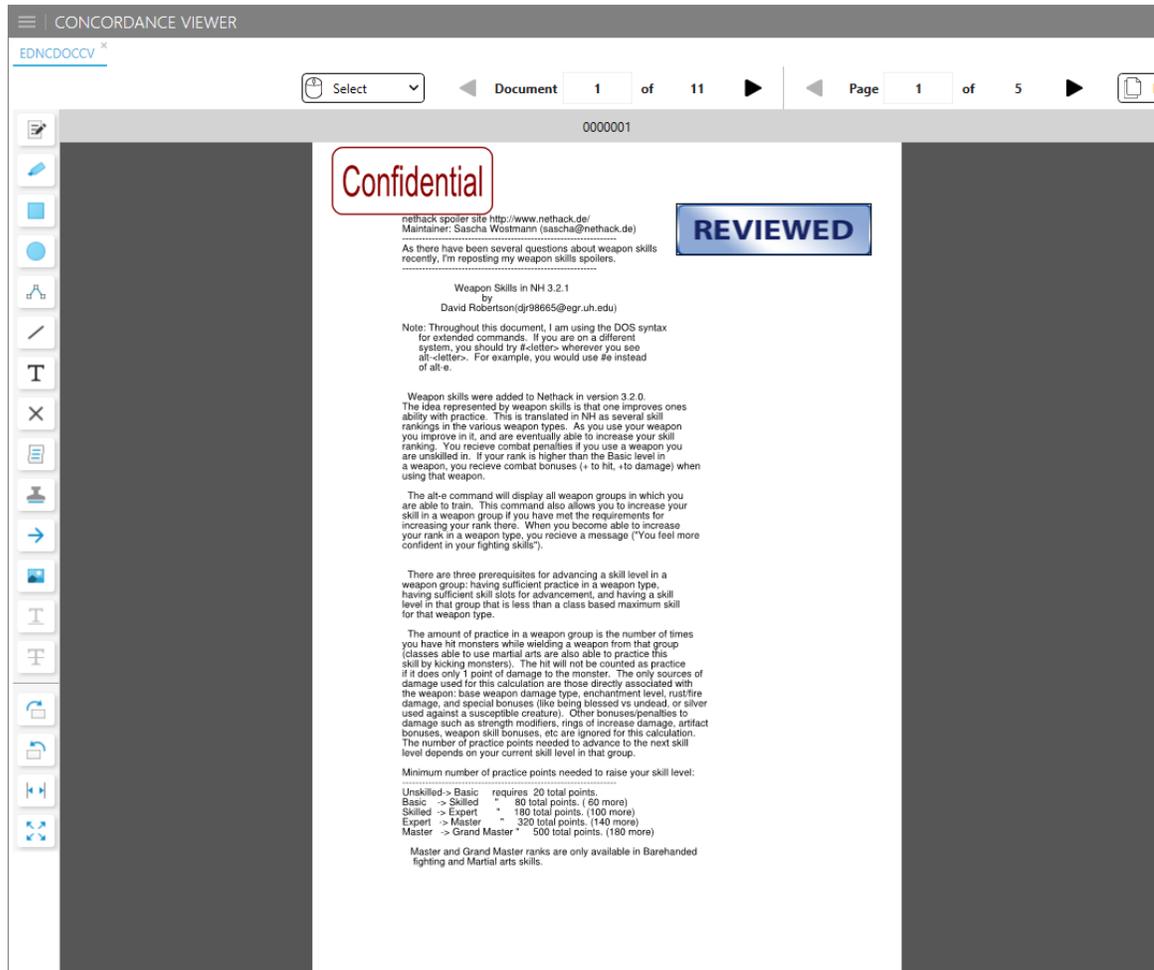
1. Use your mouse to select the markup to edit in the document.
2. In the Markup Properties toolbar, modify any properties as needed.
3. Depending on the markup type, after selecting the markup to edit the display updates to display resize and rotate handles. You can select any of these to modify the size or rotate the markup as needed.
4. Click outside the updated markup, or navigate to another document to save the markup changes.

Delete a Markup

1. Using your mouse, select the markup you want to delete.
2. Press **Delete**. The selected markup is removed.
3. Click inside the document again, or navigate to another document to save the markup changes.

The Image tool allows you to insert images (JPG, BMP, or PNG) into the current document.

The Stamp tool inserts a stamp with short text in the document. You can specify any stamp text you need such as: Attorney's Eyes Only, Attorney-Client Privilege, Confidential, and Under Seal.



To Insert an Image

1. On the Markup Toolbar, click the **Image** tool.
2. In the browse window, navigate to and select the image file you want to use and click **Open**.
3. In Concordance Viewer, use your mouse to select the area where you want to add the image.
4. Click outside the image or navigate to another document to save the markup.

To Insert a Stamp

1. On the Markup Toolbar, click the **Stamp** tool.
 2. Adjust the color, font, or font attributes for the stamp in the Markup Properties Toolbar.
 3. Use your mouse to draw a stamp box in the document.
 4. By default, the stamp text is *Confidential*. You can double click inside the text box and modify the text if needed.
1. Click outside the stamp or navigate to another document to save the markup.

A redaction is used when confidential information needs to be hidden in a produced document. Redactions placed using the Concordance Viewer are transparent and can be edited, moved, or deleted similar to other markups. Once a document is produced, redactions cannot be edited or removed in the produced file and any text or images concealed by a redaction cannot be viewed, copied or searched.

The Redaction tool allows you to place one or more redactions over various areas of sensitive information within a document. In Concordance Viewer, the redaction appears transparent to allow you to make sure the redaction covers the information you want to conceal. When a production is executed, the redaction becomes opaque concealing the information underneath.

Since PDF files are not flattened or burned, when producing PDF files the redacted information is removed from the file before the redaction is placed. The production process physically removes the hidden text from the produced file, the original document is not altered.

Redactions can be applied to specific text, or they can be applied as a box over an area of a document or image. It is recommended to use a different color for redactions than other markups. This ensures that the markup type can be easily differentiated when viewing a document or image.



If you need to produce text files, you will need to OCR the produced images after the redactions have been burned into the production output, or you can choose to scrub redacted text when generating a Production.



When redacting a bullet or numbered list, it is recommended that you apply redactions using the Area Redaction tool. This ensures that the list content is completely redacted when the content is produced and/or printed.



All redactions are produced as black when Black & White is selected in Image Settings for the production output. Color redactions will appear as set by the user when Color is selected for the production output.

To Add an Area Redaction

1. On the Markup Toolbar, click the **Redaction** tool.
2. Adjust the redaction attributes you want in the Markup Properties Toolbar. You can modify the redaction color and the redaction **Reason**. You can select a previously entered **Reason** in the list or type in a new one.
3. Use your mouse to draw a redaction box in the document over the text and/or image you want to redact.
4. Click outside the redaction or navigate to another document to save the markup.

To Add a Text Redaction

1. Select the text in the document that you want to redact.
2. On the Markup Toolbar, click the **Redaction** tool. The text will show a redaction applied.

3. If necessary, click the redacted text in the document and adjust the Markup Properties. You can modify the redaction color and/or the redaction **Reason**.
4. Click outside the redaction or navigate to another document to save the markup.

Editing a Redaction

1. Use your mouse to select the redaction to edit in the document.
2. In the Markup Properties toolbar, modify any properties as needed.
3. Click outside the redaction or navigate to another document to save the redaction changes.

You can print the currently displayed document using Concordance Viewer. When printing in Concordance Viewer, be aware of the following:

- When printing documents that have been reviewed and redacted using Concordance Viewer, any redaction placed on the document will print transparent revealing the text underneath. If you want to print opaque redactions, be sure to select the Opaque option in the Markups section of the print settings.
- Printing documents that contain markups to Adobe PDF using the File>Print option, does not permanently burn the markups in the document. If you want markups burned in, you must run the documents through the Production process in Concordance, then print the produced document.
- Some document types such as .xls, the landscape option will split the page by columns and print as portrait.
- Make sure your printer's color properties are set appropriately.
- The maximum number of copies that can be printed is 100, and the copies are automatically collated.

- Crossout, strikethrough, highlight, and underline markups can all be applied to the same text, and if so, are combined in the printed file. This means, for example, if crossout and highlight are both applied, but only crossout is selected for printing, both the crossout and highlight will be printed.

CONCORDANCE PRINTING [Close] [Maximize]

SETTINGS

Settings

[Dropdown]

Save Save as default Remove

PRINTER

Microsoft Print to PDF [Dropdown]

DOCUMENT SELECTION

Document Range: Current Document [Dropdown]

Page Range: All [Dropdown]

Include document separator sheet

Include document synopsis

OUTPUT SETTINGS

Orientation: Portrait [Dropdown]

Color Settings: Color [Dropdown]

Resize for best fit

Copies to print: 1 [Input]

MARKUPS

<input type="checkbox"/> Select All	<input type="checkbox"/> Text	<input type="checkbox"/> Note
<input type="checkbox"/> Redaction	<input type="checkbox"/> Stamp	<input type="checkbox"/> Line
<input type="checkbox"/> Image	<input type="checkbox"/> Crossout	<input type="checkbox"/> Arrow
<input type="checkbox"/> Connected Lines	<input type="checkbox"/> Ellipse	<input type="checkbox"/> Strikethrough
<input type="checkbox"/> Rectangle	<input type="checkbox"/> Underline	
<input type="checkbox"/> Highlight		

Print redactions as: Opaque [Dropdown]

HEADERS AND FOOTERS

Include headers and footers

Preview Start printing Cancel

To Print in Concordance Viewer

1. From the hamburger menu  in the upper left corner, select **Print**. The **Concordance Printing** dialog displays.
2. Select the **Printer** you want to use for printing the documents and/or images.
3. In the **Document Selection** section:
 - Choose the **Document Range** and **Page Range** you want. If you select a **page Range**, you can also specify the range of pages to print for each document.
 - Select the **Include document separator sheet** checkbox if you want separator sheets printed at the beginning of each document. See [Configuring Separator Sheets](#)²²³ for configuration information.
 - Select the **Include document synopsis** checkbox if you want synopsis sheets printed at the end of each document. See [Configuring Synopsis Sheets](#)²²⁴ for configuration information.
4. In the **Output Settings** section:
 - Select **Portrait** or **Landscape** for the **Orientation**.
 - Choose **Color** or **Greyscale** in the **Color Settings** drop down.
 - Select the **Resize for best fit** checkbox if you want the Concordance Viewer to adjust the size to fit the available print region.
 - Specify the number of **Copies to print**.
5. In the **Markups** section:
 - Check the **Select All** box if you want to include all markups. Otherwise you can select individual markups that you want to include in the printed document(s).

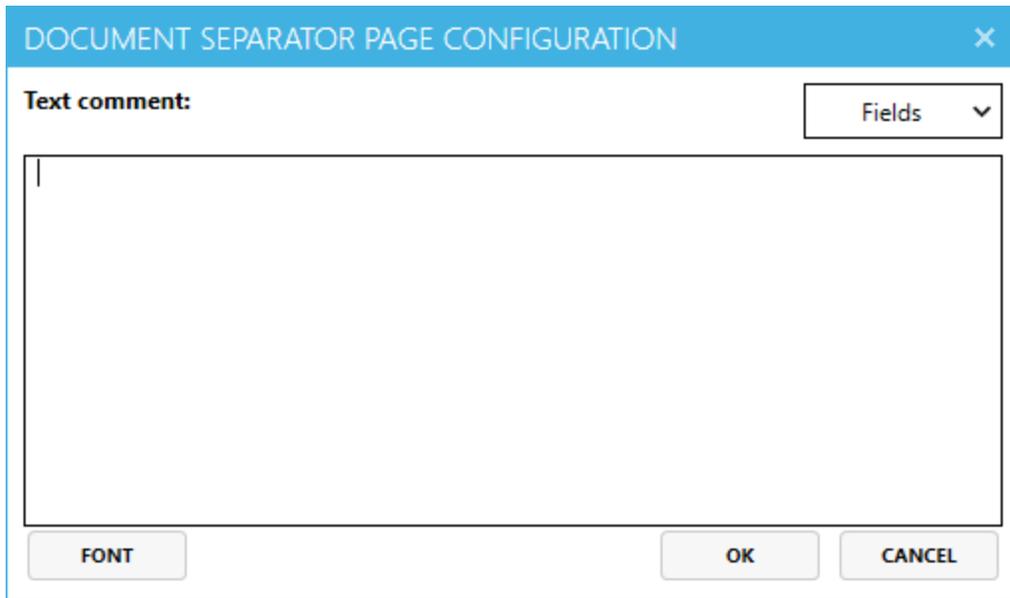
- In the **Print redactions as** drop down select either **Opaque** or **Transparent** to determine if your redactions will block out the underlying section of the document fully.
6. Select **headers and footers** to configure header and footer information for printing. See [Configuring Headers and Footers](#)²²⁵ for configuration information.
 7. Optionally you can click **Preview** to see a preview of how the current document will appear when printed.



If you select **Print** in the **Print Preview** dialog you will only print what is shown in the preview and not the full document. To print the entire document, use the **Start Printing** button on the **Concordance Printing** dialog.

8. Optionally you can go to the top of the **Concordance Printing** dialog and save all of the printing options you specified. Select a name for this configuration of **Settings** in the drop down, or type in a new **Settings** name. Once you have selected a name for the **Settings** you can **Save** or **Save as default**. The settings can be recalled by selecting the name in the drop down when printing in the future.
9. Click **Start printing** when you are ready to print.

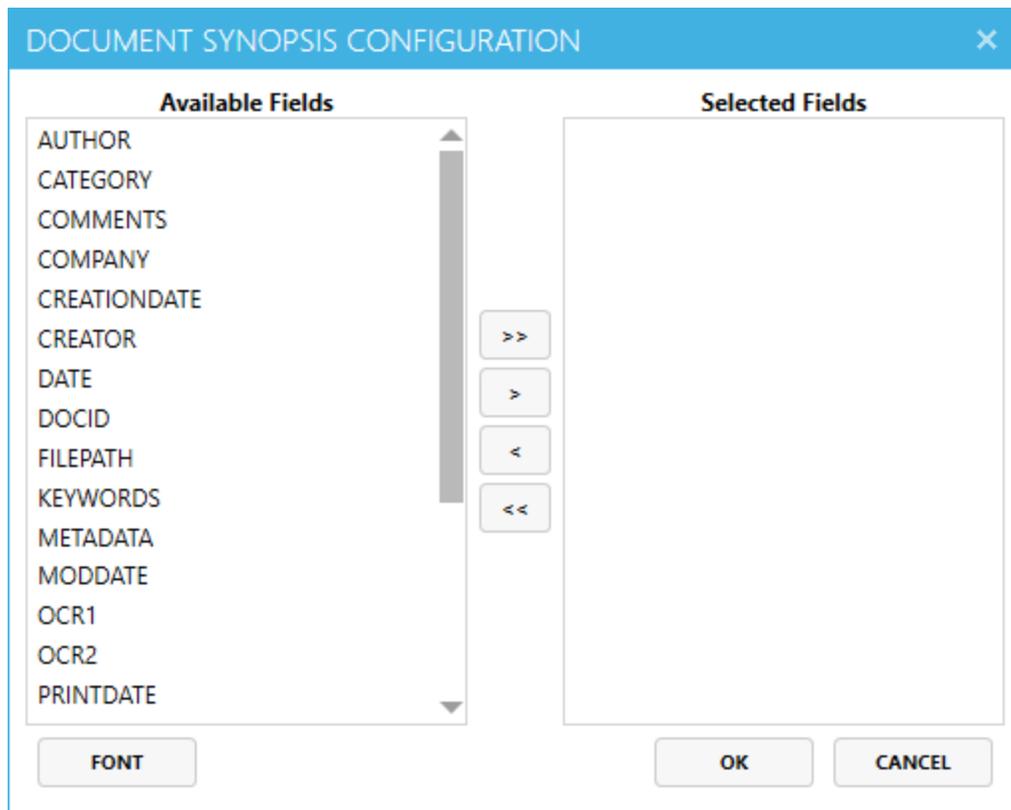
Configuring Separator Sheets



When you select the **Include document separator sheet** check box, click **Configure separator sheet** to specify the contents of your separator sheets. The contents are specified by typing into the **Text comment** box and/or adding **Fields** from the drop down on the top right. When you add a Field to the Separator Page Configuration, it is replaced in the text with the actual field value for the associated document from the Concordance database.

Use the **Font** button on the lower left to select the font attributes to use for your separator sheets.

Configuring Synopsis Sheets



When you select the **Include document synopsis** check box, click **Configure synopsis sheet** to specify the contents of your synopsis sheets. The contents are specified by selecting fields from the **Available Fields** list on the left. Select individual fields or multiple fields and use the buttons in the center to add the fields to the **Selected Fields** list. You are allowed to specify up to a maximum of 20 **Selected Fields**.

Use the **Font** button on the lower left to select the font attributes to use for your synopsis sheets.

Configuring Headers and Footers

HEADERS AND FOOTERS

Include headers and footers Font

HEADERS AND FOOTERS

Left header None ▼	Center header None ▼	Right header None ▼
Left footer None ▼	Center footer None ▼	Right footer None ▼

MARGINS

Left margin top None ▼	Right margin top None ▼
Left margin center None ▼	Right margin center None ▼
Left margin bottom None ▼	Right margin bottom None ▼

WATERMARK

Watermark
None ▼

When you select **Include headers and footers**, several additional configuration options are displayed:

1. Click the **Font** button and select your font options in the **Select Font** dialog that displays. This includes **Font Family**, **Font Size**, and **Font Style**. Click **OK** to save your font selections and close the **Select Font** dialog.
2. In the **Headers and Footers** section, specify an item to print for each header and footer based on your needs. Leave the selection set to **None** if you want that header or footer to remain blank.
3. In the **Margins** section, specify an item to print for each section of the left and right margins based on your needs. Leave the section set to **None** for a blank margin.
4. Select an item for your **Watermark**, if desired, or leave **None** for no watermark.

Review with Concordance Native Viewer

Utilizing the media key (image key) field in Concordance, Concordance Native Viewer can synchronize with the current Concordance database and display the associated documents. Using Concordance Native Viewer you can view native documents, removing the need to purchase and open the document in its native application. CNV opens the near-native view of the supported document types allowing you to review and annotate them.

With Concordance Native Viewer open alongside the Concordance application, you can view a record in the Browse and Table views while viewing the same record in the Native Viewer.

Concordance Native Viewer stores references to all native documents and image information in a single Concordance Image Base database (.cib) file. The .cib file is located in the same folder as the associated Concordance database (.dcb).



Due to changes within Brava, our third party vendor, if you are currently working on a review with Concordance Native Viewer version 1.08 or earlier, it is recommended that you complete the review and produce the files before upgrading to Concordance Native Viewer version 1.10 or later. For more information, contact Concordance Technical Support.

Supported Files

Concordance Native Viewer works with the following file types:

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
*.doc, *.dot, *.docx	Microsoft Word
*.ppt, *.pps, *.pptx, *.pptm	Microsoft PowerPoint®

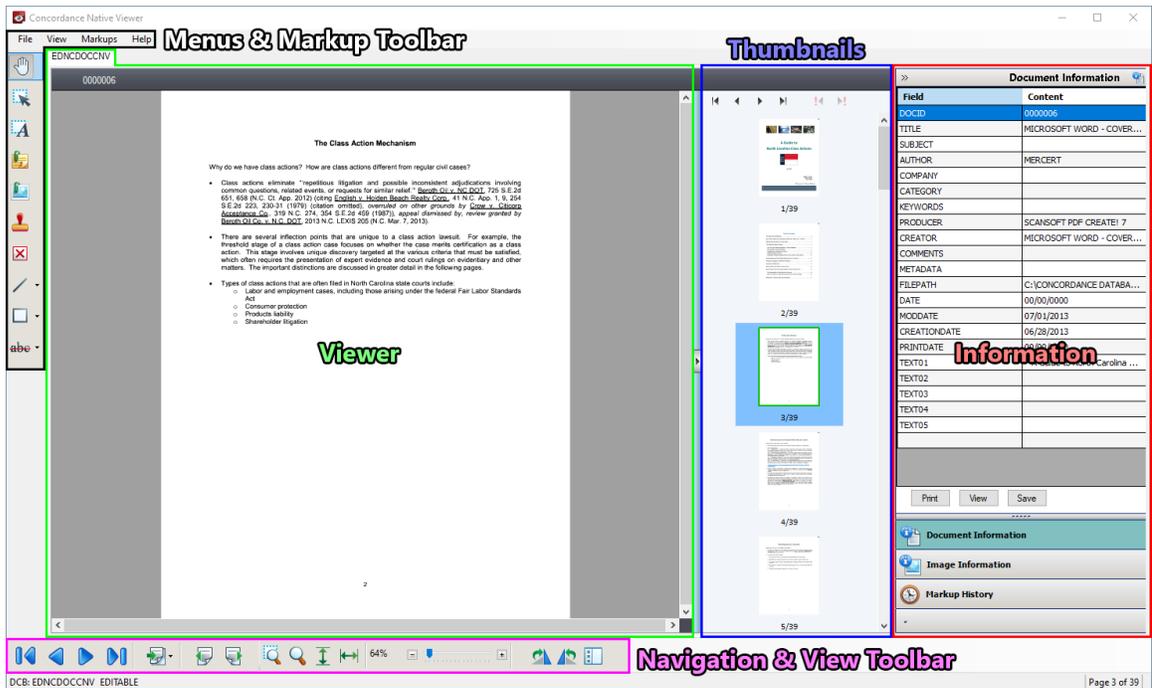
*.xls, *.xlsx	Microsoft Excel® (See note below)
*.msg	Microsoft Outlook 2010 Message File
*.txt	ASCII Text
*.rtf	Rich Text Format
*.html, *.htm	Web/HTML — Only supported in E-Document databases.



When working with a Microsoft Excel workbook that contains more than one worksheet, the data for all the worksheets is stored in the corresponding Concordance database; however, Concordance Native Viewer only displays the first worksheet during review.

The Concordance Native Viewer displays the document associated to the record currently open in Concordance. Using the tools in Concordance Native Viewer you can review documents, navigate between records, apply markups (annotations), and adjust the display of the documents.

From an open database in Concordance, you can launch Concordance Native Viewer by selecting the **View Image** (camera) icon on the Dynamic Toolbar.



Menus

- **File** - Here you can OCR an image or print documents.
- **View** - Provides access to several viewing options (also available in the View Toolbar). The "sticky" settings are accessed in this menu.
- **Markups** - Provides access to markup tools for document review (also available in the markup Toolbar).
- **Help** - Provides a link to the online Concordance Help. You can also activate Concordance Native Viewer, and view your installed Concordance Native Viewer version number.

Markup Toolbar

To ol	Na me	Description
	Pan	Moves the current page in any direction
	Sele ctio n	Selects a markup to edit, move, copy, resize, reshape, or delete
	Text Box	Places a box that contains text on the page
	Not e	Places a note icon on the page and opens a pop-up for the content
	Ima ge	Places an external image (JPG, BMP, or PNG) on the page
	Sta mp	Places a predefined stamp on the page
	Red acti on	Blocks out areas on the page that are considered confidential or sensitive from being viewed or copied after production

To ol	Na me	Description
	Line	Draws a straight line in any direction on the page
	Pol ylin e	Draws a jointed line on the page
	Cros sout	Draws an X on the page
	Arro w Line	Draws a line with an end arrowhead on the page
	Rect ang le	Draws a rectangle around the selected area on the page
	Elli pse	Draws an ellipse around a selected area on the page
	Stri keo ut	Draws a strikeout line over the selected text

To ol	Na me	Description
	Hig hlig ht	Highlights the selected text
	Und erli ne	Draws an underline under the selected text



Strikeout, Highlight, and Underline tools are only available if the document contains selectable text.

Viewer Pane

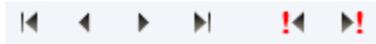
The Viewer Pane displays the current page of the current document.

Thumbnails Pane

The Thumbnails pane displays small images of the pages within the current document.

- a green rectangle highlights the currently displayed page
- a red exclamation point (!) displays next to any pages that contain markups

Use the navigation tools at the top of the Thumbnails Pane to navigate through pages of the current document, or navigate specifically through those pages with markups.



Information Pane

The Information Pane contains detailed information about each document within a record. Each tab can be configured to display the information most important to you. The information is directly linked to Concordance and stored in the Concordance Image Base (CIB) file.

Information Tab	Description
Document	Displays Concordance field data (numeric, date, text and paragraph) for the document, up to 60 characters. You can specify which fields display, and their order by clicking the View button.
Image	Displays metadata for image documents. If you are using Concordance Native Viewer this information is only

Information Tab	Description
	available for Concordance Image Load File databases that have been converted.
Markup History	Displays a complete history, in descending chronological order, of all markup additions, modifications, and deletions that have taken place for the current document.

The Information Pane provides quick access to additional information (metadata) about the current document or image. The information is directly linked to the information in Concordance and is stored in the Concordance Image Base (CIB) file.

The upper section of the Information pane displays detailed information about the document for the selected view. The lower section displays a set of buttons for one-click access to the corresponding view. When you click a view button, its contents are displayed in the upper section. The horizontal splitter bar located between the view and the buttons allows you to collapse the buttons into a button tray.

Each of the selected views has a Print button that you can use to print that view's information for the current document.

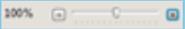
Navigation & View Toolbar

Tool	N a m e	Description
	Fir st D oc u m en t	Navigates to the first document in a single or concatenated set of Concordance databases
	Pr ev io us D oc u m en t	Navigates to the previous document in a single or concatenated set of Concordance databases
	N ex t D	Navigates to the next document in a single or concatenated set of Concordance databases

Tool	Name	Description
	Document	
	Last Document	Navigates to the last document in a single or concatenated set of Concordance databases
	Go To Document	Navigates to a specified document or page within a single or concatenated set of Concordance databases
	Previous	Navigates to the previous page in a multi-page

Tool	N a m e	Description
	io us Pa ge	document shown in the native viewer
	N e x t Pa ge	Navigates to the next page in a multi-page document shown in the native viewer
	Zo o m o n Se le cti o n	Click this tool and drag the tool across an area of the document that you want to enlarge
	M a g n i f i e r	Displays a magnifier window for viewing magnified sections of the current document. Close the magnifier window using

Tool	Name	Description
		<p>the X in the upper right corner. You can modify the magnifier window in several ways:</p> <ul style="list-style-type: none">• Click or drag the corner or edge of the magnifier window to expand or reduce its size.• Click the adjustments handle immediately to the right of the magnifier window to modify the font size within the magnifier window.• Use the Eyeglass or Bird's Eye tool in the upper left to adjust which section of the document is being displayed in the magnifier window.
	Fit to Height	Adjusts the zoom height so that the entire height of the

Tool	N a m e	Description
	ig ht	document appears in the workspace
	Fit to Wi dt h	Adjusts the zoom width so that the entire width of the document appears in the workspace
	Zo o m sli de r	Drag the slider right to increase magnification or left to decrease magnification of the document being displayed
	Ro tat e Cl oc k wi se	Rotates the document in 90 degree clockwise

Tool	N a m e	Description
	Ro tat e Co un ter Cl oc k wi se	Rotates the current document in 90 degree counter clockwise
	To gg le Th u m bn ail s	Opens the Thumbnails pane

Status Bar

The Status bar at the bottom of Concordance Native Viewer displays information about the current database being viewed, including whether the database is editable or not. On the right side, the status bar shows the current page and total page count for the current document.

Concordance Native Viewer is synchronized with Concordance. Each separately opened database has a tab at the top of the Viewer Pane that displays the current database name. You can have up to 16 databases open in Concordance Native Viewer at the same time.

Documents may consists of multiple pages. You can always determine what page you are currently viewing by looking at the page information in the lower right corner (on the Status Bar).

Use the Navigation and View Toolbar at the bottom to move between documents, and move to different pages within a document. You can also navigate pages by selecting a page in the Thumbnails Pane, or using the navigation toolbar at the top of the Thumbnails Pane.

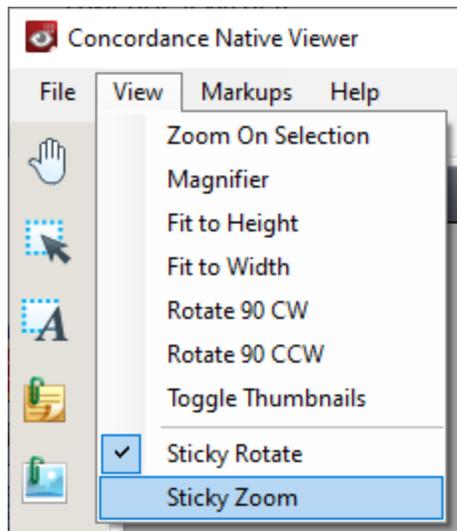
Sticky Zoom and Sticky Rotate

Many documents are often scanned with a portrait page view setting, making online reading a challenge unless the page is rotated. The Sticky Zoom and Sticky Rotate settings make reviewing easier by changing the page layout to a landscape view and keeping it there even while navigating between records.

The Sticky Zoom and Sticky rotate functions are located on the View menu:

- **Sticky Zoom** - keeps your preferred magnification settings as you move from record to record. If you uncheck the selection, and then navigate to the next record, the record defaults to the full page view.
- **Sticky Rotate** - retains the rotated settings as you page through a record. These settings are especially helpful if you are reviewing a spreadsheet. If you uncheck the selection, and then navigate to the next record, the record defaults its original view.

A check mark next to each option on the Tools menu indicates that this setting is selected. The selections are maintained for the current database when Concordance Native Viewer is closed and reopened.



Concordance Native Viewer provides several markup tools for annotating documents and images during review. Applying markups includes redacting information and adding notes. You can also apply color markings to highlight or underline text and add a circle or box to emphasize a block or region of key content. All of these elements can easily be edited, moved, or resized.

There is no limit to the number of markups you can add to a document. As a best practice, use some restraint and stick to the internal review guidelines for your organization, ensuring all annotation marks are sensibly applied and records are kept clean for other reviewers.

Markup History in the Information Pane display all markups for the current document including the markup type, title, and author. Markup history is also saved in the .CIB file.



The current state for the markups on a document are stored in an XML formatted (.xrl) file in the same directory as the corresponding media file. DO NOT edit this file. Doing so may corrupt all your

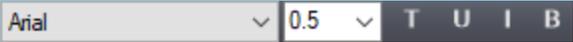
markups and redactions, as well as, possibly cause Concordance Native Viewer to crash.

When you select a Markup Tool, the top of the Viewer pane updates to display an appropriate toolbar to use for adding or editing that markup. You can change the appearance, size, and location of markups after you add them. All changes are tracked in the Markup History view of the Media Information pane.

The Markup Properties Toolbar

Tools	N a m e	D e s c r i p t i o n
	C o l	D e f i

Tools	N a m e	D e s c r i p t i o n
	o r	n e s c o l o r f o r a m a r k u p t

Tools	N a m e	D e s c r i p t i o n
		o o l
	T e x t F o r m a t	I n c l u d e s F o n t N a

Tools	Name	Description
		me, Font Size, and di

Tools	N a m e	D e s c r i p t i o n
		t i o n a l F o n t A t t r i b u t e

Tools	Name	Description
		s (T e x t B a c k g r o u n d , U n

Tools	N a m e	D e s c r i p t i o n
		d e r l i n e , i t a l i c , B o l d

Tools	N a m e	D e s c r i p t i o n
) .
	L i n e a n d S h a p e F o r	D e f i n e s w i d t h a n d

Tools	N a m e	D e s c r i p t i o n
	m a t	s t y l e f o r l i n e s o r s h a p

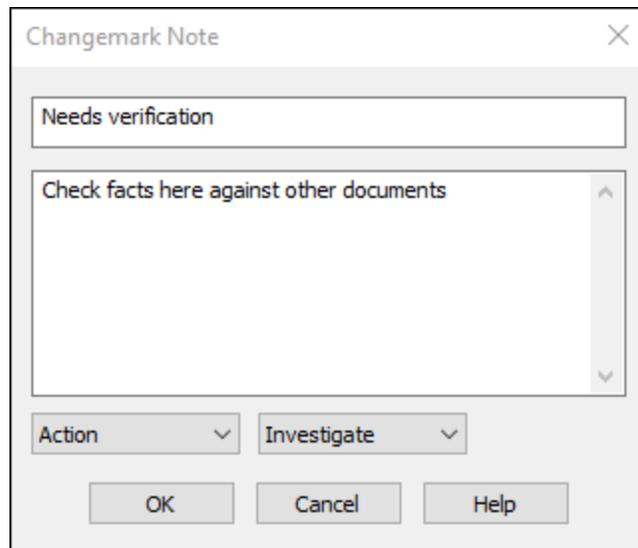
Tools	N a m e	D e s c r i p t i o n
		e s

Add Text Markup

1. On the Markup toolbar, click **Text Box** tool.
2. Use your mouse to select an area in the document where you want the text box to appear.
3. In the text box, type the text you want to add.
4. Using the Markup Properties toolbar, modify the color, or other text attributes as needed.
5. Navigate to another document to save the markup.

Add a Note

1. On the Markup toolbar, click the **Note** tool.
2. In the Markup Properties toolbar, select the color you want to use for the note.
3. Use your mouse to click a spot in the document where you want to place the note. The **Changemark Note** dialog displays.



4. Edit the information in the dialog box: title, text for the note, note type, and note state detail.
5. When finished, click **OK**.
6. Navigate to another document to save the markup.



After applying a note, with the Pan tool selected, you can move the mouse over the note to display the first 40 characters of the contents of the note. To view the full contents of the note (maximum of 520 characters), use the Note tool and double-click the note to display the Changemark Note dialog and view the entire note.

Add a Line or Shape Markup

1. On the Markup toolbar, select the line or shape tool corresponding to what you want to add.
2. In the Markup Properties toolbar, select the color, and line or shape attributes you want.
3. Use your mouse to draw the line or shape on the document.
4. Navigate to another document to save the markup.

Selectable Text Markups

When a document contains selectable text, the Strikeout, Underline, and Highlight tools become available.

1. On the Markup toolbar, select the **Strikeout**, **Underline**, or **Highlight** tool.
2. In the Markup Properties toolbar, select the color you want to use.
3. In the document, use your mouse to select the text to apply the markup to.
4. Navigate to another document to save the markup.

Editing a Markup

1. On the Markup toolbar, click the **Selection** tool.
2. Use your mouse to select the markup to edit in the document.
3. In the Markup Properties toolbar, modify any properties as needed.
4. Depending on the markup type, after selecting the markup to edit the display updates to display resize and rotate handles. You can select any of these to modify the size or rotate the markup as needed.
5. Navigate to another document to save the markup changes.

Editing Another User's Markups

1. From the Markup toolbar, click the **Selection** tool.

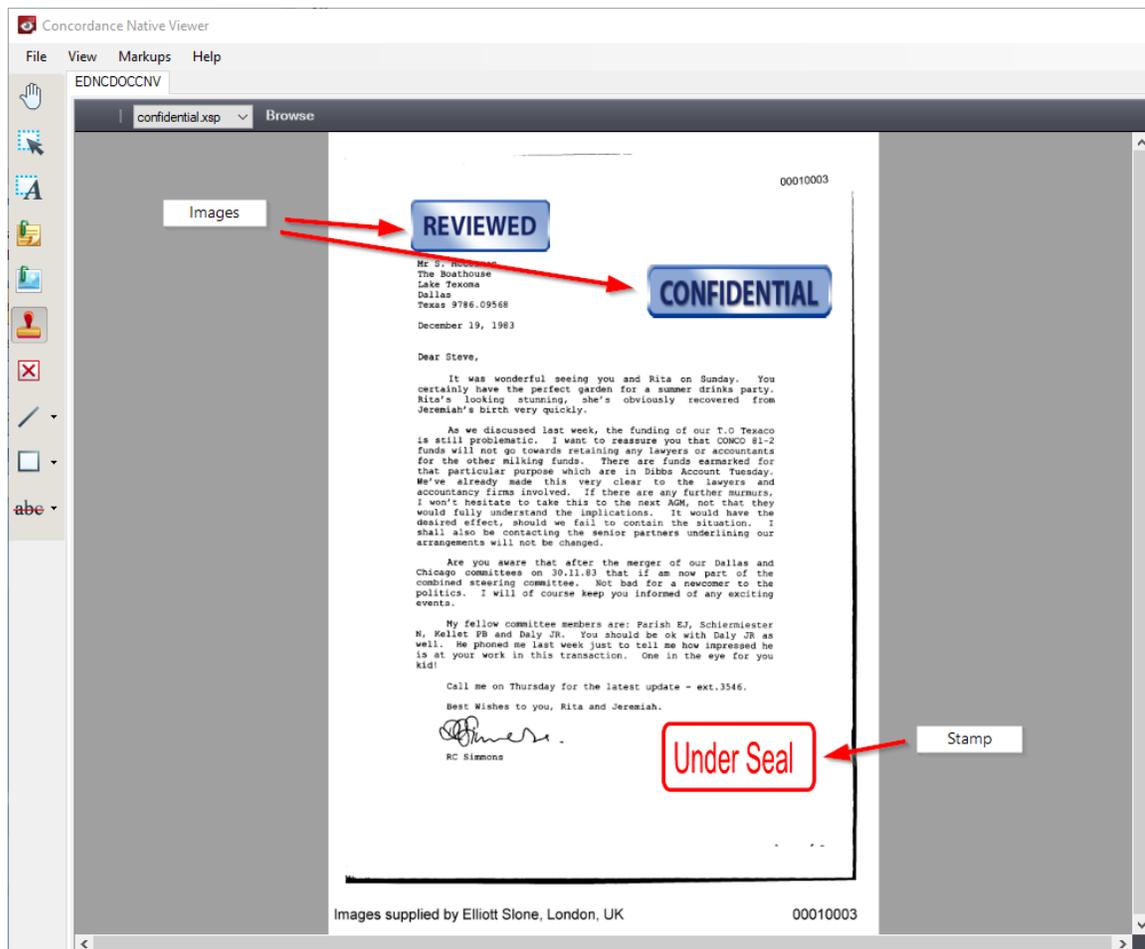
2. Press Shift and then select the markup you want to edit.
3. Follow the instructions above for Editing a Markup.

Delete a Markup

1. On the Markup toolbar, click the **Selection** tool.
2. Using your mouse, select one more more markups you want to delete. For multiple markups, press CTRL while selecting.
3. Press **Delete**. The selected markups are removed.
4. Navigate to another document to save the markup changes.

The Image tool allows you to insert images (JPG, BMP, or PNG) into the current document. Concordance Native Viewer ships with several standard image files (draft, final, redacted, reviewed, etc.). You can find these images in C:\Program Files (x86)\CloudNine\Concordance native Viewer\StampImages. You can also use other images based on your needs, or modify the existing images if necessary.

Stamps contain predefined information that cannot be modified. Concordance Native Viewer is shipped with four predefined stamps: Attorney's Eyes Only, Attorney-Client Privilege, Confidential, and Under Seal.



To Insert an Image

1. On the Markup toolbar, click the **Image** tool. The Markup Properties toolbar will display above the document.
2. On the Markup Properties toolbar, either select an image file from the dropdown list or click the Browse button to navigate to and select the image you want to add.
3. Click on the document in the area where you want the image to be added.
4. Navigate to another document to save the markup.

To Insert a Stamp

1. On the Markup toolbar, click the **Stamp** tool. The Markup Properties toolbar will display above the document.
2. On the Markup Properties toolbar, select a stamp from the dropdown list.
3. Click on the document in the area where you want the image to be added.
4. Navigate to another document to save the markup.

A redaction is used when confidential information needs to be hidden in a document for production. Redactions associated with the produced document cannot be edited or removed. Once the document is produced, any text or images concealed by a redaction cannot be viewed, copied, or searched.

The Redaction tool allows you to place one or more redactions (rectangular boxes) over various areas of sensitive information within a document. In Concordance Native Viewer, the redaction appears transparent to allow you to make sure the redaction covers the information you want to conceal. When a production is executed, the redaction becomes opaque concealing the information underneath.

Since PDF files are not flattened or burned, when producing PDF files the redacted information is removed from the file before the redaction is placed. The production process physically removes the hidden text from the produced file, the original document is not altered.

Redactions can be applied to specific text, or they can be applied as a box over an area of a document or image. It is recommended to use a different color for redactions than other markups. This ensures that the markup type can be easily differentiated when viewing a document or image.

If you need to export the body text for a production, you will need to re-OCR the images after the redactions have been burned in. You can also choose to scrub the redacted text when running a Production.



When printing Concordance Native Viewer documents, redacted documents print with transparent redactions making the text underneath the redaction visible. If you want redactions to print

opaque, you need to use the Production tool in Concordance to produce the documents and then print the output documents.

Add a Redaction

1. On the Markup toolbar, click the **Redaction** tool.
2. Using the **Redaction** tool, click and drag your mouse to select text in the document or draw a rectangular box around the area to radact.
3. Using the Markup Properties toolbar, modify the color if needed, and select a redaction **Reason**. You can select a previously entered **Reason** from the list or type in a new one. There is a maximum of 40 redaction reasons in the list, displayed in alphabetical order.
4. Navigate to another document to save the redaction.

Editing a Redaction

1. On the Markup toolbar, click the **Redaction** tool.
2. Use your mouse to select the redaction to edit in the document.
3. In the Markup Properties toolbar, modify any properties as needed.
4. Navigate to another document to save the redaction changes.

Optical Character Recognition (OCR) processing can be performed on a single page or an entire document displayed in Concordance Native Viewer. Initiating the OCR Single Image command scans the page or document and then writes the data to a specified field in the in the associated Concordance database for indexing and searching.



This feature requires activation of the OCR on the Fly license for Concordance Native Viewer.



While the OCR Single Image process is running, do not navigate between records in Concordance or close Concordance. This will cause the process to fail to write the data to the selected record. The corresponding Concordance database record is locked until the OCR process is complete.



When running the OCR process on a document that contains a markup that is not burned in, the text that lies under the markup will be scanned and imported to the specified database field. If you do not want the text under the markup scanned, you must first produce the document using the Production command in Concordance, load the produced document into the database, and then scan the document.

Digital OCR processing does not offer perfect text recognition. Accuracy may be reduced by many conditions:

- Text appears skewed or uneven on the page
- Pages are creased or torn
- Letters are faded, blurry or otherwise distorted
- Non-standard type faces used in documents
- Font style, size, and/or color
- Image files with low resolution (such as .gif formatted images), background noise, inverted colors, black margins, or wrong page orientation
- Multiple languages selected for processing

The OCR scanning process is CPU intensive and can require significant time and computing resources to carry out large jobs. Typical processing time is between 1 and 2 pages per second. This time is greatly impacted by the amount of text and other information on the pages, and the quality of the document.

Database Considerations

Concordance Native Viewer is locked once the OCR process is initiated and remains locked until it is completed. The corresponding Concordance database record is locked for all users. The database record can be viewed but not edited. Indexing cannot be performed on the database during the OCR process.

Concordance database OCR fields:

- Must already exist in the associated Concordance database
- May already contain data - you can append additional data to the next available OCR field or overlay existing content with new data
- Must have the same alpha prefix, and have a numerical suffix that starts with 1 and are the same length (i.e. OCR1, OCR2, etc.)
- Must be paragraph type fields to ensure the data is indexed and searchable
- Must be large enough and/or you must have enough fields defined to support OCR processing
- Must be accessible with full read/write access by the user

Language

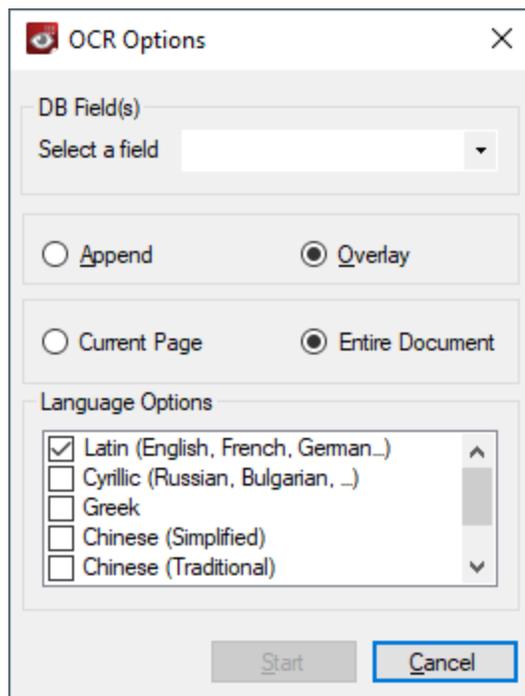
OCR Single Image supports these language types:

- Latin (for English, French, Spanish, German, etc.)
- Cyrillic (for Russian, Bulgarian, etc.)
- Greek
- Chinese (Simplified and Traditional)

- Japanese
- Korean

To OCR the Text of a Document or Image

1. In Concordance Native Viewer, navigate to the document you want to scan.
2. From the **File** menu, click **OCR Single Image**. The OCR Options dialog displays.

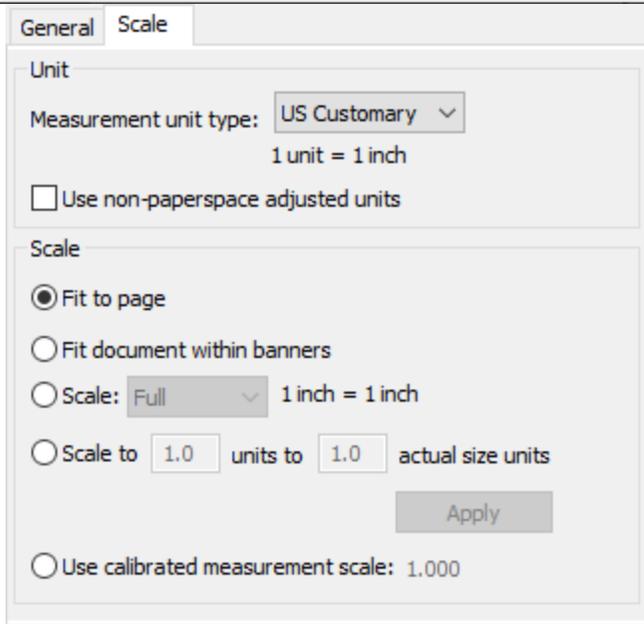
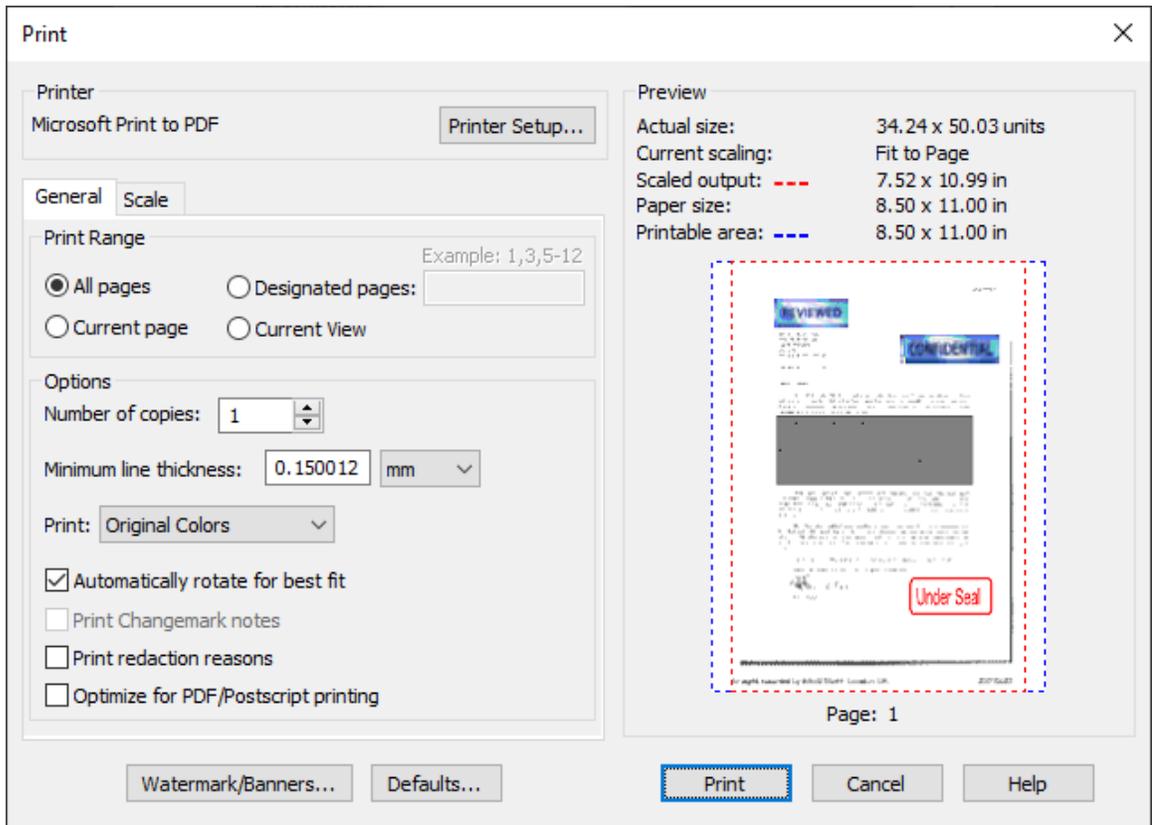


3. Select **Append** to write the OCR data in the specified field at the end of any existing data, or **Overlay** to replace existing data in the specified field (existing data in the field will be lost).
4. Select **Current Page** to OCR the page currently displayed in the viewer, or **Entire Document** to OCR all pages of the current document.

5. From the **Language Options** list, choose the language that corresponds to the text represented in the document.
6. Click **Start**.
7. If you chose **Overlay**, you will need to confirm that you want to overwrite the database field before proceeding. Select **OK** to proceed.
8. A progress dialog displays. Upon completion, you can return to Concordance to verify that the data appears in the field you specified.

Using the print command in Concordance Native Viewer, you can print the current document displayed in the viewer. When printing documents, be aware of the following:

- When printing documents that have been redacted in Concordance Native Viewer, any redaction placed on the document will print transparent revealing the text underneath. If you want to print opaque redactions, you must run the documents through the Production process in Concordance, then print the produced document.
- Printing documents that contain markups to Adobe PDF using the File>Print option does not permanently burn the markups in the document. If you want markups burned in, you must run the documents through the Production process in Concordance, then print the produced document.



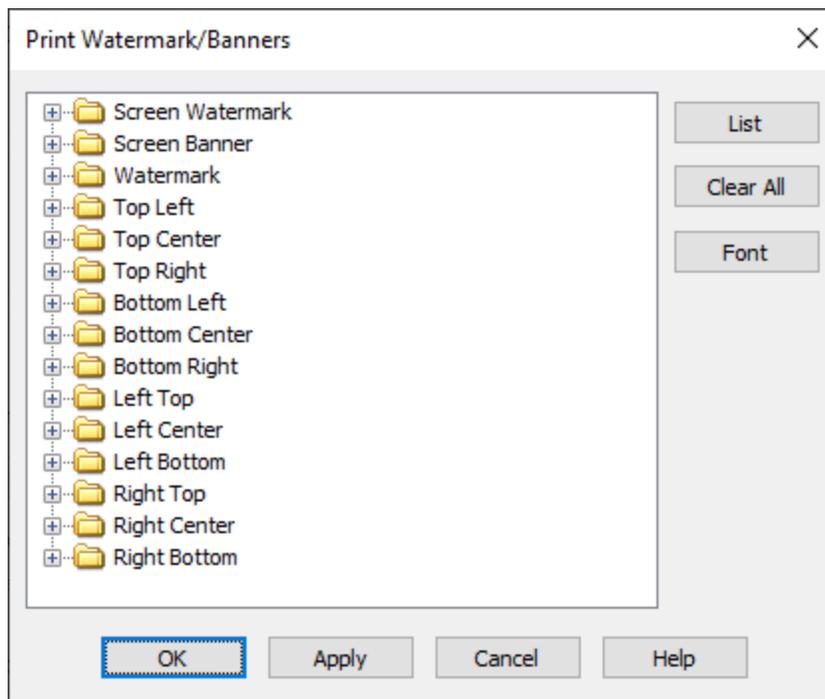
To Print the Current Document in Concordance Native Viewer

1. In **Concordance Native Viewer**, locate the document you want to print, and then from the **File** menu, click **Print**.
2. To modify the printer settings, click the **Printer Setup** button, select the printer to use, specify the paper size, orientation, and other general printing options, and then click **OK**. Options may vary with different printers and drivers.
3. On the **General** tab, select the range of pages you want to print in **Print Range. Current View** will only print the area of the image that is displayed in the viewer workspace.
4. On the **General** tab, specify the **Options** you want:
 - Set **Number of copies** to the number of copies to print.
 - **Minimum line thickness** can be set to a value from 0 to 99 to specify line weight for markups.
 - Specify the **Print** option **Original Colors** to print using the colors shown in the viewer, **As Grayscale** to print in shades of gray, or **Lines as Black** to print all lines black (markups print with color if applicable).
5. Specify any of the following print settings that are necessary:
 - Select **Automatically rotate for best fit** to allow more of the image to fit within the margins of the printed page.
 - Select **Print Changemarks notes** to include the text in any notes in the current document on a separate sheet. This option is only available if changemark notes exist.
 - Select **Print redaction reasons** to include the text in any redactions in the current document on a separate sheet.
 - Select **Optimize for PDF/Postscript Printing** if you are printing a PDF document. This option resolves some older printer issues that resulted in

reversed prints. This option results in slower print time and a larger print spool file.

6. On the **Scale** tab, you can decide to print the document as **Fit to page, Fit document within banners**, or select a customized scaling value.
7. Click Watermark/Banners to configure your watermark and margin details. See [Configuring Watermark and Banners](#)²⁶⁶ for more information.
8. Click the **Defaults** button to save the current print settings as your default values.
9. When finished, click **Print**.

Configuring Watermark and Banners



1. Click the + next to the Header/Footer or the Watermark folder you want to edit to expand the list.

2. Within the expanded list, select the <blank> field. Enter in the text that you want displayed in that area. To include a macro in the text type the percent sign (%) and the available macros list displays allowing you to select one to insert. See [Macros](#) ²⁶⁷ for the list of available macros.
3. To edit the font for the all the text, click the **Font** button, and then in the **Font** dialog box, specify the font name, style, and size.
4. To view a list of all the headers, footers, and watermark set for the production, click **List**.
5. When finished, **OK**.

Concordance Native Viewer Macro	Description
FIELD_<field name>	Inserts database field data up to 60 characters for a each specified field. For example, FIELD_OCR1 would generate the first 60 characters of the OCR1 field. If security is enabled, only those fields with a minimum of Read access are displayed.
Date	Inserts the current date
SysDate PlusDays ()	Inserts the system date plus a specified number of days. Enter the number of

	days to add to the system date in parenthesis.
Time	Inserts the current time the print is executed based on a 12-hour clock
MilTime	Inserts the current time the print is executed based on a 24-hour clock
Title	Inserts the current title of the document
Page	Inserts the page number of the document
TotalPages	Inserts the total number of pages of the document
BatesPgNo()	Inserts a page number on each printed document. Enter the starting page number for each document in parenthesis. Multi-page documents are numbered incrementally. For example, <i>BatesPgNo(0001)</i> would print 0001 on the first page, and 0002 on the second page, and so forth.
Login	Inserts the login name of the person who executed the print

User	Inserts the user name of the person who executed the print
Hostname	Inserts the hostname of the machine where the print was executed from
IPAddresses	Inserts the IP address of the machine where the print was executed from
%	Inserts a single % character
©	Inserts a copyright symbol
®	Inserts a registered trademark

Review with Concordance Image

Content review of records can be done with Concordance Image. Concordance Image allows you to magnify the original document image for clarity and inspection (especially for dates and signatures), and provides a variety of annotation tools specifically designed for privileged content and trial preparation. Once you have annotated content, especially redacted key information, the document markings are automatically saved and the changes secured. A third-party, such as opposing counsel, will not be able to uncover the redaction information or remove any notable markings once they are burned onto a new set of images during production.

Concordance Image opens image records in a secondary window, which can be resized to view alongside the main Concordance application, allowing you to see both the Browse and Table views while reading the full document content.

Not all case records are viewable in Concordance Image. Transcript files are text files stored in a separate database and viewable only in the Browse and Table views. Notes entered in the Browse view are not viewable in the image view because they are separate text files. Similarly, notes entered in Concordance Image records are not viewable in the Browse view because they are scanned image files. The same document files are linked in the database for full search functionality, but record additions are not transferable for viewing purposes.

Supported Files

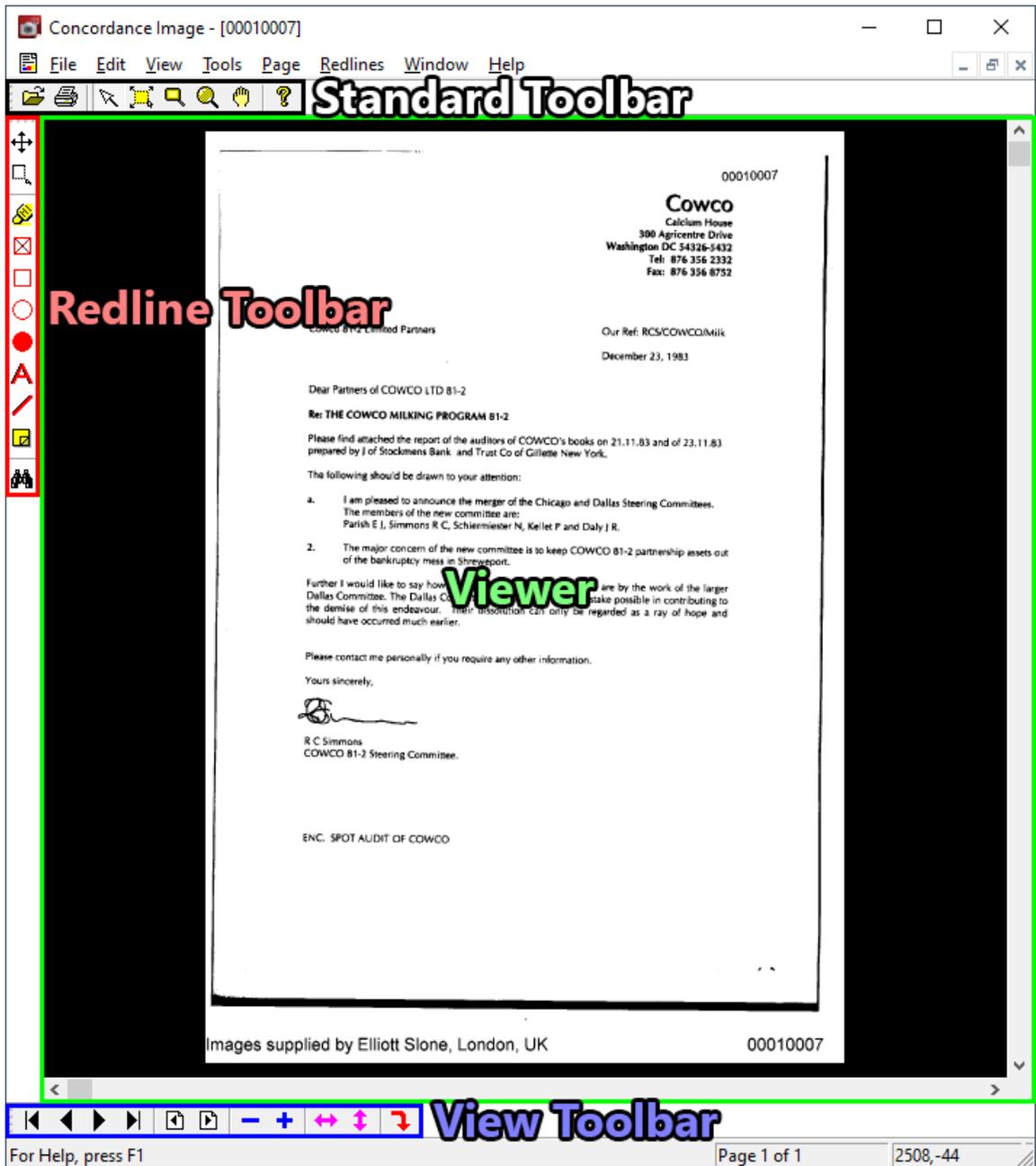
Concordance Image works with the following file types:

File Type	Description
*.tif, *.tiff	Tagged Image File
*.jpg, *.jpeg	Joint Photographic Experts Group
*.gif	Graphic Image File
*.bmp	Bitmap
*.pcx	PC Paintbrush Bitmap
*.cal, *.mil	CALS Files

*.dir, *.fyi	Concordance Image imagebase
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Concordance Image opens image records associated with the record currently open in Concordance.

From an open database in Concordance, you can launch Concordance Image by selecting the **View Image** (camera) icon on the Dynamic Toolbar. You can also right click on a record in Browse, Table or Edit views in Concordance and select **View image**.



Standard Toolbar

T o o l	Na m e	Description
	Op en	Opens images not associated with the current database
	Pri nt	Prints documents and pages from the current database
	Ma rk	Marks an area in the image to copy
	Ma rk Zo om	Captures a selected region of a document and enlarges it to fill the viewer area
	Ma gni fier	Opens a magnifier window for viewing specific sections of an image
	Zo om	Opens the Magnify window for viewing a selected area of an image
	Pan	Moves the image in any direction

T o o l	Na m e	Description
	Hel p	Opens Concordance Help

Redline Toolbar

T o o l	Na m e	Description
	Mo ve	Selects markup entries to move, copy, resize, reshape, or delete
	Res ize	Reduces the size of a redline incrementally
	Hig hlig ht	Highlights selected text on the image

T o o l	Na me	Description
	Red act	Places a redaction on the image
	Hol low Box	Places a hollow box on the image
	Hol low Elli pse	Places a hollow ellipse on the image
	Soli d Elli pse	Places a solid ellipse on the image
	Tex t	Places text on the image
	Lin e	Places a Line on the image

T o o l	Na me	Description
	Not e	Places a note on the image
	Sea rch	Opens the redlines search pane

Navigation Toolbar

To o l	Na me	Description
	First	Navigates to the first page in the document
	Previ ous	Navigates to the previous page in the document
	Next	Navigates to the next page in the document

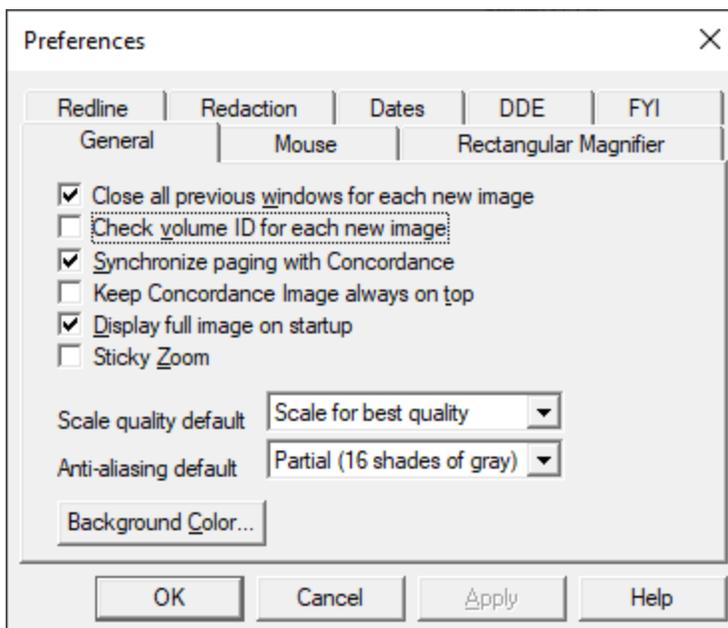
To ol	Na me	Description
	Last	Navigates to the last page in the document
	Previ ous Docu ment	Navigates to the previous document in the imagebase
	Next Docu ment	Navigates to the next document in the imagebase
	Zoo m Out	Zooms out incrementally
	Zoo m In	Zooms into smaller areas on a larger image
	Fit Widt h	Changes the zoom level such that the entire width of the image appears in the window
	Fit Heig ht	Changes the zoom level such that the entire height of the image appears in the window

To ol	Na me	Description
	Rotat e	Rotates the image by 90° clockwise

You can make your Zoom and Rotate settings "sticky" by selecting **Sticky zoom** and/or **Sticky rotate** on the **Tools** menu. Several options on the Navigation Toolbar are available on the **View** menu. The **View** menu also provides a few Mirror options to flip images horizontally, vertically, or both.

Selecting **Tools>Preferences** on the Concordance Image menu brings up the Preferences dialog box. This dialog provides eight tabs of various setting options so you can configure Concordance Image based on your needs.

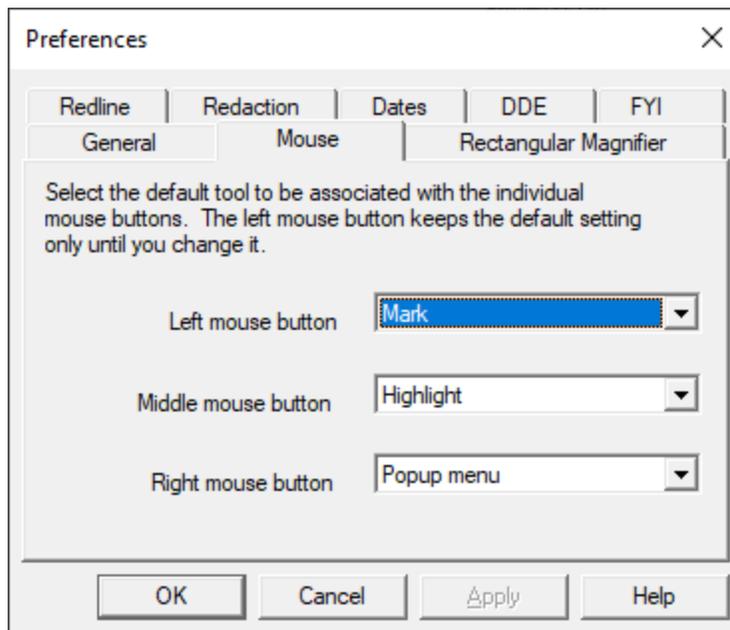
General



General Setting	Additional Information
Close all previous windows for each new image	Selecting this preference closes all windows before displaying a new image.
Check volume ID for each new image	If selected, Concordance Image will check the image location against where the image was registered. If you have multiple images with the same name, selecting this option can insure the correct image is displayed.
Synchronize paging with Concordance	This option keeps Concordance and Concordance Image synchronized when moving between documents.
Keep Concordance Image always on top	Concordance Image will always show on top of all other windows.
Display full image on startup	Displays the full image when the image is loaded.

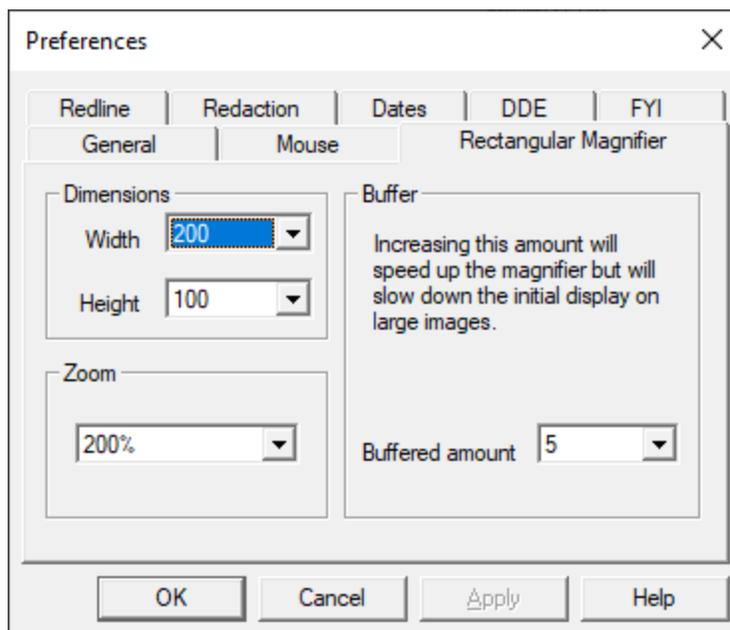
General Setting	Additional Information
Sticky Zoom	Maintains the zoom level and position for every image.
Scale quality default	Can be Scale for best quality when you want to resize for quality, or Scale fastest if speed is preferred.
Anti-aliasing default	Used for black and white images, select No anti-aliasing , Fast (4 shades of gray) , or Partial (16 shades of gray) .
Background Color	Click Background Color to select the color to display in the background of the Viewer.

Mouse



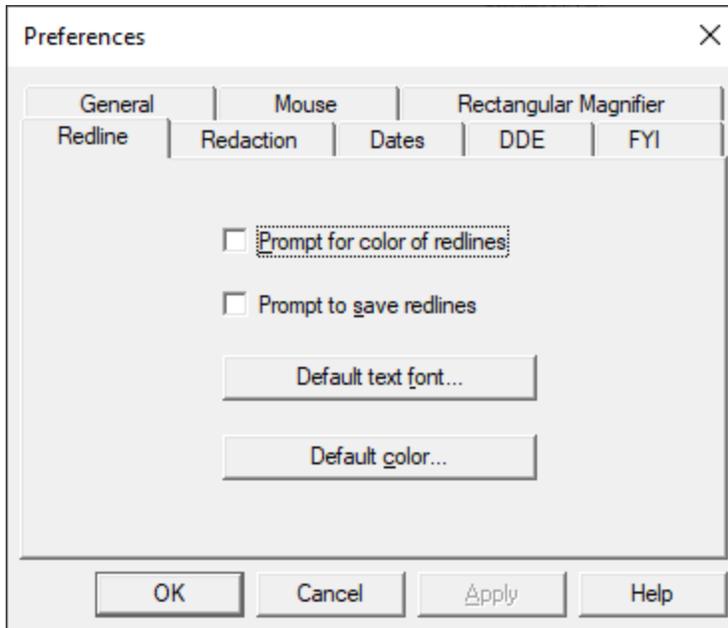
The **Mouse** preferences allow you to specify the default Concordance Image tool associated with the **Left**, **Middle**, and **Right** mouse buttons.

Rectangular Magnifier



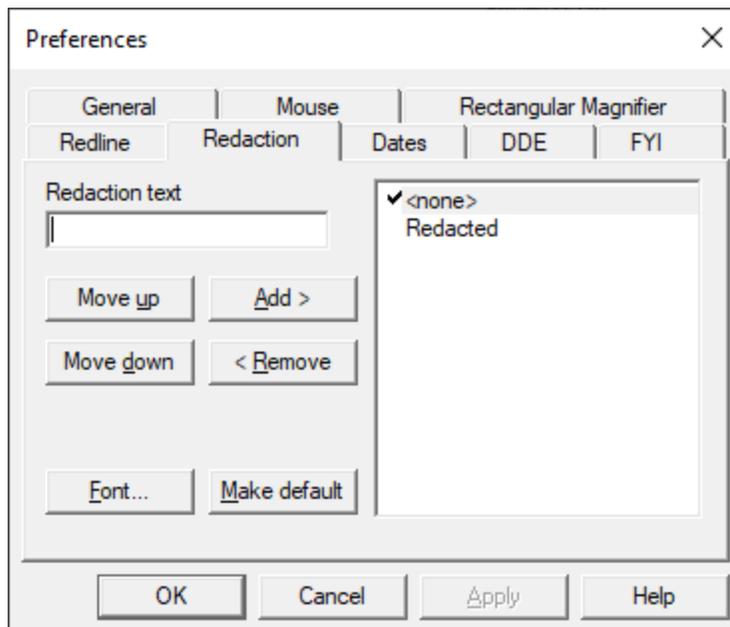
The **Rectangular Magnifier** preferences can be used to specify the **Width** and **Height Dimensions** for the magnifier window in pixels. You can also define the **Zoom** magnification percentage from the list.

Redline



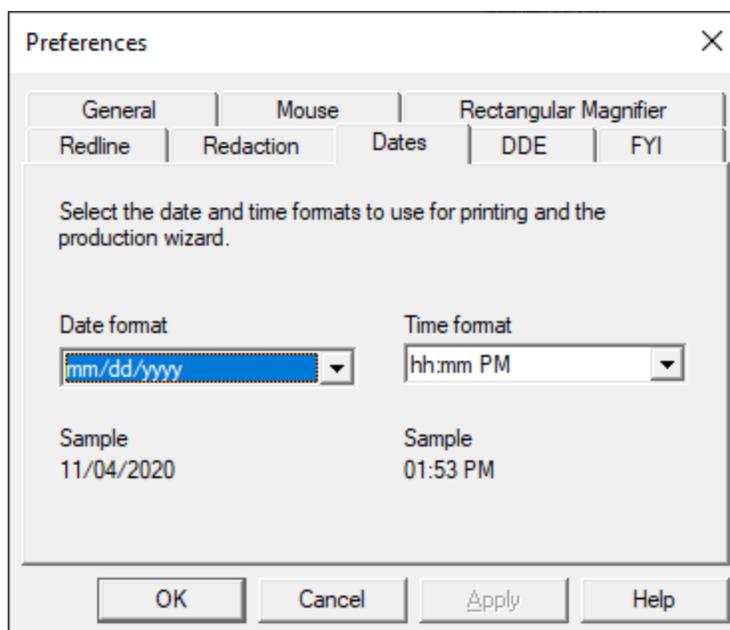
Redline preferences allow you to turn off the prompt for selecting redline color when applying a redline, and the prompt for saving the image with redlines when the image is closed. You can also define the redline **Default text font** and **Default color**.

Redaction



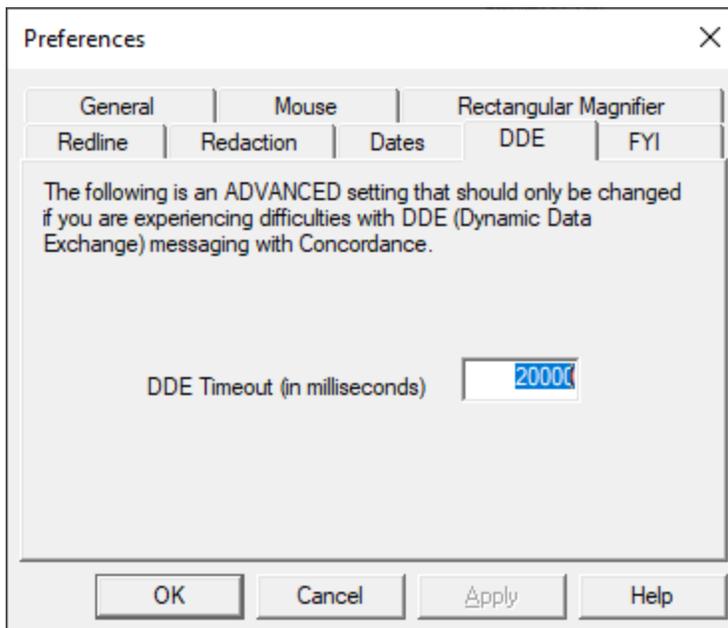
Redaction preferences are used to define the **Redaction text** list that you select from when applying a redaction. You can alter the list to appear in any order you want. This preference page also provides the ability to define the redaction **Font** to use.

Dates



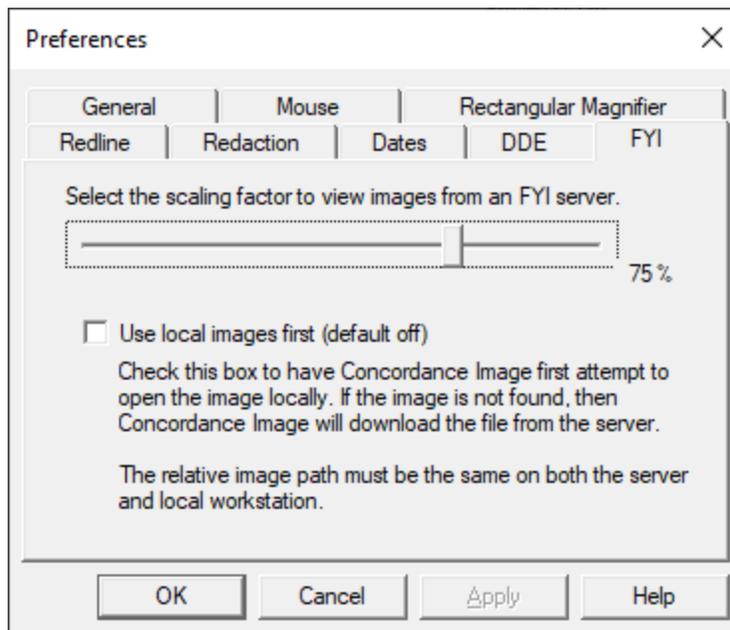
Dates preferences allows you to select your preferred **Date format** and **Time format** to use for printing and production.

DDE



The **DDE** preference page is provided for backwards compatibility with early versions of Concordance. This should only be altered with guidance from CloudNine Customer Support.

FYI



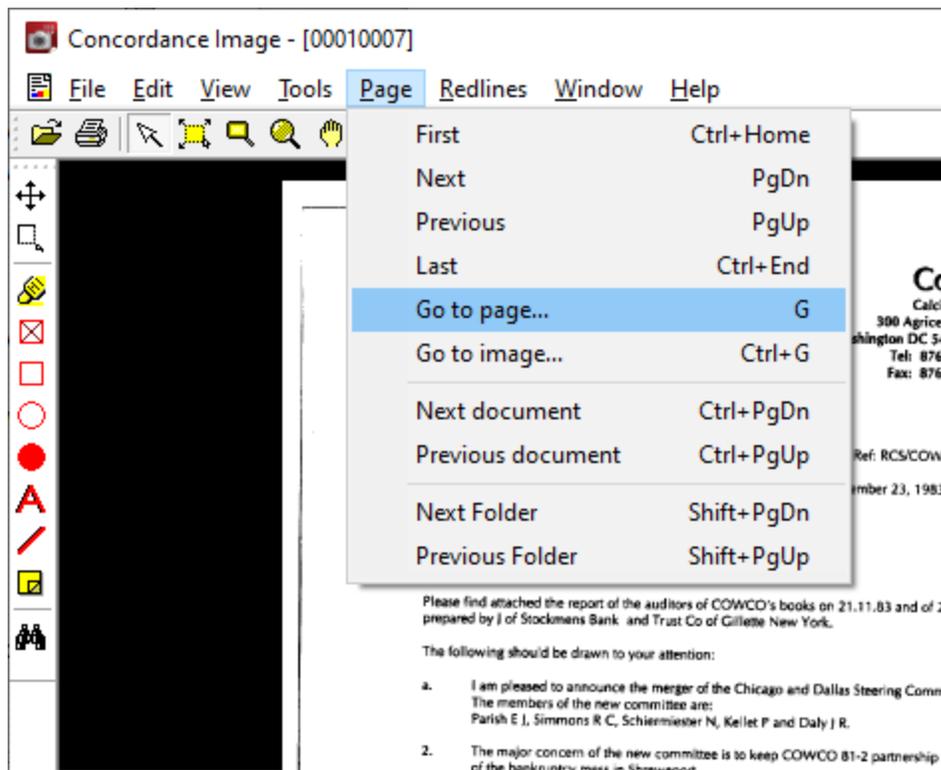
The **FYI** preferences define the **scaling factor** for transfer of images across the Internet from the server to the client PC. You can also default to **Use local images first**. When using print and production wizards with an FYI imagebase, Concordance Image automatically downloads a full-scale copy of the image regardless of the **Use local images first** setting.



Concordance version 10 databases and Concordance Image version 5 imagebases are compatible with FYI Server and FYI Reviewer versions 4.x or later.

When the View Image button is activated on the Dynamic toolbar in Concordance, opening a document in Concordance automatically launches Concordance Image. If you do not want images or attachments to automatically launch during your review, you can set this up in the Concordance Image Preferences.

With Concordance Image open alongside the Concordance application, you can view a record in the Browse and Table views while viewing the same record in Concordance Image.



In addition to the View Toolbar, the **Page** menu provides several ways to navigate pages, documents, and images. When you open Concordance Image from Concordance, you are automatically brought to the current record in the Concordance Image Viewer pane. If you want to go to a specific image, you can select **Go to image** on the **Page** menu and select the image key you want.

You can also open an imagebase that is not associated with your current Concordance database by selecting **Open Image** on the **File** menu. You will be prompted to navigate to and open a Concordance Image .dir or .fyi imagebase file.



Concordance 10 databases and Concordance Image 5 imagebases are compatible with FYI Server and FYI Reviewer versions 4.x or later.

Information about the current image you are viewing can be displayed by clicking **Help>Image Information**.

During the discovery process, annotating record detail is the phase when deeper content investigation and case record preparation begins. Upcoming depositions and court appearances require that your paperwork is already in order, opposing counsel wants copies, and all records need to be edited with proper annotations: notes added, key content highlighted, related files attached, links to websites validated, and privileged information redacted.

The Redline Toolbar, located on the upper left of Concordance Image, includes the variety of tools used to markup or redline an image during review. Applying redlines includes redacting information and adding notes. You can also apply color markings to highlight or underline text and add a circle or box to emphasize a block or region of key content. Once redlines are applied, you can search the document for each type. All of these markups can easily be edited, moved, or resized.

As soon as you begin redlining or annotating a document, the right-click menu options are available to you. This is especially helpful when applying redactions. Redaction marks and other redlines can be fused to the image file during print production, securing the document. When Concordance administrators process a production, they can then select which markings are fused to the image, depending on needs and recipient.

There is no limit to the number of annotations you can add to a document. It is best to stick to the internal review guidelines for your organization, ensuring all markups are sensibly applied and records are kept clean for other reviewers.

Concordance Image stores markups in EPS layers (up to nine layers) that cannot be unlocked, which is particularly useful for redacted content. All annotated documents are stored in a separate redline database. Redlines are automatically saved in this database once applied, but you cannot search a document for redlines and others cannot view these changes until the database is reindexed.

On the **Redaction** tab of the **Preferences** dialog (**Tools > Preferences**) you can customize the redaction text, font, and list placement, create a list of redaction terms, and set the default redaction text. If there is more than one redaction term defined, the terms are available for selection when you right click a redaction in Concordance Image.



Redaction text is not shared between Concordance Image and FYI Reviewer. If you want the same redaction text to be available in Concordance Image and FYI Reviewer, you will need to create the redaction text in both applications.

When viewing a document within the Concordance Image Viewer pane, you can select a tool from the Redline Toolbar to markup the document. You can change the appearance, size, and location of redlines after you add them.

We recommend incorporating standards for the review team for your redline markups, such as note size and location. This helps reviewers locate markups quickly at a glance. Even though a note may display small in the Viewer, it can still hold up to the 12 million character paragraph capacity.



Notes added to an image record are not viewable or accessible when the same document is viewed in the Browse view in Concordance. These database files are linked but cannot transfer or share edits.



Redlines applied to a .bmp file using Concordance Image version 5.09 or earlier and viewed in Concordance Image version 5.10 or later or FYI Reviewer version 5.07 or later will not display in the correct location.

Add a Text Redline

1. On the Redline toolbar, click **Text** tool.
2. Use your mouse to select an area in the document where you want the text box to appear. A **Text** dialog displays.

3. In the **Text** dialog, type the text you want to add.
4. You can optionally click the **Color** button to edit the text color if needed.
5. Click **OK**. The text redline displays in the Viewer pane.

Add a Note Redline

1. On the Redline toolbar, click the **Note** tool.
2. Use your mouse to select an area in the document where you want the note to appear. A **Note** dialog displays.
3. In the **Note** dialog, type the text you want to appear in the note.
4. Click **OK**. The note displays in the Viewer pane.

Add a Line or Shape Redline

1. On the Markup toolbar, select the line or shape tool corresponding to what you want to add.
2. Use your mouse to draw the line or shape on the document.
3. Right click on the redline in the document and select Change color to change the line or shape color.

Editing or Deleting a Redline

1. Use your mouse to select the redline to edit or delete in the document.
2. Choose the menu option you want to either modify the redline properties or delete the redline.

The Redaction tool allows you to place one or more redactions (rectangular boxes) over various areas of sensitive information within a document. In Concordance Image, the redaction appears transparent when you are moving it, to allow you to make sure the redaction covers the information you want to conceal.

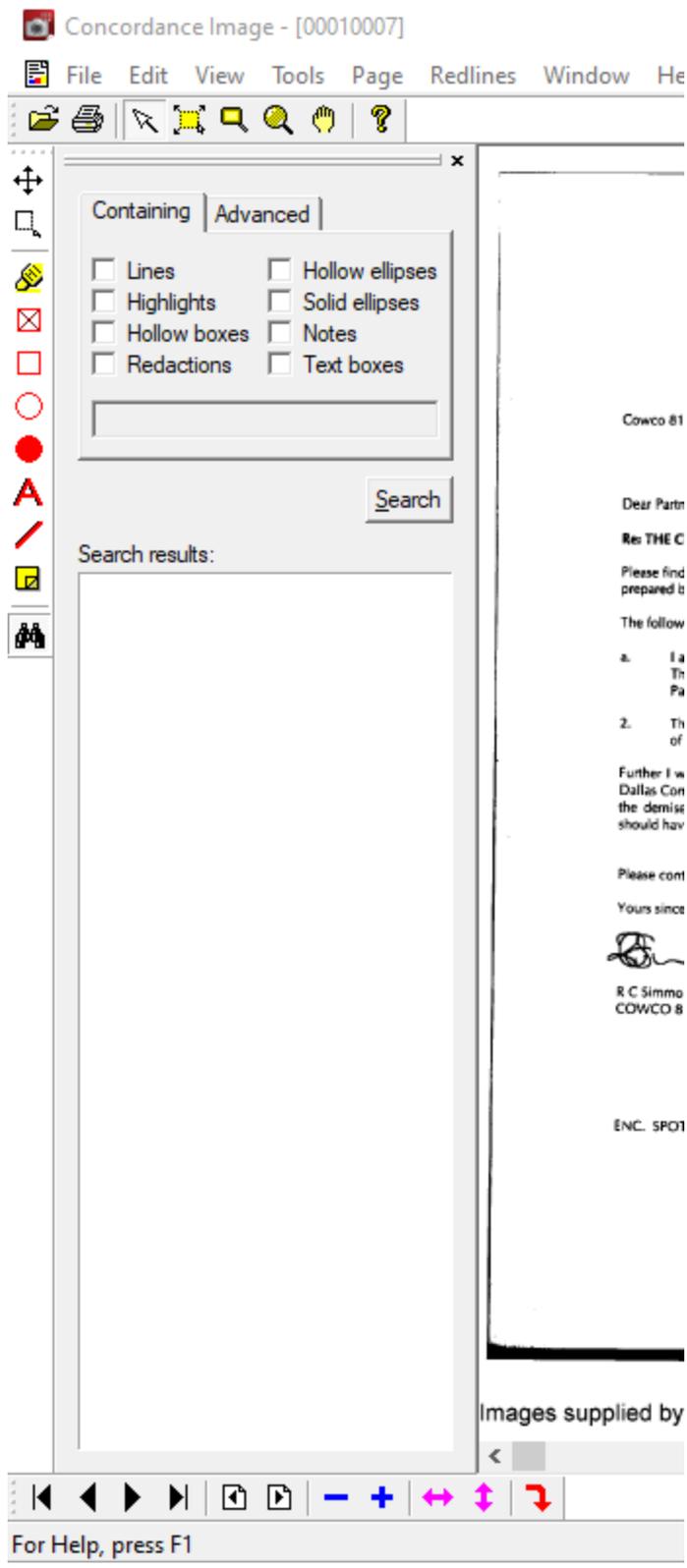
It is recommended to use a different color for redactions than other markups. This ensures that the markup type can be easily differentiated when viewing a document.

On the Redaction tab of the Preferences dialog, you can customize the redaction text, font, and list placement, create a list of redaction terms, and set the default redaction text. If there is more than one redaction term defined in Preferences, the terms are available for selection when you right-click a redaction in Concordance Image. For more information, see [Preferences](#)²⁷⁸.

To Add a Redaction

1. On the Redline toolbar, click the **Redaction** tool.
2. Using the mouse, select an area in the document to redact. Concordance Image displays a redaction box.
3. Right click on the redaction box to alter the color or redaction text.

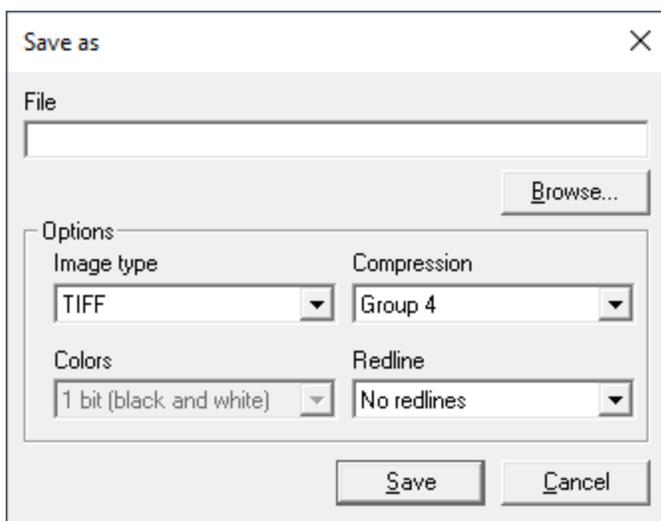
Once records have been reviewed and redlines applied, you may need to edit a comment or assess the number of redactions in a group of records. You can locate redlines in Concordance Image by type or reviewer by using the Search pane. The Search pane is displayed to the left of the Viewer pane by selecting **Redlines > Search**.



To Search for Redlines in Concordance Image

1. Select the **Redlines>Search** menu or click **Search** on the Redlines Toolbar. The Search pane displays.
2. On the **Containing** tab, select any specific redline types that you want included in your search. For redlines that include text, you can specify the text to find in the text box.
3. On the **Advanced** tab, select any reviewers that you want included in your search.
4. Click the **Search** button. All records containing your search criteria are displayed in the **Search results**. Records are listed as folders, named as the document load order number.
5. To view the document where redlines were applied, click one of the document's redlines in the **Search results** field.
6. When finished you can close the Search pane by clicking the **X** in the upper right corner of the Search pane.

Using **File>Save As**, you can save the current image under a different file name or format.



1. Type the path and file name in the **File** text box or click **Browse** to navigate to and specify the file location and name.
2. Select the **Image type**, **Compression**, **Colors**, and **Redline** options you want. See the table below for more details about which options are available based on the **Image type** and **Compression** chosen.
3. Click **Save** to save the file.

Image Type Options

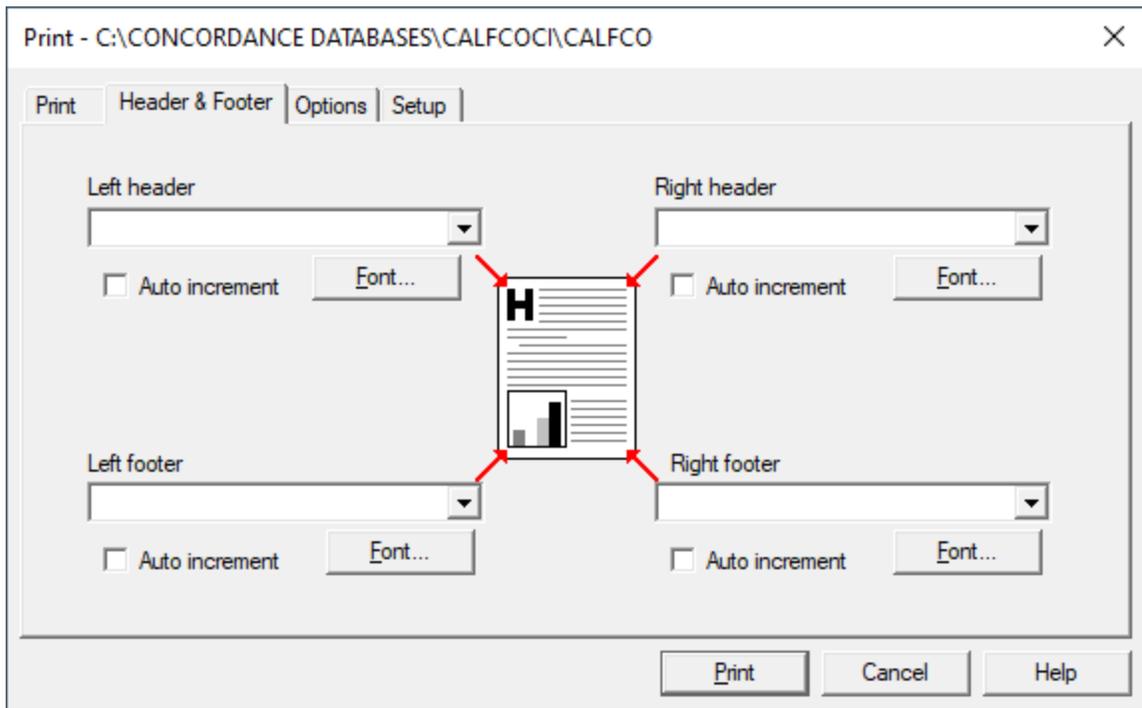
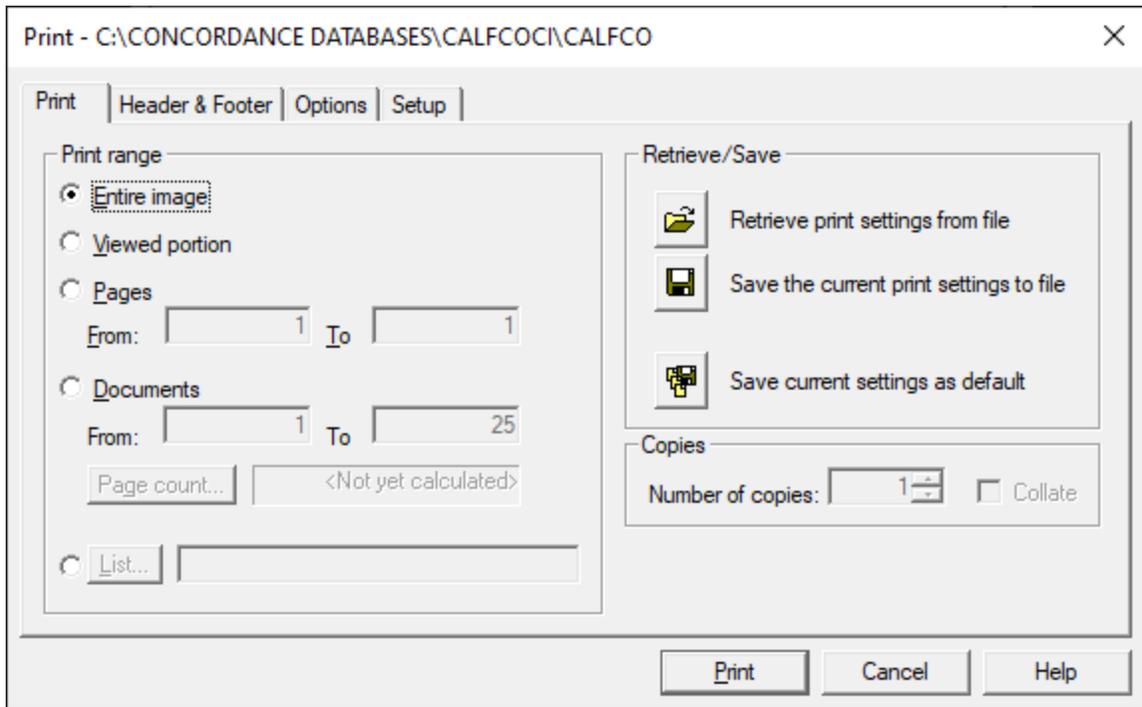
Image Type	Compression	Colors	Redline
TIFF	None PackBits	1 bit (black and white) 4 bit (16 colors) 8 bit (256 colors) 24 bit (16.7 million colors)	No redlines
TIFF	Group 3	1 bit (black and white)	No redlines

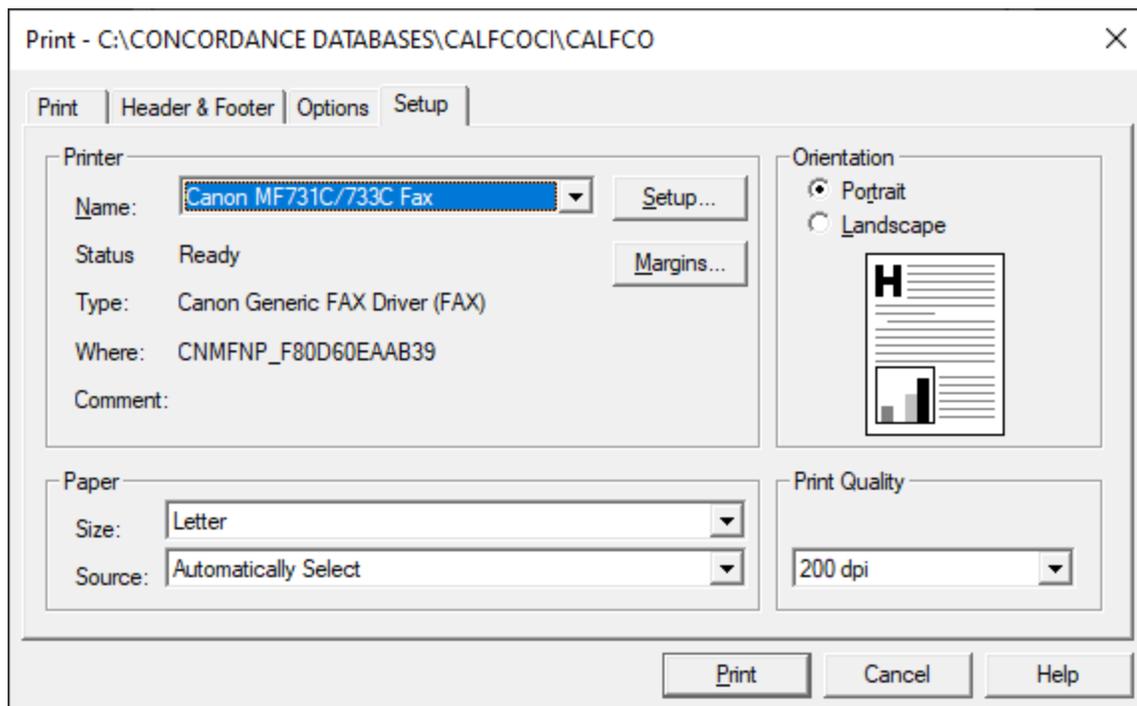
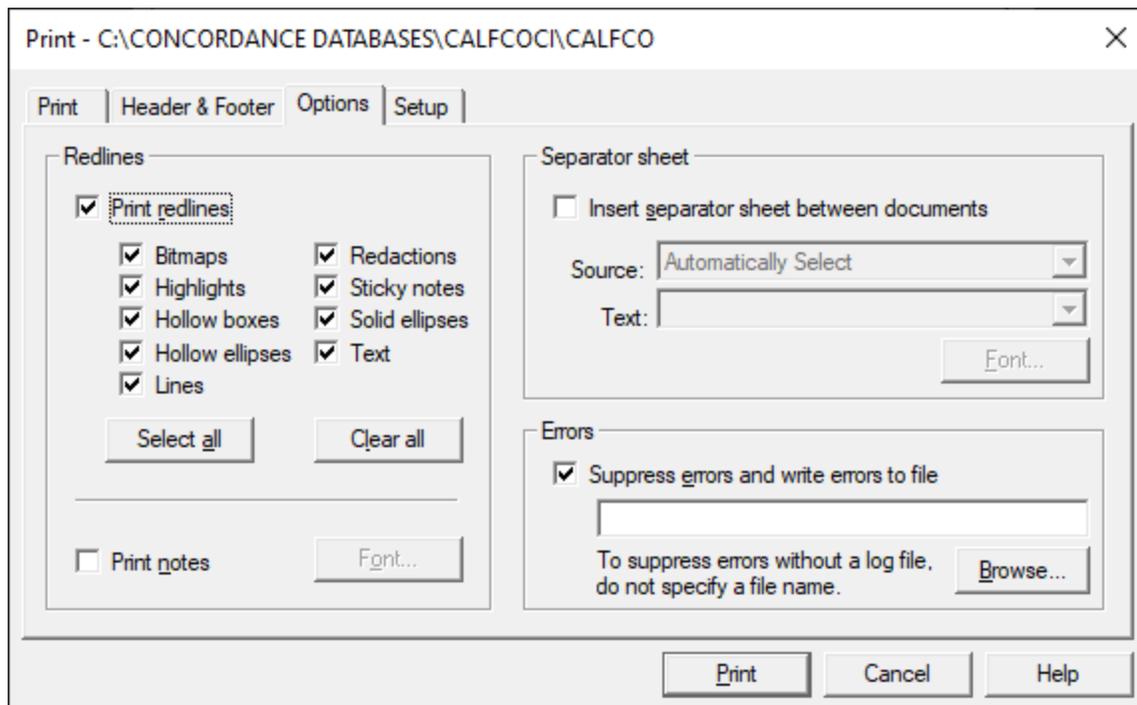
Image Type	Compression	Colors	Redline
	Group 3 2D Group 3 TIFF Group 4		Burn redlines onto image
PCX	PCX	1 bit (black and white) 4 bit (16 colors) 8 bit (256 colors)	No redlines
CALS	Group 4	1 bit (black and white)	No redlines Burn redlines onto image
JPEG	JPEG	24 bit (16.7 million)	No redlines

Image Type	Compression	Colors	Redline
		colors)	

Using the print command in Concordance Image, you can print the current document displayed in the viewer.

 Printing images that contain markups to Adobe PDF using File>Print, does not permanently burn the markups in the document. If you want markups burned in, you must run the documents through the Production process, then print the produced document.





To Print in Concordance Image

1. In **Concordance Image**, locate the document you want to print, and then from the **File** menu, click **Print**.
2. On the **Print** tab in the **Print** dialog, select what you want to print in **Print range** (image, portion, pages, and documents). Select the **Number of copies** to print. On this tab you can also save your print settings or retrieve previous print settings that you want to use.
3. On the **Header & Footer** tab, select the field that you want to appear in the four available headers and footers. Select **Auto increment** for any fields that you want to auto increment for each document. You can also select the associated **Font** button to specify the font for each header and footer.
4. On the **Options** tab, specify which **Redlines** should appear and define **Separator sheet** details if needed.
5. On the **Setup** tab, make sure the correct **Printer** is selected, and select your **Paper** options, **Orientation**, and **Print Quality**.
6. When finished, click **Print**.

Productions

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

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, please contact our Client Training Department by email at training@cloudnine.com to register for the Concordance Administration Fundamentals and the Certified Concordance Software Administrator courses.

See Preparing Productions in the Concordance Administration section for more details.

Printing in Concordance

Concordance provides several printing options for 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 the Browse and Table views. The view you print from determines the format of the print output. The print output format looks similar to the view you print from.

You can use Concordance to print:

- Records directly from the Browse view
- Record batches based on queries
- Transcript annotation reports (Annotation Report Writer)
- Tagged record lists
- Summary reports from the Table view (Report Writer or Send to Excel)
- Selected field data
- Print multiple documents and images

You can also print document pages and images in Concordance Viewer, Concordance Native Viewer, and Concordance Image. See [Printing with Concordance Viewer](#)^[219], [Printing with Concordance Native Viewer](#)^[263], or [Printing with Concordance Image](#)^[295] for more information.

Please be aware of the following:

- When printing documents that have been reviewed and redacted using Concordance Viewer, any redaction placed on the document will print transparent revealing the text underneath. If you want to print opaque redactions, be sure to select the Opaque option in the Markups section of the print settings.
- When printing documents that have been redacted in Concordance Native Viewer, any redaction placed on the document will print transparent revealing the text underneath. If you want to print opaque redactions, you must run the

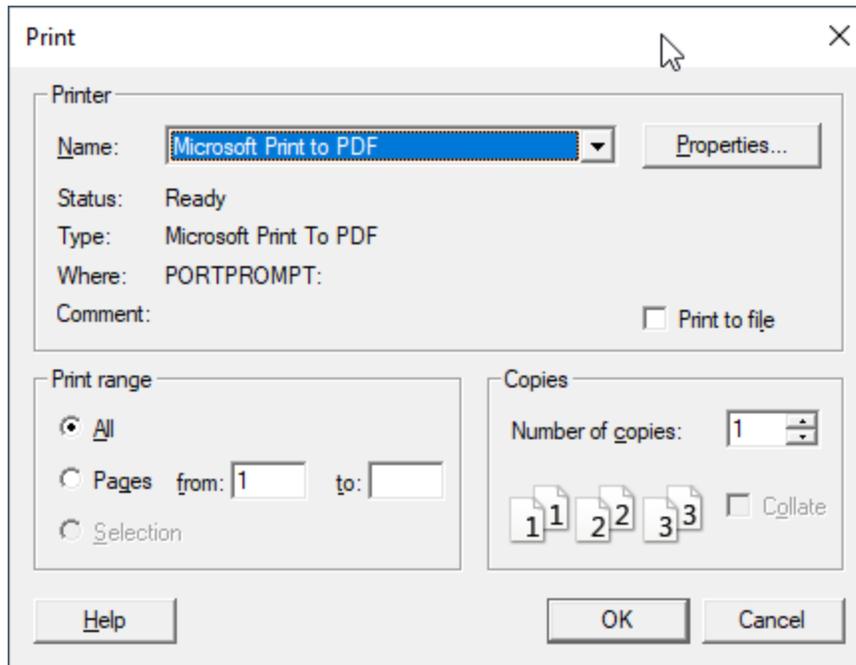
documents through the Production process in Concordance, then print the produced document.

While you have basic options for printing page numbers and dates, Concordance also offers selections for printing highlighted annotations, underlined hits, field labels, and more. These print options are useful for printing sets of records for full-text review or to print 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 for generating a summary listing. With lengthy documents like depositions, transcripts, and research reports, print a Keywords in Context (KWIC) report to capture pertinent information in context.

When a batch of images are printed, the original images never change. Annotations, highlights, and other markings are stored in the Concordance database, and can be modified without modifying the original image. Selected annotations and headers and footers can be applied to only the paper copies of images for printing or fused directly onto new images when produced. When images are printed, they have a slightly smaller output than the original image. Images are automatically reduced by 2 or 4 percent, based on the type of image file.

Media files are usually only printed in productions by your Concordance administrator once annotations are completed and all redacted content marked. This ensures that opposing counsel does not receive any original copies and other staff do not view privileged content. However, there may be instances when you need to print images or create certain reports.

Printing from the File Menu



By selecting **Print** from the **File** menu, you can:

- Print the current record as a PDF in Browse View
- Print a list of searches in Review View

Printing Standard Reports

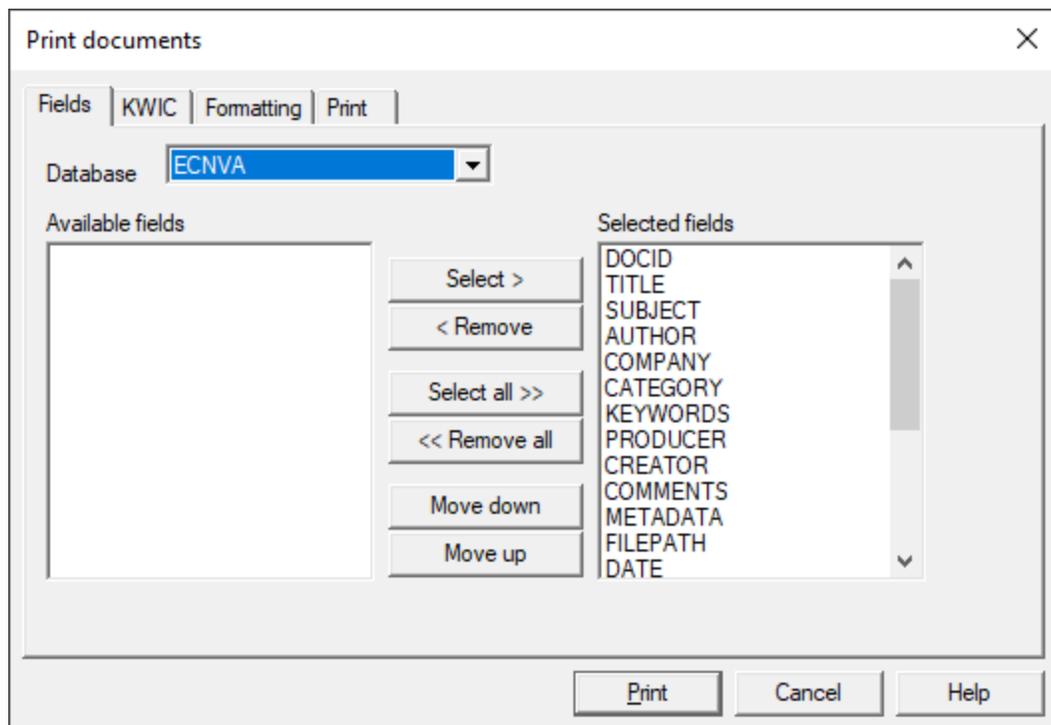
If you want to print multiple records or transcripts, you can generate a standard report. Your current search query determines which records or transcripts are available to print on a standard report.

Standard reports have a number of customizable features such as headers, footers, date and time stamps, page numbering. When you print a standard report in Concordance, by default the printed font format for records is determined by your personal Concordance display settings. If you do not want to use the default format, you can define your preferred print settings on the Print documents dialog box before printing. You can also save your preferred print settings for future printing, or reuse previously saved print settings.

To ensure records print the way you want, it is recommended to preview your print job before sending it to the printer. To preview your print job, click the Print preview button on the Print tab in the Print documents dialog box.

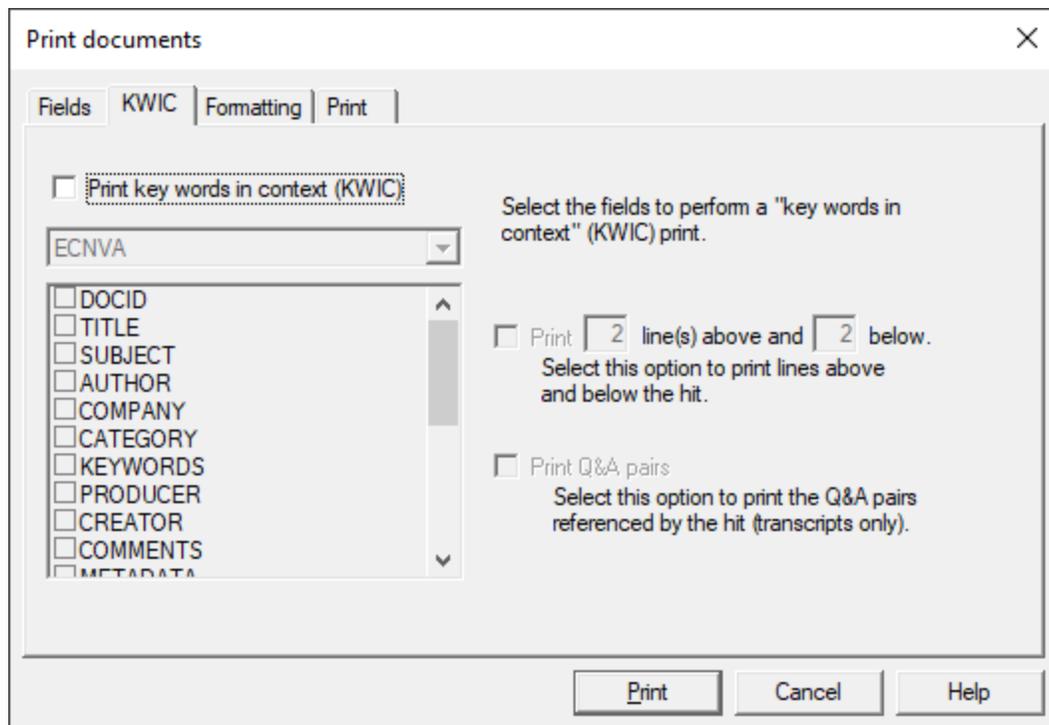
To Print Standard Reports

1. On the toolbar, click the **Print** button.
2. Click the **Fields** tab. The Fields tab is used to define the fields and their order to include on the report for the selected database. The fields are listed alphabetically in the Available fields field.



3. In the **Database** list, select the database containing the records you want to print. The Database field defaults to the current Concordance database.
4. In the **Available fields** list, choose the fields you want to include on your report and add them to the **Selected fields** list using the **Select** and **Remove** buttons in the center. You can also reorder the Selected fields as needed with the **Move** buttons.

- To print the keywords (search hits) for the current query, click the **KWIC** tab and select the **Print key words in context (KWIC)** check box.



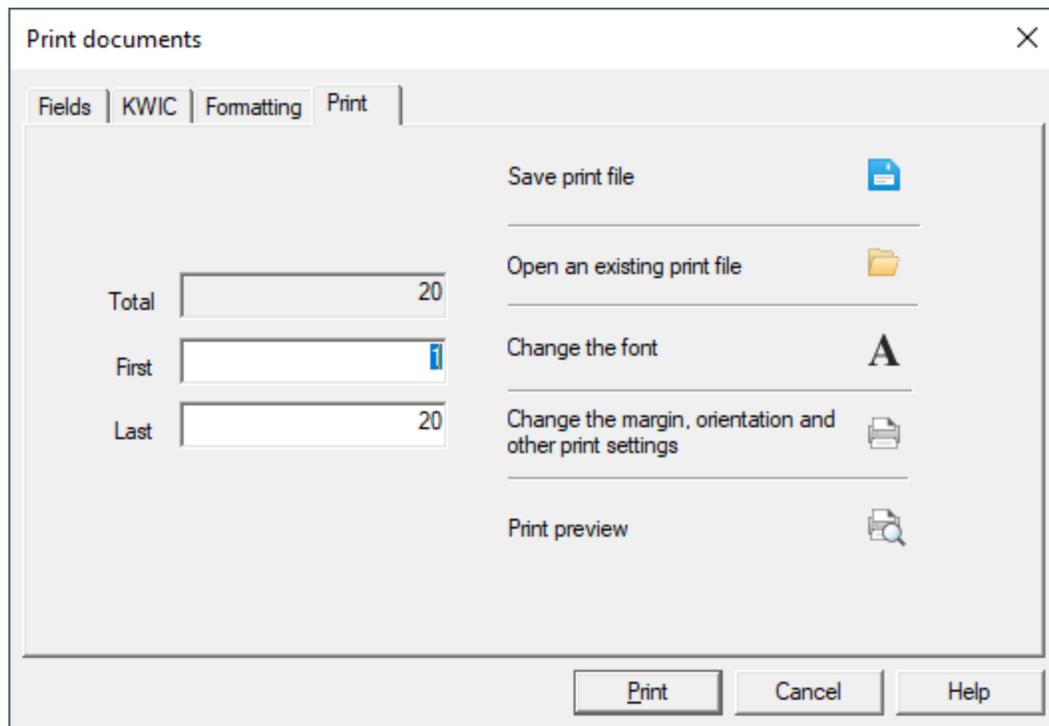
- The database and fields you selected on the Fields tab are displayed below the **Print key words in context (KWIC)** check box. In the list, select the check box next to the fields you want to print keys words in context.
- To include record text above and below the key words, select the **Print line(s) above and below** check box and type the number of lines to include above and below in the line number fields.
- To print the question and answer pair associated with the key words in transcripts, select the **Print Q&A pairs** check box. This check box only applies to transcripts.
- To add header and footer text, and define other printing controls, click the **Formatting** tab.

The screenshot shows the 'Print documents' dialog box with the following settings:

- Header: [Empty text box]
- Footer: [Empty text box]
- Page breaks: Widows = 4, Orphans = 3
- Options:
 - Print date:
 - Print time:
 - Print field labels:
 - Print page numbers:
 - Print document numbers:
 - New page for each record:
 - Highlight annotations:
 - Compressed printing: 1-up printing (dropdown)
 - Underline hits:
 - Bold hits:
 - Italicize hits:
 - Hit Color: Color (dropdown)
 - Print page borders:

10. In the **Header** field, type the report header. The header displays at the top of each printed page and is left justified on the page.
11. In the **Footer** field, type the report footer. The footer displays at the bottom of each printed page and is left justified on the page.
12. In the **Widows** and **Orphans** fields, type the number of widows and orphans to allow on each page. Widows are the lines of text left at the bottom of a page when a record is split in two. Orphans are the lines of text at the top of the next page. The number entered in the Widows field controls the minimum number of lines Concordance allows 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 number in Widows field, then the document is moved to the top of the next page. The number entered in 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 number in the Orphans field, then lines will be 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 document to print at the top of the new page.
13. Select any additional **Options** that are necessary:

- **Print date** puts the current date on each page below the footer.
 - **Print time** puts the current time on each page below the footer.
 - **Print field labels** prints the field name before each field.
 - **Print page numbers** puts the page number at the bottom of each page on the right.
 - **Print document numbers** will number each page of the report with current and total page numbers.
 - **New page for each record** prints each document on a separate page.
 - **Highlight annotations** highlights both notes and annotations in the report.
 - **Compressed printing** allows you to compress multiple pages on one printed page.
 - **Print page borders** is only available for Compressed printing and prints borders around the page.
 - **Underline hits, Bold hits, Italicize hits,** and **Hit Color** all affect how search hits will display in full-text paragraph fields
14. In the **Options** section, select the print options you want to apply to your report. Search hits are only highlighted in the full-text paragraph fields, not in fixed-length text, date or numeric fields. If a record is edited after the search, the record's search hit will not be highlighted in the report. To include the edited record's search hit, index or reindex the database and re-run the search.
15. To finalize the rest of your print settings click the **Print** tab.



16. **Total** is read-only, and displays the total number of documents in the current query. In **First**, type the number of the first document you want to include in the report. In **Last**, type the number of the last document you want to include in the report. You can also click:

- Save print file - allows you to save your print settings to a print format file (.fmt).
- Open an existing print file - allows you to load settings from an existing print format file (.fmt).
- Change the font - allows you to select fonts for the fields, data, transcripts, and header/footer in the report.
- Change the margin, orientation and other print settings
- Print preview - shows a preview of your report.

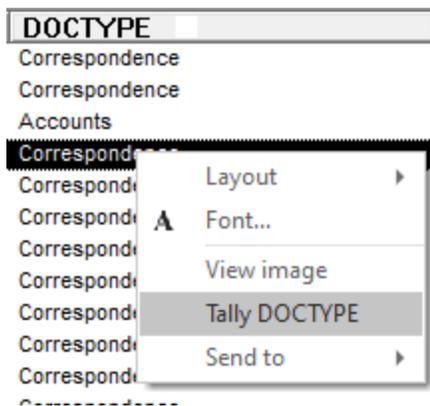
17. Click the **Print** button to generate and print the report.

Printing by Tally

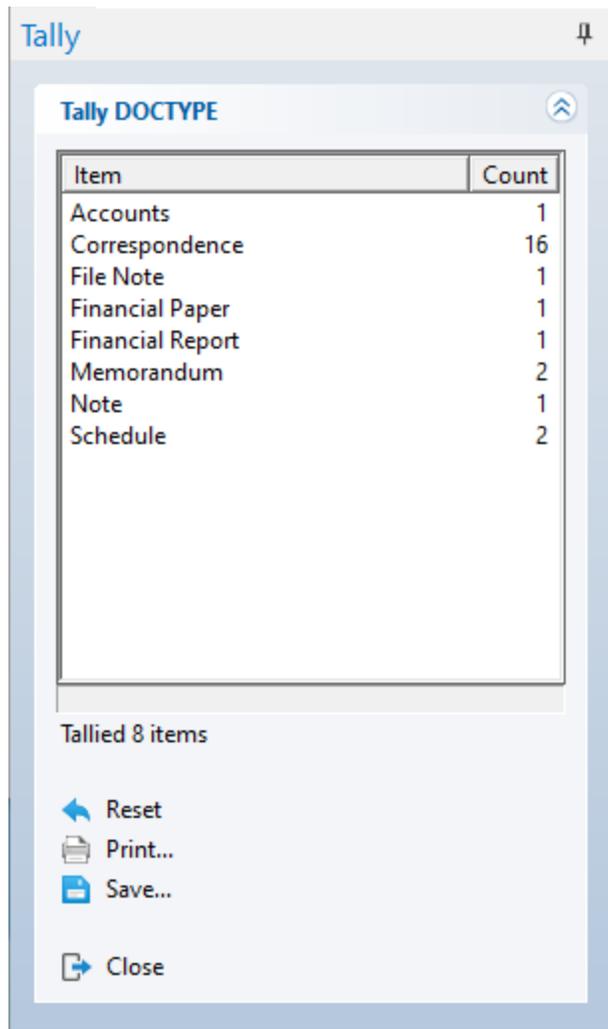
The tally feature in the Tally task pane itemizes field information for searching, and is also a great tool for helping you organize your document collection in preparation for printing reports. For example, if you want to print a subset of records based on the document type, such as a group of financial reports. The fastest way to locate these records is by running a tally count and then printing them based on your needs.

To Tally Records for Reports

1. In the **Table** view, right-click a record in the field column you want to tally, and click **Tally [field name]**.



1. Clicking Tally [field name] displays the tally results in the Tally task pane.



2. In the **Tally** task pane, double-click an item in the **Tally** list.
 - i. Double-clicking an item in the tally list displays only those records in the Table view. For example, if you ran a tally on the DOCTYPE field, and double-clicked Financial Report in the Tally task pane, only financial reports are displayed in the Table view.
3. Print the applicable records. See [Printing Standard Reports](#)³⁰¹ for details about printing individual or multiple records. See [Exporting Concordance Data](#)³⁶⁸ for details about saving data to Microsoft Excel.

Concordance Databases

We recommend preparing and outlining your database field structure in advance. This may involve discussions with a lead attorney and key people involved in the case. Making changes to the database structure once data has been loaded has a high potential for database corruption, so careful preparation helps minimize the need for changes later.

Use the database checklist to assist you when you first begin creating and indexing databases to ensure that you understand each step of the process and don't forget to verify critical data.



Making changes to your database template is the number one way to corrupt your database. It is important to prepare and outline your field structure in advance to avoid changes after data has been loaded.

Database Capacities

Database	Capacity
Number of documents	33 million
Concatenated databases	128

Datab ase	Capaci ty
Concate nated docume nts	Over four billion
Docume nt size	3 billion character s
Fields	250
Database .ivt file	1/2 terabyte
Database dictionar y	1 terabyte
Database file path name	199 character s in length

Database Checklist

Data Review	
<input type="checkbox"/>	Do you know how many documents or gigabytes (GB) of data have been received?
<input type="checkbox"/>	Are your files converted to types that are recognized by Concordance?
<input type="checkbox"/>	Do you understand Concordance field structure and how it affects importing data?
Review Load Files	
<input type="checkbox"/>	Have you reviewed the contents of the data volume you are about to load?
<input type="checkbox"/>	Have you reviewed your data load file for acceptable delimiters and date formats?

	Data Review
<input type="checkbox"/>	Do you have fields set in place for data that you are importing?
<input type="checkbox"/>	Have you verified 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 overlap, a correction should be requested from the source prior to loading.
<input type="checkbox"/>	Did you receive an image load file along with your images? If not, you can create one.
<input type="checkbox"/>	Did you adjust the directory path of your image load files, if need be?
<input type="checkbox"/>	Have you verified that your alias in the image load file matches the

Data Review	
	Image field in the Concordance database?
<input type="checkbox"/>	Have you reviewed how your OCR has been formatted, named and organized? Do you know which CPL to use for import if the OCR was not included in the .dat file?
<input type="checkbox"/>	Importing a .pst file requires that a user profile is set up for each user in Microsoft Outlook. Have you completed this process?
Database Structure	
<input type="checkbox"/>	Did you create a database template that includes administrative fields?

Data Review	
<input type="checkbox"/>	Did you select an image key field for your images?
<input type="checkbox"/>	Did you validate the EDITTRAIL and CREATEDATE fields?
<input type="checkbox"/>	Did you index all fields needed for full-text searching?
<input type="checkbox"/>	Did you create additional miscellaneous fields?
CPLs	
<input type="checkbox"/>	Did you verify supported CPLs for your current Concordance version by reviewing the ... \ProgramData\CloudNine\Concordance 10\CPL folder?

	Data Review
	Case Review
<input type="checkbox"/>	Have you reviewed case records to understand what types of files you are importing?
<input type="checkbox"/>	Did you review case records to plan your field structure?
<input type="checkbox"/>	Do you understand what types of reports you may be generating for maintenance and to support reviewers?
<input type="checkbox"/>	Do you understand the file and media requirements for print productions, especially for opposing counsel?
	Ongoing Maintenance

	Data Review
<input type="checkbox"/>	Have you outlined maintenance processes and schedules that affect your new databases?

Concordance Database Files

Each Concordance database uses several files during operation. Only four are absolutely required to open and use a database. The four mandatory files are the database control block (.dcb), the numeric date text file (.ndx), the text file (.tex), and the security file (.sec). The security file only exists if security has been enabled. All of the other files can be recreated without damaging the integrity of the data. At a minimum, these four files should be backed up for archival purposes.



A B-tree file uses a tree data structure to provide fast search results. The tree data structure minimizes the number of times the database is accessed when searching for a record, resulting in faster searches.



The .TRK file in Concordance uses SQLite. SQLite is an embedded relational database engine, and does not increase the required maintenance and administration of Concordance.

Concordance Database Files

File Extension	File Type	Usage	B-tree File?	SQL File?
.arf	Annotation reports	Contains the annotation report definition. Used by the annotation report writer.		
.arp	Report writer	Contains report definitions in plain text. These files are created and saved by the report writer, and can be edited with any text editor program.		
.cat	Concatenate	Stores a list of concatenated		

File Extension	File Type	Usage	Bitree File?	SQLite File?
	nation	databases.		
.cib	Imagebase	Stores association between media keys and native and image files including markup history (Concordance Native Viewer only).		yes
.cpl	CPL script	Concordance Programming Language (CPL) scripts.		

File Extension	File Type	Usage	B-tree File?	SQL File?
.cpt	compiled CPL script	Compiled version of a CPL script		
.csv	Security	Stores field and menu access for all users (when exported by user).		
.dat	Delimited text	Contains metadata and sometimes OCR for document records.		

File Extension	File Type	Usage	Bitree File?	SQLite File?
.dcb	Data control block	Database definition, including fields, document count, and other settings.		
.dct	Dictionary	All unique words in the database, in alphabetical order. This is not a plain text file, it cannot be read or edited by a text editor or word processor.	yes	

File Extension	File Type	Usage	B-tree File?	SQL File?
.dir	Image base	Stores image keys (Concordance Image Only).		
.fmt	Print settings	Saves print settings for reports generated using the standard print feature. This is a user generated file.		
.fyi	Concordance FYI	A link file that opens a database on a remote FYI Server.		

File Extension	File Type	Usage	Bitree File?	SQLite File?
	Server database			
.fzy	Fuzzy search dictionary	Contains homonyms for words in the search dictionary. This file is created and updated by indexing and reindexing.	yes	
.gatt	Backup	A tag backup file that stores tagging		

File Extension	File Type	Usage	B-tree File?	SQLite File?
		information. Generated by running the TagSaver_v<version>.cpl		
.ini	Configuration settings	Stores various configuration settings.		
.ivt	Inverted text	Used with the dictionary during searches.		

File Extension	File Type	Usage	Bitree File?	SQLite File?
.key	Key fields	Field storage for fast relational searching.	yes	
.layout	Table layout	Stores the defined table layouts.	yes	
.sortlayout	Sorting layout	Stores the defined sorting layouts for the current database.		
.lst	Word lists	Contains predefined values that can be	yes	

File Extension	File Type	Usage	B-tree File?	SQLite File?
		selected from a list when editing fields.		
.ndx	Numeric, date, and text fields	Stores data for the fixed length field types: Numeric, Date, and Text.		
.opf	Print settings	A Concordance Image print file that stores print settings for print		

File Extension	File Type	Usage	Bitree File?	SQLite File?
		jobs generated by Concordance Image (Opticon). This is a user generated file.		
.qry	Query	Stores search query strings.		
-redlines.dcb	Database	Stores markups and notes (Concordance Image Only).		

File Extension	File Type	Usage	B-tree File?	SQLite File?
.sec	Security control	Stores passwords and security settings. Erasing this file can lock up a database if security is enabled	yes	
.snap	Snapshots	Stores search history and auto-restore settings.		
.stop	Stop words	Contains the noise words that are ignored during database indexing.	yes	

File Extension	File Type	Usage	Bitree File?	SQLite File?
.syn	Synonyms	Stores user defined synonyms.	yes	
.tag	Tagged records	Tracks document tagging. No longer used with Concordance 9.5 and higher.	yes	
.tex	Text	Full text paragraph field storage.		
.trk	Transaction	Stores tags and tag histories, security (field and		yes

File Extension	File Type	Usage	B-tree File?	SQLite File?
	n tracking	menu access for all users) and replication data.		
.vol	Volumes	Stores image volume information (Concordance Image Only).		
.xrl	Markup	Stores the current state of markups and placeholders(Concordance Native Viewer Only).		

Temporary Files

Concordance creates and uses temporary files, which are automatically erased when you leave the program. Temporary files are not erased if there is a power outage or other problem which causes an irregular program termination. Concordance places the files in the system's temporary directory as defined by the Windows TEMP environment variable. The two most common functions that create temporary files are indexing and reindexing.

When indexing a database, two temporary files are saved in the local computer's temp directory. Both files begin with the prefix C- and end with the .tmp extension. These files represent the temporary .dct and .ivt files. They are not initially saved on the network server since network latency would severely decrease performance. When indexing is complete, the resulting .dct and .ivt files are copied to the network server.

When reindexing a database, the same temporary files are saved in the local computer's temp directory. In addition, a temporary dictionary file with a .dcb file extension is saved in the local computer's database directory. This file contains information from the newly created records. Near the end of the reindexing process, this dictionary file is merged with the main dictionary file on the network server.

Managing Data Files

Files can be received from a client, data processing vendor, or third party. When receiving data, you should always review all files on the disk, prior to loading the data, to ensure they have the proper formats for Concordance.

Load files or delimited text files are one of the files used to construct your Concordance database. These 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.

Administrators should always make a practice of opening and reviewing the delimited text files when you receive them, as the files are not always prepared perfectly and may need to be modified.

When reviewing your data load files, always check for the following:

- **Field names** – each line of metadata is one record, check each header column to verify data
- **Delimiters** – unique characters that appear in the delimited text file and do not exist in your actual data. Concordance delimiters are:
 - Comma - Field break indicator, default is ? (ASCII 20), customizable, avoid these characters in data
 - Quote - Keeps text together, default is ¨ (ASCII 254) and is only required around fields that have text and spaces, customizable, avoid these characters in data
 - New Line - Manual line break and text wraps within a field, default is ® (ASCII 174), customizable, avoid these characters in data
 - New Record - Starts a new record, final carriage return loads the last record, cannot be changed, industry standard
- **Date format** – date fields are an 8-character maximum with slashes. If dates include slashes, you can import any format. If slashes are not used, then you must use the universal date format of YYYYMMDD or the mm-dd-yyyy date format with dashes.
- **Carriage return** – a final carriage return ensures that the last record will load into the database.



Delimiters are customizable for an organization's internal database design, but many organizations ask vendors to use Concordance default delimiters. If your case records contain the registered trademark symbol, you may want to consider changing the ® to another symbol in the load file.

Data Fields

Before you begin your database construction, it's important to understand the types of data you will receive, and how that information can be categorized into the data format of Concordance fields.

There are two basic field categories available in the Concordance system: defined length fixed fields and variable length paragraphs. The full-text paragraph fields are the most flexible and most commonly used type in a Concordance database.

Fixed fields are always a pre-defined length and contain numbers, dates, or short amounts of text. Documents in a Concordance database can be sorted by the contents of both fixed fields and paragraph fields, but fixed length fields sort much faster. Data in fixed fields is typically searched using relational comparison search operators such as =, >, and <. Fixed fields can be fully indexed and searched using full-text techniques as well.

Fixed length fields have unique applications when compared to full-text paragraphs. While paragraph fields are flexible and variable in size, they do not sort quickly or search easily by comparison.

- Fixed-length fields sort the fastest.
- Fixed fields display faster in Table view than Paragraphs. This is useful in long document databases.
- Relational searches for dates and numbers work best when they are stored in Date and Numeric fields.
- Numeric and date math using the Report Writer or using Concordance's programming language work best with Date and Numeric fields.

Concordance Data Field Types

Data Type	Capacity	Type	Notes
Date	8 bytes	Fixed	Just for dates, keyed by default
Numeric	1-20 digits	Variable	Currency, zero-filled, comma, keyed by default
Text	1-60 characters	Variable	Alphanumeric, keyed by default
Paragraph	12 million characters	Fixed	Alphanumeric, indexed by default, allows rich-text format



If you want a field to be full-text searchable, make it a paragraph type. Reviewers in Browse view will see that fields with an = sign are for relational searches and fields with a : sign are full-text searchable.

Understanding Field Structure and Applying Properties

Concordance does not have a predefined field structure and there are no required fields. This means that preliminary planning in how you construct fields and apply properties to each field is essential. The general Concordance field profile includes:

- No predefined structure, no required fields
- Maximum of 250 fields per database
- Field Name maximum of 12 characters, including: Letters, Numbers at middle or end, Underscores in the middle only
- Field names are stored in capital letters
- Field name saves when the data type is selected



Media (image) key field names with Unicode characters are not supported.

Concordance Field Properties	
Image (Concordance Image Only)	Indicates which field contains the image key or alias, only selected once per database and is usually the BEGNO field.
Media (Concordance Media Only)	Indicates the field that contains the media key or alias, only selected once per database and is usually the BEGNO field.

Concordance Field Properties	
ance Native Viewer Only)	database and is usually the BEGNO field.
Key	Speeds sorting and relational searching (adds values to database .key file), keying everything dilutes the value
Accession	Copies UUID in system table into visible field, good for sorting by load order, great for tracking gaps
System	Field cannot be seen by users, Concordance creates these for replication/synchronization information
Indexed	Enables full-text searching (adds values to .ivt and .dct files)

Guidelines for Creating Fields	
Bates	A unique serial number used to identify a

Guidelines for Creating Fields	
Number	record. When setting up the numbering system, think of the longest number you might need given your case record load. Designate a length that is large enough so data does not truncate. Choose text as the field's properties in case you need an alphanumeric system implemented.
Media field (Image field)	Select the Media (Image) Key setting to indicate the media key or alias field. You can click the View image (camera) button to launch and link the imagebase files with the corresponding Concordance database records. Only make this selection once per database for a unique field, this is generally the BEGNO field.
Keyed fields	Select the Key setting to improve sorting and relational searching speed.
Indexing	Indexing puts data into the dictionary and index. You can index any data type. Paragraph fields are indexed by default. Full-text searching only works on indexed fields. Avoid indexing unique values, serial, Bates numbers, and dates to optimize the full-text searching speed. Use relational searching for non-indexed fields.

Guidelines for Creating Fields	
OCR2 field	This field is created as an overflow field for OCR1, just in case the 12 million character limit for OCR1 is exceeded. This field name must have the same alpha prefix as the primary field and the numeric suffix must be a consistent width and start at 1. Fields must be entered in order by suffix. Use the ReadOCR_v[version #].cpl if you need this overflow field.
Punctuation	Your customizable Punctuation list designates what punctuation you can use for full-text searches, as long as the characters are embedded between alphanumeric characters and are within quotes. You only need to set punctuation once for each database.
Dictionaries/Indexes	Big dictionary and index files slow search processing. Do not bloat these files with unnecessary entries; build stopword lists to exclude them.
Field Validation	Some fields require additional attributes for tracking purposes, like EDITTRAIL and CREATIONDATE date fields. These attributes are set in the Data Entry Attributes and must be added before importing load files in order to the capture information.

Guidelines for Creating Fields

Table view	<p>Field column width in Table view is determined in the Types setting in the Modify dialog box. The default column width is the field length identified in the Data Types table, and as set in field properties. And by default, paragraph fields aren't included in Table view to keep display speed optimal. You can customize Table view to include paragraph fields at any time.</p>
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Common Database Fields

Field	Type	Length and Option Settings
BEG NO	Text	30, Key, Image
END NO	Text	30
DOC DATE	Date	Key, MM/DD/YYYY

Field	Type	Length and Option Settings
DOC TYPE	Paragraph	Indexed
DOC TITLE	Paragraph	Indexed
AUTHOR	Paragraph	Indexed
RECIPIENT	Paragraph	Indexed
PAGES	Numeric	Length 20, Places 0, Plain Format, Key

Field	Type	Length and Option Settings
TEXT 01	Paragraph	Indexed
TEXT 02	Paragraph	Indexed

Common Administrative Fields

Field	Type	Settings
ACCE SSID	N u m e r i c	20, 0, Accession, Use to track delete documents. Generates a record load order number.
CREA TEDA TE	Dat e	Set properties using the Validation command on the Edit menu, normally not keyed or indexed

Field	Type	Settings
EDIT TRAIL	Paragraph	Set properties using the Validation command on the Edit menu, includes YYYYMMDD, time, time zone, [session # -- asession #] per user
PRO DBEG1	Text	Captures beginning Bates numbers for first production. Using number suffixes avoids having to rename fields later for additional productions.
PRO DEND1	Text	Captures ending Bates numbers for first production. Using number suffixes avoids having to rename fields later for additional productions.
PRO DNOTES1 PRO DNOTES2	Paragraph	Enter pertinent information here about the person who ordered the production, add this on every single record in a production set.
PRO DDATE1	Date	Enter the production date here with global edit or AppendTextToField_v<version>.cpl.

Field	Type	Settings
PRO DTA GS1	Par agr ap h	Used to capture tags as they existed at the time of production using the Tag To Field command, Tools > Manage Tags/Issues.
TAGS	Par agr ap h	Used to hold the names of checked tags generated by the Tag To Field command, Tools > Manage Tags/Issues.
TAGI NFO	Par agr ap h	Used to hold activity generated by the Tag History&Store It_v<version>.cpl.
CUST ODIA N	Par agr ap h	Original owner of the data.
REVI EWS TATU S	Par agr ap h	Name of person who reviewed the file.
ATTY NOT	Par agr	Used to hold attorney notes.

Field	Type	Settings
ES	paragraph	
ADM IN1 ADM IN2 ADM IN3 ADM IN4	Paragraph	Extra fields to hold data generated later for any reason, make several of them. When you make a new field, you must run a full index so these fields save valuable time. Make some paragraph and some for dates.

Additional Administrative Fields and Naming Conventions

Field	Type	Settings
Serial Numbers	Text	Can be used to link to image files if BEGNO is not used. May have many serial numbers during the life of a database, usually matched with

Field	Type	Settings
		the .tif file name as the first field in the database.
BEGB ATES BEG DOC STAR TPA GE	Text	Alternative field names for BEGNO.
END BATE S END DOC END PAG E	Text	Alternative field names for ENDNO.
DOC NO	Text	Document number, an alternative to using serial numbers key to the page, more common in e-documents that are not .tif files.

Field	Type	Settings
BEG ATTA CH	Text	Used to denote attachment range.
END ATTA CH	Text	Used to denote attachment range.
INCL UDE S	Text	Holds Bates or control numbers of all pages inside the document, facilitates searching for middle page .tif files.
PAR AGR APH	Paragraph	Alternative name for DOCTYPE field.
Docu ment meta data fields	Paragraph	Also called bibliographic metadata fields. Typically includes author, recipient, custodian, dates (sent, received filed, etc.), subject, title, etc. Generally this information is visible on the face of the document.

Field	Type	Settings
System metadata fields	Paragraph	Typically includes information captured automatically by the computer like last access date, modification date, and print date. This information may not appear on the face of the document.
TEXT 1 TEXT 2	Paragraph	Alternative naming convention for body text fields like OCR1, OCR2, OCR3. Used by ReadOCR_v<version>.cpl to hold imported OCR text. If these fields are named with the same alpha prefix (TEXT for example) and have numeric suffixes that start with 1, are the same numeric length, and are in order ascending by suffix, the CPL script overflows additional text into subsequent fields, as needed.
BODY, TEXT or MESSAGE	Paragraph	Naming conventions for e-documents that are not OCR scanned, fields names are usually with numeric suffixes.

Field	Type	Settings
ATTACHMENT or FILEPATH	Paragraph	Customarily used to hold a clickable hyperlink to the native document in electronic format. If this field contains a file path or web address, running the CreateHyperlinks_v<version>.cpl converts it to a hyperlink. Another use is for this field to hold the Bates number of records in Concordance, which are attachments to the current record. When populated with Bates numbers, the FindAttachments_v<version>.cpl locates the attachments. Or, this field may contain Bates numbers of any records that are attached to this document.
DOCUMENT	Paragraph	Holds notes about the document condition, like Marginalia.
PRIVCALL	Paragraph	Holds the reason a document or redacted sections are marked as privileged, like Attorney-Client, Priest-Penitent, Medical, etc.

Field	Type	Settings
MENTION S	Paragraph	Keywords included in the document.
LOAD DATE	Date	Alternative name for CREATEDATE field. Used to record the date the record was created, date data type.
AUDIT TRAIL	Paragraph	Alternative name for EDITTRAIL field. Records the date, time zone, computer session ID, and user name any time a record is changed in Edit mode, and paragraph data type.
DISC SOURCE or SOURCE	Text	Used for entering the name of the disk the data is loaded from or physical media it is delivered on, includes disk number, case number, client number, name of person who loaded it, etc.
Administrative	Paragraph	Consider creating ADMIN1PARA, ADMIN1TEXT, ADMIN1DATE, etc. to hold specific types of data.

Field	Type	Settings
fields with different data types	h or Date	
Template for administrative fields	(not applicable)	<p>Consider creating this template. Each time you make a new database, you can insert fields above them to accommodate data.</p> <p>To create a template: on the Documents menu, point to Export, and then click Structure. Locate and save the existing database structure in the Templates folder that is located in the same folder as the Concordance .EXE file.</p>
REVIEWE DBY	Paragraph	Alternative name for REVIEWSTATUS. Name of the attorney who reviewed the file.
TAG SATP	Paragraph	Alternative name for PRODTAGS1. Tags as they existed for production.

Field	Type	Settings
ROD	aph	

Handling Empty Data Fields

Empty fields are those that contain no values. You can configure a database so empty fields are not visible in the field listing. Hiding unused fields can help to improve the readability of database records for end users. Showing empty fields is generally a preference for Concordance administrators, who typically want to have all database fields visible whether they contain data or not.

By default empty fields are not visible. This means that when you create a new database but before you import data, no fields are visible since none of the fields contain any data. After you import data, any field that does not contain data will not be visible.

To Show or Hide Empty database fields:

1. Open the Concordance database you want to view.
2. From the **Tools** menu, click **Empties**. A check mark next to the **Empties** command indicates that empty fields are visible, a missing check mark indicates that empty fields are not visible.

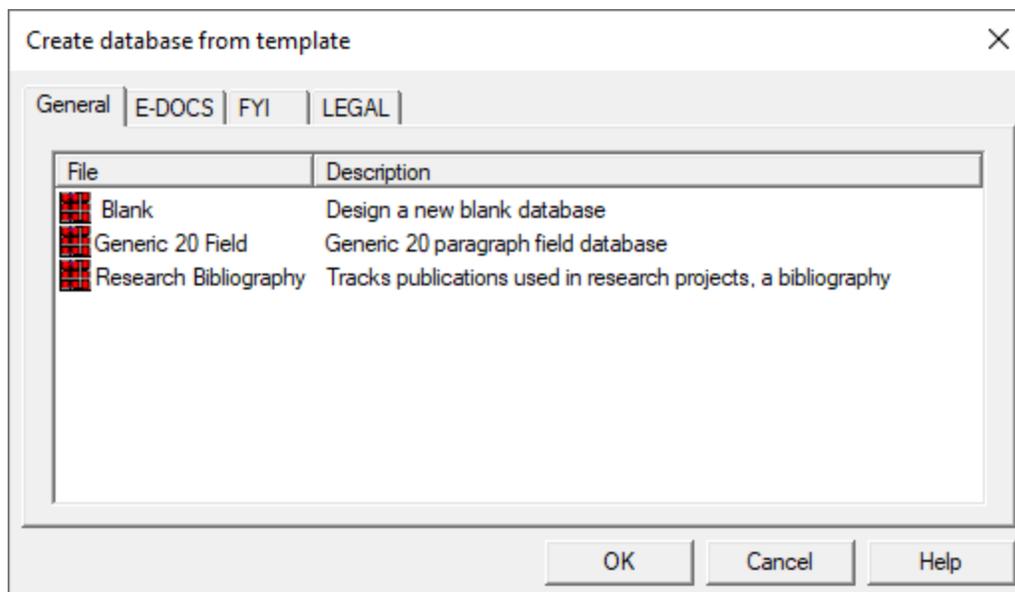


If you have the option to view empties enabled, you may still see fields with no data on individual records. This situation occurs if data exists in that field for any other record in the case.

Database Templates

Database templates are stored in C:\ProgramData\CloudNine\Concordance 10\Templates. All templates in the Templates folder and the Templates folder's subfolders are displayed in the **Create database from template** dialog box. With the exception of the General tab, the Templates folder subfolders are displayed as tabs in the dialog box. The General tab contains all database templates in the main Templates folder.

You can save your database templates in one of the existing Templates folders or create your own Templates subfolder. Concordance ships with pre-defined templates and template subfolders. You can modify or delete the pre-defined templates and subfolders if they do not meet your organization's needs.



When you create a database, a temporary subfolder is added to the database folder structure. This folder is only temporary and will be removed when the database is closed.

Pre-defined Database Templates

Fold er Nam e	Template Name
Templa tes	Blank Generic 20 Field Research Bibliography
E-Docs	E-Documents E-mail And Attachments
FYI	Fyi Log
LEGAL	Litigation Document Production Transcripts

Create a Database From a Template

1. In Concordance, on the **File** menu, click **Template**. The **Create database from template** dialog displays.
2. Select the template you want from one of the tabs and click **OK**.
3. In the **Create Database** dialog, navigate to the database location, type the name of the new database to create, then click **Open**.
4. If you selected the Blank template, there are no predefined fields, and you will have to define all of the fields in the database. The New dialog displays for you to define the fields in your new database.

Field Name	Type	Length

Status

Documents 0

Fields 0

Punctuation ',./'

Name

Type

Length

Places

Format

Image Key Accession

System Indexed

New Insert Delete Save To File Append Equivio Fields OK Cancel

5. On the right, use the fields and drop downs to define the attributes that are necessary for each new field: Name, Type, Length, Places, and Format. See [Data Fields](#)³³² for more information about the various Concordance data types that are available.
 - The Length affects the column width and how the field appears in the Table View. Small Lengths cause the field name to appear truncated.
 - Places and Format are only used for numeric field types.
 - Negative numbers use an extra place for the negative sign.



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.

6. Review the **Punctuation** and add any other punctuation characters that are integral to your searches.
7. Select the check boxes for the field properties that apply:
 - **Image** - A image/media field is used to link Concordance with a viewer, such as Concordance Viewer or Concordance Native Viewer. 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. You can configure the image viewer you want to use via Preferences. Regardless of the image viewer you use, when you view a document associated with an record in Concordance, the corresponding media/image is displayed in the selected viewer.
 - **Key** - makes the field a key field. Any field can be a key field, but most often fixed-length fields and date, numeric, and text fields that you need to search are designated as key fields. Key fields perform a function similar to indexing without needing to be indexed. For Key fields, Concordance creates a database .key file, which is used when searching key fields. Full-text paragraph fields are only made into key fields to quickly locate empty paragraph fields. Use restraint when designating key fields because they take up more room and add administrative overhead.
 - **Accession** - unique serial numbers internally assigned to each record in Concordance databases. Accession numbers are stored with each record and are managed entirely by the database software. They stay with the document as long as the document stays in the database, even if other records are deleted around it. Accession numbers cannot be edited or modified in any way, but they can be viewed. Only ONE database field should be marked as Accession.

- **System** - created by Concordance. Concordance automatically selects the System check box for system fields, which are hidden fields with no read or write end-user privileges. System fields are used for internal system administration features such as replication. Under normal circumstances, system fields should never be indexed, added, deleted or modified by users.
 - **Indexed** - a field must be indexed to use Concordance's full-text search capabilities. Indexing places every word in the field into a dictionary for fast retrieval. Concordance automatically selects the Indexed check box when you create a paragraph field. You need to manually select the Indexed check box if you want to index other field types. Be sure to index the database after modifying the Indexed check box setting to update the dictionary files.
8. To add a field to the database, click the **New** button.
 9. The order the fields are listed on the left is the order the fields will appear in Concordance. Use the **Insert** or **Delete** buttons, as needed, to rearrange or remove your database fields.
 - To move a field, click the field in the field list, click the **Delete** button, then click the field just below where you want to move the field, and click the **Insert** button.
 - To insert a new field into the existing field list, click the field just below where you want to add the field, and click the **Insert** button.
 - To delete a field, click the field in the field list and click the **Delete** button.



Make sure that the database fields you are creating match the fields in the header row of the corresponding delimited text file you will be using to import the field data.

10. If you would like to save the list fields in your database to a .txt file, click the **Save To File** button.
11. Click the **OK** to save your database.

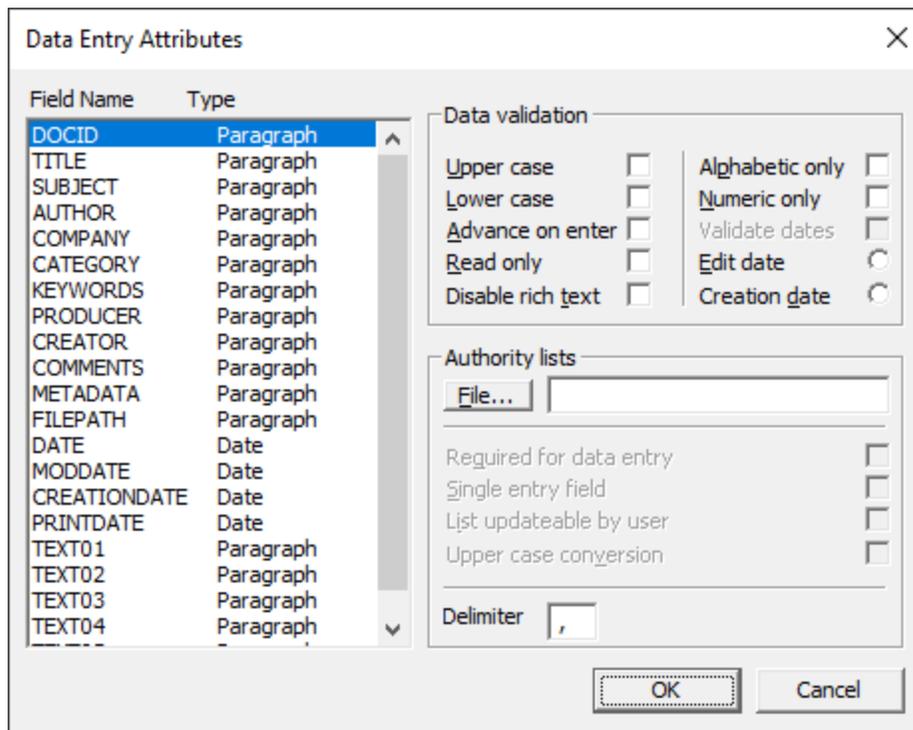
Create a Database Template

Creating a database template is great for building future Concordance databases. Database templates are created by exporting an existing database's structure. When you export a database template, the template includes fields, data types, properties, punctuation, stopwords, field data validation settings, and .ini file settings like alias groups and tags. The database structure is stored in a database.dcb file. Security settings are not included in the template.

1. In Concordance, open the database you want to use to create a database template.
2. On the **Documents** menu, select **Export**, and click **Structure**. The **Copy Structure** dialog displays.
3. Navigate to the Templates folder or one of its subfolders, type the name of the database file in the **File name** field, and click **Save**. If you want to create a new subfolder, navigate to the Templates folder, create the subfolder, type the name of the database file in the **File name** field, and click **Save**.

Data Validation

Once you have created your database and its fields, you can define the data validation attributes for your database fields in the Data Entry Attributes dialog. Data validation attributes are settings that define how data is entered in fields from Edit view.



Define Data Validation Attributes for Fields

1. On the **Edit** menu, click **Validation**. The **Data Entry Attributes** dialog displays.
2. In the **Field Name** list, select the field to edit data validation attributes for.
3. In the **Data validation** section, select the options you want to apply to the field.
 - **Upper case** - converts field text automatically to all upper case letters.
 - **Lower case** - converts field text automatically to all lower case letters.
 - **Advance on enter** - advances the cursor to the next field when a user presses the Enter key in the Edit view. This functionality is the default setting for fixed-length fields. If you select the Advance on enter check box for a full-text field, but need to insert a carriage return within the field, press CTRL+ENTER.

- **Read only** - allows users to view and copy data from the field, but they cannot edit or modify the field.
- **Disable rich text** - disables the Rich Text Toolbar and only allows plain text to be entered in the field. Existing rich text will remain in the original format. Used for text fields.
- **Alphabetic only** - allows only alphabetic characters in the field.
- **Numeric only** - allows only numeric characters in the field.
- **Validate dates** - used for date fields to validate whether a real date is entered in the field. This check box allows users to enter partial dates in the field, with zeros for unknown days, months, or years. If an invalid date is identified, users can correct the date or ignore the error.
- **Edit date** - populates the field with the current date automatically when a record is edited. Select this option for the EDITTRAIL field or its equivalent.
- **Creation date** - populates the field with the current date automatically when a record is created in Concordance. Select this option for the CREATEDATE field or its equivalent.



Upper case, Lower case, Alphabetic only, and Numeric only are only supported with English text.

4. To assign an authority list to the field, click the **File** button. In the **Open** dialog box, navigate to and select the appropriate authority list file.



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.

5. Select the check boxes 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 the Required for data entry check box 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 allows only 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 the Single entry check box and the Required for data entry check box to ensure users can only populate 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, make sure that the List updateable by user check box is not selected. When the List updateable by user check box is selected, the Insert and Delete buttons are displayed at the bottom of the authority list dialog box.
 - **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 the Upper case conversion check box if you are using an existing authority list containing lower case field values. If the check box 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.
7. 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. Delimiters are also used by exploded sort reports and the tally function to determine where one entry ends and another begins.
 8. Click **OK** to save your changes.

Punctuation

When indexing a database, Concordance uses several rules to determine what is a word and what is not. One of the rules is that a word ends when it encounters any character that is not a number or a letter. For instance, the space character would indicate that one word is ending and another is beginning. Some characters, like the decimal point and the comma in numbers or the slash in dates, do not indicate

the end of a word. They are called embedded punctuation and are a part of the word.

The set of embedded punctuation recognized by Concordance during the indexing process is determined by what you enter in the Punctuation field. By default, Concordance recognizes the period (.), comma (,), forward slash (/), and the apostrophe ('). It does not include the hyphen. These characters are only considered part of a word if they are both preceded and followed by a letter or a number.

Changes to the punctuation list are kept with the database. Use any non-alphanumeric character except the space. For example, add @ if you want to search for e-mail addresses. Up to 10 punctuation characters can be entered. Changing the embedded punctuation in the Punctuation field does not update the dictionary. Index the database after modifying the Punctuation field to update the dictionary files.

Concatenating Databases

Concatenation is joining together two or more Concordance databases, allowing you to view multiple databases as if they were one database in Concordance. There could be several reasons to break down larger databases into smaller concatenated databases:

- You can separate databases based on document type, or custodian and still search the entire case's record collection together
- Attorneys may request that records are separated by category, yet still need to combine the databases during case review
- Security is sometimes needed for a smaller set of data, so you can split the database based on security needs

Because one case can contain thousands of records and transcripts, your firm's Concordance administrator most likely will create several databases and join them together to reduce time indexing a vast amount of information, which can take several hours. Separate databases are also created based on type: emails, transcripts, and non-transcript records, so joining them for search purposes is ideal during review projects. Sometimes attorneys may want subsets of records broken

by category, such as all pleading documents and correspondence documents separated by database, and again having the benefit of concatenating them for specific review projects.

As a member of the review team, you must ensure that every pertinent record has been reviewed, sorted and tagged appropriately regardless of the database location. The way to do this efficiently is by concatenating databases and saving appropriate search queries during the discovery process. You will still be able to see every tag and issue, entered by all users, and listed alphabetically.

Concatenating databases is a powerful feature that includes:

- Searching up to 128 databases simultaneously and treating them as a single large file, depending on network set up.
- Opening transcript and non-transcript databases together.
- Using drop-down database lists on field's with selection functions.
- Save indexing time when new records needs to be imported into Concordance, by having a secondary database created and joined with the primary database.
- Save maintenance time when indexing databases. With concatenation, you can perform full index updates offline and index multiple databases at the same time.
- Automatically display tags from all databases.
- Create field groups in INI files so reviewers can search multiple fields under one alias (copy into each .ini file for joined databases).

Things to Know About Concatenated Databases:

- Concatenation is not a structural change, records in each database stay the same.
- Concatenation is not permanent.
- Concatenated databases do not have to have any fields in common.
- Saved .cat files are editable text-based files.

- If a .cat file is saved in the same folder as the primary database's .dcb file, then the concatenated database launches automatically when the primary database is opened. Packing and database modifications are done in the primary database, indexing and reindexing are done on all the databases in the concatenated set in turn.
- Searches search each dictionary file one by one.



Unless you save a .cat file, concatenated databases are merged for only one Concordance session. The next time you open Concordance, you need to rejoin the databases to continue searching in this manner.

Joining Multiple Databases

When you concatenate a set of databases, the databases remain joined only for the duration of your current Concordance session unless you save the concatenated database set as a Concatenated (.cat) file.

Saving a .cat file allows you to easily reopen the same list of databases so that you can search across all the other joined databases in another session or restore saved queries that were previously run on the concatenated set.

There are some instances where setting up a concatenated set can affect other users. You should consult with your database administrator before saving a concatenated set of databases. See [Saving a Concatenated File Set](#)³⁶⁶ for more information.

If you want to preserve your search history for the concatenated set, you need to save your queries during the current session while the databases are joined. You can restore the queries at a later time. When restoring saved queries for a concatenated database, you need to rejoin the databases before re-running the searches.

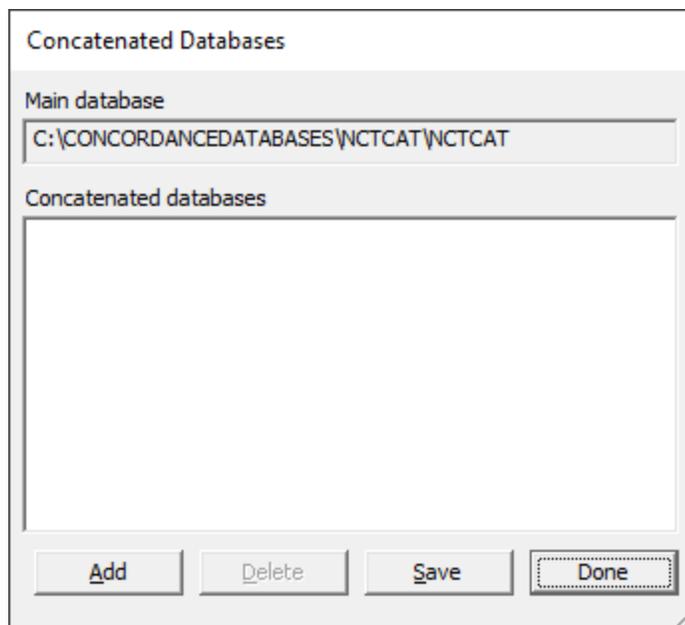


When reviewing a concatenated dataset, all tags in all databases display in the Tags panel. If you apply a tag from one database to a

record in another database, Concordance automatically writes that tag into that record's corresponding database.

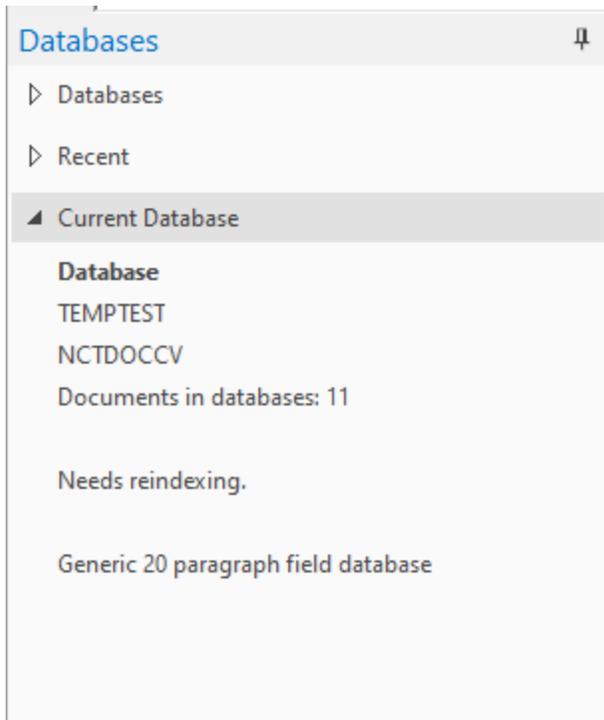
Concatenating Databases

1. To join another database with your current database, on the **File** menu, select **Concatenate** and then **Add database**. The **Concatenated Databases** dialog displays.



2. Click **Add**. Browse to and select the database to add. Click **Open**.
3. The database you selected is listed in the **Concatenated Databases** dialog. Click **Done** to join the database files.

The Current Database pane in the Databases panel displays all the concatenated databases and the total number of documents in the concatenated set. You can also view information about concatenated databases in the Properties dialog (File > Properties).



Joined databases in a Concatenated database set only remain concatenated for the current session unless you save the concatenated database set. Once you close out of the database, the concatenation is removed from each of the databases in the set.

To remove the database concatenation, on the **File** menu, select **Concatenate**, and then **Clear database**.



The Table view layout corresponds to the active database you are reviewing. If you view a record from a concatenated database, your Table view layout changes to display the fields and sort order for that database. Remember to reference the Concordance Title bar to see what database you are viewing for a particular record.



If you are reviewing multiple joined databases at a time, it may be helpful to change the font color or size in each database to help you differentiate between the databases at a glance.

Indexing and Reindexing Concatenated Databases

Edits and changes on various databases are occurring simultaneously by all users who are adding tags and comments, and editing records. Make sure that team members are updating the dictionary for searches by regularly reindexing all the databases in concatenated database sets.

When you Index a concatenated set of databases, Concordance indexes each database in the set. If you have access to multiple workstations, you can Index various databases simultaneously, saving time. When you Reindex a concatenated set of databases, each database in the concatenated set is reindexed, updating the whole concatenated database collection.

If a check mark is displayed next to **Reindex** on the **File** menu, the databases need updating. The check mark disappears from this setting after the process is completed.

Saving Searches in Concatenated Databases

When searching concatenated databases, Concordance searches across all concatenated databases but because it searches each dictionary file one by one, searches may take a bit longer.

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 gathers any updates made since the last time any database was reindexed.

Printing From Concatenated Databases

When printing from a concatenated database set, you have the option to show or hide certain fields.

If you are printing a standard report in Concordance, you need to designate the database you are printing from on the **Fields** tab in the **Print documents** dialog.

To open the **Print documents** dialog, click **Print** on the Standard toolbar. You can also select the fields you want to print and can arrange the field order for printing on the **Fields** tab.

For more information, see [Printing Standard Reports](#)³⁰¹.

Saving a Concatenated File Set

Always consult with your Concordance administrator before saving personal concatenated files to your hard drive or network to ensure you are following internal guidelines for this process. Saving .cat files can affect other users, so you need to exercise care and caution.

You have two options for saving your personal concatenated files:

- Name the concatenated file as you wish and save it to your hard drive or network in a directory that is not the directory containing the primary database file.
- Name the file differently than the primary database and save it in the primary database's directory or another network or hard drive folder.



If you name your personal concatenated file set's .cat file the same name as the primary database and store it in the same folder location as the primary database, then all the databases listed in the file launch automatically when the primary database is opened. This could create confusion and search problems for other team members.

Save a Personal Concatenated File

1. Join the databases you want to include in the concatenated file.
2. On the **File** menu, select **Concatenate**, and then **Save list**.

3. Browse to where you want to save the file, type the name of the .cat file in the **File name** field, and click **Save**.
4. In the **Concatenated Databases** dialog, click **Done**.



If you want to know which databases are joined together in a concatenated file, you can open the .cat file in Concordance, or you can open it in any text editor program to view the list of databases.

Opening a Concatenated File Set

When you open concatenated (.cat) files in Concordance, Concordance automatically opens each of the databases joined together in the file, and lets you search and review the databases as one database.

A concatenated file is an editable text file that you can open in any text editor program to review and edit the joined databases.

Open a Concatenated File in Concordance

1. In Concordance, on the **File** menu, select **Concatenate**, and then **Open list**.
2. Locate and open the .cat file. A new tab displays on the Workspace pane. The new tab name defaults to the name of the primary database in the concatenated file.

Open a Concatenated File in a Text Editor

1. Locate and right-click to select the .cat file on your hard drive or network.
2. Select **Open With** and select the text editor program.
3. The file contains a list of the joined databases with their corresponding directory paths. You can manually edit the .cat file, including cutting and pasting database directory paths directly into the text editor program and saving the file.

Deleting a Concatenated File Set

If you no longer want databases to be joined in a concatenated file or automatically launch each time the primary database is launched, simply delete or rename the .cat file in the directory you originally saved the .cat file.

Exporting Concordance Data

In Concordance, you can export record data from the Table view to Microsoft Excel, CaseMap, and Equivio. The export feature is a great tool for making custom reports, as well as contact and mailing lists. In order to export to Microsoft Excel, CaseMap or Equivio, the software you are exporting to must be installed on your computer.



If you want to export data to Microsoft Word, you can simply copy and paste data from Concordance to Microsoft Word.

Exporting to Microsoft Excel

When you export data from the Table view to Microsoft Excel, Concordance exports data from the records you select in the Table view. The fields and field order currently displayed in the Table view determine which field data is exported for the selected records and the order of the fields exported to Microsoft Excel. Before exporting, you can run a search to display the records you want to export in the Table view, and modify the table layout to define the fields and field order you want to include in the export.



Microsoft Excel has capacity limitations, especially older versions of Excel. Please verify the capacity available for your Excel version before exporting.

1. Run a search to locate the records you want to include in the export to Microsoft Excel.
2. In the **Table** view, adjust your table layout to include the fields and field order you want to export to Microsoft Excel.
3. In the **Table** view, select the records you want to export. You can export multiple adjacent records and non-adjacent records.
4. Right-click in the **Table View**, select **Send To**, and then click **Excel**. Microsoft Excel automatically launches and displays your exported Concordance data in the field order you selected.

Exporting Numerical Data

When you export numerical data from Concordance to Microsoft Excel, if the field value begins with leading zeros, the leading zeros are trimmed from the field value. For example, if you are exporting the BEGNO field value 00020177, the value is exported to Excel as 20177. To keep record numbering consistent with Concordance data, you need to add the leading zeros back onto the applicable field data in Microsoft Excel. See, Microsoft Excel documentation.



Numerical field values starting with alphabetical prefixes are not affected when exporting to Microsoft Excel.

Only the field data that is displayed in the Table view is exported. Field data is exported in the order that is displayed in the Table view, based on the selected table layout. You can use custom table layouts to determine the field data and order of field data exported to another application.

Exporting to CaseMap

When you export table data to CaseMap from the Table view, all of the records listed in the Table view are exported to CaseMap.

1. In Concordance, run a search to locate the records you want to include in the export to CaseMap.

2. In the **Table** view, right-click the records, select **Send To**, select **CaseMap**, and then click **Send all documents in query**.
3. A message displays indicating that CaseMap does not support Unicode and we will only send single-byte (Ascii) text to them. Press **OK** if you want to continue.
4. Click **OK** to continue. Clicking OK opens the Completed dialog.
5. Click the **Continue** button. The Bulk Send to CaseMap wizard in CaseMap opens. For more information about exporting Concordance data to CaseMap and using CaseMap's Bulk Send to CaseMap wizard, see the CaseMap documentation.

Protecting Data

Protecting discovery document collections is a sensitive and demanding job. Your Concordance administrator or Litigation Support Manager must perform a variety of maintenance processes and manage various files to preserve the integrity of your document collection. Stringent litigation guidelines must be adhered to and maintenance schedules followed to protect the information and ensure your databases are up-to-date and running efficiently for the review team.

Processes involved in protecting your Concordance databases include:

- Taking Snapshots
- Backing Up Databases
- Zapping Databases
- Packing Databases
- Deleting Tags
- Performing Global Replacements

Consult with your Concordance administrator or Litigation Support Manager to gain a deeper understanding of your organization's maintenance process schedule. If you are responsible for maintaining the database at an administrative level, it is

recommended that you attend our Concordance Administration Fundamentals and Concordance Certified System Administrator classes.

Avoid using administrative features in Concordance that you are unfamiliar with, because you could inadvertently cause data loss or corruption. These features may also require a backup of the database before proceeding.



Whenever possible, consult with your database administrator before attempting to use any administrative features so they can either backup the database before you proceed or take care of administrative tasks for you.

Saving and Restoring Snapshots

Snapshots are a point-in-time picture of your work history. Using snapshots is one way reviewers can help track and preserve both search history and search results.

Saved snapshots can easily be restored to see what the contents of a database were on a particular day, and what search results were found at that moment in time. During a lengthy review, tracking your work for the day is also important, not only to manage tasks and schedules, but to provide a placeholder for searches so you can jump right back into your project without duplicating previous efforts.

Unlike a query file, a snapshot saves the search results for documents retrieved, not which words were searched. This means that a snapshot will not locate new or updated documents in a database; a snapshot only displays those documents captured at the time the picture was taken. Because snapshots provide a picture-in-time reference, all your search queries and customized sort settings are preserved and can be displayed again or restored at a later time. If your database is actively being edited, changes will not be reflected in a snapshot saved last week. For instance, a document deleted from the database since the snapshot was taken will display as blank when you open the snapshot in Concordance. To capture updates after edits have been made, rerun your snapshot queries.

Snapshots are saved as .snp files and can only be restored to the original databases. When you restore a snapshot file, Concordance automatically opens the databases associated with the file, with all queries and sorts preserved.

There are two ways to save snapshots in Concordance. You can manually save snapshots or you can use the Auto restore command to have Concordance automatically save snapshots for you.



If you regularly save snapshots at the end of every work session, we recommend that you periodically review and delete outdated or unnecessary files due to their large file size on your hard drive or network.

Manually Save a Snapshot

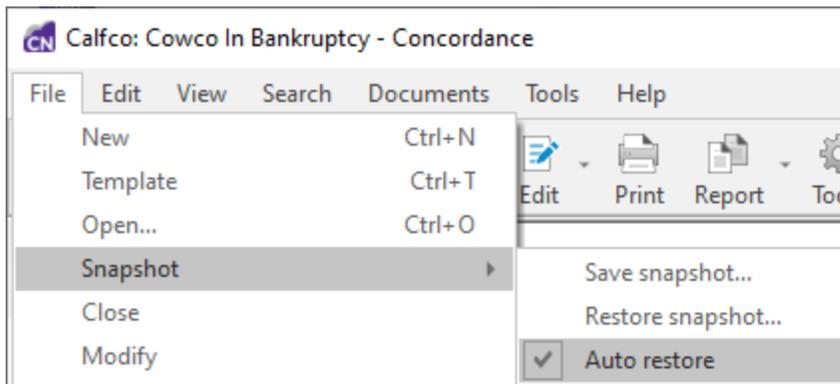
1. On the **File** menu, select **Snapshot** and then **Save snapshot**.
2. Navigate to the location for your snapshot file and provide a **File name** for the snapshot. Click **Save**.
3. All search queries and customized sort settings for the current Concordance session are saved in a .snp file.

Auto-Restoring Snapshots

With the Auto-restore feature, Concordance can automatically create and save a snapshot each time you close the Concordance application. The next time you open a Concordance session, the application automatically displays the exact record and view settings you had when you closed the application, including displaying your last search in the Review view.

The Auto-restore feature functions differently than manually saving separate snapshots of work your sessions. When the Auto-restore feature is enabled, Concordance automatically saves a autosave.snp file at the end of each session, overwriting the previous work session's snapshot file. The autosave.snp is automatically saved to the user's `\Documents\Concordance 10` folder on your machine.

By default, the Auto-restore feature is enabled. The Auto-restore feature is enabled and disabled by clicking the Auto restore option in the Snapshot menu. When a check mark is displayed next to the Auto restore menu selection, the Auto-restore feature is enabled.



Restore a Snapshot

1. On the **File** menu, select **Snapshot**, and then **Restore snapshot**.
2. Navigate to and select the snapshot file you want to open, and click **Open**.
3. Concordance restores the databases and documents that were accessed during the search session captured by the snapshot and launches them. The search results are displayed in the Review view, and the restored snapshot file is listed in the Recent panel in the Databases task pane.

Backing Up Databases

Database administrators take stringent precautions against data loss. Data loss can occur for many reasons, including hardware failures, file corruption, human error, and natural disasters that damage equipment containing data. It is important to take precautions to deter data loss by backing up data on a regular basis and having disaster recovery plans in place.

Most organizations have backup programs that run automatically at scheduled times to backup data on their network servers. We recommend becoming familiar

with your company's backup policies and disaster recovery plans in case you need to recover data that has been lost or damaged.

Every organization handles backups differently, so it is important to know how often backups occur on your network or off-site hosted network. Sometimes backups are stored off-site or may be difficult to recover on short notice, so it is helpful to know what to expect.

Concordance databases on a network should be backed up on a regular basis to protect work product. Concordance databases that are stored on local hard drives or hosted on off-network computers should have an alternative means of backing up the data, such as an external hard drive or other backup device that can be easily attached to the computer. Many of these devices come with software programs that are designed to run backups automatically at a scheduled time, or files can be backed up by copying them manually to a storage device attached to the computer.

Consult with your Concordance administrator or Litigation Support Manager if you need more information regarding your organization's backups and disaster recovery plans.

Other Maintenance Tasks

In addition to backing up and preserving databases, your Concordance administrator performs other processes that keep your document collection streamlined and running efficiently. Reviewers should understand how these processes affect their document collections, but should not attempt to use any of these tools without consulting their Concordance administrator or having received proper database administration training for Concordance.

It is highly recommended that security is applied to every Concordance database to preserve document collections and protect staff from inadvertently deleting or altering critical information.

The following administrative functions **do not have an undo feature** to retrieve data once the process is performed:

- **Zap** - deletes every record in the database

- **Pack** - deletes documents marked for deletion
- **Delete Tags** - deletes all tags in the database
- **Global Replace** - find and replace process for words or phrases in the dictionary

Zap

This is an administration-only function. The Zap feature is used to remove all documents from a database, freeing space in Concordance. Once all documents are purged, only the stopwords file and field definitions are retained in the database. When zapping a database, there is no undo feature so administrators must back up databases before running this process.

Pack

This is an administration-only function. The Pack feature is used for both the document database and dictionary file. Packing a database removes all documents that are marked for deletion. Packing a dictionary optimizes its file structure to increase search speed and index processing time. If not done properly, this feature can delete all of the records in a database. Once performed, there is no undo feature so administrators must back up databases before running this process.

Delete Tags

The Delete Tags feature is used either to remove tags from all documents, or remove all tags from a database. There is no undo feature once this process is performed.

Global Replace

Global editing is basically running a Find and Replace process for words or phrases in a database. The Global Replace function can perform replacements on specific fields, full or empty fields, with or without case sensitivity, and with or without confirmation before replacement. Caution must be used when replacing data,

otherwise information in your document collection may be unintentionally and permanently altered. There is no undo feature once this process is performed.

Concordance

User 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](#)³⁰⁹ and Importing Files 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 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 administrating 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_FAIL, DDE_FBUSY, or DDE_FNOTPROCESSED. DDE_FAIL 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 HDEEDATA 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 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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E-mail: concordancesupport@cloudnine.com

Phone: **713-462-6464 ext.14**

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