Concordance® Desktop

Administrator's Guide

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Concordance® Desktop

Concordance® Desktop Administrator's Guide

Concordance® Desktop 1.09.00.90

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Concordance Desktop

Administrator's Guide

Concordance Desktop Release Notes

Chapter

1

Concordance Desktop Release Notes

The CloudNine™ Concordance Desktop Release Notes provide information on the features and improvements in each release.

You can see a full listing of current and previous release notes on our Concordance Desktop Release Notes site.

Concordance Desktop

Administrator's Guide

Administration

Chapter

2

Administration

Server Administration

Opening the Admin Console

The Admin Console is used to setup and maintain users, databases, user groups, matters, clients, licenses, connections, scheduled jobs, and server based settings associated with a Concordance Desktop server. To connect and perform administrative tasks on a Concordance Desktop server, you must have:

- A user account/profile setup on the server to which you need to connect
- An Administrator license available on the server for you to use
- The server's numeric IP address or the server's URL, such as *cndt.myserver.com*.

To access the Admin Console:

1. Run Concordance Desktop.

2. From the **File** menu, click **Administration**, then **Admin Console**.

   The Admin Console Log on displays.
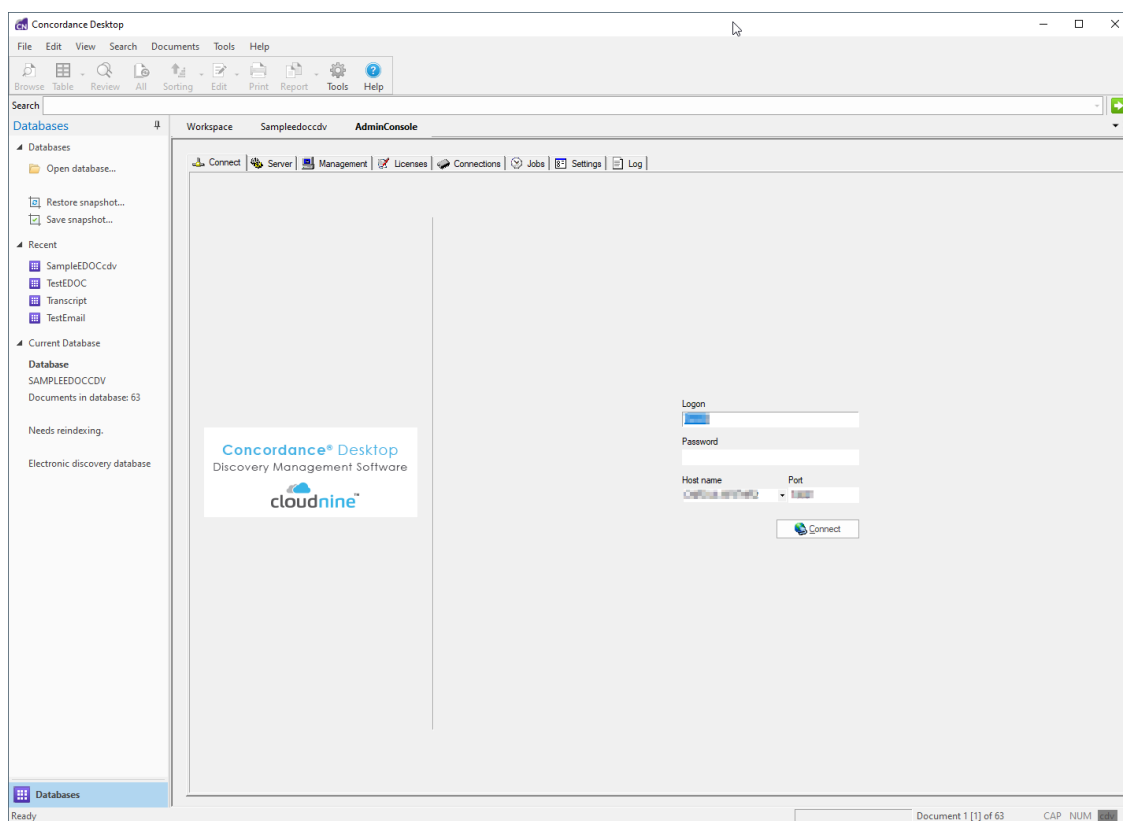
3. Type your computer or network login ID in the **Logon** field.

When Concordance Desktop is installed on your computer or workstation, it creates a user account using your computer login ID (or your network login ID, if on a Local Area Network [LAN]) as your log on ID.

4. Type your Concordance Desktop password in the **Password** field, or type a new password if this is the first time you are logging onto this server, or if you have had your password reset.

The first time you connect to a Concordance Desktop server, there is no password registered for your account. The password that you type in the Password field during your initial log on becomes your password for your user account/profile.

Once you have entered a password on your first log on, you can continue to use that same password or request a password reset, so that you can enter a new password the next time you attempt to open a database, or the Admin Console.

5. Type (or select if available) the server's numeric IP address or it's URL (such as cndt.myserver.com) in the **Host name** field.

6. Type the Admin Console listening port number in the **Port** field.

10001 is the default listening port number, which can be adjusted later. For more information about adjusting port settings, see Adjusting port settings.

7. Click the **Connect** button to connect to open the Admin Console.

Verifying connectivity - checklist

Reference the Connectivity Checklist for the Concordance Desktop server, to make sure you have completed all necessary steps to ensure connectivity channels for servers, databases, and users.

Connectivity Checklist:

Checklist: Concordance Desktop server Connectivity
Servers
☐ Is Concordance Desktop installed on the machine you are using as the Concordance Desktop server, and activated with a Server license?
☐ Did you remember to set up a valid administrator account in Microsoft Windows?

Checklist: Concordance Desktop server Connectivity
☐   Did you set up your firewall ports?
Databases
☐   Did you register existing 10.x databases in the Admin Console or place them in the Registration Directory (DB Smart Path)?
☐   Is the Yes option displayed in the Online field for the database (Admin Console, Management tab, Databases)?
☐   Did you associate your Concordance Desktop databases to the client and matter that applies for each database?   *Clients are for organizational purposes only.
☐   Did you setup all database administrators in the Admin Console?
Users/User Groups
☐   Have you setup user groups and associated them with matters that are associated databases?
☐   Do you have users associated to a database in the Concordance Desktop Admin Console?
☐   Did you save a .fyi file for each database that remote Concordance Desktop users need to access?
☐   Does each user have a valid ID and password in the Admin Console, and does it match what is used for authentication?

Manage Licenses

Adding new license keys

Before you can add user license keys to the Concordance Desktop server, you need to contact Concordance Desktop Sales to request the licenses your organization will need. CloudNine sends an e-mail containing the applicable license keys. Once you have the licenses keys, you can add them to the Concordance Desktop server from the Admin Console.

To add a new license key:

1. Contact Concordance Desktop Sales at Sales@cloudnine.com to request an FYI Reviewer license.

   In the license request, please include the following:

   - Your organization's server name
   - Number of seats needed
   - Length of time needed per seat

   When your seat request is approved, CloudNine will send an e-mail containing the license keys.

2. Once you receive the license keys, Log onto the **Admin Console** on the Concordance Desktop server where you need to add the license keys.

3. Click the **Licenses** tab.

4. Copy the license key from the e-mail (CTRL+C) and paste it (CTRL+V) into the **Enter a new license key here** field.

5. Click the **Activate** button to enable the license for this server.

6. Repeat steps 4 and 5 for each license key you need to add.

   When the seats are activated, the license count at the top of the tab is updated, and the license key is added to the license key list on the Licenses tab. Seats are valid during the date range you specified in the e-mail.

   When you enter the license key, ensure that you include the semi-colon at the end, and that there are no extra spaces at the front or end of the entry, otherwise you will receive an error stating that it is an invalid or duplicate license.

Removing license keys

To remove a license key:

1. Open the Admin Console on the server where you need to delete the license key.

2. Click the **Licenses** tab.

3. In the license key list, click the license key you want to remove.

4. You are asked to confirm the deletion, click **Yes**.

5. Click the **Remove** button.

The license key is removed from the list of license keys, indicating that it has been removed from the server.

Setting up license notifications

Concordance Desktop administrators can receive e-mail notifications when a license is about to expire, providing their user account includes their email address. Notification options can be set from the Admin Console Licenses tab. Concordance Desktop ASPs may also want to use e-mail notifications to alert clients of any upcoming license expiration.
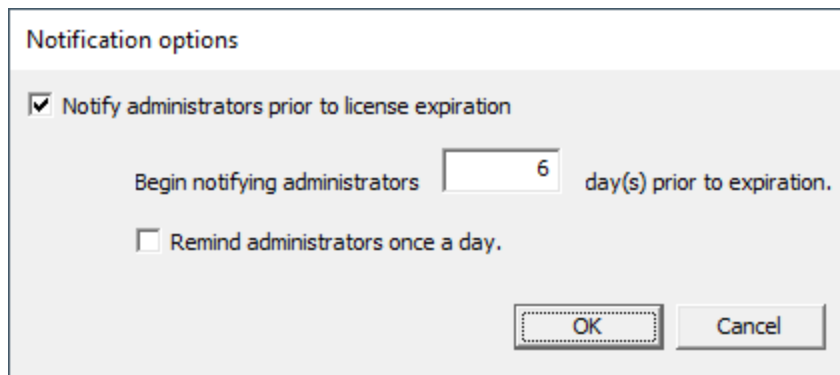
License expiration occurs at midnight on the last date of the licensing period. If licenses do expire for users, they will not be able to access any databases until you reactivate the licenses.

📝 You must have an email client installed on the server in order to send notifications.

To set options for license expiration notifications:

1. From the **Admin Console**, click the **Licenses** tab.

2. Click the **Notification options** button.

   Clicking the Notification options button opens the Notification options dialog box.

   ┌───┐
   │ Notification options   │
   │   │
   │ ☑ Notify administrators prior to license expiration │
   │   │
   │   Begin notifying administrators │   6 │ day(s) prior to expiration. │
   │   │
   │   ☐ Remind administrators once a day.   │
   │   │
   │   [OK   ] [Cancel] │
   └───┘

3. Select the **Notify administrators prior to license expiration** check box to receive an e-mail alert when a license is about to expire.

4. In the **Begin notifying administrators day(s) prior to expiration** field, type the number of days prior to the expiration date that a notification email will start being sent out for an expiring license.

5. To have an e-mail notification sent out every day once the notification begins, select the **Remind administrators once a day** check box.

6. Click **OK** to save your settings.

For an administrator to receive e-mail notifications, their e-mail address must be added to the **E-mail** field in their user account.

For more information about administrators and setting up e-mail notifications, see Adding administrator accounts to the server.

Manage Users

About user setup & management

User accounts for all users must be added to the Concordance Desktop server in order to have access to the databases created, migrated to, and registered on that Concordance Desktop server. As users are added to the server, they are automatically added to a group named "All Users." The "All Users" group, that includes the user name, field rights and menu access settings of every user added to the server, is automatically applied to a *matter* named "All User Groups." As databases are created, migrated to, or registered on the Concordance Desktop server, they too are automatically associated with the "All User Groups" *matter*. It is this set of associations to the "All User Groups" *matter* that makes it possible for every user to have access to every database on the Concordance Desktop server.

Users can be added to the server using any of the following methods:

- One user at a time, under the Management tab in the Admin Console.
  This method is used when Concordance Desktop is used for user authentication.
- Inserting of multiple users from Active Directory or another external domain.
  This method is used when Active Directory or another external domain is used for user authentication.
- Users assigned to a Concordance 10.x database that is migrated or registered on the Concordance Desktop server.
  During the migration or registration of a Concordance 10.x database, users who were assigned to the database, are carried over and automatically added to the Concordance Desktop server.

Methods for adding and managing users

There are several methods you can use for adding and managing users on a Concordance Desktop server; you can use Concordance Desktop authentication, Active Directory or another external domain authentication, or by migrating or registering a Concordance 10.x database with Concordance Desktop. How users are added, and how you maintain those users moving forward, depends on the method selected for adding them. The selected method also determines the users' database access rights defaults.

Concordance Desktop authentication:

Users who are added one at a time in the Admin Console automatically receive full rights to all databases. Though user field rights and menu access can be changed in a user's user account. Any restrictions set in a user's user account are applied to all databases associated with the "All User Groups" matter, with the exception of any migrated or registered Concordance 10.x databases that the user may have been assigned. In a migrated or

registered Concordance 10.x database, the user's rights assigned to that database in Concordance are carried over and applied only to that database, in Concordance Desktop.

Active Directory or another external domain:

Users who are added from an external domain automatically receive full rights to all databases. Just like users who are added one at a time in the Admin Console, user field rights and menu access can be changed in a user's user account in the Admin Console. Any restrictions set in a user's user account are applied to all databases associated with the "All User Groups" matter, with the exception of any migrated or registered Concordance 10.x databases that the user may have been assigned. In a migrated or registered Concordance 10.x database, the user's rights assigned to that database in Concordance are carried over and applied only to that database, in Concordance Desktop.

Migrating or registering a Concordance 10.x database:

Users who are added to the server during the registration of a migrated Concordance 10.x database receive full rights to all Concordance Desktop databases. However, whatever rights were assigned to them in the Concordance 10.x database, are carried forward and applied for that database only. As with users added by the other methods, these users automatically receive full rights to all other databases. And their rights in those other databases can be changed in the Admin Console. However, in order to change their rights on the migrated/registered Concordance 10.x database, you need to user the User Management feature. The User Management feature lets you set rights on a database by database basis. For more information about the User Management feature, see Restricting user access on databases.

Most firms will find that the user access they grant in the Admin Console is sufficient for all databases on the server. However, if your firm requires that specific users be restricted on one or more databases, you can setup each user's general access settings in the Admin Console that will be applied to all databases, and then set user restrictions for the specific database(s) using the User Management feature. For more information about the User Management feature, see Restricting user access on databases.

💡 Consider matching user IDs to a reviewer's Windows or network ID. You can also reference your staff's Windows profiles to review what permissions should be granted to different reviewers.

About user logon names and passwords

Users of Concordance Desktop are not asked for log on credentials until they actually attempt to open a database. It is only during this attempt that their installation of Concordance Desktop can determine which Concordance Desktop server they need to access the database from. This holds true for administrators as well when they attempt

to access the Admin console or create a new database. However, administrators are also asked for the server name and port on their log on screen.

The user name and password a user must use when opening a database, is based on the method used to add and authenticate users on the Concordance Desktop server.

When Concordance Desktop is used for user authentication: Users are authenticated by their user account on the Concordance Desktop server. Whatever user name their user account is setup with, that is the name they need to use when they open a database on a Concordance Desktop server. Passwords cannot be changed by an administrator on the Concordance Desktop server, but they can be reset so that users are prompted to enter a new password the next time they attempt to open a database.

When an external domain is used for user authentication: Users are authenticated by the network. Whatever user name and password is setup for them on the network, those same credentials must be used to open a database on a Concordance Desktop server. If using an external domain add and authentication users, the user's network password must be set to "Never expire."

When users are added by migrating or registering a Concordance 10.x database: Users are authenticated by whichever method (Concordance Desktop or external domain) is used to authenticate the users. Their user names, as set in the database, are carried over and added to the Concordance Desktop server. If Concordance Desktop is the authentication method, they use their Concordance Desktop user name, and are asked to create a password on their first attempt to open a database. If an external domain is used for authentication, they use their network user name and password when they attempt to open a database.

For more information about resetting passwords, see Resetting a user's password.

Before user setup

Before you set up users in Concordance Desktop, please consider the following tips:

General user setup tips

- User passwords are encrypted with the SHA-1 standard in the .sec files
- Concordance Desktop does not support special characters such as %, & #, etc., in user, user group, database, matter, and client names.
- Concordance Desktop does not support user names, passwords, or database names containing characters in Unicode, such as Chinese or Japanese characters. Currently, only user names, passwords, or database names containing single-byte characters are supported, such as English characters.
- Distinct user IDs and passwords need to be the same across all databases the users need access to on the Concordance Desktop server. This includes all databases

created in Concordance Desktop and all Concordance 10.x databases that have been migrated to Concordance Desktop.

- Best practice is to ensure there is at least one user who is setup as a Supervisor, with full rights. Since most users at a firm perform several different tasks, this is the default for all users, unless a user's rights are changed in the Admin Console, or in a specific database using the User Management feature

- Concordance Desktop captures a user's network log on and compares it with the user list from the Admin Console and if applicable, with the restrictions in database user management settings. If a match is found, then the user receives the corresponding rights. If a match is not found, the user receives the default user rights (all rights to all databases).

- Deleting the Default user in Concordance Desktop is optional, but suggested.

User setup limitations

- User IDs – 22-character maximum, not case sensitive, spaces allowed, special character such as %, &, #, etc. are not allowed in user IDs

- Passwords – 24-character maximum, case sensitive, created on first access, slashes, and other special characters, such as %, &, #, etc., are not allowed in passwords

- Blank user names are not allowed in Concordance Desktop

Active Directory authentication user setup tips

- First set up users in Microsoft Active Directory before adding them to the Concordance Desktop server.

- The spelling of the user name must be the same as the user name in the Active Directory.

- Passwords in Active Directory must be set to never expire, for all Concordance Desktop users.

⊟ User setup tips for restricting user access rights in a databases

- Consider setting up a user group for each user type (administrators, project manager, CCSA, database administrator, etc.), that require the same access to all databases, and then drag and drop each user to their respective user group. When you need to assign the users with new database, you create a matter, and drag the specific user group(s) and database to the matter. This assigns the database and the user group(s) to the same matter, allow those users to access that database.

- By default, all users are granted full rights to fields and access to all menus when they are added to the server.

- When you add a new field to a database, by default all users are granted full access rights to that field. If you want to restrict access to the field you need to modify the field access rights for each applicable user whom you want to restrict.

- If you intend to set the same restrictions for a user, or multiple users, across several databases, you can create a template (role template) .csv file. You create the .csv file by 'exporting' the user restrictions from one database and 'importing' them into another database. The same user restrictions can be imported to several other databases. When you export to a .csv file, both the field rights and menu access rights are saved to the .csv file.
- It is best practice to always export a copy of your user management settings each time you update them so you have a current backup copy to reference. Be sure your supervisor or secondary database administrator has access to this file in case of an emergency.

Recommended database menu restrictions

If you are using the User Management feature to restrict user rights in a database, we recommend that you restrict the following menu rights from all users except the applicable database administrators and supervisors:

- File > Index
- File > Reindex
- File > Administration
- File > Begin Program
- File > Edit Program
- Edit > Delete and Undelete

It is best to adhere to these guidelines when setting restrictions on users in Concordance Desktop databases, to ensure consistency in how user settings are applied.

If you restrict a user's access to Edit > Validation, that user will not be able to access list files.

Optional field restrictions

Even if user management is not applied to a database, you can apply read-only rights to database fields in the Data Entry Attributes screen. Any field marked as read-only in this box applies to all database users and also overrides field rights applied in the User Management screen.

For more information about the Data Entry Attributes screen, see Setting data validation.

User management guidelines for concatenated databases

Setting up user management for concatenated databases includes the following guidelines:

- Field rights and menu access settings can be set up in each database if you need to apply restrictions for users of that database. Setting up these settings in a concatenated database set only affects the primary database.

- The user name and password must be the same for all databases in the concatenated set.

- When the user name and password in the primary database does not exist in a secondary database, and security is enabled, the concatenated database will not open. The user will receive a message that they do not have access rights to the specific database.

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

For detailed instructions on setting up Concordance Desktop database access restrictions, see Restricting user access on databases.

User Authentication Setup

We recommend that before you set up users and apply Field and Menu permissions, that you pre-plan the following items noted in the Setting Up User Authentication Checklist.

- If you are using external authentication, you want to set up your users first in the Microsoft Active Directory and then import the users into the Administration Console when registering databases on a Concordance Desktop server.

- If you are not using authentication, we recommend that you set up users in the Concordance Desktop Admin Console. This will allow each user to have access to all databases on that server or added to that server, unless you restrict user access using the User Management feature.

Setting Up User Authentication Checklist

Checklist: Setting Up User Authentication
Pre-Planning for User Setup
☐ Have you determined if external authentication will be implemented?
☐ Do you have a method of assigning and tracking user IDs to help manage individual user accounts?

Checklist: Setting Up User Authentication

☐ Have you implemented a process for adding users to the Concordance Desktop server?

Are these processes known to other administrators who are responsible for setting up users and managing databases?

☐ Did you implement a folder template to store your databases and associated files?

Admin Console User Setup

☐ Did you add additional administrator user accounts, and set full menu and field access rights?

Did you include an email address for each administrator who needs to receive watchdog and other notifications from the server?

☐ Did you set up e-mail options and watchdog services under the Settings tab?

(All notifications will be sent to all administrators who have an e-mail address included in their user account/profile.)

☐ For databases migrated to Concordance Desktop using the DB Smart Path directory: Did you verify that all users associated with the database, now have user accounts in the Admin Console under the Management tab?

☐ Did you associate your Concordance Desktop databases to the client and/or matter that applies for each database?

Note: Clients are for organizational purposes only.

☐ Did you add additional contact information for each user, in the Admin Console under the Management tab, in the event that the user or main contact for a case needs to be contacted?

User Management Setup for Restricting User Rights in One or More Databases
* Only if you are restricting one or more user's rights in one or more databases.

☐ Did you set the administrator credentials for the applicable databases in the User Management dialog box in Concordance Desktop, and did you give them full access to all fields and menu items? (Optional)

This should be done only if you are using the User Management feature to restrict user field rights and menu access on a per user per database basis.

☐ Have you planned and designed user roles with pre-defined database field and menu settings based on the types of administrators and users that are accessing databases? (This is only applicable if you are going to setup user restrictions on a database by database basis.)

Checklist: Setting Up User Authentication

☐ Have you created user role templates on which to base the same restrictions for one or more users across multiple databases?

☐ Did you verify field rights and menu access as designed in user templates and customize per user, as needed?

☐ Did you export a backup copy of the .csv file for reference, and save it to a specified location in the folder template?

Note: You can import the .csv file into other Concordance Desktop databases to save time with user restriction set up.

Authentication Options

When using Concordance Desktop, you have two primary user authentication options:

- **External** - Concordance Desktop relies on an external source to validate users.
- **Internal** - Concordance Desktop determines whether a user has access to a database or to view matters.

Using External Authentication

When using Concordance Desktop with Microsoft Active Directory, Microsoft Windows NT or PDC (Primary Domain Controller) to authenticate users, a two-fold verification takes place. The user is first authenticated with one of the following: Active Directory, Windows NT or PDC. If the person is a valid user, they are then authenticated in the Concordance Desktop Admin Console and have permissions based on the user rights applied.

To use this method of user verification, the login IDs in Concordance Desktop must be identical to the login IDs used in the directory service on the network. User passwords must be set to "never expire" on the network.

To add outside users to the Concordance Desktop server when using this type of authentication, the user must be added to the directory service on the network. For security purposes, they can be assigned no rights at the network level – but they need to be listed in the network directory for the authentication to take place. In the Concordance Desktop Admin Console, users can be added and granted the appropriate rights they need for the case. The same rules apply with regard to matching log on IDs in both the Active Directory and Concordance Desktop Admin Console.

For more information about authentication types, see Setting authentication types.

Authentication Type Considerations

The Concordance Desktop server supports a variety of authenticators that determine what source grants or denies users from accessing resources and the hosted databases. Please read the following sections before you adjust settings for authentication types.

Supported Authentication Types	
Internal Types	**Description**
Concordance Desktop	Concordance Desktop handles authentication. A valid user ID and password is required to connect.
External Types	**Description**
External by Domain	Authentication by NT Domain Controller (non-Active Directory)
External by NT Server	Authentication by stand-alone server (Member server)
External by Active Directory LDAP	Authentication by Lightweight Directory Access Protocol (Microsoft Active Directory)

🖹 If you are using external authentication, you must still use Concordance Desktop security.

Concordance Desktop

This authentication method verifies user credentials set in the Concordance Desktop Admin Console. Concordance Desktop gives users their designated field and menu access. Users who are not verified by the Concordance Desktop settings are refused access by the Concordance Desktop server.

⊟ **External by Domain**

Domain passwords take precedence over Concordance Desktop passwords:

- If a user name or password is not recognized by the domain controller, then the user is refused access by the Concordance Desktop server.
- If the user is verified by the domain controller, then the user is given access to all Concordance Desktop databases where Concordance Desktop rights allow access for that log on, regardless of the Concordance Desktop password.

The External by Domain setting typically requires use of several ports: 137 TCP, 138 UDP, 139 TCP, and 445 TCP. Please ensure that your firewall is not blocking these ports.

You can verify user credentials through your Windows NT Primary Domain Controller (PDC) or Backup Domain Controller (BDC).

External by NT Server

This authentication method verifies user credentials through your Windows NT Primary Domain Controller (PDC) or Backup Domain Controller (BDC), specified by the Internet or IP address. This method has the same restrictions and features as described above for the External by Domain method.

If you enter an IP address and the server's IP address changes, the Concordance Desktop server will not be able to communicate with the credential server until the address is manually updated.

Port addresses typically required by this method include 137 TCP, 138 UDP, 139 TCP, and 445 TCP. Please ensure that your firewall is not blocking these ports.

External by Active Directory

Microsoft Active Directory passwords take precedence over Concordance Desktop passwords.

This authentication method requires a Microsoft Active Directory compatible credentials server. User credentials are verified and used as described above for the External by Domain method.

If you enter an IP address and the server's IP address changes, the Concordance Desktop server will not be able to communicate with the credential server until the address is manually updated.

Firewall ports that need to be open for Active Directory include 389 (LDAP), 636 (secure LDAP), and NetBIOS ports for the change password feature.

When authenticating users against an Active Directory server in a domain other than where the Concordance Desktop server is located, make sure that the Concordance Desktop server is running on Windows Server 2008 R2, Windows Server 2012, or Windows Server 2012 R2.

Concordance Desktop ASPs will want to set up a separate domain for their clients and then set up user accounts with passwords set to never expire. Firms and organizations hosting their own data can use their existing domain and user accounts.

When using external authentication, it is necessary that user IDs and passwords in a Concordance Desktop database are identical to those used in the Active Directory. To do this, you will need to create organization units (OU) in the Active Directory specifically for Concordance Desktop server users and set passwords to never expire so that you are not updating passwords in both the Active Directory and Concordance Desktop databases if passwords expire.

For more information about setting up users in Active Directory, please refer to Microsoft's help system.

Managing users between Active Directory and Concordance Desktop can be an easy task when there are clear, written instructions on how to add, update, and remove users. Always ensure that the administrators are using the same methodologies and there is documentation in a shared location for new administrators and for reference.

Managing Users	
Application	**Tasks Include**
Active Directory	Domain Users
	Resetting user passwords
	Editing Users
Concordance Desktop	Admin Console - Management Tab - Users
	Modifying user Concordance Desktop server access settings
	Resetting lost passwords for individual users
	Exporting user account files in User Management for reference files or to import into another database

Adding/modifying users

User accounts for all users must be added to the Concordance Desktop server in order to have access to the databases created, migrated to, and registered on that Concordance Desktop server. As users are added to the server, they are automatically added to a group named "All Users." The "All Users" group, that includes the user name of every user and their field rights and menu access settings, is automatically applied to a matter named "All User Groups." As databases are created, migrated to, or registered on the Concordance Desktop server, they too are automatically associated with the "All User Groups" matter. It is this association that allows all users to access all databases on the Concordance Desktop server.

User accounts are added to the Concordance Desktop server in any one of three ways:

- Manually adding each user's user account in the Admin Console - Management tab, under Users

- Migrating and registering a Concordance 10.x database on the Concordance Desktop server

- Adding user accounts from an external domain, such as Active Directory

When adding users through the Admin Console, by default, full rights to fields (read and write) and full menu access (all menus in each database) are granted to the user. However, these defaults can be changed if you need to restrict the user's field rights and menu access rights across **all** databases. See Restricting user access on databases for more details.

When adding users by registering a migrated Concordance 10.x database, user accounts and rights to the migrated database are carried over from the Concordance 10.x database and applied to that database in Concordance Desktop. However, for all other databases on the server, field rights and menu access defaults are used. Therefore, users added through migration may have restricted rights, while all other users on the Concordance Desktop server still have full rights to the migrated database. If you need to restrict user rights on these migrated databases, you can do so from the User Management screen. See Restricting user access on databases for more details.

When adding users through an external domain (such as Active Directory), as with users manually added in the Admin Console, the default of full rights to fields (read and write) and full menu access (all menus in each database) are granted to each user. These defaults can be changed if you need to restrict a user's field rights and menu access across all databases. See Restricting user access on databases for more details.

It is important to note that no matter how users are added to the Concordance Desktop server, if you need to setup restrictions for a user across **all** databases, you need to do so in the user's user account in the Admin Console immediately after their user account appears in the Admin Console. This is the only way in which to ensure that the restrictions you setup will be applied to all databases on the Concordance Desktop server. If you setup restrictions later on, the new settings will only apply to all databases added to the server from that point forward.

📝 Concordance Desktop does not support user names, passwords, or database names containing characters in Unicode, such as Chinese or Japanese characters. Currently, it only supports user names, passwords, or database names containing single-byte characters, such as English characters.

⚠ Concordance Desktop does not support the use of special characters such as %, &, #, etc. in user names, user group names, matter names, client names, or database names. Characters in Unicode are also not supported in user names, password, and databases.

📝 When adding users, the user name cannot be greater than 22 characters in length.

To add users when using Concordance Desktop authentication:

When using Concordance Desktop as your authentication type, you add users to the server one at a time in the Users list, from the Management tab in the Admin Console.

You must be an administrator on the Concordance Desktop server where you need to add users, as only Administrators can open the Admin Console.

To add a user to the server:

1. Log onto the server where the user account needs to be added.

   This can be done by either:
   - Logging into the computer/server that has been registered as the Concordance Desktop server
   - Using Windows Desktop Remote to log into the physical Concordance Desktop server computer/server

2. Run **Concordance Desktop** on the server computer.

3. From the **File** menu, click **Administration**, and then **Admin Console**.

4. Enter your administrator **Logon** name and **Password**.

5. Enter the Concordance Desktop server **Host name** and the **Port** number (usually 10001) to use for accessing the Admin Console.

6. Click **Connect**.

   Th Admin Console opens.

7. Click the **Management** tab.

8. Right-click on the **Users** folder and click on **New user,** to open a box in which to type the new user name.

9. Type the user name and press **Enter** to display the fields for setting up a user.
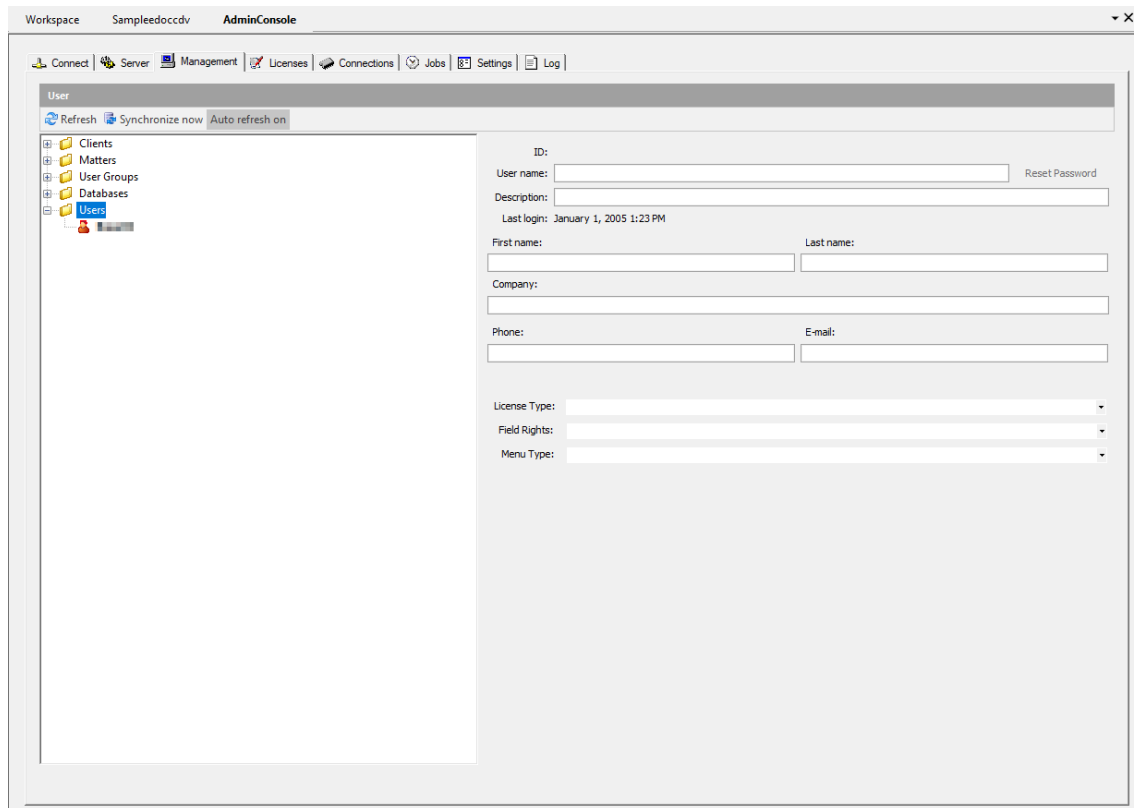
The 'User name' field automatically populates with the user name you entered in step 3.

The 'Description' field is used to indicate how the user was added to the server. If this user was added along with other users from a server list, or from the migration of a Concordance 10.x database, that information is displayed in the this area.

The 'Last login' field indicates the last time the user had logged into the server. Because you are just setting up this user account, "(never)" is displayed in this field.

Adding the user's contact information is optional, and what you enter should be based on your organization's user account guidelines.

10. After adding the user, if you want to add contact information, click on their name in the Users list, to open the user account pane for their account.

11. In the **First name** field, type the user's first name.

12. In the **Last name** field, type the user's last name.

13. In the **Company** field, type the company/firm name.

14. (Optional) In the **Phone** field, type the user's phone number.

15. In the **Email** field, type the user's e-mail address if they are to receive e-mail notifications.

    By adding an e-mail account, the administrator is notified when a license is about to expire, if you have setup the license notification options under the Licenses tab. The notification is sent to all Administrators who have an E-mail address in their user account.

    E-mail notifications need to route through an existing SMTP server and Port (the standard default port is 25). The SMTP options can be setup on the Settings tab in the Admin Console. See Setting up SMTP options for more details.

    Ensure that the Concordance Desktop server and SMTP server have IP trust between them. For instance, the anti-spamming rules must accept emails from the servers.

16. Click the **License Type** down-arrow and select **Administrator**, to setup this account as an administrative user.

17. Click the **Field Rights** down-arrow and select **Read and Write**, to ensure this account has full rights when working with databases.

    - **Read and Write:** Read/write access to fields. This level of access for all fields is required for anyone who will be performing maintenance functions such as indexing, packing, or a database modify. If the user does not have full access to the fields, Concordance Desktop does not either.

    - **Read only:** Ability to search, browse, and print fields. User with this access cannot edit or otherwise modify read-only fields. Commands such as Global edit and Load will not display fields which have read-only access. These fields are displayed in Edit view, but only for reference or to copy text to the clipboard.

18. Click the **Menu Type** down-arrow and select the preset you want to apply for the user.

    - **Supervisor:** User has access to all menus and menu commands.

    - **Administrator:** User has access to all menus and menu commands except the *Modify*, *User Management*, and *Zap* menu commands.

    - **Editor:** User does not have access to the menu commands restricted in the Administrator preset, and does not have access to the following menu commands: *New*, *Reindex*, *Index*, *Pack*, *Begin program*, *Edit program*, and the menu commands for data validation. Though Editors can still search and edit, perform a global edit, load and unload data, and run reports.

    - **Researcher:** User does not have access to the menu commands restricted in the Administrator and Editor presets, and cannot edit or append, load, overlay, import data, perform global edits, or unload a copy of the database's structure.

    - **No Access:** User does not have access to any menus or menu commands. User can only open and exit the database.

19. Click the **Synchronize now** button (at the top of the Admin Console pane) to synchronize the new user account with the databases on this Concordance Desktop server.

<u>**To add users when using external domain authentication:**</u>

Domain users can only be added to the Concordance Desktop server when External by domain, External by NT Server, or External by Active Directory LDAP is selected as the authentication type on the Settings tab in the Admin Console. When any one of these authentication types are selected, the 'Insert domain user' option is available when you right-click on the Users folder under the Management tab.

You must be an administrator on the Concordance Desktop server where you need to add domain users, as only Administrators can open the Admin Console.

📝 User passwords cannot be changed when using an external authentication method.

To add/insert users from the selected domain:

1. Log onto the Concordance Desktop server where the users need to be added.
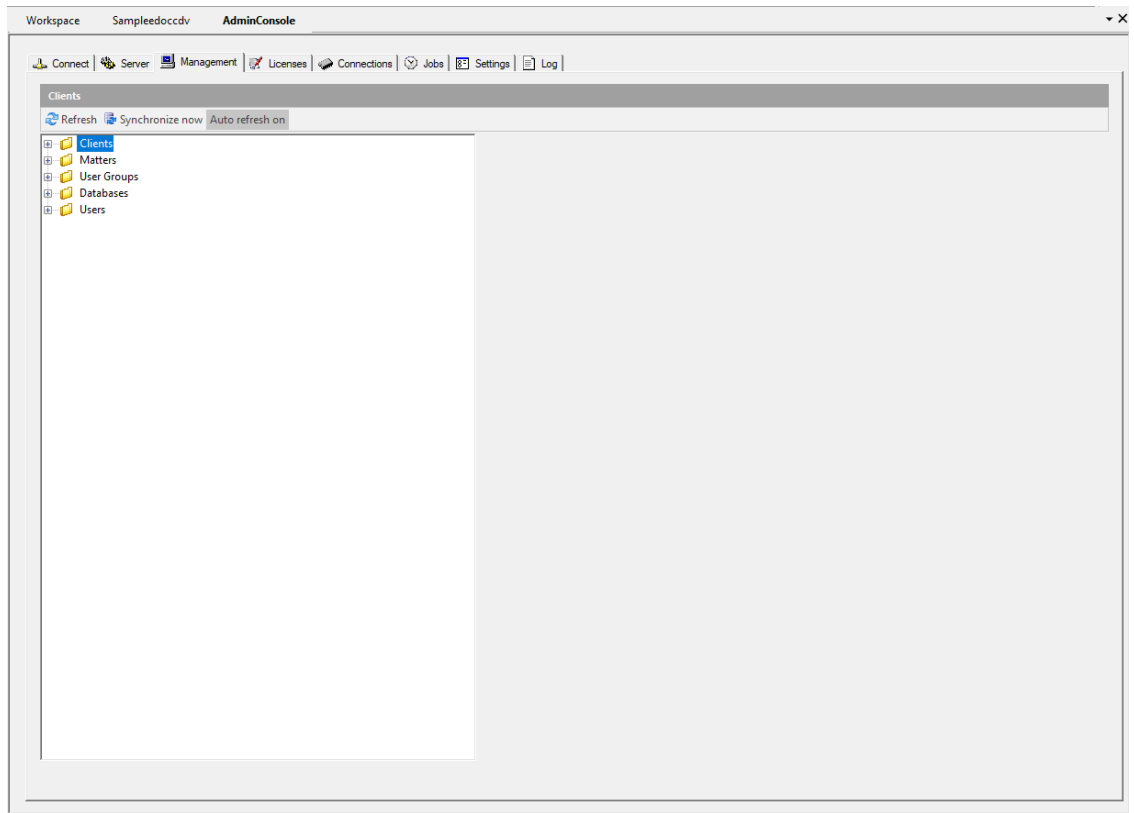
   This can be done by either:

   - Logging into the computer/server that has been registered as the Concordance Desktop server
   - Using Windows Desktop Remote to log into the physical Concordance Desktop server computer/server

2. Run **Concordance Desktop** on the server computer.

3. From the **File** menu, click **Administration**, and then **Admin Console**.

4. Enter your administrator **Logon** name and **Password**.

5. Enter the Concordance Desktop server **Host name** and the **Port** number (usually 10001) to use for accessing the Admin Console.

6. Click **Connect**.

   The Admin Console opens.

7. Click the **Management** tab.

8. Right-click on the **Users** folder and click on **Insert domain user**, to open a box in which to type the new user name.

   - If this is the first time you have accessed the domain user list, you are asked for your domain user name and password. Type them in the appropriate fields and click **Submit** to continue.
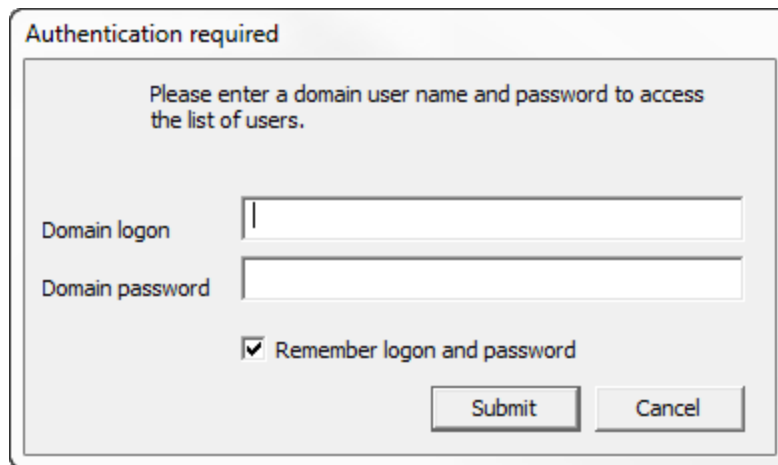
The Domain user import dialog box opens.

- If this is not the first time you have accessed the domain user list, the Domain user import dialog box opens. If you have been logged into the server and Admin Console prior to clicking on Insert domain user, you are not asked to provide your domain user name and password.
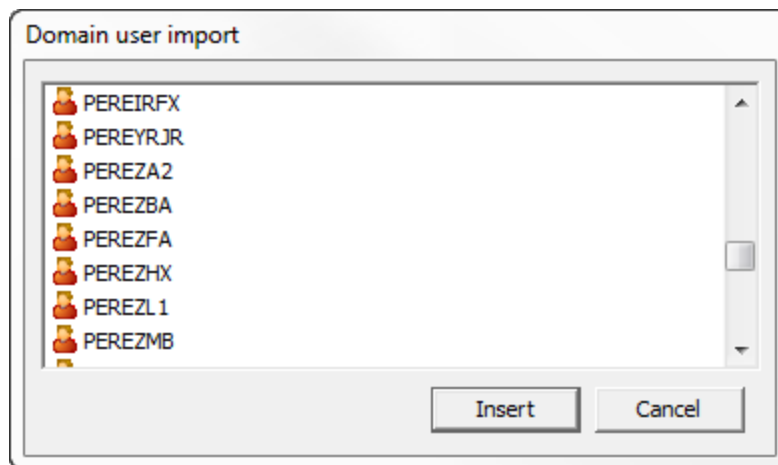
9. Click the domain user you want to insert, and click the **Insert** button.

   To select multiple users at once, use **SHIFT+click** or **CTRL+click** and then click the **Insert** button.

   Adding user contact information is optional, and what you enter should be based on your organization's user account guidelines.

10. After inserting a domain user, if you want to add contact information, click a user's name in the Users list, to open the user account pane for their account.

11. In the **First name** field, type the user's first name.

12. In the **Last name** field, type the user's last name.

13. In the **Company** field, type the user's company name.

14. In the **Phone** field, type the user's phone number.

15. In the **E-mail** field, type the user's e-mail address if they are to received email notifications. Usually, the email address is only added for administrators.

    By adding an e-mail account, if the user is an administrator, they are notified when a license is about to expire, if you have setup the license notification options under the Licenses tab. The notification is sent to all Administrators who have an E-mail address in their user account.

    📝 E-mail notifications need to route through an existing SMTP server and Port (the standard default port is 25). The SMTP options can be setup on the Settings tab in the Admin Console.

    📝 Ensure that the Concordance Desktop server and SMTP server have IP trust between them. For instance, the anti-spamming rules must accept emails from the servers.

16. Click the **License Type** down-arrow and select the license type this user is to use on this Concordance Desktop server.

    Available License Types are:

    Administrator: This license is to be used for those users who require access to the Admin Console and all administrator features for this Concordance Desktop server. This includes database administration.

    Full Reviewer: This license is to be used for those users who require the ability to search and view documents in their near native format (PDF format) and apply notations, redact text, etc. to those PDF copies.

    Data Reviewer: This license is to be used for those users who require the ability to search and view documents in text format only.

17. Click the **Field Rights** down-arrow and select whether the user should have **Read and Write** or **Read Only** rights, to all the databases on the Concordance Desktop server.

18. Click the **Menu Type** down-arrow and select the preset you want to apply for the user.

    - **Supervisor:** User has access to all menus and menu commands.
    - **Administrator:** User has access to all menus and menu commands except the *Modify*, *User Management*, and *Zap* menu commands.
    - **Editor:** User does not have access to the menu commands restricted in the Administrator preset, and does not have access to the following menu commands: *New*, *Reindex*, *Index*, *Pack*, *Begin program*, *Edit program*, and the menu

commands for data validation. Though Editors can still search and edit, perform a global edit, load and unload data, and run reports.

- **Researcher:** User does not have access to the menu commands restricted in the Administrator and Editor presets, and cannot edit or append, load, overlay, import data, perform global edits, or unload a copy of the database's structure.
- **No Access:** User does not have access to any menus or menu commands. User can only open and exit the database.

19. Click the **Synchronize now** button (at the top of the Admin Console pane) to synchronize the settings with all the databases on this Concordance Desktop server.

To modify a user's field rights and menu access settings

If you need to change a user's field rights and menu access settings across all databases, you can make the changes in the Admin Console under the Management tab, by following the instructions below. However, if you need to change a user's field rights and menu access settings on a specific database, you must open the database in Concordance Desktop and make the changes in the User Management screen instead. For more information about changing field rights and menu access at the database level, see Restricting user rights to databases.

Modifying a user's field rights and menu access settings across all databases:

1. Log onto the server where the user account needs to be added.

   This can be done by either:

   - Logging into the actual computer/server that has been registered as the Concordance Desktop server
   - Using Windows Desktop Remote to log into the physical Concordance Desktop server computer/server

2. Run **Concordance Desktop** on the server.

3. From the **File** menu, click **Administration**, and then **Admin Console**.

4. Enter your administrator **Logon** name and **Password**.

5. Enter the Concordance Desktop server **Host name** and the **Port** number (usually 10001) to use for accessing the Admin Console.

6. Click **Connect**. The Admin Console opens.

7. Click the **Management** tab.

8. Double-click on the **Users** folder to display the list of users on the Concordance Desktop server.

9. Locate and click on the user you need to change, to display the user account pane for the user.

10. Click the **Field Rights** down-arrow and select whether the user should have **Read and Write** or **Read Only** rights, to all the databases on the Concordance Desktop server.

    If a user has been added to the server from the migration of a Concordance 10.x database, their rights on that database cannot be overridden with this setting. Instead, you need to make the changes at the database level, from the User Management screen. See Restricting user rights to databases for details.

11. Click the **Synchronize now** button (at the top of the Admin Console pane) to synchronize the settings with all the databases on this Concordance Desktop server.

Administrator Accounts

Administrators are added to a Concordance Server through the Admin Console Management tab, just like all other users. And like other users, there is some setup that must be done on the Concordance Server, before an administrator can log onto the server.

- A user account/profile must already be setup for them on the Concordance Desktop server, with the "Administrator" License Type assigned to their user account.

- An Administrator license must be available on that server for them to be able to connect as an Administrator on that server. If no Administrator license is available, Concordance Desktop automatically grants access, but at the next access level down, providing there is an available license at that level for them to acquire.

- Concordance Desktop must be installed on the computer they are using to connect to the server.

When you add administrators, take into account each of their roles and schedules for managing server processes and ongoing maintenance tasks.

📝 If you intend to restrict databases field rights and menu access, we recommend that you grant full rights for the supervisor of each database in the under User Management feature. This ensures that the supervisor is not accidentally locked out of the database they need to manage.

To add a new administrator account to the server:

You must be an administrator on the Concordance Desktop server in order to log onto the server and open the Admin Console.

1. Log onto the server where the administrator account needs to be removed.

This can be done by either:

- Logging into the computer that has been registered as the Concordance Desktop server
- Using Windows Desktop Remote to log into the physical Concordance Desktop server computer

2. Run **Concordance Desktop** on the server computer.

3. From the **File** menu, click **Administration**, and then **Admin Console**.

4. Enter your **Logon** name and **Password**.

5. Enter the Concordance Desktop server **Host name** and the **Port** number (usually 10001) to use for accessing the Admin Console.

6. Click **Connect**.

7. Click the **Management** tab.

8. Right-click on the **Users** folder and click on **New user**, to open a box in which to type the new user name.

9. Type the administrator's user name and press **Enter** to display the fields for setting up a user.

   The 'User name' field automatically populates with the user name you entered in step 3.

   The 'Description' field is used to indicate how the user was added to the server. If this user was added along with other users from a server list, that information is displayed in the this area.

   The 'Last login' field indicates the last time the user had logged into the server. Because you are just setting up this user account, "(never)" is displayed in this field.

10. In the **First name** field, type the user's first name.

11. In the **Last name** field, type the user's last name.

12. In the **Company** field, type the company/firm name.

13. (Optional) In the **Phone** field, type the user's phone number.

14. In the **Email** field, type the user's e-mail address if they are to receive e-mail notifications.

    By adding an e-mail account, the administrator is notified when a license is about to expire, if you have setup the license notification options under the Licenses tab. The notification is sent to all Administrators who have an E-mail address in their user account.

E-mail notifications need to route through an existing SMTP server and Port (the standard default port is 25). The SMTP options can be setup on the Settings tab in the Admin Console. See Setting up SMTP options for more details.

Ensure that the Concordance Desktop server and SMTP server have IP trust between them. For instance, the anti-spamming rules must accept emails from the servers.

15. Click the **License Type** down-arrow and select **Administrator**, to setup this account as an administrative user.

16. Click the **Field Rights** down-arrow and select **Read and Write**, to ensure this account has full rights when working with databases.

   - **Read and Write:** Read/write access to fields. This level of access for all fields is required for anyone who will be performing maintenance functions such as indexing, packing, or a database modify. If the user does not have full access to the fields, Concordance Desktop does not either.
   - **Read only:** Ability to search, browse, and print fields. User with this access cannot edit or otherwise modify read-only fields. Commands such as Global edit and Load will not display fields which have read-only access. These fields are displayed in Edit view, but only for reference or to copy text to the clipboard.

17. Click the **Menu Type** down-arrow and select either **Supervisor** or **Administrator**.

   - **Supervisor:** Access to all menus and menu commands.
   - **Administrator:** Access to all menus and menu commands except the Modify, User Management, and Zap menu commands.

18. Click the **Synchronize now** button (at the top of the Admin Console pane) to save the new user account.

Administrator accounts are deleted in the same manner as any other user account on the Concordance Desktop server.

The current administrator account cannot be deleted while it is active. To remove the current administrator account, log off of the Concordance Desktop Admin Console and log on as another administrator.

To delete an administrator account:

1. Log onto the server where the administrator account needs to be removed.

   This can be done by either:

   - Logging into the computer that has been registered as the Concordance Desktop server
   - Using Windows Desktop Remote to log into the physical Concordance Desktop server computer

2. Run **Concordance Desktop** on the server computer.

3. From the **File** menu, click **Administration**, and then **Admin Console**.

4. Enter your **Logon** name and **Password**.

5. Enter the Concordance Desktop server **Host name** and the **Port** number (usually 10001) to use for accessing the Admin Console.

6. Click **Connect**.

7. Click the **Management** tab.

8. Double-click the **Users** folder to display the list of users.

9. Right-click on the administrator user you need to delete, and click **Delete** user.

   The following message displays:
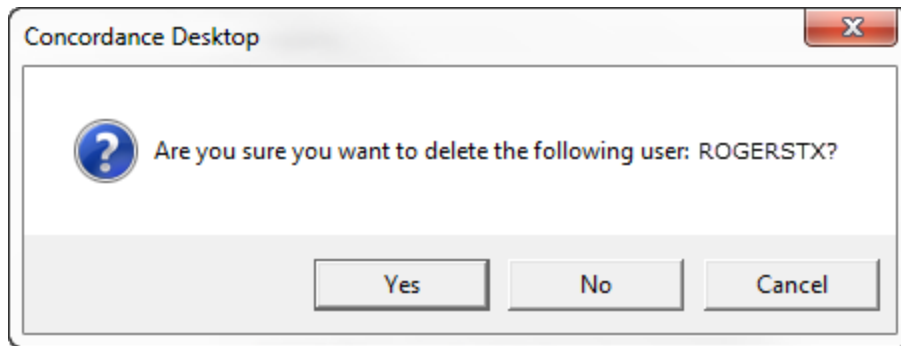
10. Click **Yes** to delete the administrator account.

Deleting users

Users can be manually deleted from the Concordance Desktop Admin Console. When you delete the user, it removes their user account from the Concordance Desktop server, preventing them from being able to open any of the databases on the Concordance Desktop server.

To delete a user from a Concordance Desktop server:

You must be an administrator on the Concordance Desktop server where you need to add users, as only Administrators can open the Admin Console.

To delete a user on a Concordance Desktop server:

1. Log onto the server where the user account needs to be added.

    This can be done by either:
    - Logging into the computer that has been registered as the Concordance Desktop server
    - Using Windows Desktop Remote to log into the physical Concordance Desktop server computer

2. Run **Concordance Desktop** on the server computer.

3. From the **File** menu, click **Administration**, and then **Admin Console**.

4. Enter your administrator **Logon** name and **Password**.

5. Enter the Concordance Desktop server **Host name** and the **Port** number (usually 10001) to use for accessing the Admin Console.

6. Click **Connect**.

7. Click the **Management** tab.

8. Double-click on the **Users** folder to open the list of user accounts on the server.

9. Right-click on the user name of the user you need to delete and click **Delete user**.

10. You are asked to confirm the deletion, click **Yes**.

11. Click the **Synchronize now** button to remove the user's association with all databases on the server that are associated with the "All User Groups" matter .

To remove a user's access to a specific database:

Access to a database is controlled by the association of the database and a user group with a specific matter. Therefore, when you need to remove a user's access from a database, you actually have to remove the user from the user group associated with the matter to which the database is associated.

First, determine the user group associated with the matter to which the database is associated. Once you know the user group, follow the steps below.

1. Open and log onto the **Admin Console**.

2. Click the **Management** tab.

3. Double-click on the **User group** folder to display the list of user groups.

4.   Double-click on the user group that is associated with the matter to which the database is associated.

5. Right-click on the user name of the user to be removed and select **Remove user from usergroup**.

6. Click the **Synchronize now** button to synchronize the change with the database.

Resetting a user's password

If a user has forgotten a password, an administrator user can reset their password, provided the administrator is assigned as an administrator on the Concordance Desktop server where the user needs to have their password reset. The password reset feature does not allow the administrator to create a new password for the user, instead it removes the old password. The next time the user attempts to open a database on the server, they are asked to create their new password. This process ensures the integrity of the user's password.

☑ If you are using external authentication, such as Microsoft Active Directory, user passwords cannot be reset from the Concordance Desktop Admin Console. User passwords can only be reset in the Admin Console if Concordance Desktop is the authentication type.

☑ If you reset an administrator's password, make sure that you tell them they must open a database, as opposed to the Admin Console, in order to reset their password. Administrators cannot reset their passwords from the Admin Console log on.

To reset a user's password:

1. From the **File** menu click **Administration**, and then **Admin Console**, to open the Admin Console.

2. Log onto the server where the user needs their password reset.

3. Click the **Management** tab.

4. Double-click the **Users** folder to expand the list of users.

5. Locate and click on the user ID of the user whose password needs to be reset.

6. In the user account pane on the right, click **Reset Password**.
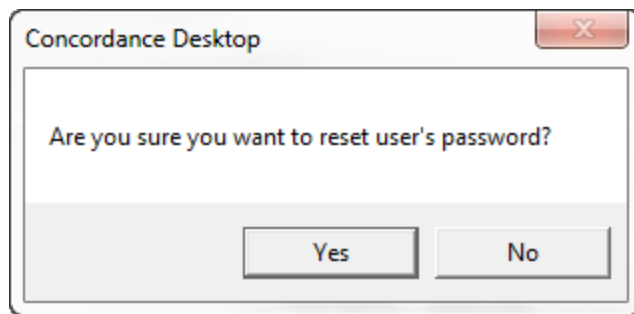
You are asked if you want to reset the user's password.

In the New password and Confirm new password field, type the new user password.

7. Click **Yes**.

8. Click the **Synchronize now** button to synchronize the change with all databases on the server to which the user has access.

This resets the user's password to be blank.

The next time the user attempts to open a database on this server, the New password screen opens.

Automatically refreshing the users and connections lists

The Auto refresh on button under the Admin Console *Management* tab allows you to view who is currently connected to the Concordance Desktop server. For example, when a user logs on to the server and opens a database, their name displays in bold in the Users folder on the Management tab.

The Auto refresh on button under the Admin Console *Connections* tab also allows you to view who is currently connected to the Concordance Desktop server, but the Connections tab displays more details about each user's connection.

To ensure that the user list and/or connections list is always refreshed, you can turn on the auto refresh feature.

To turn auto refresh on/off:

The Auto refresh on button works like a toggle switch to turn on and off the feature. To turn it on or off for either the User list or the Connections list, click on the associated tab, and then do one of the following:

- To toggle auto refresh on, click the **Auto refresh off** button so that it shows "Auto refresh on."

- To toggle auto refresh off, click the **Auto refresh on** button so that it shows "Auto refresh off."

There may be a slight delay before the automatic refresh begins. If you to see an immediate refresh, you can use the Refresh button.

Using the Refresh button to immediately refresh

To immediately refresh a list under the Management tab in the Admin Console:

- Click on the **Refresh button** at the top of the tree navigation pane.

Auto refresh does not need to be turned on for the refresh button to do an immediate refresh, as the refresh button and the Auto refresh on/off toggle work independent of one another.

Disabling and re-enabling user accounts

Individual user accounts can be disabled if you need to temporarily prevent a user from opening databases on a particular Concordance Desktop server. Disabling a user account does not remove the user from the server, nor does it prevent them from opening databases on any other Concordance Desktop server where they have a user account. It simply prevents them from opening any of the databases registered on the server where their account has been disabled.

⊟ To disable a user account:

1. Open the **Admin Console** on the Concordance Server where the user account needs to be disabled.

2. Click the **Management** tab.

3. Double-click the **Users** folder to display the list of user accounts on the server.

4. Click on the name of a user to open their user account pane.

5. Click on the **License Type** down-arrow and select **Disabled** from the list.

The next time the user attempts to open a database on this Concordance Desktop server, they will not be able to log onto the server.

To re-enable a user account:

1. Open the **Admin Console** on the Concordance Server where the user account needs to be re-enabled.

2. Click the **Management** tab.

3. Double-click the **Users** folder to display the list of user accounts on the server.

4. Click on the name of a user to open their user account pane.

5. Click on the **License Type** down-arrow and select the license type you need to assign to them.

The next time the user attempts to open a database on this Concordance Desktop server, they will be granted access to the server and the database.

Limiting user access to a database

When a database is created, all users are automatically assigned to the database through the "All User Groups" matter, and granted whatever rights are defined in their user accounts. If you have a database to which you need to restrict access to only a specific group of users, you can do so by using the associations between matters, databases and user groups. There are several steps involved when you first setup the associations, but once it is done, adding and removing users becomes a very simple and manageable task.

If you need to set restricted field rights and menu access for specific users on a specific database, you can use the following steps to associate the users with the database through a matter, and then use the User Management feature to set the specific field rights and menu restrictions for those users in the database. For more details on the User Management feature, see Restricting user field rights and menu access on databases.

To limit user access to a specific database:

Step 1: Create a matter

1. Open the **Admin Console** on the Concordance Desktop server where the database is registered.

   See Accessing the administration console for instructions on opening the Admin Console.

2. Click the **Management** tab.

3. Right-click on the **Matters** folder and select **New matter**.

   An empty field appears.

4. Type a short name for the matter in the field and press **Enter**.

    The matter information appears in the right-hand pane, where the *Name* field displays the name you just entered.

5. Type a longer title or description for the matter in the **Description** field and press **Enter**.

The matter is now created.

Next you need to associate the database with the new matter.

<u>**Step 2: Associate the database with the matter**</u>

To associate the database on which you need to limit user access, with the matter you just created, use a simply drag and drop action.

1. Double-click on the **Databases** folder to display the list of databases on the server.

2. Press and hold down the left mouse button on top of the database.

3. Drag the mouse until it is on top of the matter you just created, then release the button to drop the database onto the matter.

The database is now associated with the matter.

Next you need to create a user group that you can associate to the matter.

<u>**Step 3: Create a user group**</u>

To create a user group:

1. Right-click on the **User Groups** folder and select **New usergroup**.

    An empty field appears.

2. Type a name for the user group in the field and press **Enter**.

3. Type a more descriptive name or description of the user group in the **Description** field in the right-hand pane.

The user group is now created.

Next you need to assign the user group to the matter associated with the database in which you want to limit user access.

Step 4: Assign users to the user group

1. If not already visible, double-click on the **User Groups** folder to display the list of user groups.

2. Double-click on the **Users** folder to display the list of users.

3. In the **Users** list, press and hold the mouse button down on a user name.

   To select multiple users at once, use CTRL+click or SHIFT+click to select the names.

   Once they are all highlighted, release the CTRL or SHIFT key - the user names should remain highlighted. Place the mouse anywhere over the list of highlighted names and then press down and hold the left mouse button.

4. Drag the mouse until it is on top of the user group you just created, then release the button to drop the database onto the user group.

   This action assigns the selected user(s) to the user group.

5. Repeat steps 3 and 4 to assign more users to the user group.

6. When finished, click the **Synchronize now** button.

The users who need access to the database are now assigned to the new user group.

 Next you need to to associate this user group with the same matter with which you associated the database.

Step 5: Associate the user group with the matter

1. Double-click on the **Matters** folder to display the list of matters.

2. If not already displayed, double-click on the **User Groups** folder to display the list of user groups.

3. Press and hold down the left mouse button on top of the user group to which you just assigned the users.

4. Drag the mouse until it is on top of the matter to which the database is associated, then release the button to drop the user group onto the matter.

The user group is now associated with the matter. All users in the group will have access to any databases associated with this same matter.

The final step is to remove the database from the "All User Groups" matter.

<u>**Step 6: Remove the database from the "All User Groups" matter**</u>

The final step of the process is to remove the database from the "All User Groups" matter so that all other users on the Concordance Desktop server no longer have access to the database.

1. Double-click on the **Matters** folder to display the list of matters.

2. Double-click on the "**All User Groups**" matter to display the list of databases and user groups associated with it.

3. Locate the database for which you just created the new matter and user group.

4. Right-click on the database and select **Remove Database from matter**.

5. You are asked to confirm the removal, click **Yes**.

Once the matter, database, and user group are all setup and associated under the matter, making changes going forward involves only a simple drag and drop action to add users and a right-click on the user names in the user group to remove users.

Restricting user field rights and menu access on databases

Users receive access to databases through a specific *matter* named "All User Groups" to which all databases and all users are automatically associated. When a user account is setup, it is automatically added to a specific group named "All Users." The "All Users"group is automatically assigned to the "All User Groups" *matter*. Likewise, as a database is created, it is automatically assigned to the "All User Groups" *matter*. It is this assignment of the databases and the "All Users" group to the "All User Groups" *matter* that allows all users to have access to all databases on the Concordance Desktop server.

In similar fashion, initial field rights and menu access settings to all databases are controlled through the settings in each user's user account displayed in the Admin Console. The only exception is when user accounts are added through the migration of a Concordance 10.x database to Concordance Desktop.

To further explain:

When adding users through the Admin Console, by default, full rights to fields (read and write) and full menu access (all menus in each database) are granted to the user. However, these defaults can be changed if you need to restrict the user's field rights and menu access rights across **all** databases. See Restricting user access on databases for more details.

When adding users by registering a migrated Concordance 10.x database, user accounts and rights to the migrated database are carried over from the Concordance 10.x database and applied to that database in Concordance Desktop. However, for all other databases on the server, field rights and menu access defaults are used. Therefore, users added

through migration may have restricted rights, while all other users on the Concordance Desktop server still have full rights to the migrated database. If you need to restrict user rights on these migrated databases, you can do so from the User Management screen. See Restricting user access on databases for more details.

When adding users through an external domain (such as Active Directory), as with users manually added in the Admin Console, the default of full rights to fields (read and write) and full menu access (all menus in each database) are granted to each user. These defaults can be changed if you need to restrict a user's field rights and menu access across all databases. See Restricting user access on databases for more details.

It is important to note that no matter how users are added to the Concordance Desktop server, if you need to setup restrictions for a user across **all** databases, you need to do so in the user's user account in the Admin Console immediately after their user account appears in the Admin Console. This is the only way in which to ensure that the restrictions you setup will be applied to all databases on the Concordance Desktop server. If you setup restrictions later on, the new settings will only apply to all databases added to the server from that point forward.

If you have a need to restrict a user's field rights and menu access settings for a specific database, you do so from the User Management dialog box in Concordance Desktop.

💡 If you need to setup the same restricted field and menu access rights to one or more users across multiple databases, but not *all* databases, you can setup the restrictions for each user in one database, and they export the settings to a role template (.csv file) and import those same user restrictions to those same users on other databases.

📝 When you make changes to user settings in the User Management screen, and the user currently has the database open on their desktop, the changes are not applied until the database is closed and reopened by that user.

To restrict a user's field rights and menu access across all databases:

In each user's account, you can quickly restrict database field rights and menu access, which is then applied to all databases when you synchronize the changes with the databases. The one exception is if the user ID is listed in a Concordance 10.x database that has been migrated to Concordance Desktop; in which case, the field rights and menu access settings for that user in that database override whatever settings are selected in the user's account in the Admin Console.

📝 To set a user's Field Rights & Menu Type restrictions across all databases, you must change the default settings when the user is first added to the Concordance Desktop server. If you change a user's settings later on, the new settings will only take affect on databases added to the server from that point forward.

To set user restrictions for a user across all databases on the Concordance Desktop server:

1. In Concordance Desktop, click on the **Workspace** tab to ensure that your focus is not on a database.

2. From the **File** menu, click **Administration**, and then **Admin Console**.

3. Log onto the server where you need to restrict the user's rights.

4. Click the **Management** tab.

5. Double-click the **Users** folder.

6. Click on the user ID of the user for whom you need to apply access restrictions.

7. Click the **Field Rights** down-arrow and select whether the user should be able to read and write to all fields in all databases or just read access.

8. Click the **Menu Type** down-arrow and select the user Preset you want to apply for this user across all databases.

Menu Type Presets

Menu access rights for each Preset:

Supervisor:	User has access to all menus and menu commands.
Administrator:	User has access to all menus and menu commands except the *Modify*, *User Management*, and *Zap* menu commands.
Editor:	User does not have access to the menu commands restricted in the Administrator preset, and does not have access to the following menu commands: **New**, **Reindex**, **Index**, **Pack**, **Begin program**, **Edit program**, and the menu commands for data validation. Though Editors can still search and edit, perform a global edit, load and unload data, and run reports.
Researcher:	User does not have access to the menu commands restricted in the Administrator and Editor presets, and cannot edit or append, load, overlay, import data, perform global edits, or unload a copy of the database's structure.
No Access:	User does not have access to any menus or menu commands. User can only open and exit the database.

9. Repeat steps 6 through 8 for each user you need to set restrictions on.

10. Click the **Synchronize now** button to apply the restrictions.

These restrictions are applied to all databases, except for those in which the user was added to a Concordance 10.x database that has been migrated to Concordance

Desktop. In this case, the settings assigned in the database are carried over and override the settings from the user account in the Admin Console.

To restrict a user's field rights and menu access on a specific database:

🗏 When you make changes to user settings in the User Management dialog box, the changes are not applied until the database is closed and reopened by the user whose settings were changed.

1. In Concordance Desktop, open the database in which you need to set user restrictions.

2. From the **File** menu, click **Administration**, and then **User Management**.

   The User Management screen opens.

3. Click on the user name of the user for whom you need to set restrictions.

4. To set or modify field rights, click the **Field rights** tab.

   - In the Field list, select the fields to apply or remove field rights. To select multiple fields, use CTRL+click or SHIFT+click.

     By default, the Full access check box is selected for all fields when you add a user to the Concordance Desktop server.

     Field right presets

Full access:	Gives users both read/write access to a field. This level of access for all fields is required for anyone who will be performing maintenance functions such as, indexing, packing, or a database modify. If the user does not have full access to the fields, Concordance Desktop does not either.
Read only:	Gives users the ability to search, browse, and print the field. They may not edit or otherwise modify read-only fields. Commands such as Global edit and Load do not display fields which have read-only access. These fields are displayed in Edit view, but only for reference or to copy text to the clipboard.

     The Read-only setting for fields in the Data Entry Attributes dialog box takes precedence over the read-only setting for fields on the Field rights tab in the User Management dialog box.
     For example, if the Read only check box is selected for the OCR1 field in the Data Entry Attributes dialog box, and the Full access check box is selected for the OCR1 field on the Field rights tab in the User Management dialog box, the OCR1 field will be read-only for the user in the Edit view.

For more information about the Data Entry Attributes dialog box, see Setting data validation.

Write only: Give very limited access. Users with write-only field access can load data into fields using Load, and assign values to them through the programming language, but they are not able to view or search these fields. The Edit view does not display write-only fields and therefore, they cannot be edited. The searches are post-processed to remove any references to hits in these fields. The searches may also run slower.

No rights: Denies all access to the field. Users are not able to search for data in these fields. Searches are post-processed to remove any references to hits in these fields. The searches may run slower and the results may not contain the same count as a search with read-only field access.

5. To set or change menu access rights, click the **Menu access** tab, click one of the menu access preset buttons, and/or manually define the menu and menu command access for the user in the menu tree.

By default, new users have full access to all menus and menu commands on the Menu access tab.

You can manually select the menu access permissions for each menu, select one of the menu access presets, or select a preset and then manually customize the menu permissions for the individual user.

Menu access presets

Menu access rights for each Preset:

Supervisor: User has access to all menus and menu commands.

Administrator: User has access to all menus and menu commands except the *Modify*, *User Management*, and *Zap* menu commands.

Editor: User does not have access to the menu commands restricted in the Administrator preset, and does not have access to the following menu commands: **New**, **Reindex**, **Index**, **Pack**, **Begin program**, **Edit program**, and the menu commands for data validation. Though Editors can still search and edit, perform a global edit, load and unload data, and run reports.

Researcher: User does not have access to the menu commands restricted in the Administrator and Editor presets, and cannot edit or append, load, overlay, import data, perform global edits, or unload a copy of the database's structure.

No Access: User does not have access to any menus or menu commands. User can only open and exit the database.

- When a menu or menu command check box is checked, the user has access to this menu or menu command.

- When a menu check box is checked but the check box is gray, the user has access to the menu, but does not have access to some of the menu command on the menu.

- When a menu or menu command check box is not checked (blank), the user does not have access, and cannot view the menu or menu command in Concordance Desktop.

6. Click the **Apply** button to save the user settings.

7. Repeat the steps for each user you need to restrict.

⚠ If you are setting up user database restrictions for a new database, and want to import restricted user settings, including users, from another database, be sure to import the user management settings before manually defining any restrictions in the User Management screen.

When you import user restrictions from a .csv file, the file overwrites all existing settings previously defined in the User Management screen or in the Admin Console, for the selected database only.

📝 Whenever you add or rename a field in the database, by default, full field access rights are granted to all users. Therefore, if you have renamed a field to which some users were assigned specific restrictions, you will need to reset those restriction for those users. If you have created a new field that some users should have limited or no rights in, you will need to set those user restrictions.

As users are added to the Concordance Desktop server, they are granted administrative rights across all databases, unless you change their License Type and Menu Type settings in the Admin Console. Administrative users have access to additional menu options that other user types cannot access. These additional menu options are described below under the Administrator default menus section.

Administrator default menus

Database administrator only - menu commands when focus is on a database tab:

On the File menu, you can access the following Administration commands:

- **Admin Console** (Server and license management, and user, database, user group, matter, and client setup and maintenance at the Concordance Desktop server level)

- **Added menu items** (Adding custom menus at the database level)

- **User Management** (Field rights and Menu access at the database level)

- **Pack > Database**
- **Pack > Dictionary**
- **Zap**
- **Imagebase Management** (Rename media paths/folder, rename or delete media keys, export imagebse to OPT format, calculate or update document page count)
- **Remove Kashida Characters**
- **Bulk Field Format Reset**
- **Concatenate > Edit Concatenation** (Add databases to a concatenated set, or create a concatenated set by adding databases to the currently opened database. Remove one or more databases from a concatenated set.
- **Concatenate > Clear Concatenation** (Remove a concatenated set)

Administrator-only menu commands when focus is on the Workspace tab:

On the File menu, you can access the following Administration commands:

- **Admin Console** (Server and license management, and user, database, user group, matter, and client setup and maintenance at the Concordance Desktop server level)

Optional Field and Menu restrictions

There are two options you can implement to prevent users from accessing fields and menus.

Restricting Field Access

Even if user management is not applied to a database, you can apply read-only rights to fields in the Data Entry Attributes dialog box. Any field marked as read-only in this box applies to all database users and also overrides field rights applied in the user management console.

For more information about the Data Entry Attributes dialog box, see Setting data validation.

User restriction guidelines for concatenated databases

Setting up user restrictions for concatenated databases includes the following guidelines:

- User restrictions need to be set up in each database. Setting them in a concatenated database set only affects the primary database.
- The user name and password must be the same for all databases in the concatenated set.

- When the user name and password in the primary database does not exist in a secondary database, the concatenated database will not open. The user will receive a message that they do not have access rights to the specific database.

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

To export user management settings:

You can export the user management settings from a Concordance Desktop database and import them into another Concordance Desktop database. When you export Concordance Desktop user management settings, you are exporting all of the user access settings, including users, that are defined for the database in the User Management dialog box. The exported settings can be used to set up a database template with your user access specifications.

⚠ It is best practice to always export a copy of your user access settings each time you update them so you have a current backup copy to reference. Be sure your supervisor or secondary database administrator has access to this file in case of an emergency.

1. On the **File** menu, click **Administration**, and then **User Management**.

   The User Management dialog box opens.

2. In the **Field rights** tab, click the Export button.

   The Save As dialog box opens.

3. Navigate to where you want to save the exported user access settings file, type the name of the file in the **File name** field, make sure that **Comma separated file (*.csv)** is selected in the **Save as type** field, and click **Save**.

   It is best practice to store this file in a separate, secure folder on your network.

   Hre is an example of exported user access settings file in a spreadsheet:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Fields	BEGNO	ENDNO	DOCDATE	DOCTYPE	DOCTITLE	TO	FROM	PAGES	OCR1	OCR2	ADMIN1	ADMIN2
2	Delete DEFAULT												
3	Rights DEFAULT	r	r	r	r	r	r	r	r	r	r	w	w
4	Delete ADMIN												
5	Rights ADMIN	rw	rw	rw	rw	rw	rw	rw	rw	rw	rw	rw	rw
6	Delete ATTORNEY												
7	Rights ATTORNEY	r	r	r	r	r	r	r	r	r	r	w	w
8	Delete PARALEGAL												
9	Rights PARALEGAL	r	r	rw	rw	rw	rw	rw	rw	rw	rw	rw	rw
10	DeletedMenuItems paralegal=MODIFY												
11	DeletedMenuItems paralegal=ZAP												
12	DeletedMenuItems paralegal=SECURITY												
13	DeletedMenuItems attorney=MODIFY												
14	DeletedMenuItems attorney=MANAGE LIST FILES												
15	DeletedMenuItems attorney=INDEX												
16	DeletedMenuItems attorney=IMPORT												

7. Click **OK** to close the **User Management** dialog box.

To import user management settings:

You can import the user management settings from one Concordance Desktop database into another Concordance Desktop database. When you import Concordance Desktop user management settings, you are importing all of the user access settings, including users, that were defined for the database in the User Management dialog box.

The import requires at least one commonly named field between the .csv file and the database to which the file is being imported. Before importing a .csv file exported from another Concordance Desktop database, make sure that there is at least one commonly named field. For example, the user access settings for the DOCTITLE field are exported to the user management settings .csv file, and the .csv file is being imported into a database also containing a field named DOCTITLE.

⚠ If you are setting up user management, and want to import the user access settings, including users, from another database, be sure to import the user access settings before manually defining any user access settings on users in the database.

When you import a user management settings CSV file, the file overwrites all existing user access settings defined in the User Management dialog box.

1. On the **File** menu, click **Administration**, and then **User Management**.

    The User Management dialog box opens.

2. On the **Field rights** tab, click the **Import** button.

    An Open dialog box opens.

6. Browse to and click the .csv file containing the user management settings you want to import and click the **Open** button.

    The user access settings from the file are imported into the database. If there were any existing user access settings defined in the User Management dialog box, they are overwritten by the user access settings defined the .csv file during the import.

7. Click **OK** to close the **User Management** dialog box.

Managing User Sessions

From the Connections tab in the Concordance Desktop Admin Console, you can monitor and manage user activity and time allotments for user sessions.

The Connections tab displays all users currently connected to the Concordance Desktop server. Each user's current status is displayed, along with what database is being accessed, the start time and duration of the connection, the remaining time before their allotment expires, the IP address being used, the type of software being used for the connection (CN = Concordance Desktop), the version of that software, and the type of license their account is using on the server. Most users' status displays as idle while they are logged on.

You can also use the Connections tab to send broadcast messages and disconnect users, including administrators.

Select the Server side tab to administer user sessions. Select the Administration side tab to administer the administrator user sessions.


You can define the user connection options for the Concordance Desktop server on the Connections tab in the Admin Console.

⊟ <u>**To set user connection options:**</u>

1. Open the **Admin Console** on the Concordance Desktop server where you need to set/change user connection options.

2. On the **Connections** tab, do one of the following:
   - Click the **Server** side tab to set the user connection options for the Concordance Desktop server.
   - Click the **Administration** side tab to set the user connection options for the Admin Console.

3. Click the **Options** button to open the **Connection options** dialog box.
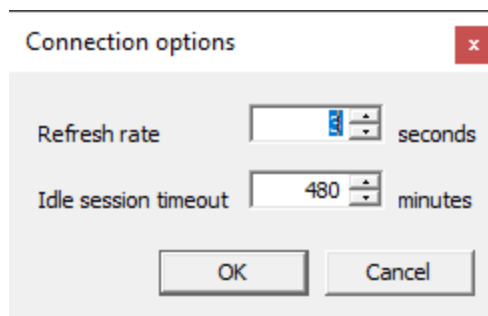
   The Refresh rate field determines how often, in seconds, the user connection list refreshes on the Connections tab. The Refresh rate field defaults to 3 seconds.

4. In the **Refresh rate** field, type or scroll to how often you want the list to be refreshed.

   The Idle session timeout field determines how long, in minutes, a session can be idle before the Concordance Desktop Admin Console automatically closes the session connection and disconnects the user. The Idle session timeout field defaults to 480 minutes. To disable time-outs, set the Idle session timeout field to 0 minutes.

   ✎ The Idle session timeout can also be set on the Settings tab in the Concordance Desktop Admin Console. For more information. see Adjusting time-outs.

5. In the **Idle session timeout** field, type or scroll to how long a user session can be idle before the session times out.

6. Make sure that the **Auto refresh** button is toggled to on.

   When the Auto refresh function is turned on, user connections list on the Connections tab will automatically refresh at the rate you specified in the Connection options dialog box.

User sessions expire when the software sits idle for the time specified on the Connections tab. You can manually extend a user session back to the default time-out period, or enter a zero to disable time-outs.

For more information about defining the default time-out period and disabling time-outs, see Setting user connection options.

If a user time-out period expires, the Admin Console automatically alerts the server with an announcement. Users who are logged in, but not actively working in a database, may risk losing editing updates if you manually kill their session when their user session expires.

For more information about disconnecting users, including soft and hard kills, see Disconnecting user sessions.

You can extend user time-outs for users on the server and performing administration tasks on the Connections tab in the Concordance Desktop Admin Console.

To manually extend user time-outs:

1. On the **Connections** tab, do one of the following:

    - Click the **Server** side tab to extend a users session on the server.
    - Click the **Administration** side tab to extend a users session in the Admin Console.

2. In the user listing, click the applicable user connections.

    To select multiple connections, use SHIFT+click or CTRL+click.

3. Click the **Extend** button.

    Clicking the Extend button resets the session time-out to number of minutes entered in the Idle session timeout field in the Connection options dialog box, and updates the time-out minutes displayed in the Expiration column.

    The Idle session timeout can also be set on the Settings tab in the Concordance Desktop Admin Console. For more information. see Adjusting time-outs.

To alert users that you need to perform administrative tasks and that they need to exit the application, you can send a broadcast message notifying them of the task and how much time they have before it occurs. If a user does not respond to the notice, you then have the option to disconnect them.

You can send broadcast messages to users on the Concordance Desktop server from the Connections tab in the Admin Console.
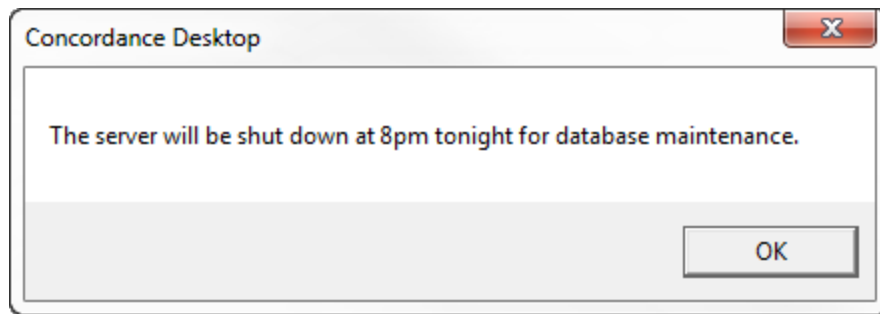
⊟ **To send a broadcast message:**

1. On the **Connections** tab, do one of the following:

   - Click the **Server** side tab to broadcast a message to users on the Concordance Desktop server.
   - Click the **Administration** side tab to broadcast a message to users on the Concordance Desktop Admin Console server.

2. In the user listing, click the applicable user connections.

   To select multiple connections, use SHIFT+click or CTRL+click.

3. Click the **Broadcast** button to open the **Message Broadcast** dialog box.
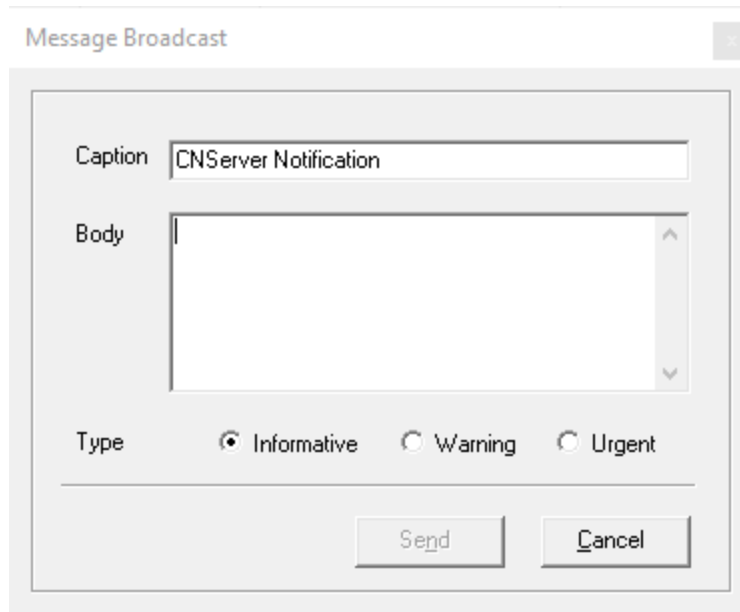
4. In **Caption** field, type a description for the notification.

   The Caption field defaults to Concordance Desktop Notification.

5. In the **Body** field, type the message you want to broadcast.

6. In the **Type** field, select the type of message you are broadcasting:

   - **Informative**
   - **Warning**
   - **Urgent**

7. Click the **Send** button to broadcast the message to the selected user connections.

   The selected users immediately receive a message prompt onscreen with the content of your message.

If a user does not respond to a broadcast message to exit the system or you have a need for users to exit the system immediately, you can manually disconnect them.

You can disconnect user sessions on the server and to the Admin Console from the Connections tab in the Admin Console.

For more information about time-out settings on the Settings tab, see Adjusting time-outs.

📝 If you disconnect a user when they are in the process of clicking on the File menu, the user will not receive the message that their connection has been terminated.

☐ **To disconnect user sessions:**

1. On the **Connections** tab, do one of the following:
    *   Click the **Server** side tab to disconnect user sessions on the server.
    *   Click the **Administration** side tab to disconnect user sessions in the Admin Console.
2. In the user listing, click the applicable user connections.

    To select multiple connections, use SHIFT+click or CTRL+click.

3. Click the ✖ **Kill** button.

4. You are asked to confirm that you want to disconnect the user's session, click **Yes**.

Clients, Matters and User Groups

In Concordance Desktop, a matter is the focal point for associating users with a database. Matters are used to organize and maintain associations between databases and users on the server. First you create a matter and associate the database with that matter. Next you create a "user group" and assign all the users who need to access the database, to that user group. Last, you associate that user group with the matter with which you have already associated the database. It is the use of these associations that allows those users to access that database. Management of user access becomes easier, as maintaining access is as simple as adding or removing users in the user group. Each user group can also be associated with multiple matters, allowing the same users access to different databases simply by adding the user group to a matter that is associated with a different database.

Concordance Desktop, has an automated association that allows all users to have access to all databases on a Concordance Desktop server, for those firms in which all users need access to all databases. This automated association method is the default in Concordance Desktop. Here's how this automated association works:

- When a database is created on, migrated to, or registered with the Concordance Desktop server, that database is automatically associated with a special matter named "All User Groups."

- When users are added to the Concordance Desktop server, their user account is automatically added to a special "All Users" user group, which is also automatically associated with the "All User Groups" special matter.

It is this association process that allows ALL users with user accounts setup on a Concordance Desktop server to have access to ALL databases.

The default behavior may be modified by selecting a different user group as the default user group for all members.

Clients have a different use. They are used solely for containing all matters that relate to a single client. For example, if you have multiple matters (cases) that apply to the same client, you may want to organize those matters under a single "client" name to make it easier to find all matters associated with that client.

All these associations are managed from a tree view on the Management tab in the Admin Console. The tree displays a listing of all Clients, Matters, Databases, User Groups and Users. From the tree you can visually verify each of the associations. In addition, the tree view lets you easily manage the databases, users, user groups, matters and clients directly from the folders in the tree.

- **Clients** - From the Clients folder you can add, remove, and modify clients, and associate multiple matters with a client.
- **Matters** - From the Matters folder you can add, remove, and modify matters, and associate databases and user groups.
- **Databases** - From the Databases folder you can register and unregister databases, enable databases for FYI Reviewer, and create shortcut (.FYI) files for Concordance Desktop users.
- **User groups** - From the User groups folder you can add, modify and delete user groups, and assign users to each user group.

- **Users** - From the Users folder you can add, modify, and delete users, insert and remove domain users, reset passwords for users, and disable user accounts.

⊟ **Setting Up Clients, Matters, and Databases Checklist**

We recommend that you set up clients and/or matters prior to creating user groups and registering databases in the Admin Console. This way you can easily associate databases and user groups with those clients and/or matter. Reference the following checklist to ensure that you have completed the necessary phases of planning and implementing clients and/or matters, databases, and user groups.

Checklist: Setting Up Clients and Matters	
Pre-planning	
☐	Have you created a list for all clients and/or matters, databases, user groups and users that you need to manage and what matters apply to each of them?
☐	Have you created a list of what databases are associated with each client and/or matter?
☐	Are you going to migrate/register databases individually or automatically (using the DB Smart Path folder) for each client and matter?
	Will you allow all users to be added to the All Users Group and the all matters to be added to the All Users Group matter? If not, have you established a default user group and modified the Setting in the administration console?
Setup	
☐	Did you set up all clients and/or matters and user groups?
☐	Did you already add all users to the Concordance Desktop server?
☐	Did you add users to each of the user groups?
Registering Databases	
☐	Did you specify a database administrator?
☐	Did you associate each database with a client and/or matter?
Publishing Databases	
☐	Did you remember to save a Database Shortcut (.fyi) file for licensed Concordance Desktop users to access databases from remote locations?
☐	Did you set up e-mail templates to distribute Database Shortcut (.fyi) files?

Managing clients

Client folders can be used to keep track of multiple matters. Adding clients is one way to organize your matters for the clients for whom you host data or for the clients your organization represents. Clients are displayed in alphabetical order and can easily be added or removed, as needed.

💡 Once clients are added, you can drag-and-drop matters to clients or in version 1.07+ click on a client and use the selection box to associate matters with them.

To add a client

1. From the **Admin Console**, click the **Management** tab.

2. Right-click on the **Clients** folder and select **New client**.

   An empty folder appears.

3. Type a short name for the client in the field and press **Enter**.

   The client information appears in the right-hand pane, where the *Name* field displays the name you just entered.

4. Select the new client. The client information expands and allows you to type a longer title or description for the client in the **Description** field and press **Enter**.

The client is now created.

To delete a client

1. From the **Admin Console**, click the **Management** tab.

2. Expand the **Clients** folder on the left..

3. Right-click on the client name that you need to delete, and select **Delete client**.

4. You are asked to confirm the deletion, click **Yes**.

The client is removed from the Clients folder and all associated matters are disassociated with the client. The matters are not removed, only the association between the matters and the client are removed. If you need to recreate the client, you will need to associate the matters with the client again.

To associate a matter with a client

In version 1.07+, Matters can be associated with Clients using the drag and drop method or by selecting the desired matter(s) and adding them to the client.

1. From the **Admin Console**, click the **Management** tab.

2. Expand **Clients** and select the desired client with which to associate a matter by either using the drag and drop method or selecting matters for association.

Selecting matters for client association in version 1.07+.

Selecting the column header **Matter** for either Available Matters or Client Matters will sort the matters in ascending Matter ∕ or descending Matter ▽ order.

3. After sorting the matters to find your desired matter, do one of the following:

- Select the Matter from the Available Matters column and select **Add Matter**.

- Select the Matter from the Available Matters column by clicking the left mouse button twice.

4. The added matter will be removed from the Available Matters column and added to the Client Matters column.

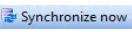Available Matters - lists all Matters registered on the server.
Client Matters - lists all Matters currently added to the selected client.

If there are more entries in either column (Available User Groups or Matter User Groups) than can be displayed at once, then a scroll bar will be displayed for scrolling purposes.

To associate a matter with a client using drag and drop

3. Double-click on the **Matters** folder to display the list of matters.

4. Press and hold down the left mouse button on top of the matter you want to associate with a client.

5. Drag the mouse until it is on top of the client, then release the button to drop the database onto the matter.

The matter is now associated with the client.

To see the changes reflect on the menu tree select Refresh ↻ Refresh . After adding all desired databases to the matters, select **Synchronize now** ⬇ Synchronize now from the Management tool bar to update the changes in the matters and databases.

⊟ **Removing Matters from a client**

To remove matters from the client. The matters are not deleted, only the association between the matters and the client is removed.

Select the client to which you need to remove matters.

Do one of the following:

- In version 1.07+, select the Matter from the Client Matters column and select **Remove Matter**.

- In version 1.07+, select the Matter from the Client Matters column by clicking the left mouse button twice.

- Expand the client to review the associated matters then right click on the matter. Select **Remove matter from Client**.

The selected matter will be removed from the Client Matters Column and added to the Available Matters column.

Available Matters - lists all Matters registered on the server.
Client Matters - lists all Matters currently added to the selected client.

If there are more entries in either column (Available User Groups or Matter User Groups) than can be displayed at once, then a scroll bar will be displayed for scrolling purposes.

To see the changes reflect on the menu tree select Refresh ♻ Refresh . After adding all desired databases to the matters, select **Synchronize now** ⟳ Synchronize now from the Management tool bar to update the changes in the matters and databases.

Managing matters

Matters are used for organizing client cases. Adding matters also helps you manage databases by topic or case. However, the most important purpose of a matter is to create an association between a database and the users that need to open that database. In order for users to access a database on the Concordance Desktop server, both the database and the users (via a user group), must be associated with a matter.

We recommend that you outline and create matters so that you can keep track of multiple databases and the user groups that require access to them. Folders display in alphabetical order and can easily be added or removed, as needed.

💡 Once matters are added to the Concordance Desktop server, you can associate databases and user groups to the matters, which will allow the users, assigned to the associated user group, to open the associated database(s).

To add a new matter

1. From the **Admin Console**, click the **Management** tab.

2. Right-click on the **Matters** folder and select **New matter**.

   An empty field appears.

3. Type a short name for the matter in the field and press **Enter**.

4. Double click the newly created matter and the matter information appears in the right-hand pane, where the *Name* field displays the name you just entered. Type a longer title or description for the matter in the **Description** field and press **Enter**.

You can now associate a database and user group to the matter, so that the users in the user group have the ability to open the database.

To delete a matter

1. From the **Admin Console**, click the **Management** tab.

2. Expand the **Matters** folder on the left to display the list of matters.

3. Right-click the matter you want to delete and select **Delete matter**.

4. You are asked to confirm the deletion, click **Yes**.

Deleting a matter removes it from the Concordance Desktop server and any associated clients. Once you delete a matter, if you need to recreate the matter, you need to associate the matter to the applicable clients, databases, and user groups again.
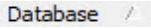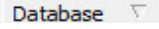
Deleting a matter from the Matters folder, removes the matter from the Concordance Desktop server and any associated client, databases, and user groups. When a matter is removed from a client in the Clients folder, the matter is only deleted from the selected client. The associated database(s) and user group(s) are not affected.

⚠ If you delete the "All User Groups" matter, it prevents ALL users from accessing ALL databases on the Concordance Desktop server. For this reason, we recommend that you do not delete this matter and user group unless you plan to create a matter and user group for every database on the server, and then associate the appropriate databases and user groups with the various matters.

To associate a database with a matter

1. From the **Admin Console**, click the **Management** tab.

2. Expand **Matters** and select the desired matter with which to associate a database then either use the drag and drop method or database selection.

⊟ **Selecting databases for matter association.**

Selecting the column header **Database** for either Available Databases or Matter Databases will sort the databases in ascending Database or descending Database order.

In version 1.07+, databases can be associated with matters by selecting the desired database(s), and adding them to the matter.

3. Select the **Databases** tab to change from the User Groups selection screen.

4. After sorting the databases to find your desired database, do one of the following:

- Select the database from the Available Databases column and select **Add**.

- Select the database from the Available Databases column by clicking the left mouse button twice.

5. The added database will be removed from the Available Databases column and added to the Matter Databases column.

Available Databases - lists all databases registered on the server.
Matter Databases - lists all databases currently added to the selected matter.

If there are more entries in either column (Available Databases or Matter Databases) than can be displayed at once, then a scroll bar will be displayed for scrolling purposes.

Drag and drop database association method.

1. Double-click on the **Databases** folder to display the list of databases on the server.

2. Press and hold down the left mouse button on top of the database you want to associate with a matter.

3. Drag the mouse until it is on top of the matter, then release the button to drop the database onto the matter.

The database is now associated with the matter.

To see the changes reflect on the menu tree select Refresh Refresh .   After adding all desired databases to the matters, select **Synchronize now** Synchronize now from the Management tool bar to update the changes in the matters and databases.

To Insert a database in a matter

1. From the **Admin Console**, click the **Management** tab.

2. Expand **Matters** and select the desired matter with which to add a database.

3. Right click and select **Insert database**.

4. A new folder is created.

5. Type the database name and hit **Enter**.

6. A new window opens for browsing to the database that you would like to add.

7. Browse out to the database.dcb and select **Open**.

8. The database will be added to the server and the matter.

To remove a database from a matter

To remove databases from the matter. The databases are not deleted, only the association between the database and the matter is removed.

Select the matter to which you need to remove database.

Do one of the following:

- In version 1.07+, select the database from the Matter Databases column and select **Remove**.

- In version 1.07+, select the database from the Matter Databases column by clicking the left mouse button twice.

- Expand the matter to review the associated databases then right click on the database. Select **Remove Database from matter**.

The selected database will be removed from the Matter Databases Column and added to the Available Databases column.

📝 Available Databases - lists all databases registered on the server.
  Matter Databases - lists all databases currently added to the selected matter.

  If there are more entries in either column (Available Databases or Matter Databases) than can be displayed at once, then a scroll bar will be displayed for scrolling purposes.

To see the changes reflect on the menu tree select Refresh 🔄 Refresh . After adding all desired databases to the matters, select **Synchronize now** 🗘 Synchronize now from the Management tool bar to update the changes in the matters and databases.

To associate a user group with a matter

1. From the **Admin Console**, click the **Management** tab.

2. Double-click on the **Matters** folder to display the list of matters.

3. Select the desired matter with which to associate a user group then either use the drag and drop method or database selection.

<u>**Selecting user groups for matter association**</u>

Selecting the column header **Usergroup** for either Available User Groups or Matter User Groups will sort the databases in ascending Usergroup ∕ or descending Usergroup ∇ order.

In version 1.07+, user groups can be associated with Matters by selecting the desired user group(s), and adding them to the matter.

4. Select the **User Groups** tab to change from the Databases selection screen.

5. After sorting the user groups to find your desired user group, do one of the following:

   • Select the user group from the Available User Groups column then select **Add**.

   • Select the user group from the Available User Groups column by clicking the left mouse button twice.

6. The added user group will be removed from the Available User Groups Column and added to the Matter User Groups column.

Available User Groups - lists all User Groups registered on the server.
Matter User Groups - lists all User Groups currently added to the selected matter.

If there are more entries in either column (Available User Groups or Matter User Groups) than can be displayed at once, then a scroll bar will be displayed for scrolling purposes.

<u>**Drag and drop user group association method.**</u>

4. If not already displayed, double-click on the **User Groups** folder to display the list of user groups.

5. Press and hold down the left mouse button on top of the user group.

6. Drag the mouse until it is on top of the matter, then release the button to drop the user group onto the matter.

The user group is now associated with the matter. All users in the group will have access to any databases associated with this same matter.
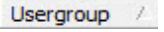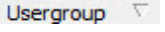
To see the changes reflect on the menu tree select Refresh ⟳ Refresh . After adding all desired user groups to the matters, select **Synchronize now** ⟳ Synchronize now from the Management tool bar to update the changes in the matters and user groups.

<u>**To remove a user group from a matter**</u>

To remove user groups from the matter. The user groups are not deleted, only the association between the user group and the matter is removed.

Select the matter to which you need to remove user group.

Do one of the following:

- In version 1.07+, select the user group from the Matter User Groups column and select **Remove**.

- In version 1.07+, select the user group from the Matter User Groups column by clicking the left mouse button twice.

- Expand the matter to review the associated user group(s) then right click on the user group. Select **Remove Usergroup from matter**.

The selected user group will be removed from the Matter User Groups Column and added to the Available User Groups column.

📝 Available User Groups - lists all user groups registered on the server.
    Matter User Groups - lists all user groups currently added to the selected matter.

    If there are more entries in either column (Available User Groups or Matter User Groups) than can be displayed at once, then a scroll bar will be displayed for scrolling purposes.

To see the changes reflect on the menu tree select Refresh ⟳ Refresh . After adding all desired databases to the matters, select **Synchronize now** ⮍ Synchronize now from the Management tool bar to update the changes in the matters and user groups.

Managing user groups

User groups are used to group users together who require access to the same database(s). User groups are required if you want to grant user access to a database, as users cannot be added to a database, nor to a matter to which the database is associated.

💡 The user group can be associated with a matter to which a database is associated, allowing the users of the user group to open that database. See Managing matters for more information.

<u>**To add a user group**</u>

1. From the **Admin Console**, click the **Management** tab.

2. Right-click on the **User Groups** folder and select **New usergroup**.

   An empty folder appears.

3. Type a name for the user group in the field and press **Enter**.

The user group is now created.

Next you need to assign the users to the user group.

To delete a user group

Deleting a user group removes it from the Concordance Desktop server and removes any associations it has to any matters. Once you delete a user group, if you need to recreate it, you need to associate it with at least one matter to allow users of the group to open any database that is associated with that matter.

1. From the **Admin Console**, click the **Management** tab.

2. Expand the **User Groups** folder on the left to display the list of matters.

3. Right-click the user group you want to delete and select **Delete usergroup**.

4. You are asked to confirm the deletion, click **Yes**.

⚠ If you delete the "All Users" user group or remove it from the "All User Groups" matter, it prevents ALL users from accessing ALL databases on the Concordance Desktop server. For this reason, we recommend that you do not delete this matter and user group unless you plan to create a matter and user group for every database on the server, and then associate the appropriate databases and user groups with the various matters.

To assign users to a user group

1. If not already visible, double-click on the **User Groups** folder to display the list of user groups.

2. Select the newly created User Group. You can type a more descriptive name or description of the user group in the **Description** field in the right-hand pane.

3. Add a user or users to the User Group by either using the drag and drop method or user selection.

To add users by user selection

Selecting the column header **User** for either Available Users or User Group User will sort the users in ascending User ⁄ or descending User ▽ order. The

users can also be sorted by email address using the column header **eMail** in ascending [eMail] or descending [eMail] order.

In version 1.07+, users can be associated with User Groups by selecting the desired user(s), and adding them to the user group.

4. After sorting the users to find your desired user, do one of the following:

    • Select the user from the Available Users column and select **Add**.

    • Select the user from the Available Users column by clicking the left mouse button twice.

5. The added user will be removed from the Available Users column and added to the User Group Users column.

    Available users - lists all users registered on the server.
    User Group Users - lists all users currently added to the selected user group.

    If there are more entries in either column (Available Users or User Group Users) than can be displayed at once, then a scroll bar will be displayed for scrolling purposes.

⊟ **To add users by drag and drop**

1. Double-click on the **Users** folder to display the list of users.

2. In the **Users** list, press and hold the mouse button down on a user name.

    To select multiple users at once, use CTRL+click or SHIFT+click to select the names.

    Once they are all highlighted, release the CTRL or SHIFT key - the user names should remain highlighted. Place the mouse anywhere over the list of highlighted names and then press down and hold the left mouse button.

3. Drag the mouse until it is on top of the user group you just created, then release the button to drop the database onto the user group.

    This action assigns the selected user(s) to the user group.

4. Repeat steps 3 and 4 to assign more users to the user group.

To see the changes reflect on the menu tree select Refresh [Refresh] . After adding all desired databases to the matters, select **Synchronize now** [Synchronize now] from the Management tool bar to update the changes in the matters and databases.

Monitoring Server Status

About monitoring server status

The overall status of the server can be monitored from the Server tab in the Admin Console. You can also stop and start the server, and set server options from the Server tab.

The Server tab allows you to instantly view the following:

- Current CPU load percentage
- Amount of memory being used
- Number of users currently logged on to the server
- Amount of server traffic (received and transmitted in bites per second)
- Amount of disk memory being used by processes
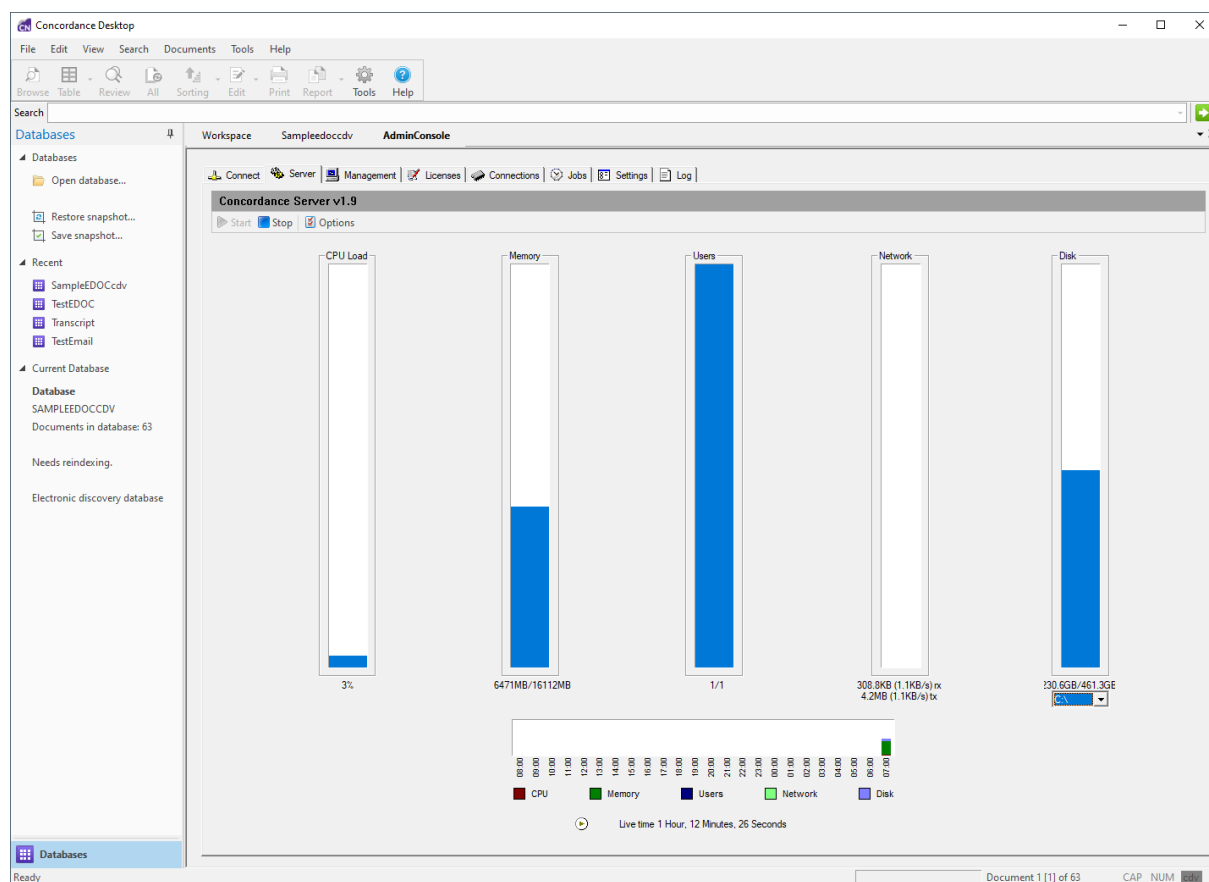
Each bar graph displays color indicating how resources are currently being used. Green in a bar graph indicates resources used by the server itself. Blue in a bar graph indicates overall resources used by the operating system. The lower portion of the Server tab displays the usage for the past 24 hours, with the latest information on the far right.

💡 Click on a bar graph to change it to a line graph and toggle to change the graph views.

Starting and stopping a server

You can start and stop a Concordance Desktop server from the Server tab in the Admin Console.

⚠ Before stopping a server, we strongly advise sending a broadcast message to any users with live connections, as stopping the server closes all their connections and they lose any work done in databases. For more information about broadcast messages, see Sending broadcast messages.

📝 If you stop the server from the Server tab of the Admin Console, you must click the Start button to restart the watchdog services. They will not restart automatically.

If you manually stop the Server and Admin services from Windows Task Manager, when you restart the services (from Windows Task Manager), always start the Server (Concordance Server) service before starting the Admin (Concordance Admin Server) service.

To stop the server:

1. Log onto the **Admin Console** on the Concordance Desktop server you need to stop.

2. On the **Server** tab, click the **Stop** button.

3. You are asked to confirm the stop, click **Yes**.

To start the server:

1. Log onto the **Admin Console** on the Concordance Desktop server you need to stop.

2. On the **Server** tab, click the **Start** button.

The server starts.

⚠ If you manually stop the services through Windows Task Manager, always start the Server service (Concordance Server) before starting the Administration Console

service (Concordance Admin Server).

Setting the refresh rate

You can adjust the refresh rate for a Concordance Desktop server status graphs on the Server tab in the Admin Console, allowing you to control the number of seconds between updates.

To refresh the graphs on the Server tab:

1. Log onto the **Admin Console** on the Concordance Desktop server where you want to set the refresh rate.

2. Click the **Server** tab.

3. Click the **Options** button to open the **Server options** dialog box.
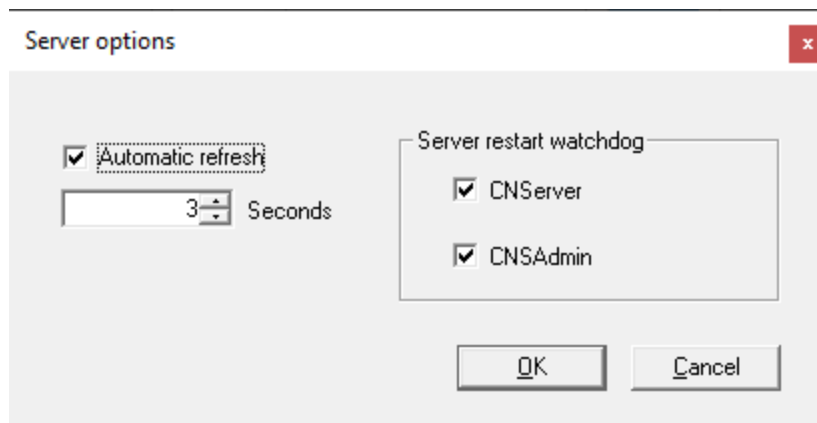
The Automatic refresh check box determines whether the graphs on the Server tab are automatically refreshed. The Automatic refresh field determines how often, in seconds, the status graphs refresh on the Server tab. The Automatic refresh field defaults to 3 seconds.

4. Select the **Automatic refresh** check box, and type or scroll to how often you want the graphs to be refreshed.

5. Click **OK** to save the settings.

Setting watchdog services

In the event that a Concordance Desktop server stops for any reason, you can set watchdog services to automatically restart the server and admin console services. When the watchdog services are enabled, the watchdog service can send an e-mail alert to the Concordance Desktop administrator when it restarts services.

We recommend that you enable both the Concordance Desktop server and Admin Console watchdog services. You can enable and disable watchdog services on the Server tab in the Concordance Desktop Admin Console. By default, the watchdog services are enabled for both servers.

For more information about setting up watchdog e-mail messages, see Adding administration accounts to the server.

📝 If you stop the services from the Server tab of the Admin Console, you must click the Start button in the Admin Console Server tab to restart the services. They will not restart automatically.

To enable watchdog restart services:

1. On the **Server** tab, click the **Options** button to open the **Server options** dialog box.
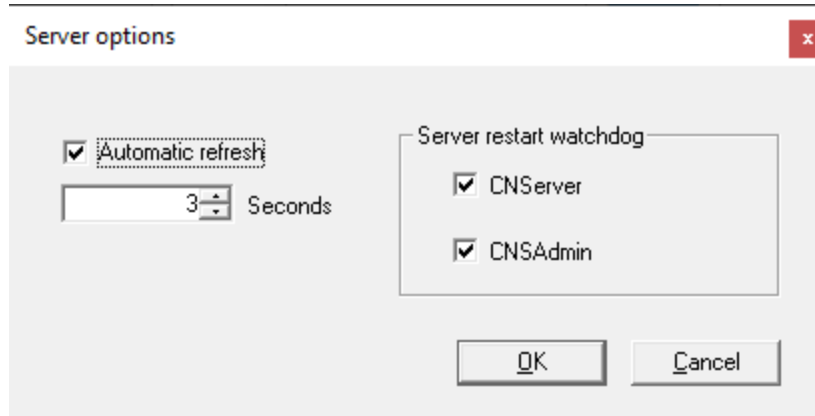
2. Select the **CNServer** check box to enable the server watchdog service.

3. Select the **CNSAdmin** check box to enable the Admin Server watchdog service.

   If you need to disable the watchdog services, clear the check box for the applicable server.
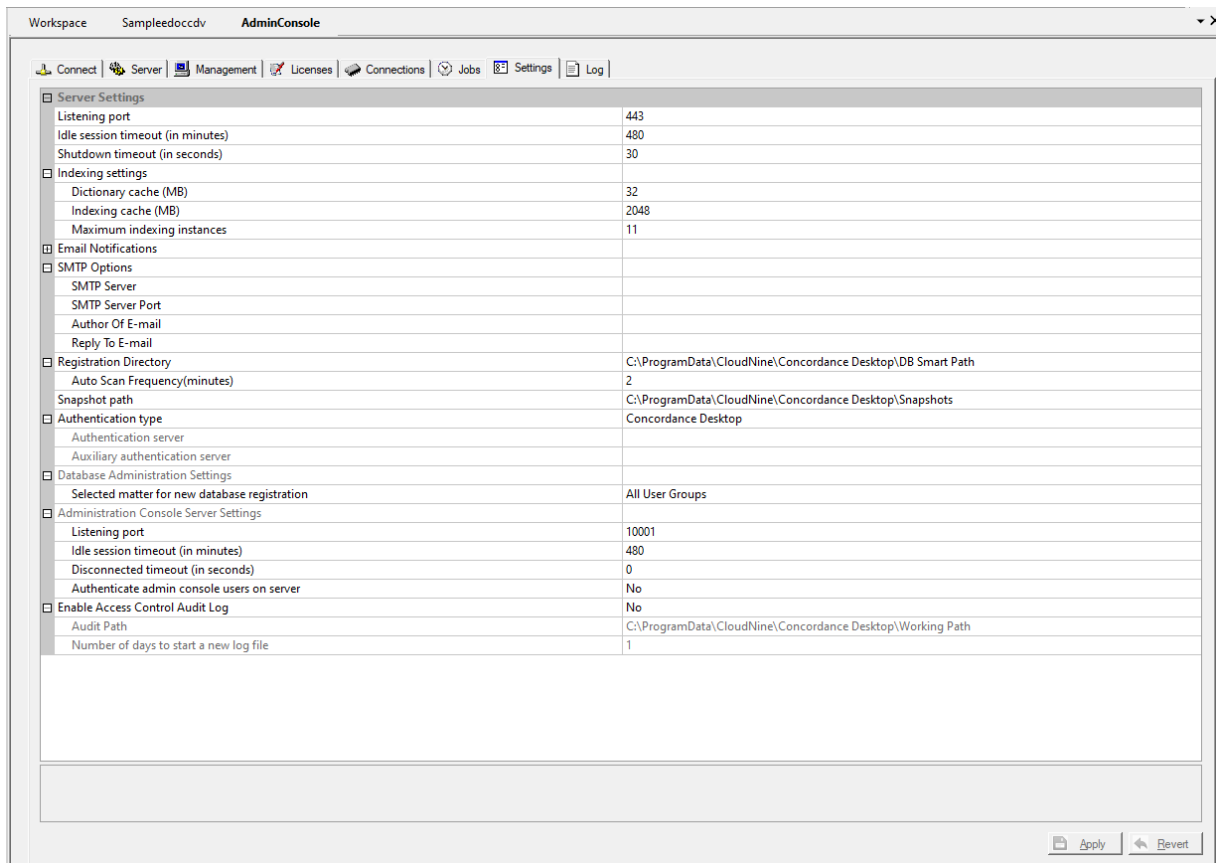
4. Click **OK** to save the settings.

Applying Advanced Server Settings

About applying advanced server settings

You can adjust server settings, including memory cache usage, indexing performance limitations, and server port addresses, for the both the Concordance Desktop Admin Console Server on the Settings tab.

⚠ Before making any changes to the server settings, we recommend you read all topics in this module. Adjustments to the server settings can affect user access and server performance.

Server settings include:

- Server listening port address
- Session idle and shutdown time-outs
- Indexing
- Email notifications
- SMTP options
- Registration directory
- Snapshot path

- Authentication type selection

Admin Console settings include:

- Server port address
- Idle session and disconnected time-outs

📝 At the bottom of the tab, you can click the Apply button to save all changes made since the last time they were saved, and you can click the Revert button to undo all changes made since the last time they were saved.

Adjusting port settings

Ports for users and administrators are set during the activation of a Server license on a Concordance Desktop installation. Typically, default settings are accepted during installation and are later adjusted as needed on the Settings tab. You can, however, select any port your network needs.

Port defaults include:

- **Port 443** - is used by the Concordance Desktop server to connect with registered databases. This default port is selected because it's commonly left open for use with SSL connections.
- **Port 10001** - is used by the Concordance Desktop Admin Console to manage the Concordance Desktop server. This default port is selected because it's not commonly used and unlikely to conflict with other services.

📝 To lookup the host name (computer name), open a command prompt, type **ipconfig /all**, and press **Enter**.

📝 If you change the default ports for the Admin Console, you need to stop and then restart the Concordance Admin Server service from the Windows 'Services' window, for the change to take affect. To get to the Services window in Windows 7 click Start > Control Panel. In the Control Panel window click the Administrative Tools link. From Administrative Tools, double-click on the Services icon in the right pane.

Considerations for changing the port address:

- Port address changes are immediate
- Send a broadcast announcement to affected users before modifying the port address
- Will not log out currently connected users until services are restarted
- Will invalidate any previously distributed shortcut (.fyi) files for Concordance Desktop users. The shortcut .fyi) file needs to be recreated and redistributed to users.

To modify the Concordance Desktop server port address:

1. Before changing the server's port address, send a broadcast message to inform users of the port change and that the server will be restarted for this process. Inform users they need to save their work and exit the application.

   For more information about broadcast messages, see Sending broadcast messages.

2. Log onto the **Admin Console** on the Concordance Desktop server where you need to change the port address.

3. Click the **Settings** tab.

4. In the **Server Settings** section, click the port number in the **Listening port** row, and type or scroll to the new port number.

5. Click **Apply** to save your settings.

6. Click **Yes** to confirm the change.

7. Stop and restart the server.

   To restart the server

   Click the Server tab.

   Click the Stop button at the top of the Server pane.

   You are asked to confirm the stop, click Yes. The server is stopped. Now you need to start the server.

   Click the Start button. The server restarts.

   For more information, see Starting and stopping a server

   When you change the server port address, all users are disconnected when the server is restarted. The users receive a message stating that their server connection was dropped.

8. Remind users to enter the new port number the next time they attempt to open a database on the server.

9. For Concordance Desktop shortcut (.fyi) file users, create and distribute a new shortcut (.fyi) file.

   The previously distributed shortcut (.fyi) file references the old port address, so the file can no longer be opened in Concordance Desktop. For more information about creating and distributing shortcut (.fyi) files, see Creating shortcut (.fyi) files and Distributing the shortcut (.fyi) file to users.

To change the Admin Console port address:

1. Before changing the Admin Console port address, send a broadcast message to inform users of the port change and that the server will be restarted for this process. Inform users they need to save their work and exit the application.

   For more information about broadcast messages, see Sending broadcast messages.

2. Click the **Settings** tab.

3. In the **Administration Console Server Settings** section, click the port number in the **Listening port** row, and type or scroll to the new port number.

4. Click **Apply** to save your settings.

5. Click **Yes** to confirm the change.

6. Stop and restart the Concordance Desktop server.

   For more information on stopping and restarting the server, see Starting and stopping the Concordance Desktop server.

   When the Admin Console port address is changed and you restart the server, all server users and any administrator user connections, except for the one you are using, will be disconnected.

7. Remind users to enter the new port number in the **Port** field on the Connect tab in the Concordance Desktop Admin Console the next time they log on.

Adjusting time-outs

On the Server tab, you can adjust the following time-out settings:

Idle session

The Idle session timeout feature allows you to set the number of minutes the Concordance Desktop server and/or Admin Console allows a session to sit idle before closing the connection and disconnecting the user. When a user's connection status on the Connections tab in the Concordance Desktop Admin Console displays as Idle, the user is typically editing or reviewing records in Concordance Desktop .FYI, or working in the Concordance Desktop Admin Console.

The Idle session time-out feature can be set on the Settings and Connections tabs in the Concordance Desktop Admin Console. For more information about modifying the setting on the Connections tab, see Setting user connection options.

⚠ The idle session timeout does not apply when a user is running a production or print job associated with the Concordance Viewer so that these jobs are allowed to run to completion.

Shutdown

You can adjust the number of seconds the Concordance Desktop server waits before ending a session in FYI Reviewer or Concordance Desktop .FYI by changing the Shutdown timeout (in seconds) setting on the Settings tab. Sessions are ended when Concordance Desktop server services are stopped/restarted on the Server tab or when an individual user session is disconnected on the Connections tab. When a user's session ends, Concordance Desktop server first attempts a soft kill, which sends a message to the server requesting it to close all files, save data, and end the user's session. Soft kills do not save data currently being edited by the client.

⚠ If a time-out occurs while a user is performing a long-term process, such as packing, indexing, or running a CPL, possible database corruption may occur.

Disconnect

You can adjust the number of seconds the Concordance Desktop server waits before disconnecting users' connections to the Concordance Desktop Admin Console by changing the Disconnected timeout (in seconds) setting on the Settings tab. Sessions are ended when Concordance Desktop server services are stopped/restarted on the Server tab or when an individual user session is disconnected on the Connections tab. When a user's session ends, Concordance Desktop server first attempts a soft kill, which sends a message to the server requesting it to close all files, save data, and end the user's session. Soft kills do not save data currently being edited by the client.

⚠ If a time-out occurs while a user is performing a long-term process, such as packing, indexing, or running a CPL, possible database corruption may occur.

For more information about starting and stopping the Concordance Desktop server, see Starting and stopping Concordance Desktop server.

For more information about broadcast messages and disconnecting sessions, see Sending broadcast messages and Disconnecting user sessions.

To modify the idle session time-out setting on the Server tab:

1. Click the **Settings** tab.

2. Do any of the following:

    *   To modify the time-out for the Concordance Desktop server, in the **Server Settings** section, click the time-out minutes in the **Idle session timeout (in minutes)** row, and type or scroll to the number of minutes a user session can be idle before the session times out.

- To modify the time-out for the FYI Administration Console Server, in the **Administration Console Server Settings** section, click the time-out minutes in the **Idle session timeout (in minutes)** row, and type or scroll to the number of minutes a user session can be idle before the session times out.

  The Idle session timeout (in minutes) setting defaults to 480 minutes. To disable time-outs, set the Idle session timeout (in minutes) field to 0 minutes.

3. Click **Apply** to save your settings.

To modify the shutdown time-out setting:

1. Click the **Settings** tab.

2. In the **Server Settings** section, click the time-out seconds in the **Shutdown timeout (in seconds)** row, and type or scroll to the number of seconds Concordance Desktop server waits before ending a session in FYI Reviewer or Concordance Desktop .FYI.

   The Shutdown timeout (in seconds) setting defaults to 30 seconds. We recommend a shutdown of 4 minutes (240 seconds) for FYI Reviewer users, allowing them to save their work and exit the application.

3. Click **Apply** to save your settings.

To modify the disconnected time-out setting:

1. Click the **Settings** tab.

2. In the **Administration Console Server Settings** section, click the time-out seconds in the **Disconnected timeout (in seconds)** row, and type or scroll to the number of seconds Concordance Desktop server waits before disconnecting users' connections to the Concordance Desktop Admin Console.

   The Disconnected timeout (in seconds) setting defaults to 0 seconds. When Disconnected timeout (in seconds) is set to 0, the setting is disabled. We recommend a shutdown of at least 30 seconds for Concordance Desktop Admin Console users. One second is the minimum accepted value.

3. Click **Apply** to save your settings.

Adjusting indexing settings

Indexing settings affect performance and capacity. We recommend that you read the entire topic before making any changes.

In the Admin Console under the Settings tab, you can adjust the amount of memory the server uses for indexing. Indexing cache memory is only used during the indexing and

reindexing process, then the memory is released back to the operating system when indexing is complete.

Large memory allocations index databases faster. However, it is important to consider how many clients or users will index or reindex a database at the same time. Do not over-commit memory to indexing instances.

To calculate the indexing cache:

We recommend you leave at least 512 MB of RAM free and allow the rest to be used by indexing when needed. To calculate the indexing cache, take the amount of memory you have available, subtract 512 MB, and divide the remainder by the number of users you will allow to index at one time. Use that number for the Indexing cache (MB) setting.

Set the maximum number of users allowed to index concurrently in the Maximum indexing instances setting. Indexing is processor intensive. We recommend that you allow only one indexing process per processor, reserving the additional processor for general purposes. Count each Xeon or Pentium HT processor as two processors. For instance, if you have dual Xeon server with 2GB of RAM, you could set the Maximum indexing instances setting to 3 and the Indexing cache setting to 512 MB. If you want to allocate more memory to the index cache for faster performance, then lower the number of indexing instances to avoid over-committing memory.

To modify the indexing cache and instances:

1. Click the **Settings** tab.

2. In the **Server Settings** section under **Indexing settings**, click the megabytes in the **Indexing cache (MB)** row, and type or scroll to the indexing cache that you calculated in megabytes.

3. The **Indexing cache (MB)** setting defaults to **128** MB.

   The Maximum indexing instances setting controls the number of simultaneous indexing processes allowed. The number of instances entered for this setting should be low to ensure processing is done on the server.

4. In the **Maximum indexing instances** row, click the number and instances, and type or scroll to the new number of instances.

5. Click **Apply** to save your settings.

   If two users are concurrently indexing, the allocated indexing cache is per user. For example, if the Indexing cache (MB) is set to 679 MB, both users are allocated 679 MB of cache.

Adjusting dictionary cache settings

The Dictionary cache (MB) setting controls the amount of memory the dictionary cache uses to process list files. We recommend a dictionary cache setting of 32 MB for the Concordance Desktop server. A server allocation smaller than 32 MB can cause contention between client sessions.

Dictionary Cache is used to process list files including:

- Database dictionary
- Database key file
- Stopword files
- Files for spell checking
- Miscellaneous .LST files
- Security files
- Password files

<u>**To modify the dictionary cache size:**</u>

1. Click the **Settings** tab.

2. In the **Server Settings** section under **Indexing settings**, click the megabytes in the **Dictionary cache (MB)** row, and type or scroll to the dictionary cache size you want to use in megabytes.

   The Dictionary cache (MB) setting defaults to 32 MB.

3. Click **Apply** to save your settings.

Setting up email notifications

As the administrator of the Concordance Desktop server, you may want to be notified via email when there are issues concerning the Concordance Desktop server. In order to receive notification, you need to setup your email address, and the issues for which you would like to receive email notifications.

📝 You need to also setup SMTP Options in order for the notification to be sent. In addition, you must have an email client installed on the server in order to send notifications.

To setup email notification:

1. Open the **Admin Console**.

2. Click the **Setting** tab.

3. Double-click on **Email Notifications** to expand it.

4. Type your email address, or whatever address you want notification to be sent, in the **Email** field.

   To receive specific types of notifications, you need to set the notification to Yes.

5. Click on the field of the type of notification you want to receive, and then click **Yes**.

6. Repeat **step 5** for each notification you want to receive.

7. Ensure that **No** is selected for those notifications that you do not want to receive.

You must now setup your SMTP Options so that the notification can be sent from the server.

Setting up SMTP options

In order for the Concordance Desktop server to send out notifications to administrators and users, you need to have an SMTP client (email client) setup on the server, and you need to define the SMTP Options in the Concordance Desktop Admin Console, so that the Concordance server can send the notifications via email.

📝 You must have an email client installed on the server in order to send notifications.

If you are an administrator and would like to receive notifications (Watchdog notifications) when specific issues arise with the Concordance server, you also need to setup your email address and types of notifications.

To setup the SMTP Options:

1. Open the **Admin Console**.

2. Click the **Settings** tab.

3. Double-click on **SMTP Options** to expand it.

4. Type your SMTP server name in the **SMTP Server** field.

5. Type the port number your SMTP Server uses into the **SMTP Server Port** field.

6. In the **Author Of E-mail field**, type the name of the person whose name you want to appear in the signature of the email message.

7. In the **Reply To E-mail**, type the email address of the person whose name you want to appear in the FROM box.

    Usually this will be the email address of the person whose name you entered above.

Changing the default Registration Directory

The Registration Directory is a special directory you can designate in the Admin Console, that allows you to automatically migrate and register existing Concordance 10.x SQLite databases on the Concordance Desktop server. When you place a folder, that contains all the files for a Concordance 10.x SQLite database, into the designated "Registration Directory," the database is automatically migrated and registered on the Concordance Desktop server when Concordance Desktop is run on that server. The "Registration Directory" can be any directory on the server computer, even a directory that contains all your current Concordance 10.x SQLite databases. Only one Registration Directory can be designated per Concordance Desktop server. By default, a directory is already setup for you named DB Smart Path, but you can the default to any directory you want to use. The default directory is located in the server computer's ProgramData folder (usually C:\ProgramData\CloudNine\Concordance Desktop\DB Smart Path). If you decide to keep the default directory, you will need to move your database folders into the DB Smart Path default directory to have the database migrated and automatically registered on the Concordance Desktop server. See Migrating databases for instructions on moving database folders to the Registration Directory.

💡 We recommend that you setup the Registration Directory at the server's root, or as close to the root folder as possible, as there is a path and file name limitation that if exceeded, can prevent users from being able to open files in the viewer.

⚠ Only one Registration Directory can be designated per Concordance Desktop server.

To change the default Registration Directory:

1. Open the **Admin Console**.

2. Click the **Settings** tab.

3. Double-click on **Registration Directory** to expand it.

4. Click in the field to display the Browse (ellipses) button.

The Select the DB Smart Path (Registration Directory) window opens.

5. Navigate to the location of the directory that you want to setup as the automatic database migration and registration directory.

6. Click on the directory name to select it. This action places the name in the **File name** field.

⚠ Before clicking OK, please ensure that the directory path and folder name for the Registration Directory does not include special characters such as %, &, #, etc., as special characters are not supported.

7. Click **OK**.

Setting the snapshot path

The Snapshot path setting is the directory location where you want .snp files to be stored on the Concordance Desktop server. We recommend this setting always be on the database server's C:\ drive.

With the Snapshot path setting enabled for users, each time a user exits the application, a snapshot of the session is automatically taken. Snapshot files allow users to restart a session from where they left off.

📝 Users can also save snapshots of their session at any time. A shortcut file is saved on their local computer and the snapshot file is saved on the Concordance Desktop server, as specified in the Snapshot path setting. Snapshots can only be restored in the original database.

For more information about snapshots in Concordance Desktop, see Saving and restoring snapshots in the Using Concordance Desktop module.

📝 Ensure that the snapshot path is no longer than 256 characters. This includes whatever name is given to a snapshot, so make sure you account for snapshot file names.

<u>**To set up the snapshot path:**</u>

1. Click the **Settings** tab.

2. In the **Server Settings** section, click the snapshot directory in the **Snapshot path** row.

3. Click the ellipsis (**...**) button to open the **Select a folder that will contain the Snapshot files** dialog box.

4. Navigate to and select the folder where you want to store the snapshot .snp files, and then click **OK**.

   This location should be on the Concordance Desktop server's C:\ drive.

   Clicking OK adds the directory path to the Snapshot path row.

5. Click **Apply** to save your settings.

6. Check the snapshot directory occasionally to delete old and unused snapshot files.

   💡 You can also schedule a job on the Jobs tab to automatically delete old snapshots. For more information about scheduling jobs, see Adding and managing jobs.

Setting the authentication type

Although there are four options in the Authentication type list, these can be divided into two categories: Concordance Desktop security and external authentication through Microsoft Windows (depending on your version of Microsoft Windows Server). In choosing external authentication, you gain the use of policies, including but not limited to password expiration, renewal, and format.

When the authentication type is external to Concordance Desktop, such as Microsoft Active Directory, the Concordance Desktop server uses the external authentication logon name to determine the user's Concordance Desktop database rights, field rights, and menu security. If the user's external authentication logon name is not added to the Concordance Desktop database, the user will not have access to the database.

📝 Dual authentication, authenticating users against more than one server, can only be set for a maximum of two Active Directory LDAP servers. The Auxiliary authentication server setting is not available for the External by Domain or External by NT Server options.

📝 When authenticating users against an Active Directory server in a domain other than where FYI Sever is located, make sure that the Concordance Desktop server is running on Windows Server 2008 R2.

If a database administrator account is specified on the Management tab in the Concordance Desktop Admin Console, the Concordance Desktop server then copies the users from Concordance Desktop and adds them to the Concordance Desktop Admin

Console for that specific database. This allows you to use external security to set password policies, including expiration, renewal, and format.

⚠ Before changing the authentication type to an external method, check the Concordance Desktop databases and add user names and rights as needed.

For more information about authentication types, see About setting up user security.

<u>**To set the authentication type to Concordance Desktop:**</u>

1. Click the **Settings** tab.

2. In the **Server Settings** section, click the authentication type in the **Authentication type** row.

3. Click the arrow to open the authentication type list, and click **Concordance Desktop**.

    When Concordance Desktop is selected, Concordance Desktop server uses the a Concordance Desktop database's .sec file to authenticate users.

4. Click **Apply** to save your settings.

5. Remember to adjust port settings as specified for each authentication type, and update IP addresses if they change.

<u>**To set the authentication type to External by domain:**</u>

1. Click the **Settings** tab.

2. In the **Server Settings** section, click the authentication type in the **Authentication type** row.

3. Click the arrow to open the authentication type list, and click **External by domain**.

    When External by domain is selected, Concordance Desktop server allows for user authentication against an NT domain controller without an Active Directory.

4. Click in the **Authentication server** row below **External by domain**, and type the authentication server name, such as a company or work group name (.com or IP address entries are not acceptable).

5. Click **Apply** to save your settings.

6. Remember to adjust port settings as specified for each authentication type, and update IP addresses if they change.

External by domain authentication typically requires use of several ports: 137 TCP, 138 UDP, 139 TCP, and 445 TCP. Ensure that your firewall is not blocking these ports.

To set the authentication type to External by NT Server:

1. Click the **Settings** tab.

2. In the **Server Settings** section, click the authentication type in the **Authentication type** row.

3. Click the arrow to open the authentication type list, and click **External by NT Server**.

   When External by NT Server is selected, Concordance Desktop server allows for user authentication against a stand alone server (member server).

   A member server is a server that meets all of the following requirements:

   - The server is running a Microsoft Windows 2008 R2 Server operating system
   - The server is part of a domain
   - The server is not a domain controller

4. Click in the **Authentication server** row below **External by NT Server**, and type the authentication server name, such as *mypdc.company.com* or an IP address.

5. Click **Apply** to save your settings.

6. Remember to adjust port settings as specified for each authentication type, and update IP addresses if they change.

   The port addresses typically required by External by NT Server authentication include: 137 TCP, 138 UDP, 139 TCP, and 445 TCP. Ensure that your firewall is not blocking these ports.

To set the authentication type to External by Active Directory LDAP:

1. Click the **Settings** tab.

2. In the **Server Settings** section, click the authentication type in the **Authentication type** row.

3. Click the arrow to open the authentication type list, and click **External by Active Directory LDAP**.

   When External by Active Directory LDAP is selected, Concordance Desktop server uses Microsoft Windows Active Directory to authenticate users.

4. Click in the **Authentication server** row below **External by Active Directory LDAP**, and type the authentication server name or an IP address.

5. (Optional) Click in the **Auxiliary authentication server** row to set a second authentication server, and type the authentication server name or an IP address.

   📝 When authenticating against an internal and an external domain, make sure that the same username does not appear in both domains.

6. Click **Apply** to save your settings.

7. Remember to adjust port settings as specified for each authentication type, and update IP addresses if they change.

   The firewall ports that need to be open for Active Directory include: 389 (LDAP,) 636 (secure LDAP,) and NetBIOS ports for the *change password* feature.

   📝 If both the LDAP and Auxiliary server options are set, both server names are displayed when using the Insert Domain Users option for the Users tab in the Concordance Desktop Admin Console.

Selecting a matter for new database registration

In Concordance Desktop, matters are used for organizing client cases and serve as the focal point for associating users with registered databases. In order for users to access a database on the Concordance Desktop server, both the database and the users (via a user group), must be associated with a matter.

With Concordance Desktop, we have also created an automated association that allows all users to have access to all databases on a Concordance Desktop server, for those firms in which all users need access to all databases. This automated association method is the default in Concordance Desktop, since most firms using the product prefer to allow all their users access to all of the databases.

You can change the default matter for new database registration in the admin console to prevent newly registered matters from being automatically accessible by all users.

🗀 **To choose a different default matter for new database registration:**

1. Click the **Settings** tab.

2. In the **Database Administration Settings** section, click the **Selected Matter for new database registration** row.

3. Click the arrow to open the list of available matters.

📝 Matters must be created prior to selecting them from the list. For more information about creating matters, see Creating Matters.

4. Select the desired matter.

5. Click **Apply** to save your settings.

Authenticating Admin Console Users

The option to authenticate users that are logging into the Admin Console is now built into Concordance Desktop. When the option is set to NO, administrators will be able to log into the Admin Console from the Concordance Desktop Server without using a password. When the option is set to YES, administrators accessing the admin console from the Concordance Desktop server will be required to enter a password when logging into the Admin Console.

⊟ **To set the Admin Console authentication on the server:**

1. Click the **Settings** tab.

2. In the **Administration Console Server Settings** section, click the authentication option in the **Authenticate admin console users on server** row.

3. Click the arrow to open the authentication options, and select one of the following:

YES - Administrators are required to enter a password when logging into the Concordance Desktop Admin Console.

NO - Administrators are not required to enter a password when logging into the Concordance Desktop Admin Console.

4. Click **Apply** to save your settings.

📝 The option defaults to 'No' when Concordance Desktop is installed.

Enabling access control audit logs

This setting enables audit logging for Concordance Desktop Administrators that will include timestamps, username and action taken.

⊟ **To Enable Access Control Auditing**

1. Click the **Settings** tab.

2. In the Administration Console **Server Settings** section, select Yes or No to enable Access control logging.

3. By default, the Audit log is saved in this location: C: \ProgramData\CloudNine\Concordance Desktop\Working Path. Click the ellipsis (…) button to navigate to a different location of your choice.

4. For the **Number of days to start a new log file** option, use the arrows to choose between 1 and 1000 days.

5. Click **Apply** to save your settings.

Scheduling Jobs

About scheduling jobs

Common administrative tasks can be managed on the Jobs tab. New jobs can be added to run automatically at scheduled intervals and existing jobs can be removed, disabled, edited, and run manually. Setting up these actions in advance allows you complete control in managing your schedule and ongoing maintenance tasks, freeing your time for other needs.

Scheduled job activities can be automatically updated on the Jobs tab as changes are recorded by the server. On the Jobs tab, use the Auto refresh feature to automatically update jobs displayed, or click the Refresh button to manually update the listing.

💡 You can also schedule jobs to run using Windows Task Scheduler to save server resources and manage load balancing.

📝 Job processing uses server RAM. To monitor any memory drain when certain jobs are running, check the Memory bar graph in the Server tab.

⚠ Too much processing on the Concordance Desktop server can bring the server down. Watchdog services will restart the server but user sessions will be shutdown. Each user needs to log back on to regain access.
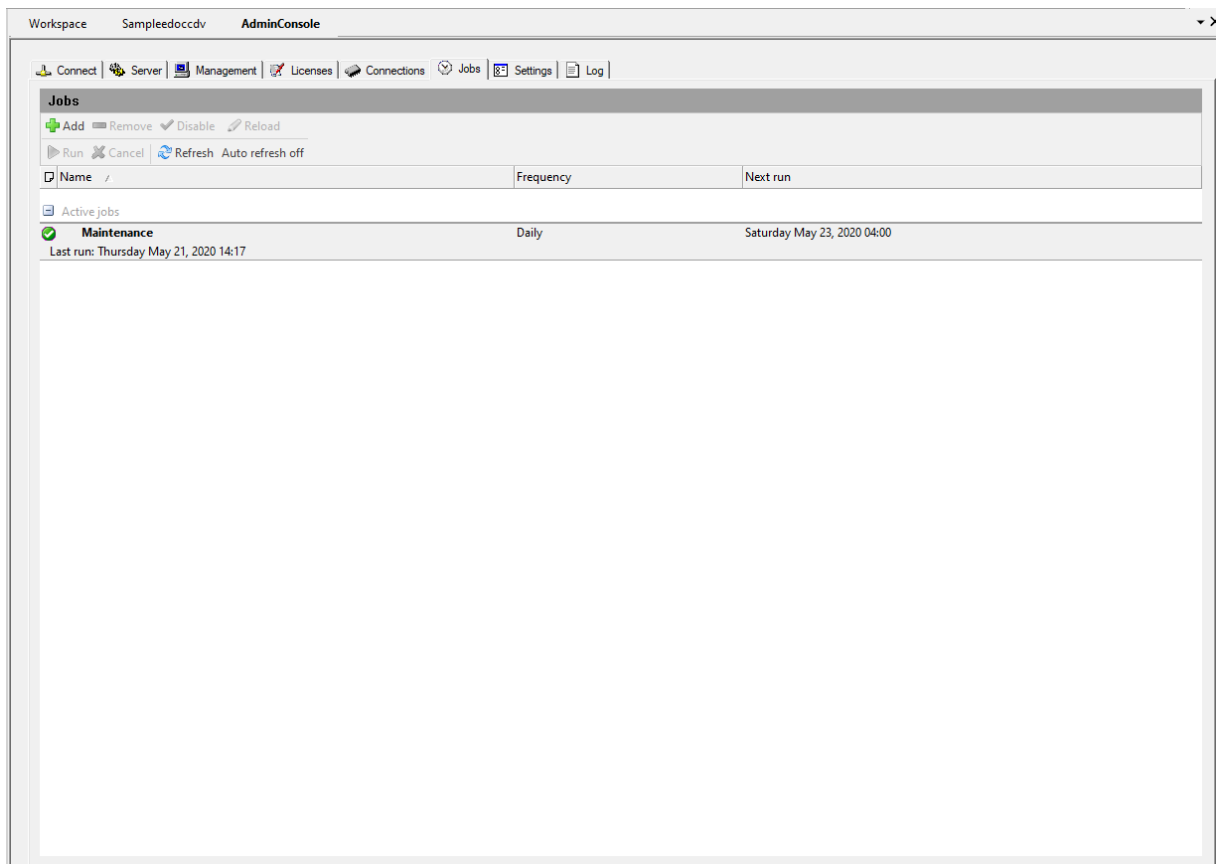
From the Jobs tab you can schedule the following tasks:

- Reindexing of one or all databases

- Indexing of one or all databases

- Packing of one or all databases

- Packing of one or all dictionaries

- Deleting old snapshot .snp files saved on the server

Snapshot .snp files store users search history and can be large. Review these files periodically, and delete any that have not been accessed within an established timeframe, such as 30 days. For more information about snapshots, see Setting the snapshot path.

Adding and managing jobs
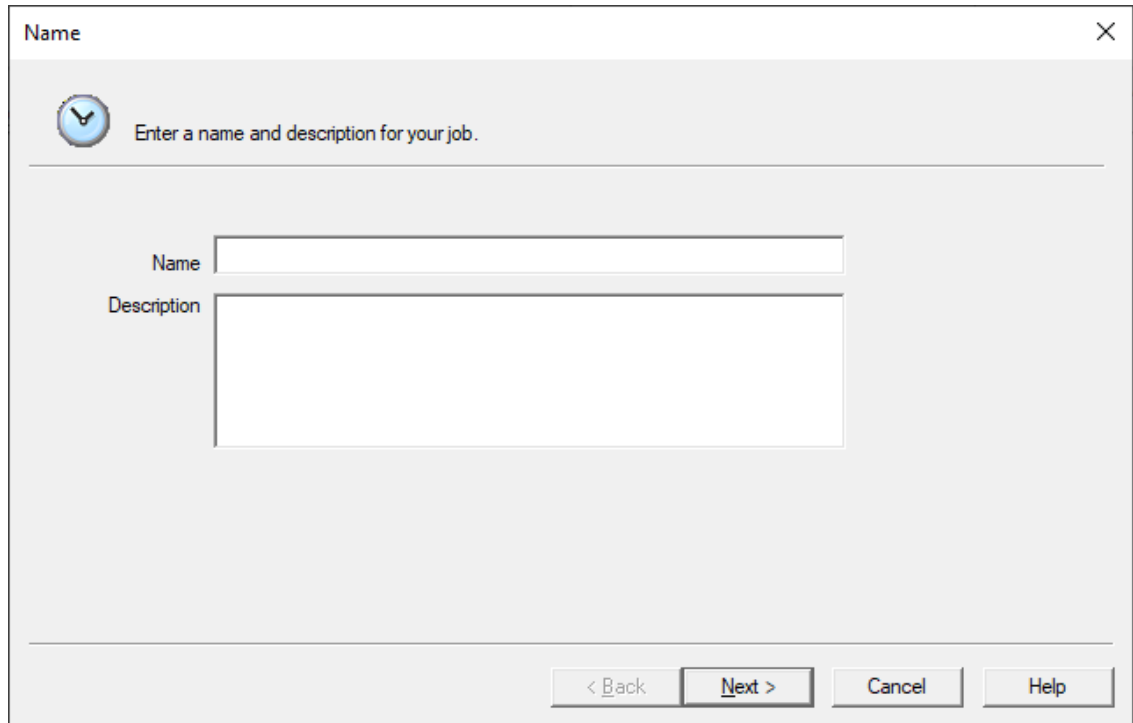
Automate your administrative tasks on the Jobs tab where they can be set to run at scheduled intervals, as needed. Once scheduled, you can easily edit, disable, or remove a job whenever necessary. You can also manually start any scheduled job, if you need it to run immediately.

☑ The Maintenance job is a built-in job that comes with the server and performs basic server maintenance. It cannot be removed from the Job list.

To add a new job:

1. On the **Jobs** tab, click the **Add** button.

   Clicking the Add button opens the Name dialog box.

2. In the **Name** field, type the job name.

3. In the **Description** field, type the job description.

4. Click **Next** to open **Actions** dialog box.
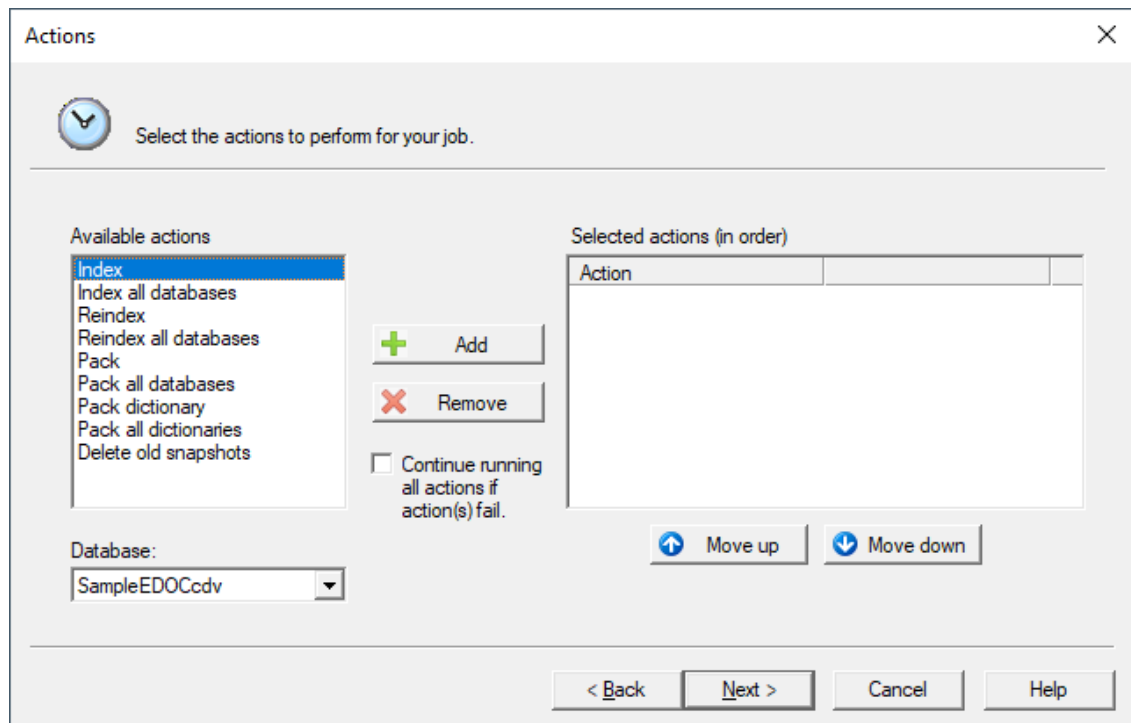
5. In the **Available actions** list, click the action you want to include in the job.

6. If the job is not for all databases, in the **Database** field, click the database you want the action run on.

    If you are deleting old snapshots, in the Days prior field, type the number of days that a snapshot file remains unaccessed, before it is automatically deleted.

7. Click the **Add** button to add the action to the **Selected actions (in order)** list.

    The job performs each action in the order the actions are displayed in the Selected actions (in order) list. To change the order of actions in the list, click the action you want to move, and click the Move up or Move down button to modify the action order.

8. If your job contains multiple actions, and you want the job to continue running the other actions if an action in the job fails, select the **Continue running all actions if action(s) fail** check box.

9. Click **Next** to open the **Frequency** dialog box.

10. Define the job frequency settings, and click **Finish**.

📝 Remember to send broadcast announcements to users prior to scheduled tasks for tasks that will affect their access to the server. For more information, see Sending broadcast messages.

To manually run a job:

1. On the **Jobs** tab, click the job you want to run.

2. Click the **Run** button ▶.

To manually cancel a job:

1. On the **Jobs** tab, click the currently running job that you want to cancel.

2. Click the **Cancel** button ✖.

To edit a job:

1. On the **Jobs** tab, click the job you want to edit.

2. Click the **Edit** button to open the **Name** tab in the **Edit job** dialog box.

   You can change the name or description of the job on the Name tab.

3. To modify job actions or the order in which the actions run, click the **Actions** tab.

4. To change the time, date or frequency of a job, click the **Frequency** tab.

5. When you are finished editing the job, click **OK** to save your changes.

To disable a job:

1. On the **Jobs** tab, click the job you want to disable.

2. Click the **Disable** button.

   Clicking the Disable button disables the job and moves the job to the Inactive jobs list on the Jobs tab.

   To enable an inactive job, click the job and click the Enable button.

To delete a job:

1. On the **Jobs** tab, click the job you want to delete.

2. Click the **Remove** button to permanently delete the job.

Troubleshooting jobs

If you created a job for deleting old snapshots, but old snapshots are not being deleted, the Microsoft Windows registry setting for the Last Access file attribute may be disabled on the machine hosting the server.

By default, the Last Access file attribute is disabled for NTFS-based operating systems, such as Microsoft Windows Vista, to improve the NTFS (NT File System) performance. When the Last Access file attribute is disabled, the Delete old snapshots action will not run for a job on the Concordance Desktop server.

⚠ Before enabling the Last Access attribute, refer to Microsoft Windows documentation to determine whether you should activate the Last Access attribute, and consult with your Network Administrator before changing the Last Access attribute setting.

<u>**To determine whether the Last Access file attribute is disabled:**</u>

1. On the **Start** menu, click **Run** to open the **Run** dialog box.

2. Type **cmd** in the **Open** field and click **OK** to open the **cmd.exe** command prompt.

3. Type *fsutil behavior query disablelastaccess* and then press Enter.

   When disablelastaccess = 0, the Last Access attribute is enabled.

   When disablelastaccess = 1, the Last Access attribute is disabled.

<u>**To enable the Last Access file attribute:**</u>

1. On the **Start** menu, click **Run** to open the **Run** dialog box.

2. Type **cmd** in the **Open** field and click **OK** to open the **cmd.exe** command prompt.

3. Type *fsutil behavior set disablelastaccess 0* and then press Enter.

4. Restart the computer.

   You must restart the computer for the change to take effect.

Indexing and reindexing considerations

Indexing will not occur if a user is logged into a database. The system will not kick a user out, but rather reassign the scheduled task to run at the next interval. We recommend that you ensure all users have exited the system and take the database offline before indexing is scheduled to occur.

Reindexing affects users differently than indexing. If the reindexing process starts when a user is still logged into a database, they can remain logged in. Users who wish to continue working while the database is being reindexed may find that the searching speed slows during this timeframe.

Using Windows Scheduled Tasks

You can automate administrative tasks using the Microsoft Windows Scheduled Tasks with CPLs. These tasks need to be scheduled with the Concordance Desktop.exe file and modified to include the designated CPL you want to run.

For more information about CPLs, see About the Concordance Desktop Programming Language Reference in the Concordance Desktop Programming Language module.

Please refer to Microsoft's instructions on how to add a scheduled task.

Managing Logs

About managing logs

The Log tab displays server activities recorded by the Admin Console Server and the server. Activities include user log on and off time, administrative jobs such as database packing and indexing, and detected errors.

Server activities are automatically saved as text files in the server's Working Path folder. These log files can be read by text editor programs and imported into a spreadsheet or database for future analysis. The log files can also be reloaded back into the Concordance Desktop Admin Console for review.

The default directory for the Working Path folder is *C:\Users\All Users\LexisNexis\Concordance Desktop (Windows 7 and above)*
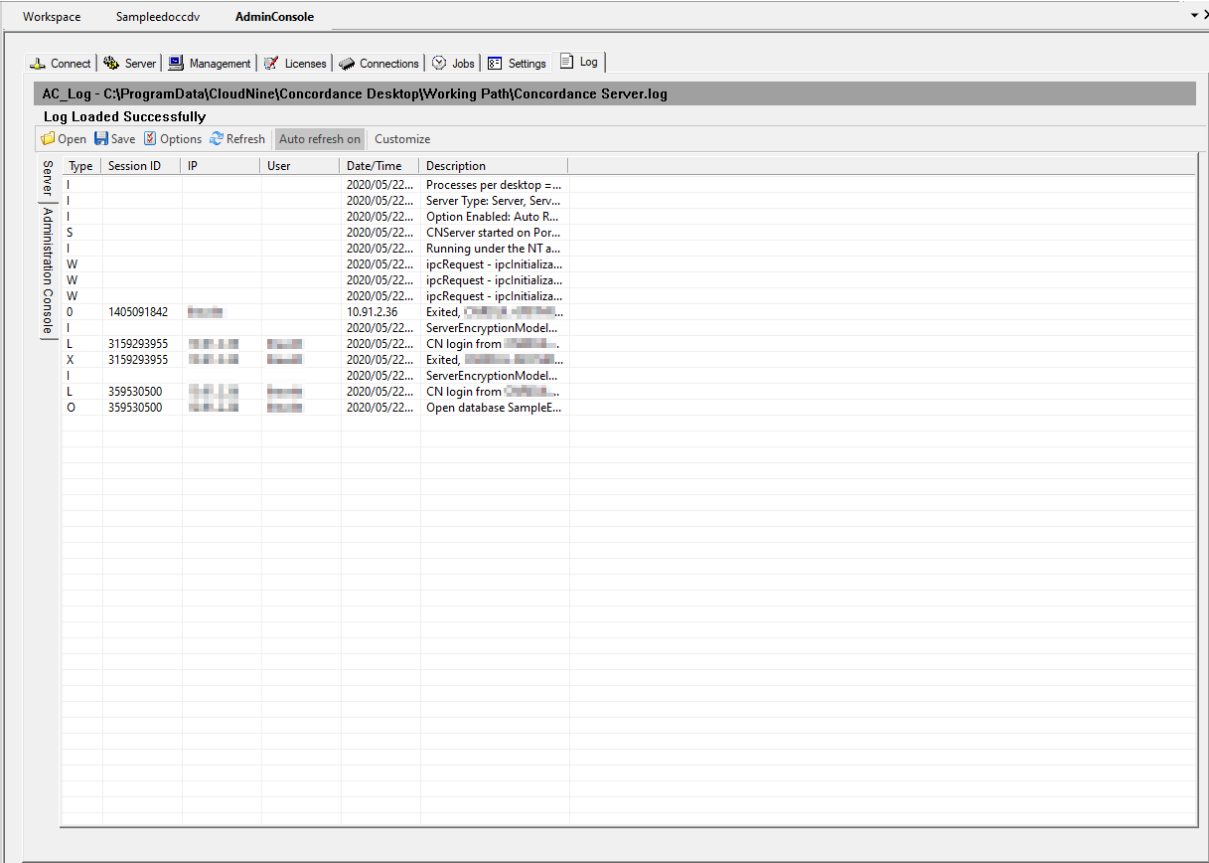
From the Log tab you can:

- Select the Server tab to view activities and major errors
- Select the Administration Console tab to view console activities and major errors
- Open and review log files
- Save activities as text files to the server for future analysis
- Customize server log options (Options button) for maximum log lines, refresh rate, retention, and start new settings
- Customize server and admin console logs (Customize button) to include or exclude specific information
- Clear log activities

💡 We recommend you start a new log every seven days. Remember to also set the option for the Admin Console Server as well, perhaps for every 30 days.

Viewing activities

The server activities are listed on the Log tab for both the Admin Console Server and the server. Select either side tab to view server activities.

Concordance Desktop Server Activities

The Log listing has six columns of server information as outlined in the Concordance Desktop server Activities table:

Server Activities	
Log Tab Columns	**Description**
Type	A single letter indicating the message type: • **O** – Open • **C** – Close • **X** – Exit (log off) • **L** – Log on • **S** – Server Start • **T** – Server Terminate (shut down) • **I** – Information • **E** – Error

Server Activities	
Log Tab Columns	**Description**
	• **W** – Warning • **!** – Severe error
Session ID	A unique session ID assigned when logging on
IP	The user's IP address
User	The user's logon name
Date/Time	The date and time of the log entry
Description	A description of the action

To refresh the Log tab:

The server activities list on the Log tab can be automatically updated as changes are recorded by the server:

• To automatically refresh the activities displayed on the Log tab, make sure that the Auto refresh button is toggled to on.

   When the Auto refresh function is turned on, the server activities list on the Log tab will automatically refresh at the rate specified in the Server log options dialog box.

• To manually refresh the activities displayed on the Log tab, on the Log tab, click the Refresh button.

   When the Auto refresh feature is turned on, the Log tab does not need to be manually refreshed.

Setting server log options

Server log options are defined on the Server log options dialog box. We recommend you start a new log every seven days. Remember to also set the option for the Admin Console as well, perhaps for every 30 days.

To set the server log options:

1. Click the **Log** tab.

2. Do one of the following:

   - To set the server log options for the server, click the **Server** side tab.
   - To set the server log options for the Admin Console, click the **Administration Console** side tab.

3. Click the **Options** button to open the **Server log options** dialog box.

The Maximum log lines to view field controls the maximum number of lines displayed on the Log tab. The default setting is 1000 lines. For slow client connections, set this option to a low number to maintain reasonable performance.

📝 If you want to view all information that occurs on a given day, you may need to

increase the number of lines in the Maximum log lines to view field to ensure that lines are not overwritten when the maximum number of lines is reached.

4. In the **Maximum log lines to view** field, type or scroll to the maximum number of lines to include in the log file.

    The Refresh rate field controls how often the server activities are updated on the Log tab. Changes are sent to the Log tab when they are available. The default setting is 1 second. Slower connections can benefit from a longer interval.

5. In the **Refresh rate** field, type or scroll to how often, in seconds, the server activities list refreshes on the **Log** tab.

    The Start a new log file every field controls how often a log file is created. By default, a new log file is started or rotated, every day. Therefore, each log file contains entries from one day. To include entries from more than one day, increase the number of days for this option.

    We recommend creating a new log file for the Concordance Desktop server every seven days, and creating a new log file for the FYI Administration Console Server every 30 days.

6. In the **Start a new log file every** field, type or scroll to how often, in days, you want to start a new log file.

    The Previous logs to retain field controls the maximum number of log files to retain. Log files over this limit are deleted. The setting defaults to 7 days. To retain all log files, type 0 in the Previous logs to retain field.

7. In the **Previous logs to retain** field, type or scroll to how many logs to retain on the server.

8. Click **OK** to save the settings.

Customizing logs

A customize log feature has been added to Concordance Desktop that allows you to select specific data to gather and include in the logs, that can provide more detailed information for troubleshooting. In addition to the ability to log more data, this feature also provides easy access to those logs directly from the Admin Console, simplifying the act of locating the logs for troubleshooting.

In order to use the customize logs feature, you must run Concordance Desktop as Administrator (Windows Administrator).

To include or exclude additional data to be logged:

1. Run Concordance Desktop as Administrator.

   <u>**To do this:**</u>

   a. Right-click the **Concordance Desktop** icon on the desktop and select **Run as administrator**.

   b. When the User Account Control window opens, click **Yes**.

   c. If you are presented with a Concordance Desktop Logon box, enter the logon information for the server, then click **Connect**. If not, ignore this step.

   Concordance Desktop opens to the Workspace.

2. Log onto the Admin Console.

3. Click the **Log** tab.

4. Click **Customize**.

   An Extended Logging Options box opens.
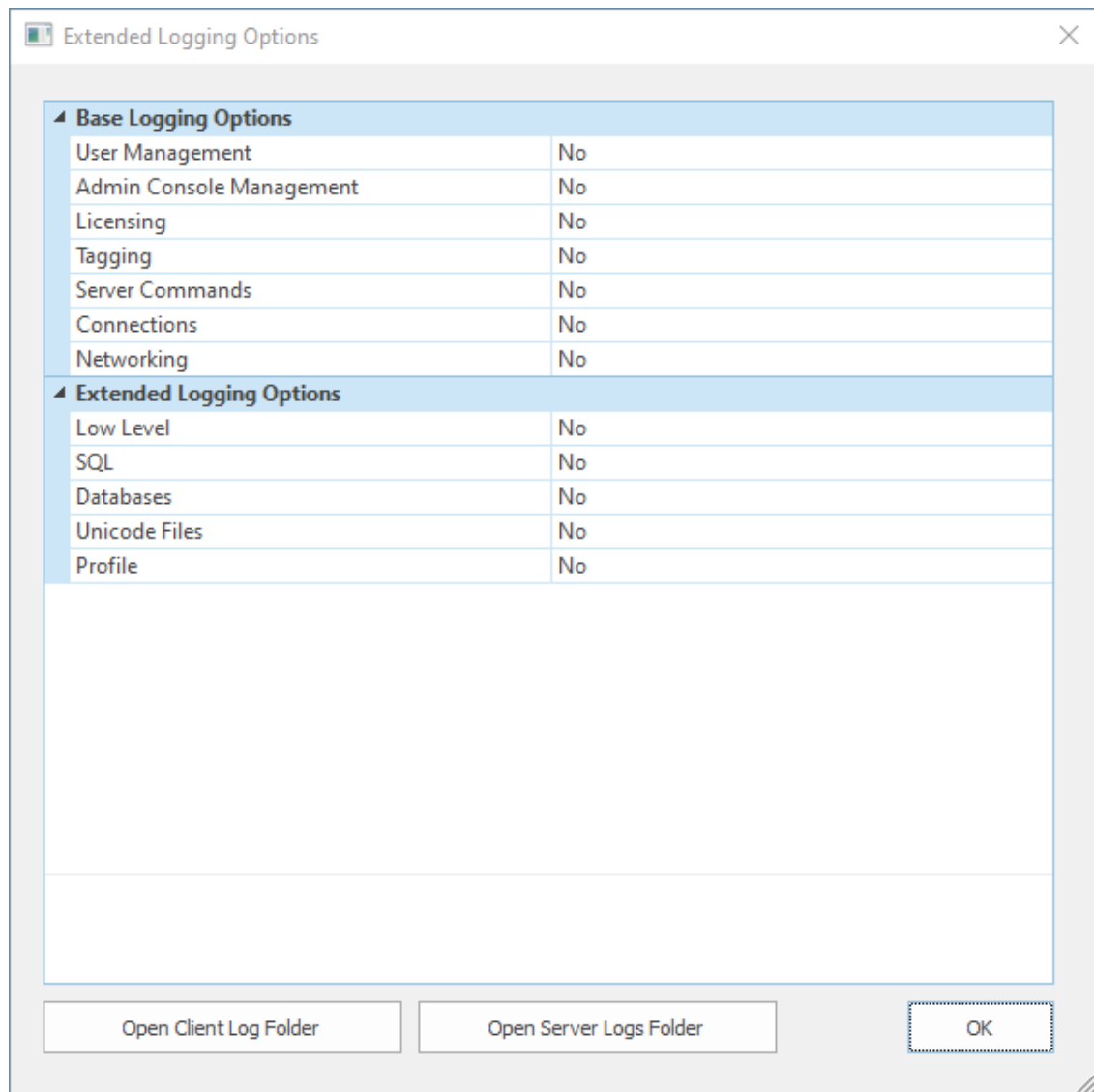
In this box you can select to include specific base and extended logging options. By default, all options are excluded from logging.

5. Click on an option to display its description at the bottom of the box.

   For more detailed descriptions about logs see the Log descriptions topic.

6. To include an option, click on the down-arrow for the option and select **Yes**.

7. To exclude an option, click on the down-arrow for the option and select **No**.

8. Click **OK**.

9. A confirmation box opens, stating that you will need to stop and restart the Concordance Desktop and servers, click **OK**.

Refer to Starting and stopping a server for further details.

Sometimes you may need to access the folders where the server and client logs are located, so that you can view more detailed logged information, or to send a log file to Support for troubleshooting. While this can be accomplished using Windows Explorer, it is often difficult or cumbersome to locate and open the correct folder. To make locating and opening the folder an easy task, Concordance Desktop provides quick, easy access to the folders from the Extended Logging Options box. See Opening log files for details on how to access the folders.

Opening log files

Log files for the Concordance Desktop Server and the Admin Console are automatically saved in the Working Path folder on the Concordance Desktop server. Working Path Log files are retained for the number of days specified in the 'Previous logs to retain' field in the Server log and Administration server log options dialog boxes. In the Admin Console, you can either open a server or Admin Console server log file by using the Open button, or from a button in the Customize pane.

Concordance Desktop Client Log files are automatically saved in a Concordance Desktop folder found under each users AppData, Local, CLoudNine directory.

📝 You must run Concordance Desktop as Administrator in order to access the Customize dialog box. To do this, right-click on the Concordance Desktop icon on the server desktop and select Run as administrator.

The default directory for the Working Path folder is C*: \ProgramData\CloudNine\Concordance Desktop\Working Path (Windows 7)*.

To open a Server or Admin Console server log file using the Open button:

1. In the Admin Console, click the **Log** tab.

2. Click the **Open** button.

    The **Open log file** box opens.
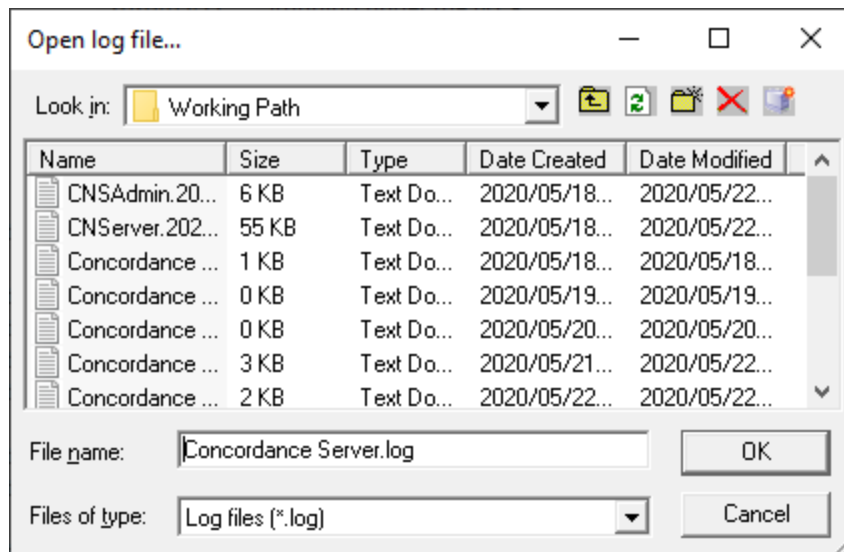
3. Click the log file you want to open, and click **OK**.

Clicking OK opens the log file on the Custom side tab on the Log tab. The Custom side tab is only visible on the Log tab when a retained log file is opened.

Sometimes you may need to access the folders where the server and client logs are located, so that you can view more detailed logged information, or to send a log file to Support for troubleshooting. While this can be accomplished using Windows Explorer, it is often difficult or cumbersome to locate and open the correct folder. To make locating and opening the folder an easy task, Concordance Desktop provides quick, easy access to the folders from the Extended Logging Options box.

To easily find and open the Server Logs folder:

1. Run Concordance Desktop as Administrator.

    To run Concordance Desktop as Administrator:

    There may be times when you need to run the Concordance Desktop software as a Windows administrator. For example, to activate a Concordance Desktop server license on a computer, or to select additional data to be logged in the log files for troubleshooting purposes.

    For your convenience, here are the steps on how to do this:

    1. Right-click the **Concordance Desktop** icon on the desktop and select **Run as administrator**.

    2. When the User Account Control window opens, click **Yes**.

    3. If you are presented with a Concordance Desktop Logon box, enter the logon

information for the server, then click **Connect**. If not, ignore this step.

2. Log onto the Admin Console.

3. Click the **Log** tab.

4. Click **Customize**.

An Extended Logging Options box opens.

▣ Extended Logging Options		✕
▲ **Base Logging Options**		
User Management	No	
Admin Console Management	No	
Licensing	No	
Tagging	No	
Server Commands	No	
Connections	No	
Networking	No	
▲ **Extended Logging Options**		
Low Level	No	
SQL	No	
Databases	No	
Unicode Files	No	
Profile	No	

Open Client Log Folder	Open Server Logs Folder	OK
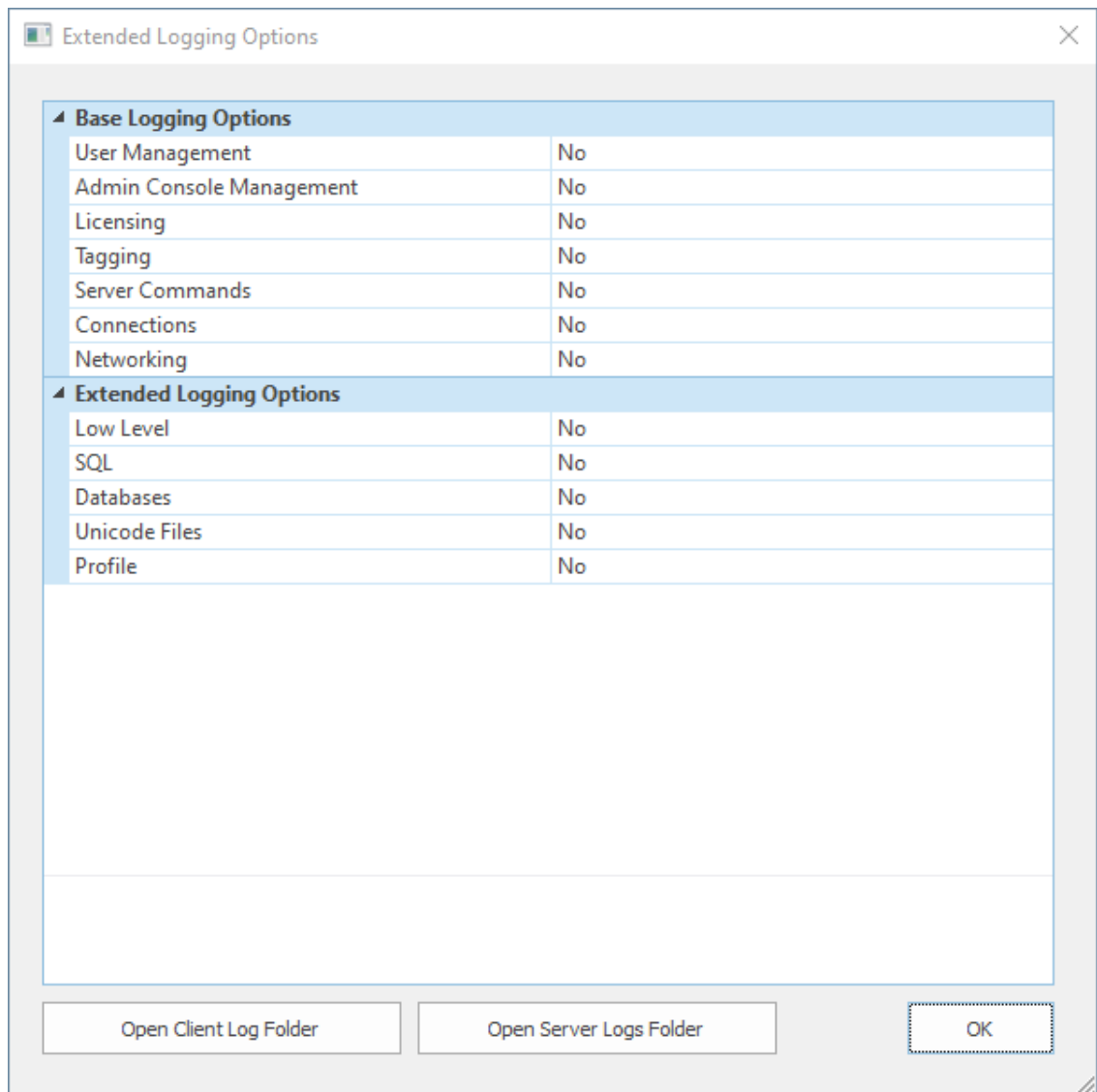
5. Click the **Open Server Logs Folder** button.

A Windows Explorer window opens to the folder where the logs are saved.

6. To open a log for viewing, double-click on the log name.

7. When finished viewing the log, click the Windows **Close** button to exit the window.

8. You are returned to the Extended Logging Options box.

9. Click **OK** to close the Extended Logging Options box.

To easily find and open the Client Logs folder:

1. Run Concordance Desktop as Administrator.

2. Log onto the Admin Console.

3. Click the **Log** tab.

4. Click **Customize**.

    An Extended Logging Options box opens.
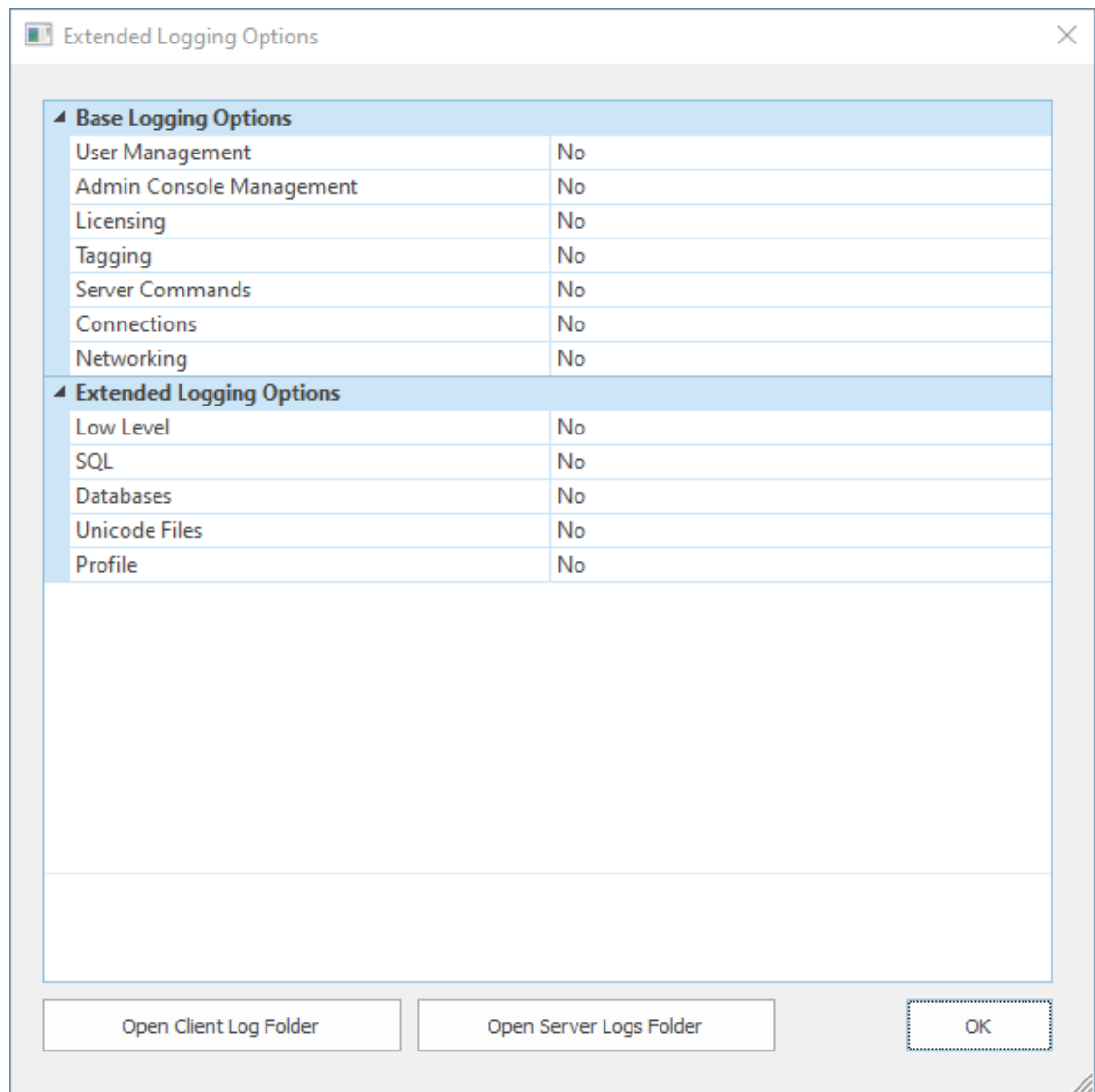
5. Click the **Open Server Logs Folder** button.

6. A Windows Explorer window opens to the folder where the logs are saved.

7. To open a log for viewing, double-click on the log name.

8. When finished viewing the log, click the Windows **Close** button to exit the window.

   You are returned to the Extended Logging Options box.

9. Click **OK** to close the Extended Logging Options box.

Saving log file activities

The server activities displayed in the Log tab can be saved to a file. These log files are formatted as tab delimited text files and can be imported into spreadsheets and databases. They can also be saved as other file types for further analysis. All log files are saved in the server's Working Path folder.

The default directory for the Working Path folder is *:
\ProgramData\LexisNexis\Concordance Desktop\Working Path (Windows 7)*.

To save all activities displayed on the Log tab:

1. Click the **Log** tab.

2. Do one of the following:

    - To save the server log activities for the server, click the **Server side** tab.
    - To save the server log activities for the FYI Administration Console Server, click the **Administration Console** side tab.

3. Click **Save** to open the **Save As** dialog box.

    You can also right-click any activities and click Save to open the Save As dialog box. By default, the .log files are saved to the Working Path folder.

4. In the **File name** field, type the log file name.

5. Click **Save**.

To save selected activities displayed on the Log tab:

1. Click the **Log** tab.

2. Do one of the following:

    - To save the server log activities for the server, click the **Server side** tab.
    - To save the server log activities for the FYI Administration Console Server, click the **Administration Console** side tab.

3. Select the activities you want to save.

    To select multiple activities, use SHIFT+click or CTRL+click.

4. Right-click a selected activity and click **Save selection** to open the **Save As** dialog box.

5. Click **Save** to open the **Save As** dialog box.

    By default, the .log files are saved to the Working Path folder.

6. In the **File name** field, type the log file name.

7. Click **Save**.

1. Click the **Log** tab.

2. Do one of the following:
   - To copy the server log activities for the server, click the **Server side** tab.
   - To copy the server log activities for the FYI Administration Console Server, click the **Administration Console** side tab.

3. Select the activities you want to copy.

   To select multiple activities, use SHIFT+click or CTRL+click.

4. Right-click a selected activity and click **Copy to clipboard**.

5. Paste the activities to another program.

Deleting log files

In the Concordance Desktop Admin Console you can delete all log files in the Working Path folder from the Server log options dialog box. If you want to delete individual log files, you will need to manually delete the log files from the Working Path folder in Microsoft Windows Explorer.

1. Click the **Log** tab.

2. Do one of the following:
   - To delete the logs for the Server, click the **Server side** tab.
   - To delete the logs for the Administration Console, click the **Administration Console** side tab.

3. Click the **Options** button to open the **Server log options** dialog box.

4. Click the **Clear all logs** button.

5. Click **Yes** when asked *Are you sure you want to remove all previous log files?*.

6. Click **OK**.

    All .log files are deleted from the Working Path folder and the server log activities on
    the selected side tab are cleared from the Log tab.

Log descriptions

Below are the logs available from Concordance Desktop and their respective descriptions.

Basic logging

Server logs			
Log Name	**Location**	**Description**	**Extended Logging**
Concordance Server.log	C: \ProgramData\LexisNexis\ Concordance Desktop\Working Path	This is the tab separated database output for the "logging" tab in the Admin Console. It is less complete and detailed	Limited effect
Concordance Server - YYYY-MM-DD.log	C: \ProgramData\LexisNexis\ Concordance Desktop\Working Path	Saved copy of 'Concordance Server.log' for the day listed in the file name.	Limited effect
CNServer.YYYYMM.log	C: \ProgramData\LexisNexis\ Concordance Desktop\Working Path	*** Required when escalating issues*** Logs the action taken by the server. For example, removal of DCB's, Job indexing/reindexing, packing etc., license information/authenticat ion, Ports, number of users allowed to connect to server (per proc limit) - all for the month listed in the file name.	See Extended logging table
ServerCPU YYYY-MM-DD.txt	C: \ProgramData\LexisNexis\ Concordance Desktop\Working Path	Internal data format for the Admin Console. This is now the charts get their data.	No effect

Server logs

Log Name	Location	Description	Extended Logging
OverallCPU YYYYY-MM-DD.txt	C:\ProgramData\LexisNexis\Concordance Desktop\Working Path	Internal data format for the Admin Console. This is now the charts get their data.	No effect
Server Memory YYYY-MM-DD.txt	C:\ProgramData\LexisNexis\Concordance Desktop\Working Path	Internal data format for the Admin Console. This is now the charts get their data.	No effect
OverallMemory YYYY-MM-DD.txt	C:\ProgramData\LexisNexis\Concordance Desktop\Working Path	Internal data format for the Admin Console. This is now the charts get their data.	No effect

Admin logs

Log Name	Location	Description	Extended Logging
Concordance Admin Server.log	C:\ProgramData\LexisNexis\Concordance Desktop\Working Path	This is the tab separated data output for the "logging" tab in the Admin Console. It is a less complete and less detailed version of the CNSAdmin.YYYYMM.log for the Admin Console.	Limited effect
Concordance Admin Server - YYYY-MM-DD.log	C:\ProgramData\LexisNexis\Concordance Desktop\Working Path	Saved copy of "Concordance Admin Server.log" for the day in the day listed in the file name.	
CNSAdmin.YYYYMM.log	C:\ProgramData\LexisNexis\Concordance Desktop\Working Path	*** Required when escalating issue *** Logs/captures the settings in the Admin Console for the month listed in the file name.	See Extended logging table

Import logs			
Log Name	**Location**	**Description**	**Extended Logging**
DATImportLog_MM_DD _YYYY_HH_MM_SS.log	DatabaseLocation\logs	Logs the initial import of documents. (aka: the first load at db creation) Name depends on the type of database created (initial load)	No effect
EdocImportLog_MM_D D_YYYY_HH_MM_SS.lo g	DatabaseLocation\logs	Logs the initial import of documents. (aka: the first load at db creation) Name depends on the type of database created (initial load)	No effect
EmailImportLog_MM_D D_YYYY_HH_MM_SS.lo g	DatabaseLocation\logs	Logs the initial import of documents. (aka: the first load at db creation) Name depends on the type of database created (initial load)	No effect
ImportLog_MM_DD_YY YY_HH_MM_SS.log	DatabaseLocation\logs	Logs the append import of documents into the database.	No effect
NAMEOFDATABASE YYYY-MM.LOG	DatabaseLocation\logs	Logs all log on/off activity to the database for that month.	No effect
OverlayLog_MM_DD_Y YYY_HH_MM_SS.log	DatabaseLocation\logs	Logs the Overlay import of information into the database.	No effect

Miscellaneous logs			
Log Name	**Location**	**Description**	**Extended Logging**
Concordance Desktop.YYYMM.log	C: \Users\"Username"\AppData\Local\LexisNexis\Concordance Desktop	*** Required when escalating issues *** Logs all actions executed by the EXE for the month listed in the file name.	See Extended logging table
ImageBaseManagement.log	C: \Users\"Username"\AppData\Local\LexisNexis\Concordance Desktop	Each module has its own individual log file, as .NET programs do not share a log file.	No effect
CDV.log	C: \Users\"Username"\AppData\Local\LexisNexis\Concordance Desktop	Each module has its own individual log file, as .NET programs do not share a log file.	No effect
ProductionModule.log	C: \Users\"Username"\AppData\Local\LexisNexis\Concordance Desktop	Each module has its own individual log file, as .NET programs do not share a log file.	No effect
PrintingModule.log	C: \Users\"Username"\AppData\Local\LexisNexis\Concordance Desktop	Each module has its own individual log file, as .NET programs do not share a log file.	No effect

Extended logging

Logging options enable extended information prior to and after an error, that may help to diagnose unusual things.

Log Option	Basic Description	When you would use it
Admin Console Management	Enables logging for actions in the Admin Console that alter definitions such as, editing the name of a database.	
Licensing	Actions such as, adding a license or verifying if a license is valid or	When licenses that appear to be valid are not registering.

Log Option	Basic Description	When you would use it
	expired, are logged with this options. Advanced diagnostics are available when Low Level is enabled as well.	
Tagging	Tag errors (note that at this time, tag operations are not heavily logged).	
Server Commands	Shows the CNServer command diagnostics for all messages being sent to the server. This can become quite noisy, but may be required for some diagnostics.	When you want to verify that command traffic is happening.
Connections	Shows details of connections to the server, and actions upon those connections. Advanced diagnostics are available when Low Level is enabled as well.	Enable when extra information is needed, regarding needed when a client successfully connected and disconnected. This information can help diagnose things that aren't errors, by tracking when the client signed on and left, and the extra information about their connection.
Networking	The details of lower level network protocols and traffic are exposed with this option. Advanced diagnostics are available when Low Level is enabled as well.	When you need to review network traffic, like packet sends and socket ports, showing extra information around the traffic.
Low Level	Enables extended logging of more data than the Base Options. For example, with Licensing enabled the log displays messages about a license registered. However, with Low Level enabled, the log also shows debug information that is used to diagnose even more details.	Enable this when development needs detailed logs. This expands and affects many of the other options. Some options require this option to be enabled in order to log detailed information, while others provide details without having to have this option enabled.
SQL	Internal Query Engine states and operations such as, when you have a failure to insert a record for a user. Most of these only show up in the log if Love Level is also enabled.	If there are problems where things are not getting inserted or queried, enabling this may help diagnose the SQL statements. This may be useful when unexpected data, for example, a user name with a Unicode character may have issues inserting.

Log Option	Basic Description	When you would use it
Databases	Actions that happen on a database (DCB) such as, creation or registration. Most of these only show up in the log if Low Level is also enabled.	Problems with opening databases or related.
Unicode Files	Shows extended information during the reading of Unicode files, helpful when diagnosing why a text file doesn't read correctly in some situations.	When trying to figure out if a file is Unicode, and if so, what type. This log data will diagnose the path of that. For example, if you convert an OPT to Unicode, when the database is opened for any operation, that information about the file will be logged.
Profile	Extends information during reading of profile data such as, a home directory from the user's profile.	

Backing Up Concordance Server

About backups and data recovery

For information about backing up SQL Server and other supporting products, refer to your organization's internal guidelines or source documentation.

Please read all the topics in the Backing Up Concordance Desktop server topic to ensure that you are not missing any relevant information. If regular backups are not scheduled, you can possibly risk losing data.

Backups for the Concordance Desktop server include the following:

- FYI.db file
- Concordance Desktop databases
- User Management settings (under each database folder)
- Tags
- List files, queries, and other supporting files

Most FYI ASPs and large firms and organizations should already have backup and data retrieval planning outlined and implemented, as well as disaster recovery protocols. Determining backup schedules for the Concordance Desktop server depends on the number of databases and users you have to manage. If you have numerous users accessing databases and running tasks, you may want to consider scheduling backups twice daily. If

you only have a few databases with a handful of users accessing them, you may be able to set backup schedules to once a week.

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

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

Backing up FYI.db files

The FYI.db file holds all settings for the Concordance Desktop Admin Console, links to the database, and includes the database name. As a standard practice, you can always export a copy of your database to make a backup. You can also create a backup copy of the FYI.db file by stop and restarting the Concordance Desktop server services in the Concordance Desktop Admin Console.

If your FYI.db is corrupted and irretrievable, you will lose the following:

- User settings: must re-enter all users and re-apply user permissions
- Client, matter, user groups and database structure: must rebuild folders and organize databases per matters

We recommend that you regularly make backup copies of the FYI.db file if administrators are performing tasks in the Concordance Desktop Admin Console that affects information you want stored in the FYI.db file, such as registering and removing databases, managing logs, setting up network maps.

Back-Up Considerations:

- We encourage you to back up your primary databases every night.
- If you have secondary databases that are not accessed as much, consider backing them up on a weekly basis.
- If you are performing full nightly backups, you need to take your databases offline. You can conduct incremental backups.
- Remember to make time for backup copies of your Snapshot files so they can be restored for reviewers; backing up this file can be a time consuming task given that some .SNP files reach terabyte size

⚠ Always back-up your FYI.db files before performing any updates to any products or services that run on the server that hosts the Concordance Desktop server. Do not use live backups as it may corrupt your databases.

⚠ Do not copy and paste the .dcb file because Windows could corrupt it.

To back up the FYI.db file:

1. In the Admin Console, click the **Server** tab.

2. Click the **Stop** button to stop the Concordance Desktop server services.

3. To recover the file, locate the directory folder where Concordance Desktop is installed.

   The default location is *C:\Users\All Users\LexisNexis\Concordance Desktop*. The last 10 nightly backups are automatically stored in this directory.

   Here is an example of what a backup file name may look like: f68f7096-a85e-49be-823b-b48fd0617137.db

4. Select the latest version of the .db file for the date and time when services were stopped and rename the file or move it to a different directory location.

5. Rename the file to **FYI.db**.

6. In the Concordance Desktop Admin Console, on the **Server** tab, click the **Start** button to restart the Concordance Desktop server services.

   When you restart the services, it relinks to the new FYI.db file. Every time you restart services, the server looks for a FYI.db file in the install directory.

Backing up authentication files

For the Concordance Desktop Admin Console, you will also want to ensure that you back up copies of the Admin Authentication.dcb file. This file is a Concordance Desktop database that contains no data, but retains all administrative settings except passwords. You will want to ensure that at least one administrator has access to this file.

If you find yourself without a backup copy or with a corrupt file, contact Concordance Desktop Technical Support for assistance.

Backing up registry settings

The Concordance Desktop server holds all root registry settings for Concordance Desktop server. The registry settings are stored in the following directory in the Microsoft Registry Editor:

- HKEY_CURRENT_USER\Software\LexisNexis\Concordance Desktop
- HKEY_LOCAL_MACHINE\Software\Wow6432Node\LexisNexis\Concordance Desktop

To make a backup copy of your registry settings, do one of the following:

- In the **Registry Editor**, right-click the **Concordance Desktop** folder, and click **Export**.
- In the **Registry Editor**, click the **Concordance Desktop** folder, and on the **File** menu, click **Export**.

Disaster recovery protocols

Protecting your organization's data in the event of a natural or man-made disaster is essential to ensuring that data retrieval occurs in a timely fashion with limited impacts for conducting business. We recommend that you have data recovery protocols in place at an offsite location. Many vendors have data hosted and archival environments with a variety of services to choose from.

With Concordance Desktop server, you may want to keep an inactive copy as a failover means of ensuring access to your data. Internally, you will want to mirror hard drives on your servers and may want redundancy for the SQL Server.

Concordance Desktop server components to mirror:

- The Concordance Desktop server directory by default, it is located in the following directory:

  C:\Program Files (x86)\LexisNexis\Concordance Desktop (Windows 7)
- The Concordance Desktop server application directory is located in the following directory:

  C:\Users\All Users\LexisNexis\Concordance Desktop (Windows 7)

  The Concordance Desktop server application directory includes the necessary fyi.db file, which maintains a list of registered databases, users, user groups and other essential information.
- The services settings for both servers.

  The services settings are located in the Services Control Panel (Start > Control Panel > Administrative Tools > Services). These settings include the system user name and password used to access network shares.

Data recovery and retrieval

Protecting your organization's data in the event of a natural or man-made disaster is essential to ensuring that data retrieval occurs in a timely fashion with limited impacts for conducting business. We recommend that you have data recovery protocols in place at an offsite location. Many vendors have data hosted and archival environments with a variety of services to choose from.

Things to consider for data recovery and retrieval:

- Manual backups that are scheduled on a regular basis that store data in a secure, offsite location in a controlled environment
- Incremental secure backups or data mirroring/clustering
- Backup rotation storage of files and databases
- Environments that include comprehensive, around-the-clock network/server monitoring of network traffic with industry-leading technologies for intrusion and protection detection
- Environments that implement 24-hour surveillance requiring with an infrastructure that imposes keycard, fingerprint, and/or retina scan access
- Environments that operate on full redundancy, in addition to stand-alone power generation, and can support heavy transactional processing
- Vault storage specifically designed for long-term data storage with additional services for online viewing access

Database Administration

Supporting Reviewers

Supporting reviewers

As an administrator, your job is to support the document review team by providing the best database structure and maintenance for document review, on a case-by-case basis. The more you can learn and understand from a reviewer's perspective and the needs of each particular case, the easier your job becomes in providing proper support.

This topic covers the administrative information and activities that you will need to perform to support reviewers in searching, saving queries, sorting, and tallying.

How to Support Reviewers:

Searching

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

Searching Overview:

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

Tips to Increase Search Processing Speed:

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

Tips for Assisting Reviewers:

- Verify that reviewers are not running relational searches on paragraph fields
- Verify that reviewers are placing a full-text search clause before the relational clause to cut down search processing time
- Verify that search syntax is correct
- Verify the search terms are included in the dictionary
- Verify that the field is indexed for full-text searching
- Reindex the database to ensure all updates are available to reviewers

Creating a Synonyms List

Creating a synonyms list for your database increases your reviewers search capabilities by locating results for words that have similar meanings or alternative names. Synonyms can be based off of words already entered in your database dictionary, creating a permanent link between them, or other search terms in Concordance Desktop. 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.

💡 If your reviewers are receiving over-inclusive results or search time is getting bogged down, this is one area you can check for shaving off processing time. You can easily edit the list later, if need be.

For more information about creating a synonyms list, see Creating a synonyms list.

Saving queries

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

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

Search Query Options:

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

Modifying query files

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

To modify a query file:

1. Locate the query (.qry) file you want to modify.

2. Right-click and open with any text editor program you want to use to modify the file.
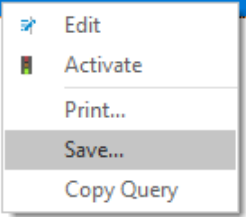
   If the text editor program is not listed, click Choose Program to locate the text editor program.

3. In the text editor program, make the applicable edits and save your changes.

Saving search results

In the Review view, you can print your search results or save them to an ASCII text file by right-clicking your mouse in the center of the view. If you save your search results to a text file from the Review view, the search terms and search results information saved to the text file can be used as a backup of search results in a report format in case a reviewer needs to prove what search criteria was used during an e-discovery.

Search Number	Number of Hits	Number of Docs	Search Term(s)
00000	63	63	<Entire Database>
00001	4	1	cluster
00002	89	13	enron
00003	39	39	(CREATIONDATE GE 01/01/2007)

Edit
Activate
Print...
Save...
Copy Query

Clearing searches

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

To clear search history, on the Search menu click Clear Search History. The user's search results in the Review view will be erased and reset except for the All query used to locate all records in the database.

⚠ We recommend that you save a user's searches to a .qry file before clearing them from Concordance Desktop. Once you have cleared a user's search history, there is no Undo function to retrieve this information.

Tallying records

Tally is a great sorting tool for a quick record count and for quality assurance checks. You can search on a unique value within a field and also print a list of these results.

Tally is also useful to organize documents in preparation for printing reports. The Tally feature is only accessible by right-clicking on a field in the Table view and clicking Tally.

Customizing table layouts

The document listing in the Table view can be customized by viewer preference or for viewing particular query results. Each user can create one private table layout per database that is not viewable by other users, except the database administrators. Private layouts are identified by the user ID in the layout name.

All layouts, except for private layouts, are made public to all users in the database and stored in the .layout file. We recommend that you implement custom table layout guidelines for your organization, because too many table layouts may result in a cluttered layout menu tree. A database's .layout file can be used and copied to other databases, which is useful when working with concatenated database sets. If you are experiencing problems with users creating too many layouts, you can set up a group of standard layouts and make them read-only. Any layout customizations that users may want can be done using their private layouts.

For more information about layouts, see Using table layouts.

Saving snapshots

Snapshots are a point-in-time picture of a user's work history and helps them track and preserve their search history and search results. Saved snapshots can 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. Snapshots only store historical data, such as searches, the last record selection, and the last sort performed during a user's Concordance Desktop session.

When a saved snapshot file is restored, Concordance Desktop automatically opens the databases associated with the file, with all queries and sorts preserved.

Users may also choose to have the auto-restore feature turned on, which is a feature similar to saving a snapshot. An Auto-restore snapshot file contains that last record selection and last record viewed at the end of a Concordance Desktop session, so when users next access Concordance Desktop they can resume reviewing where they last left off. Unlike manually saved snapshot .snp files, the Auto-restore file is overwritten each time the user logs out of Concordance Desktop.

Snapshot Overview:

- Snapshots are saved as non-editable .snp files and can only be restored on original databases
- Auto-restore will not work if a user does not have Microsoft Windows permissions
- Sometimes Auto-restore will not work if the most recently used (MRU) feature is disabled

 If reviewers make a practice of saving snapshots at the end of every work session, we recommend that you periodically review and delete outdated or unnecessary .snp files due to their large file size on a hard drive or network.

For more information about saving snapshots, see Saving and restoring snapshots.

Sorting records

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

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

Sorting Overview:

- The default sort order of all queries is the record creation or load order of the documents when they were added to the database (accession number)
- Sorting can be done on up to 16 fields at one time with a maximum character limit of 1,000
- Sorting of paragraph fields is done on the first 60 characters only and uses the longest value in the field up to 60
- Sort order is temporary and only applies to the current query
- Speed up sorting by selecting the Key check box for database fields in the Modify dialog box.

For more information about sorting records and field data, see Sorting documents.

Permanently sorting database files

You can permanently sort databases using two methods:

- Export the database
- Replicate the database

To permanently sort a database, sort the records in the database the way you want them to be permanently sorted, then export or replicate the database to a new database to replace the original database.

To permanently sort a database:

1. Back up the original database.

   For more information see backing up databases.

2. In Concordance Desktop, open the database you want to permanently sort.

3. Sort the database.

   For detailed steps on sorting a database, see Sorting documents.

   To permanently sort a database you can either export or replicate the database.

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

4. To export the database, on the **Documents** menu, point to **Export**, and click **As a Concordance Desktop database**.

The accession number is reassigned in your new database to match the import order.

For detailed steps on exporting a database, see Exporting databases.

Once you have named the database with its new sort order, you can start using your new database. You will need to delete or archive your old database.

About Databases

About Concordance Desktop 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

The Database Capacities table lists the capacities for each of the database elements.

Database Capacities	
Database	**Capacity**
Number of documents	500,000
Concatenated databases	128
Document size	3 billion characters
Fields	250

Database Capacities	
Database	**Capacity**
Characters per field	12 million
Database .ivt file	6 gigabytes
Database dictionary	6 gigabytes
Database file path name	199 characters in length

Database Checklist

Checklist: Database	
	Data Review
☐	Do you know how many documents or gigabytes (GB) of data have been received?
☐	Are your files converted to types that are recognized by Concordance Desktop?
☐	Do you understand Concordance Desktop field structure and how it affects importing data?
	Review Load Files
☐	Have you reviewed the contents of the data volume you are about to load?
☐	Have you reviewed your data load file for acceptable delimiters and date formats?
☐	Do you have fields set in place for data that you are importing?
☐	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.
☐	Did you receive an image load file along with your images? If not, you can create one.
☐	Did you adjust the directory path of your image load files, if need be?
☐	Have you verified that your alias in the image load file matches the Image field in the Concordance Desktop database?

Checklist: Database

☐ 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?

☐ 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

☐ Did you create a database template that includes administrative fields?

☐ Did you select an image key field for your images?

☐ Did you validate the EDITTRAIL and CREATEDATE fields?

☐ Did you index all fields needed for full-text searching?

☐ Did you create additional miscellaneous fields?

CPLs

☐ Did you verify supported CPLs for your current Concordance Desktop version by reviewing the ...\ProgramData\LexisNexis\Concordance Desktop\CPL folder, or Concordance Desktop Scripts Help topic?

Case Review

☐ Have you reviewed case records to understand what types of files you are importing?

☐ Did you review case records to plan your field structure?

☐ Do you understand what types of reports you may be generating for maintenance and to support reviewers?

☐ Do you understand the file and media requirements for print productions, especially for opposing counsel?

Ongoing Maintenance

☐ Have you outlined maintenance processes and schedules that affect your new databases?

About Concordance Desktop database files

When you create a database, you import the initial load files to populate the database with records. These initial files can be either PST files, electronic documents, or delimited text files prepared by a vendor (or other party), and can be imported as you create the new Concordance Desktop database. Concordance Desktop provides a Creation Wizard to help you create and import the documents all together.

- You can import the following types of files:
- Delimited text file
- Native files
- Electronic documents
- E-mails and attachments
- Transcripts
- Concordance Desktop databases

Each Concordance Desktop 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, and text file (.ndx), the text file (.txt), and the user management file (.sec). 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.

For more information see backing up databases.

📝 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 Desktop uses SQLite. SQLite is an embedded relational database engine, which brings more stability to the functions of the .TRK file. Because SQLite is an embedded database, SQLite does not increase the required maintenance and administration of Concordance Desktop.

Concordance database files

Concordance Desktop Database Files			
Name	**File Description**	**Usage**	**File Type**
.cat	Concatenation	Stores a list of concatenated databases	Text file
.cib	Imagebase	Stores association between media keys and native and image files including markup history	SQLite file

Concordance Desktop Database Files

Name	File Description	Usage	File Type
.cpl	CPL script	Store Concordance Desktop Programming Language (CPL) scripts	Script file
.cpt	CPL script	Stores compiled versions of CPL script	Script file
.csv	User management	Stores field and menu access for all users (when exported by user)	Text file
.dat	Delimited text	Contains metadata and sometimes OCR for document records	Text 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	B-tree file
.fmt	Print settings	Saves print settings for reports generated using the standard print feature User generated file	
.fyi	Concordance Desktop Concordance Desktop server database	A link file that opens a database on a remote Concordance Desktop server	Text file
.fzy	Fuzzy search dictionary	The fuzzy search dictionary contains homonyms for words in the search dictionary This file is created and updated by indexing and reindexing	B-tree file
.gat	Back Up	A tag backup file that stores tagging information. Generated by running the TagSaver.cpl	
.ini	Configuration settings	Stores various configuration settings	Text file
.ivt	Inverted text	Used with the dictionary during searches	

Concordance Desktop Database Files

Name	File Description	Usage	File Type
.key	Key fields	Field storage for fast relational searching	B-tree file
.layout	Table layout	Stores the defined table layouts	B-tree file
.sortlayout	Sorting layout	Stores the defined sorting layouts for the current database	
.editlayout	Editing layout	Stores the defined editing layouts for the current database	
.lst	Word lists	Contains predefined values that can be selected from a list when editing fields When a list is assigned to a specific field, it's called an Authority List	B-tree file
.ndx	Numeric, date, and text fields	Stores data for the fixed length field types: Numeric, Date, and Text	
.opf	Print settings	A Concordance Desktop Image print file that stores print settings for print jobs generated by Concordance Desktop Image *(Opticon)* User generated	
.qry	Query	Stores search query strings	
.sec	User management control	Stores user management settings	B-tree file
.snp	Snapshot	Stores search history and auto-restore settings	
.stp	Stopwords	Contains the noise words that are ignored during database indexing	B-tree file
.syn	Synonyms	Stores the user defined synonyms	B-tree file
.tex	Text	Full text paragraph field storage	Text file
.trk	Transaction tracking	Relational SQLite file structure that stores tags and tag histories, security (field and menu access for all users) and replication data	SQLite file

Concordance Desktop Database Files			
Name	**File Description**	**Usage**	**File Type**
.xrl	Markup	Stores the current state of markups and placeholders	

Temporary files

Concordance Desktop creates and uses temporary files, which are automatically erased when you leave the program. However, temporary files are not erased if there is a power outage or other problem which causes an irregular program termination. Concordance Desktop 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 Concordance Desktop 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.

For more information about indexing and reindexing, see Indexing Databases.

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 Desktop.

Load files or delimited text files are the files used to construct your Concordance Desktop 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 so they can be imported separately.

As an administrator, you should always make a practice of opening and reviewing your delimited text files when you receive them, as the files are not always prepared perfectly and may need to be modified.

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
- **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.

Concordance Desktop Delimiters	
Comma	Field break indicator, default is ? (ASCII 20), customizable, avoid characters in data
Quote	Keeps text together, default is þ (ACSII 254) and is only required around fields that have text and spaces, customizable, avoid characters in data
New Line	Manual line break and text wraps within a field, default is ® (ASCII 174), customizable, avoid characters in data
New Record	Starts a new record, final carriage return loads the last record, cannot be changed, industry standard

📝 Delimiters are customizable for an organization's internal database design, but many organizations ask vendors to use Concordance Desktop 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.

About 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 Desktop fields.

Concordance Data Field Types

There are two basic field categories available in the Concordance Desktop 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 Desktop database.

Fixed fields are always a pre-defined length and contain numbers, dates, or short amounts of text. Documents in a Concordance Desktop database can be sorted by the contents of both fixed fields and free-text paragraph fields, but fixed length fields sort much faster. Data in fixed fields is typically searched using relational *comparison* search operators such as =, >, and <, however 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.

Use the following table as a reference when you review your data.

Concordance Desktop 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 using the Browse view will then understand 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 Desktop does not have a pre-defined field structure and there are no required fields. However, preliminary planning in how you construct fields and apply properties to each is essential.

Concordance's 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
  - Underscoring in the middle only
- Field names are stored in capital letters
- Field names save when the data type is selected

⚠ Media (image) key field names with Unicode characters are not supported.

Concordance Field Properties:

Concordance Desktop Field Properties	
Image *(Concordance Desktop Image Only)*	Indicates which field contains the image key or alias, only selected once per database and is usually the BEGNO field.
Media *(Concordance Desktop Viewer Only)*	Indicates the field that contains the media key or alias, only selected once per 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 Desktop creates these for replication/synchronization information
Indexed	Enables full-text searching (adds values to .ivt and .dct files)

Guidelines for Creating Fields:

Guidelines for Creating Fields	
Bates Numbering	A unique serial number used to identify a 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

Guidelines for Creating Fields

	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 Desktop 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.
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.
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 can be set in the Modify window, and must be added before importing load files in order to capture the information.
Table view	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.

Additional fields and naming conventions

Use the following table as a reference when planning your database field structure. You may find that adopting the use of these fields is beneficial to your administrative functions or provides alternative naming conventions for fields previously mentioned. Use this table to brainstorm other fields that make sense to your organization's processes and use of Concordance Desktop.

Additional Administrative Fields and Alternative 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 #s during the life of a database, usually matched with the .tif file name as the first field in the database.
BEGBATES BEGDOC STARTPAGE	Text	Alternative field names for BEGNO.
ENDBATES ENDDOC ENDPAGE	Text	Alternative field names for ENDNO.
DOCNO	Text	Document number, an alternative to using serial numbers key to the page, more common in e-documents that are not .tif files.
BEGATTACH	Paragraph	Used to denote attachment range.
ENDATTACH	Paragraph	Used to denote attachment range.
INCLUDES	Text	Holds Bates or control numbers of all pages inside the document, facilitates searching for middle page .tif files.
PARAGRAPH	Paragraph	Alternative name for DOCTYPE field.
Document metadata 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.
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.
TEXT1 TEXT2	Paragraph	Alternative naming convention for document-level text fields like OCR1, OCR2, OCR3.

Additional Administrative Fields and Alternative Naming Conventions		
Field	**Type**	**Settings**
		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 import process 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.
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.cpl converts it to a hyperlink.
DOCCOND	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.
MENTIONS	Paragraph	Keywords included in the document.
LOADDATE	Date	Alternative name for CREATEDATE field. Used to record the date the record was created, date data type.
AUDITTRAIL	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.
DISCSOURCE 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 fields with different data types	Paragraph or Date	Consider creating ADMIN1PARA, ADMIN1TEXT, ADMIN1DATE, etc. to hold specific types of data.
Template for administrative fields	(not applicable)	Consider creating this template.

Additional Administrative Fields and Alternative Naming Conventions		
Field	**Type**	**Settings**
		Each time you make a new database, you can insert fields above them to accommodate data. 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 Desktop .EXE file.
REVIEWEDBY	Paragraph	Alternative name for REVIEWSTATUS. Name of the attorney who reviewed the file.
TAGSATPROD	Paragraph	Alternative name for PRODTAGS1. Tags as they existed for production.

Configure visibility of Empty fields

You can configure a database such that empty fields are not visible in the field listing. Empty fields are those that contain no values. Hiding unused fields can help to improve the readability of database records for end users. Showing empty fields is generally a preference for Concordance Desktop administrators, who typically want to have all database fields visible whether they contain data or not.

Database with empty fields hidden

CNDCN	:	0000006
TITLE	:	
SUBJECT	:	
FILENAME	:	CLIENT ACCOUNTING INQUIRY.PDF
AUTHOR	:	
COMPANY	:	
CATEGORY	:	
KEYWORDS	:	
PRODUCER	:	
CREATOR	:	
COMMENTS	:	
METADATA	:	
FILEPATH	:	C:\USERS\LHEWITT\DOCUMENTS\CONCORDANCE DESKTOP\NATIVES\VOL000001\CLIENT ACCOUNTING INQUIRY.PDF
SOURCE	:	C:\TEST DATA\CONCORDANCE\EDOC
FILEEXT	:	PDF
DATE	=	00/00/0000
MODDATE	=	12/22/2010
CREATIONDATE	=	12/22/2010
PRINTDATE	=	00/00/0000
REGNO	:	

Database with empty fields shown

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 is not visible.

To show empty database fields:

1. Open the Concordance Desktop 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.

    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.

To hide empty database fields:

1. Open the Concordance Desktop database you want to view.

2. From the **Tools** menu, click **Empties** to remove the check mark next to the command and hide the empty fields from view.

About punctuation

When indexing a database, Concordance Desktop 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 Desktop during the indexing process is determined by what you enter in the Punctuation field. By default, Concordance Desktop 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.

Basic database fields

To help you plan and create your databases, we have created a list of the standard

Concordance Desktop database fields, including administrative fields:

Basic database fields

Field Name	Field Description	Possible Values/Examples	Load File	Email & Attachments	E-Docs
CNDCN	A unique identifier assigned to each record.	0000001	√	√	√
ATTACHMENT	Populates a list of the parent document and its attachments.	Ex: ABC0002;ABC0003		√	
CONVERSINDEX	E-mail thread identification.	Ex: 01C72AC4CB0FC3953C5FA8E149389B522EFF595EF9FB		√	
FROM	Author of the e-mail message.			√	
TO	Main recipient(s) of the e-mail message.			√	
CC	Recipient(s) of "Carbon Copies" of the e-mail message.			√	
BCC	Recipient(s) of "Blind Carbon Copies" of the e-mail message.			√	

Field Name	Field Description	Possible Values/Examples	Load File	Email & Attachments	E-Docs
TITLE	Title field value extracted from the metadata of the native file.		√	√	√
SUBJECT	Subject of the e-mail message.	Ex: FW: Concordance Desktop	√	√	√
FILENAME	Original filename of native file. Contains subject of e-mail message for e-mail records.	Ex(1): Estimates.xls Ex(2): FW: Monday Meeting	√	√	√
AUTHOR	Author field value pulled from metadata of the native file.		√	√	√
COMPANY	Name of the company that created the document.		√	√	√
CATEGORY	Category field value pulled from metadata of the native file.	Ex. Software	√	√	√
KEYWORDS	Keywords extracted from the metadata of the native file.		√	√	√
PRODUCER	The name of the PDF producer.		√	√	√
CREATOR	The software that created the document.		√	√	√
COMMENTS	Comments field value pulled from the metadata of the native file.		√	√	√
FILEPATH	Contains a clickable hyperlink to the native document in electronic format.		√	√	√
SOURCE	The original folder path or pst path that the file was saved in.		√	√	√
FILEEXT	File extension of native file.	Ex. DOC	√	√	√
FOLDER	The original folder the file was saved in.			√	

Field Name	Field Description	Possible Values/Examples	Load File	Email & Attachments	E-Docs
DATE	The date the original file was created.			√	
TIME	The time the email message was received.			√	
GMT_DATE	Email received date in GMT.			√	
GMT_TIME	Email received time in GMT.			√	
MODDATE	Last day the file was modified.		√	√	√
CREATION DATE	The day the document was created.		√	√	√
PRINTDATE	Last day the document was printed.		√	√	√
BEGATTACH	Displays BegDoc# of parent record.	EX: ABC0001		√	
ENDATTACH	EndDoc# of last attached document in family.	EX: ABC0003		√	
ATTACHRANGE	Stores BegDoc# of parent record and EndDoc# of last attachment record, separated by a hyphen. Populated for all records in the family (parent and attachment(s)).	Ex: ABC0001 - ABC0003		√	
BEGNO	Displays page ID of first page in a document.		√	√	√
ENDNO	Displays page ID of last page in a document.		√	√	√
TEXT01	Contains document level text.		√	√	√
TEXT02	Overflow field for document level text.		√	√	√
TEXT03	Overflow field for document level text.		√	√	√
TEXT04	Overflow field for document level text.		√	√	√

Field Name	Field Description	Possible Values/Examples	Load File	Email & Attachments	E-Docs
TEXT05	Overflow field for document level text.		√	√	√
EDITDATE	Last day the document was edited in Concordance Desktop.		√		√
CREATEDDATE	The date the document was added to Concordance Desktop.		√		√
HEADER	Contents of the header in an e-mail message.			√	
METADATA	A collection that represents all of the built-in document properties.		√	√	√
MESSAGEID	Outlook identification number.	81F3CC6EBB6FD01191780 0805FC17836072FDBF2@P ANTHERS.RBVDNR.COM		√	
MESSAGEINDEX	The index of the message file in the database.			√	
ENTRYID	Unique identifier of e-mails in mail stores.	Ex: 1322C3C03649D44186257 11400748A13		√	
PARENT_DOCID	Parent ID of the document's family.			√	
BEGPRODNO	Captures the beginning production number.		√	√	√
ENDPRODNO	Captures the ending production number.		√	√	√

Basic administrative fields

Basic Administrative Fields		
Field	**Type**	**Settings**
ACCESSID	Numeric	20, 0, Accession, Use to track delete documents Generates a record load order number.

Basic Administrative Fields

Field	Type	Settings
CREATEDATE	Date	Set properties using the Validation command on the Edit menu, normally not keyed or indexed
EDITTRAIL	Paragraph	Set properties using the Validation command on the Edit menu, includes YYYYMMDD, time, time zone, [session # -- assession #] per user
PRODBEG1	Text	Captures beginning Bates #s for first production. Using number suffixes avoids having to rename fields later for additional productions.
PRODEND1	Text	Captures ending Bates #s for first production. Using number suffixes avoids having to rename fields later for additional productions.
PRODNOTES1, PRODNOTES2	Paragraph	Enter pertinent information here about the person who ordered the production, add this on every single record in a production set.
PRODDATE1	Date	Enter the production date here with global edit or AppendTextToField.cpl.
PRODTAGS1	Paragraph	Used to capture tags as they existed at the time of production using the Tag To Field command, Tools > Manage Tags/Issues.
TAGS	Paragraph	Used to hold the names of checked tags generated by the Tag To Field command, Tools > Manage Tags/Issues.
TAGINFO	Paragraph	Used to hold activity generated by the Tag History&Store It.cpl.
CUSTODIAN	Paragraph	Original owner of the data.
REVIEWSTATUS	Paragraph	Name of person who reviewed the file.
ATTYNOTES	Paragraph	Used to hold attorney notes.
ADMIN1, ADMIN2, ADMIN3, ADMIN4	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.

Reviewing load files

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 document-level text, sometimes referred to as OCR text.

📝 Though Concordance Desktop can import OCR text that is contained in a load file (DAT file), it is best practice, and our recommendation that your OCR text be separated into individual text files and imported using an OPT file to reference the location of each OCR text file.

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.

To review a load file:

1. Open the load file in any text editor program.

📝 Delimited text files can be opened with any text editor program, such as Notepad. We recommend using an advanced text editor program like TextPad® or UltraEdit®.

2. Review the load file for the following elements:

   - The file must be a text-based format with an extension of .dat or .csv.
   - If there is not a header row containing field names, open the associated .tif file for the first record and match the data in the record to the data in the .tif file.
   - Note the delimiters used in the file. Concordance Desktop can handle any standard text delimiters.
   - Note the date format used in the file. Concordance Desktop can load dates containing slashes in any order with either 2- or 4-digit years, with a maximum of 8 digits. The only date formats Concordance Desktop can load without slashes is the 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 Desktop will not load the last record if the carriage return at the end of the record is missing.

📝 Concordance Desktop database field names do not support special characters.

Therefore, 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.

Load files that include OCR text

If the OCR text is included in the load file (DAT file), Concordance Desktop provides a check box you can select, that will enable the import process to read the text from the load file and write it to the OCR designated field in the database records. It is recommended that before creating a database with a load file that includes OCR text, you ensure that there is a designated OCR field for each OCR text entry.

Note that an OCR field can contain up to 12 million characters. As the import process reaches the 12 million character limit, the text is overflowed into the next OCR field. If one does not exist in the database, the import process creates the field. At that point, a '1' is added to the original OCR field (OCR1), and the second OCR field is named the same as the original OCR field, but with a '2' added to the end of the field name (OCR2). The database then have two OCR fields; OCR1 and OCR2 (or TEXT1, TEXT2). All characters following the 12 millionth character are placed into the second OCR field (OCR2) of the records. If the character limit is reached a second time, the import process creates a third and final OCR field, naming it the same as the other two, and adding a number 3 to the field name (OCR3). All characters following the 24 millionth character are placed into the third OCR field (OCR3).

As you create a new database from a load file that contains the OCR text (document-level text), during the import process the OCR text (document-level text) is imported into each corresponding record and placed in the specific OCR field, usually named OCR, TEXT, or something similar. When the document-level text exceeds the capacity of that OCR field (capacity is 12 million characters), Concordance Desktop will automatically overflow the text into the next available field, regardless if that field is setup for the OCR text or not. In order to prevent the overflow text from filling a field not designed for that text, you need to ensure that there are multiple OCR fields to contain the document-level text (ex., OCR1, OCR2, OCR3, etc.), and that after the 12 million characters has been reached, the OCR field for the next character starts with the next incremented OCR field name. . With OCR text that is external to the load file, this isn't a problem, as you can create additional OCR fields using the Customize feature in the import process. However, when the OCR text is included in the load file, the field name is included with each line of textwhen the document-level text reaches the 12 million character limit, you need to ensure that the next character begins

When your OCR (document-level text) is included in the delimited text file, the process is the same, except that on the field in the delimited text file that contains the document level text. This field is usually named OCR, but may be named TEXT or something similar. During the import process, the field needs to be identified so that the document-level text can be copied into each record. When checking the delimited text file, you need to keep in mind that should the total of all the document-level text , Concordance Desktop automatically overflows the text into the next available field. For this reason, there needs to be a defined 2, 3, etc. extension of the OCR field for this character overflow (example: OCR2, OCR3, OCR4), and the document-level text in the delimited file needs to be broken up after every set of 12 million characters and the

OCR field incremented so the next character set begins in the next OCR field. What this means is you will need to change the field name every 12 million characters, by incrementing the additional number by 1. For example, at the first 12,000,001 (12 million + 1) character you will need to split the text between two lines and ensure that the 12,000,001 characters gets placed into a

When your OCR is placed into individual document-level text files, the text is imported into each corresponding record based on fields you create in the database to contain that text. The fields can be created during the import process by using the Customize feature. you have to create fields (usually OCR1, OCR2, OCR3, etc.) during the import process to contain the document-level text (OCR) from the individual text files. This is done by using the Customize feature in the Load File window.

About Creating Databases

When you create a database, Concordance Desktop imports the initial load files to populate the database with records. These initial files can be either PST files, electronic documents, or delimited text files prepared by a vendor (or other party), and can be imported directly into the new Concordance Desktop database. Concordance Desktop provides an Import Wizard to help you create the database.

After a database is created, additional files can be added directly to the database by dragging and dropping the files onto that database in Concordance Desktop. Though there are a few exceptions in which dragging and dropping is not supported. The exceptions, along with more information about dragging and dropping can be found in the About adding extra files to a database topic.

⚠ When creating a new database, if you cancel at any time during the import process, it corrupts the new database. If you wish to create the new database again, you have to delete the corrupted database, and then start the create process from the beginning.

About delimiter characters

Delimiters are unique characters that appear in the delimited text file and do not exist in your actual data. The delimiters are used to determine where fields break, to encase fields that have text with spaces, to indicate the start of a new line, and to indicate the start of a new record.

🗹 Delimiters are customizable for an organization's internal database design, but many organizations ask vendors to use Concordance Desktop 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.

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

Char	Code	Char	Code	Char	Code	Char	Code
⌐	(001)	-	(045)	´	(180)	Ú	(218)
⌐	(002)	.	(046)	µ	(181)	Û	(219)
∟	(003)	/	(047)	¶	(182)	Ü	(220)
⌐	(004)	:	(058)	·	(183)	Ý	(221)
|	(005)	;	(059)	¸	(184)	Þ	(222)
—	(006)	<	(060)	¹	(185)	ß	(223)
•	(007)	=	(061)	º	(186)	à	(224)
□	(008)	>	(062)	»	(187)	á	(225)
	(009) Horizontal Tab	?	(063)	¼	(188)	â	(226)
	(010) Line Feed	@	(064)	½	(189)	ã	(227)
	(011) Vertical Tab	[	(091)	¾	(190)	ä	(228)
	(012) Form Feed	\	(092)	¿	(191)	å	(229)
	(013) Carriage Return	]	(093)	À	(192)	æ	(230)
	(014) SO	^	(094)	Á	(193)	ç	(231)
¤	(015)		(095)	Â	(194)	è	(232)
†	(016)	`	(096)	Ã	(195)	é	(233)
◄	(017)	{	(123)	Ä	(196)	ê	(234)
↕	(018)	|	(124)	Å	(197)	ë	(235)
‼	(019)	}	(125)	Æ	(198)	ì	(236)
¶	(020)	~	(126)	Ç	(199)	í	(237)
⊥	(021)	¡	(161)	È	(200)	î	(238)
⊤	(022)	¢	(162)	É	(201)	ï	(239)
┤	(023)	£	(163)	Ê	(202)	ð	(240)
↑	(024)	¤	(164)	Ë	(203)	ñ	(241)
├	(025)	¥	(165)	Ì	(204)	ò	(242)
→	(026)	¦	(166)	Í	(205)	ó	(243)
←	(027)	§	(167)	Î	(206)	ô	(244)
!	(033)	¨	(168)	Ï	(207)	õ	(245)
"	(034)	©	(169)	Ð	(208)	ö	(246)
#	(035)	ª	(170)	Ñ	(209)	÷	(247)
$	(036)	«	(171)	Ò	(210)	ø	(248)
%	(037)	¬	(172)	Ó	(211)	ù	(249)
&	(038)	-	(173)	Ô	(212)	ú	(250)
'	(039)	®	(174)	Õ	(213)	û	(251)
(	(040)	¯	(175)	Ö	(214)	ü	(252)
)	(041)	°	(176)	×	(215)	ý	(253)
*	(042)	±	(177)	Ø	(216)	þ	(254)
+	(043)	²	(178)	Ù	(217)	ÿ	(255)
,	(044)	³	(179)				

About OCR

Optical Character Recognition (OCR) is the process of scanning native files and processing them into readable text files. During the Concordance Desktop database creation and import process, these readable text files (often called OCR or OCR'ed text), are written to a designated field in the database records. The incorporation of this readable text in the

database records provides the ability to index and search document-level data in Concordance Desktop. Documents that are not processed through OCR scanning will often contain characters that are not supported by Concordance Desktop, and therefore may provide unreadable results when viewed in Concordance Desktop.

For those instances where the native document files have not been OCR'ed (scanned into readable text), you can select to have Concordance Desktop OCR them during the import process. This option may be optimal for smaller databases, but probably not for very large ones, as it increases the import processing time. Files that have not been OCR'ed can still be imported/added to a database, but the native data is imported "as is," meaning that some of the data may be unreadable, and therefore not indexed or searchable in Concordance Desktop, and not viewable in the viewer. If this is the case, there is an option in Concordance Desktop that allows you to 'optimize' the native file(s) so that the text is readable, can be indexed, and is searchable in Concordance Desktop, and the document(s) viewable in the viewer.

For those instances where the native document files have been OCR'ed, Concordance Desktop provides a few options for adding the OCR'ed text to the records in the database:

- **OCR'ed text files with an OPT** - If you have OCR'ed text files in one or more folders and an OPT file referencing each of those files, you can select to have Concordance Desktop read the OPT file to find the text files and write the text to the corresponding records as referenced in the OPT file. Concordance Desktop will not attempt to OCR the files, it will simply read the text and write it to the associated records. This option helps to minimize import processing time, as the OCR process is not run.

- **OCR'ed text files without an OPT** - If you have OCR'ed text files but no OPT file referencing the location of the text files, you can select to have Concordance Desktop find the files based on a folder where the files are located. This option is usually selected in conjunction with the option to have the import process create an OPT file in the Load File window. Concordance Desktop will not attempt to OCR the files, it will simply find the files and write the OCR'ed text to the corresponding records in the database. This option helps to minimize import processing time, as the OCR process is not run.

- **OCR'ed text included in the load file** - If the OCR'ed text is included in the load file (DAT file), Concordance Desktop provides a check box you can select which will enable the import process to read the text from the load file and write it to the OCR designated field in the database records. Concordance Desktop will not attempt to OCR the files, it will simply read the text and write it to the associated records. This option helps to minimize import processing time, as the OCR process is not run.

- **OCR Path is included in the load file** - If the DAT file references an OCR path, the new import option allows you to import document level text. The OCR path needs to be edited to reflect the directory where the text is located or edited to reflect a relative path. When using the relative path in the DAT file, the edited copy of the DAT file must be in the same directory as your text folders.

  Example of a full text path:

  C:\Cowco_Data\OCR\Vol001\ABC0001.TXT

  Example of a relative text path:

  .\Vol001\ABC0001.txt

About the OCR field

Before creating a database with a load file, we recommend that you ensure there is at least one designated OCR field in the database. Note that an OCR field can contain up to 12 million characters. As the import process reaches the 12 million character limit, the text is overflowed into the next OCR field. If another OCR field is not included in the database, the import process creates the field and labels it with the same name, and adds a number (example: OCR2). For each additional OCR field needed, the number is incremented by one (OCR2, OCR3). Only two additional fields can be automatically created by the import process (OCR2 and OCR3). If more fields are required, you will need to add them using the Customize feature in the Load File window.

Preparation for database creation

Before creating a load file database:

- Make sure that an OCR field (i.e., OCR, TEXT, TXT, etc.) exists in the load file - if not, use the Customize feature in the Load File window to add it.

  OCR fields can be named anything, as long as you reference the correct name when selecting the OCR field in the Load File window, so the OCR'ed text appears in the correct field in the database records.

- Make sure that all OCR fields are setup as 'Paragraph' type fields, to ensure that the data can be indexed and searched
- Make sure the file path pointing the text files are accurate to ensure

Before adding documents to an existing load file database:

- Make sure that the OCR fields in the corresponding Concordance Desktop database are setup properly (i.e., OCR1, OCR2, OCR3, etc.)
- Make sure that there are enough OCR fields to support all the text - each OCR field can hold a maximum of 12 million characters
- Make sure that the OCR fields are setup as 'Paragraph' type fields to ensure that the data is indexed and searchable
- Make sure that you have read/write access to the OCR fields if you are adding documents to an existing load file database

⊟ **Tips and Tricks for Importing OCR Files**

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

- Verify file names and extensions
- Consider using a renaming utility software or use a DOS batch file (.BAT extension) if the file names do not match the key
- Check your .LOG file to verify whether each OCR file successfully loaded

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

About native imagebase load files

For the discovery process, it is common practice to pre-process documents, by converting them to image files for review. However, it is often more desirable to review certain documents in PDF format so they appear just as they do in their native format. Concordance Desktop provides an "Optimize" feature that allows you to create PDFs of one document, a query of documents, or all documents in a database. While the viewer provides access to both the PDF file copies and the images, thus speeding up the review process.

When PDF copies of the files are available, the viewer opens the PDF copy of the native document including images, layout and more. The PDF can be reviewed, redacted, and marked-up for production. These PDFs are referred to as "optimized" PDFs, because they allow for any type of document to be viewed in the viewer.

When importing native documents into Concordance Desktop for viewing in the viewer, the database must contain a valid media (image) key and file path field. The media (image) key field is used to link the Concordance Desktop database with the viewer. In the database records, the FILEPATH field stores the path to the native document.

Concordance Desktop imagebase load file formatting

A load file (.opt, .log, .txt) format is a delimited ASCII file containing all information necessary to insert links into the imagebase. The load file consists of seven delimited entries. Reference the following table and examples when formatting images.

Image Load Files	
Format	**Description**
ALIAS	Should match your media (image) key from the Concordance Desktop database. Concordance Desktop stores this key in order to reference the image. Media keys are case-sensitive.
VOLUME	Name of the volume where the documents and image reside, typically the volume name of a CD or DVD server.
PATH	Full path and file name (and extension) of the image.
DOC_BREAK	Enter a *Y* to denote whether this image marks the beginning of a document.
PAGES	Number of pages associated with the document or image
Character	**Description**
Y	First page of a document

Image Load Files	
Format	**Description**
Comma (,)	Indicates a page break or pages

Example: viewer format for single-page files

00010002,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010002.tif,Y,,,1

00010003,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010003.jpg,Y,,,1

00010004,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010004.gif,Y,,,1

00010005,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010005.tif,Y,,,

00010006,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010006.tif,Y,,,

Example: viewer Format for Multiple-Page files

00010036,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010036.pdf,Y,,,1

00010065,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010065.tif,Y,,,2

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

00010070,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010070.pdf,Y,,,1

00010071,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010071.pdf,Y,,,1

📝 A load file does not necessarily need the volume name, but still needs the
parameter for the volume name (the commas). The format is
Imagekey/Alias,Volume Name,Pathname,Doc Break,Folder Break, Box Break, Page
Count

Example format with the VOL name:
0000001,NROTEK001,D:\VOLO001\001\0000001.tif,Y,,,1

Example format without the VOL name:
0000001,,D:\VOLO001\001\0000001.tif,Y,,,1

⚠️ A document or image media key and file path cannot contain a comma (,) when
loading documents and images for the viewer. The comma is used as a delimiter in
the exported OPT file.

Unique identifier (Media Key)

Your load file format's alias (media key) should match your image key from the Concordance Desktop database. Concordance Desktop stores this key in order to reference the image.

🗒 The alias in your load file matches the database field that has the Image check box selected on the Modify dialog box for the database in Concordance Desktop. For more information about the Image check box, see About fields. Note that this check box should only be checked when you have an imagebase. If you want to import a database that does not have an imagebase, then you need to ensure that the Image Key check box is not checked, prior to starting the import.

🗒 The viewer will not load documents and images if the media (image) key contains over 1000 characters.

⚠ A document or image media key and file path cannot contain a comma (,) when loading documents and images for the viewer. The comma is used as a delimiter in the exported OPT file.

About e-documents

There are several file and electronic document formats that are supported for creating and adding to an e-documents database, but there are some that may not be supported. For formats that are not supported, the files are still added to the database as an excluded file, but the contents is not imported. When working with e-document files, you'll need to adhere to any forensic data processes as outlined by your organization or recommended for e-discovery processing.

Concordance Desktop supports the following E-Document file types for creating and adding documents to an E-Documents database:

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

*.pdf	Adobe Portable Document Format
*.doc, *.dot, *.docx	Microsoft Word
*.ppt, *.pps, *.pptx, *.pptm	Microsoft PowerPoint®
*.xls, *.xlsx, *.xlw, *.xlt	Microsoft Excel®
*.msg	Microsoft Outlook 2010 or later Message File
*.eml	Microsoft Outlook Express Message File
*.txt	ASCII Text
*.rtf	Rich Text Format
*.html, *.htm	Web/HTML
*.pab	Microsoft Outlook Personal Address Book
*.wps	Microsoft Works

📝 Some earlier versions of Microsoft Excel files are no longer supported through Microsoft and cannot be opened from Concordance Desktop. For more information, please see the Microsoft website.

Concordance Desktop integrates with CloudNine™ LAW as well as a few other products, so you can import and export data to and from other industry software applications. CloudNine™ LAW can be used to extract text content and metadata from electronic files in native file format, and scans and exports data directly into databases.

For more information about other product integrations, see Welcome.

Creating Databases

Creating a new database from load files

When creating a database, Concordance Desktop uses a wizard type interface that walks you through each step of the database creation process. The Database Creation Wizard for load files uses the header row of a delimited text file, an existing Concordance Desktop database structure, or a setting file that was saved from an existing database, to create the fields and import the data.

Keep the following in mind when creating a database from load files:

- Field names longer than 12 characters will be automatically truncated.
- 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***).
- Only one OPT file can be loaded. If you have more than one OPT file, you can "drag and drop" each additional OPT onto the database, after the database has been created. See the Adding extra OPT files to a database topic.

- Make sure that OCR fields (i.e., OCR1, OCR2, OCR3, etc.) exist in the load file - if not, use the Customize feature in the Load File window to add them.

  These fields can be named anything (example; TEXT1, TEXT2, etc.). As long as you reference the correct name when selecting the OCR field in the Load File window, the OCR'ed text will appear in the correct field in the database records.

- Make sure that there are enough OCR fields to support all the text in the OCR'ed text files - each OCR field can hold a maximum of 12 million characters

- If you add OCR fields using the Customize feature, make sure that you set them up as 'Paragraph' type fields so that the data can be indexed and searched.

📝 Only files with a .DAT or .CSV file extensions can be loaded. If you have a .TXT, or .ASC file, you must rename the file extension to either .DAT or .CSV prior to loading the file.

The format and delimiters used in the load file help determine the options you select to create the new database. For example, if the load files were created using Concordance Desktop, than the format and delimiters should be the same Concordance Desktop standards, meaning, that the default settings in the Load File window can be used. However, if the load files were created using a different application such as Microsoft Excel, or they are simple comma delimited, or text files, the formatting, delimiters and date format are probably not set to the Concordance Desktop standards. For these files, you will need to customize the settings in the Load File window.

Additional factors to consider when creating a new database are:

- Do you want the Concordance Desktop import process to OCR the native document files? (See the About OCR topic for more information)

- Do you want the Concordance Desktop import process to create near-native PDFs of each native file for better viewing in the viewer?

By default, the above two processes are not run, thus minimizing the time required to create the database. However, you can select to run these processes during the import. Please note that if not run during the import, you can run the processes later on one, several, or all of the files in the database, using the Optimize feature. For more information about the Optimize feature, please see the Optimizing documents to PDF topic.

Based on the above information, you can choose to use default settings, or customized settings, when creating a new database from load files. Below is a summary of what needs to be considered for each:

- Use the Create a new database using load files and Concordance Desktop default settings instructions to create the new database if:

  - The format, delimiters, and date format in the load file all match the Concordance Desktop standards, and your load file (DAT or CSV) already has a one or more fields (usually named OCR, TEXT, or something similar) designated for OCR data (document-level text)

  OR

  - Your load file contains OCR data (document-level text), the format, delimiters, and date format in the load file all match the Concordance Desktop standards, and the

fields defined for the do not want to the import process to create PDF files from the native files.

- Use the Create a new database from load files using customized settings instructions to create the new database if any of the following are true:
  - The load file does not contain the same standard format, delimiters, and/or date format as those in Concordance Desktop
  - You have an OPT file that references the OCR text files, and your load file does not contain fields for holding OCR data
  - Your DAT file does not contain fields for holding the OCR data (OCR fields are required for the input of the text files into the database records)
  - You need to add fields that don't currently exist in the load file, for example fields to attorney comments, or administrator comments
  - Your load file is a DAT that contains OCR data, but the format, delimiters, and date format in the load file do not match the Concordance Desktop standards
  - You want to include beginning and ending attachment fields
  - If you need to make any setting changes to accommodate what is included in the load file
  - You would like to add a previously defined Tag List to the new database

Create a new database using load files and Concordance Desktop default settings:

1. Review the load files you are importing into the database, see Reviewing load files.

2. In Concordance Desktop, on the **File** menu, click **New**.
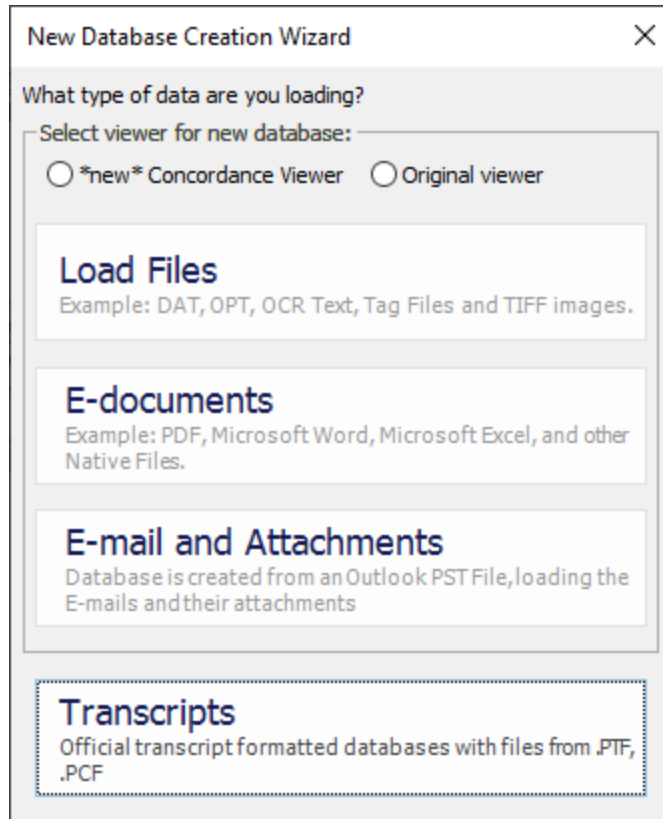
3. Select the viewer for the new database. The "new" Concordance Viewer is recommended.

4. In the **New Database Wizard** dialog box, click the **Load Files** button.

    Load File opens in a new window to configure your load file import settings.

Load File

Database

Enter Database Name

[   ] [Browse]

Load File (.DAT)

Select DAT File

[   ] [Browse]

[Customize]   [Preview]

OPT/OCR/Image

Select OPT File

[   ] [Browse] [Create]

☐ Pre-append path

[   ] [Browse]

Key   [▼]

        ☐ OCR contained in load file

OCR   [▼] [Customize Image/OCR]

Process to PDF
○ Images and supported native files will be processed to PDF
   for best viewer functionality. Additional processing time is
   required.

Do not process to PDF
◉ Images and native files will not be processed to PDF and
   viewer functionality will be limited. Files may be processed
   later if necessary.

Import Status

[   ]

[Import]   [Cancel]

If you know the exact path where you want to save the new database:

- In the **Database Name** field, type the path where you want to save the database, along with a name for the database.

> If there isn't a folder previously created for the new database, it is recommended to create a new folder. Name the new folder according to your database. Double click the newly created folder to open it.

If you do not know the exact path where you want to save the new database:

a. Click the **Browse** button next to the **Enter Database Name** field.

b. Select the location where you want to save the new database.

> It is recommended that each database be created in its own unique folder. Name the new folder according to your database. Double click the newly created folder to open it.

c. In the **File name** field at the bottom of the window, type a name for the database you are creating.

d. Click **Save**.

    You are returned to the Load File window where the Enter Database Name field is populated with the information you entered in the Create Database window.

4. Click the **Browse** button next to the **Select DAT file** field.

5. Locate and select the DAT file, and then click **Open**.

6. To preview the records prior to loading the file:

    a. Click the **Preview** button to open the Preview window.
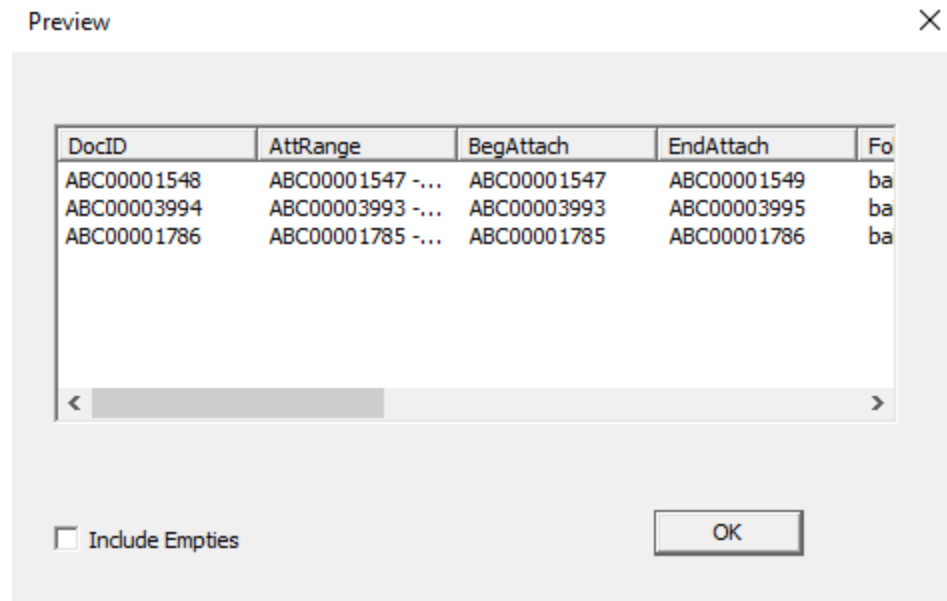
The Preview window displays all fields in which there is data, along with a few of the records in the load file.

b. To turn on the visibility of empty fields, check the **Include Empties** check box.

When checked, empty fields are displayed in the preview, along with the populated fields.

c. When finished viewing the records, click **OK** to close the Preview window.

7. If you need to alter the format and delimiter settings, stop here and go to the Create a new database from load files using custom settings section for detailed instructions.

List of settings you can change when selecting to customize:

- **Load Field Names From:** Location from which to load Field Names. You can select to load Field Names from the DAT file you are loading, from a Template/Structure file, from a previously defined Settings File, or define a new set by manually creating all field names.
- **Select the delimited format to import or select custom values**: You can change the delimiter settings to match the settings in the load file, should they differ from the standard Concordance Desktop delimiters.
- **Select the date format for importing date fields**: You can change the date format, if the format in the load file differs from the standard yyyymmdd used in Concordance Desktop.
- **Load Tag List**: You can load a set of Tags from a saved Tag List file so that those tags are available in the new database.
- **Field Names**: You can add or modify field names.

- Change the order in which fields display in the database.
- **Show System fields**: You can select to include the display of system fields in the database.
- **Skip first line**: You can select to skip the first line in the DAT load file.
- **Import rich text**: You can select to import rich text formatting when importing a text file.
- **Set Attachment Fields**: You can select the field to store the attachment range data, or select the beginning attachment number and ending attachment number fields.

8. Select the path and **File name** of the load file to use for creating the database.

9. Click **Open**.

You are returned to the Load File window where the Select DAT File field is populated with the information you entered in the Open window.

10. Do one of the following:

If you have an OPT file to load, select it.

   a. Click the **Browse** button next to the **Select OPT File** field.

   b. Locate and select the .opt file you want to load.

   c. Click **Open**.

       You are returned to the Load File window where the Select OPT File field is populated with the selection you just made

If you do not have an OPT file to load, you need to create one.

   a. Click the **Create** button next to the **Select OPT File** field.
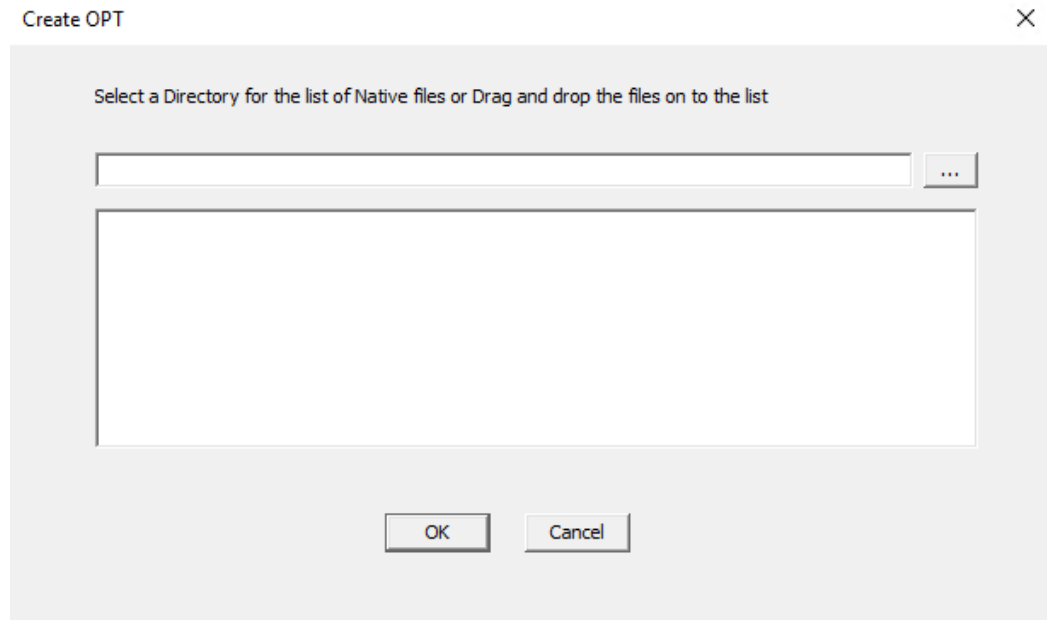
b. Click the ellipse button and select the location where you want to store the OPT file.

 We suggest that you enter a folder and sub-folder that is located in the same directory as the database .DCB file, and name the .OPT file the same as the .DCB file, but with a .OPT extension. Alternatively, you can open Windows Explorer, locate and open the folder where the native files are, and then drag and drop the native files into the large box below the OPT file.

c. Open a Windows Explorer window.

d. Locate and open the folder where the native (.tif, .ppt, .doc, etc.) files are located.

e. Drag and drop the native files into the large box below the OPT file.

f. Click **OK**.

 You are returned to the Load File where the Select OPT file is populated with the OPT file location you just entered.

11. Select **Pre-append path**. In the Pre-append dialog box the UNC path upto the image path in the .opt or browse out to the folder containing the image folder.

What is a pre-appended path?

 For example, the path in the .opt is: Images\0001\T000001.tif

 The folder structure where the data was copied is: \ \uncpath\Matter001\Vol001\Images\0001\T000001.tif

 Select Pre-append path and add \\uncpath\Matter001\Vol001\ in the Pre-append dialog box or browse to \\uncpath\Matter001\ and select Vol001.

The UNC path is added before the image path in the .opt during import.

Pre-append path assists the administrator in appending the path without having to change the structure of the .opt.

12. Click the **Key** down-arrow and select the name of the field used to identify the beginning of new records.

An example would be BEGNO.

13. If OCR text is included in the load file, check the **OCR contained in load file** check box, otherwise leave the check box blank.

14. Click the **OCR** arrow and select the name of the field to contain the OCR text in the record.

Some examples are TEXT1 or OCR1

📝 The wizard can import both single or multi-page text files.

 (Optional) Click the **Customize Image/OCR** button if you want to change the default OCR method. This option is not available when you check the 'OCR contained in load file' check box, as the OCR'ed text already exists.

The Customize Image/OCR dialog box opens.

Options are:

- **Use CN Desktop OCR** - Use this option if you want Concordance Desktop to OCR all the files regardless of any existing OCR'ed text files. By default, Concordance Desktop does not OCR the text files.

- **Use OPT Files to load Text Files** - Use this option if you want Concordance Desktop to load the document-level text from files existing in designated folders that are referenced in the OPT file. Concordance Desktop does not OCR the document-level text, it simply takes the text from the text files and loads it into the associated records. This option can help save processing time.

- **Use OCR Text Files** - Use this option if you have text files that have already been OCR'ed and you want Concordance Desktop to use those OCR'ed text files. As with the Use OPT Files to load Text Files option, Concordance Desktop will not do any OCRing of the text, it will simply load the text from the text files into the associated records. This option can help save processing time. When this option is selected, you also need to click the Browse button to locate and select the text files.

- **Use Field Containing File Path to load Text Files -** Use this option if you want Concordance Desktop to load the document level text from an OCR path referenced in the DAT file. This new import option allows you to import document level text if your DAT file references an OCR path. The OCR path needs to be edited to reflect the directory where the text is located or edited to reflect a relative path. Save the edited copy of the DAT file to the same directory as your text folders.

⚠ If the file path pointing to your text files is not accurate the text will not be imported.

15. If you want Concordance Desktop to create optimized PDFs of the native files during the import process, check the **Process to PDF**.

   By default, **Do not process to PDF** is checked, which helps to reduce processing time. When **Process to PDF** is checked, rendering of supported native file types is done on the fly as they are viewed in the viewer. Unsupported files types however, cannot be viewed in the viewer until they are optimized. For more information about optimizing, please see the Optimizing documents to PDF topic.

16. Click **Import** to start the import of the load files you have selected.

17. A status bar is displayed showing the import record currently in process during the load file import process.

18. If one or more files did not import properly, a dialog box displays telling you to see the log file. Click **OK**.

19. In the DAT Database dialog box:

- If all files imported properly (i.e., you did not see a dialog box stating one or more files imported properly) , click the **Open** button to open the database in Concordance Desktop.

- If any files did not import properly, click the **View Log** button to check the log for any files that did not import properly.

Create a new database from load files using customized settings

You can customize to the settings for the database so that they match the settings in the load file you are importing.

1. Review the load files you are importing into the database, see Reviewing load files.

2. In Concordance Desktop, on the **File** menu, click **New**.
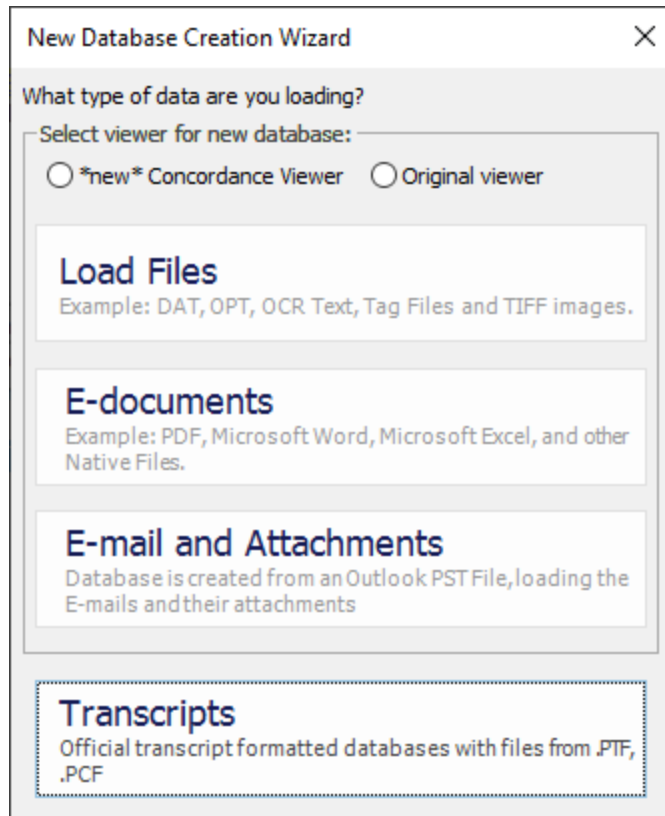
3. In the **New Database Wizard** dialog box, click the **Load Files** button.

Load File

Database

Enter Database Name

| | Browse

Load File (.DAT)

Select DAT File

| | Browse

Customize   Preview

OPT/OCR/Image

Select OPT File

| | Browse   Create

☐ Pre-append path

| | Browse

Key | | ▼ |

☐ OCR contained in load file

OCR | | ▼ | Customize Image/OCR

Process to PDF
○ Images and supported native files will be processed to PDF
for best viewer functionality. Additional processing time is
required.

Do not process to PDF
◉ Images and native files will not be processed to PDF and
viewer functionality will be limited. Files may be processed
later if necessary.

Import Status

| |

Import   Cancel

If you know the exact path where you want to save the new database:

- In the **Database Name** field, type the path where you want to save the database, along with a name for the database.

> If there isn't a folder previously created for the new database, it is recommended to create a new folder. Name the new folder according to your database. Double click the newly created folder to open it.

If you do not know the exact path where you want to save the new database:

a. Click the **Browse** button next to the **Enter Database Name** field.

b. Select the location where you want to save the new database.

> If there isn't a folder previously created for the new database, it is recommended to create a new folder. Name the new folder according to your database. Double click the newly created folder to open it.

c. In the **File name** field at the bottom of the window, type a name for the database you are creating.

The Concordance Desktop server does not support Unicode characters (such as Chinese or Japanese characters) in database names. Currently, only single-byte characters (such as English characters) are supported.

d. Click **Save**.

You are returned to the Load File window where the Enter Database Name field is populated with the information you entered in the Create Database window.

4. Click the **Browse** button next to the **Select DAT file** field.

5. Locate and select the DAT file, and then click **Open**.

6. To view a display of a few records prior to loading the file:
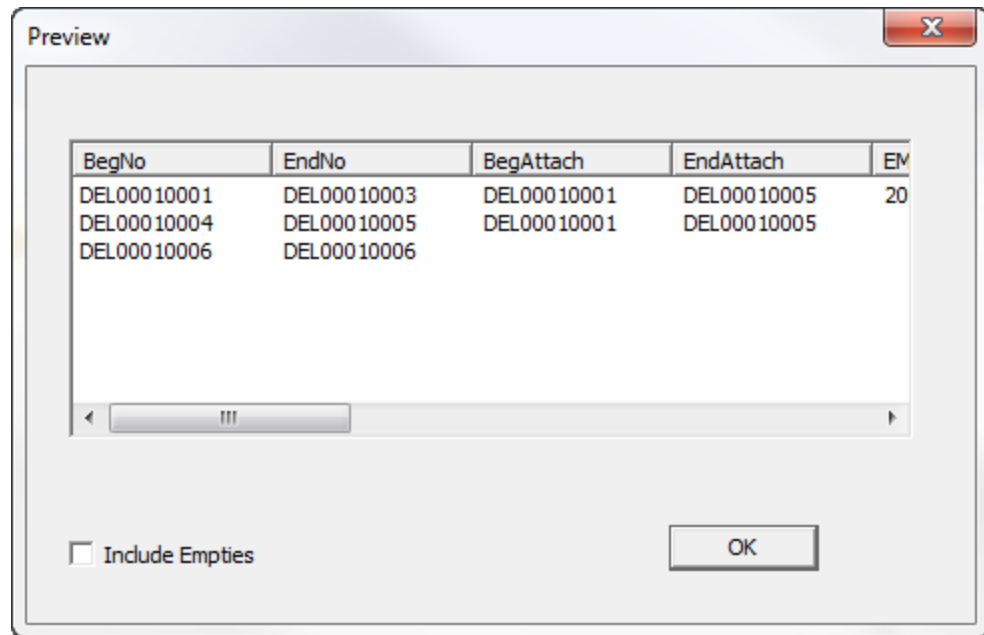
a. Click the **Preview** button to open the Preview window.

The Preview window displays all fields in which there is data, along with a few records in the load file so you can ensure that the expected meta data for each field is correct.

a. To turn on the visibility of empty fields, check the **Include Empties** check box.

When checked, fields containing no meta data are displayed in the preview, along with those fields containing meta data.

b. When finished viewing the records, click **OK** to close the Preview window.

7. Click the **Customize** button to open the Choose Delimiter window.

8. Use the Load Field Names From pane to define the database structure.

In the **Load Field Names From** section, do one of the following:

- 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 the **Browse** button to locate and select the template/database you want to load.

- Select **Settings File** to import the field names and field type settings from a specified Field Properties File (.TXT), click the Browse button to locate and select the Field Properties file.

  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 Desktop requires that each field name be unique; therefore, if the imported settings file and/or DAT file contain duplicate fields, the duplicate field names are appended with a suffix of 01 up to the maximum number of characters allowed for field length.

- Select **None** (Enter Field Names Manually) to manually enter all field names to include in the database.

9. Define delimiter formats.

The delimiter format defaults to the Concordance Desktop delimiters. If you are exporting and importing documents within the Concordance Desktop system, then you won't need to change these default values. However, if the load file uses a different format (i.e., comma delimited, tab delimited or a custom delimited format) you need to change the delimited format to match that which is in the file you are loading.

Concordance default delimiters

Concordance Desktop Default Delimiters		
Delimiter Character	**Function**	**Numeric Value**
Format	A selection of predefined delimiter formats.	
Comma	The field delimiter separates one field from the other.	20

Concordance Desktop Default Delimiters		
Delimiter Character	**Function**	**Numeric Value**
Quote	The text qualifier encloses text to differentiate it from field delimiters which may appear in the data.	254
Newline	Substitute carriage return. Some programs use this character to designate multi-level fields or fields-within-fields. Concordance Desktop replaces all carriage returns or carriage return linefeed combinations with the newline code within the data of a field. The record itself is still terminated with a real carriage return and a line feed.	174

To select a predefined format:

    a. Click the **Format** down-arrow.

    b. In the menu that appears, select the format that matches the format of the load file.

    c. Make any other format changes necessary.

To select a custom format:

    a. Click the **Format** down-arrow.

    b. In the menu that appears, select **Custom**.

    c. To modify the **Comma**, **Quote**, or **Newline** delimiter settings, click on the associated down-arrow and select the format that matches the format in the load file.

10. Define the date format used in the load file.

    a. In the **Select the date format for importing date fields** field, click the down-arrow.

    b. Select the date format that matches the date format in the load file.

11. Optional: Import a Tag List.

    a. In the **Load Tag List** pane, click the **Browse** button.

b. In the **Open** window, locate and select the directory containing the tag list you want to include.

c. Click the **Open** button.

> 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 are prompted to make corrections. For more information about creating a Tag list, see Importing and Exporting Tags.

12. Click the **Next** button.

13. Define the database field names and type properties

> 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.

> 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.

> Make sure that the database fields you are creating match the fields in the header row of the corresponding delimited text file you are using to import the field data.

a. In the Modify dialog box, review the **Field Name** list and modify the **Type** settings for each database field as needed.

Field names must begin with an alphabetic character. Only alphanumeric characters and the underscore character are allowed in the field name. The maximum number of characters for a field name is twelve.

The order the fields are listed, is the order the fields appear in Concordance Desktop.

If you are creating database fields using an existing database template or structure, or a settings file, make sure that the database fields you are defining match the fields in the header row of the corresponding delimited text file you will be using to import the field data.

If you accidentally click the OK button or press ENTER while entering fields in the Modify window, the window clsoes. To reopen it, click the Back button and then click the Next button.

To create a text field:

1. In the **Type** field, click **Text**.

2. In the **Length** field, type the number of characters allowed in the field value.

Text fields can have from 1 to 60 characters. Fixed length text fields should be used for numeric values that are not used mathematically, such as telephone numbers, social security numbers, and other serial numbers.

Sorting is alphanumeric. The numbers 1 and 1000 sort before 9 and 999. Use zeros for any numeric values or serial numbers stored in text fields so that they sort correctly, 0009 before 1000.

The field length value, affects the column width and how the field name appears in the Table View. The larger the number the wider the column. Values smaller than 20 cause the field name to appear truncated.

To create a numeric field:

1. In the **Type** field, click **Numeric**.

2. In the **Length** field, type the number of characters allowed in the field value.

   Numeric fields can have up to 20 characters, including the decimal place. The number you type in the Length field defines the total length of the number including the decimal place and all digits following the decimal place.

   The field length value, affects the column width and how the field name appears in the Table View. The larger the number the wider the column. Values smaller than 20 cause the field name to appear truncated.

3. In the **Places** field, type the number of decimal places for the numeric field.

   For example, the number *1234.56* would have a field length of seven and a places value of two.

   Negative numbers use an extra place for the negative sign.

4. In the **Format** field, choose one of the following numeric field formats:

   - **Plain**
   - **Comma**
   - **Currency**

- · **Zero Filled**

    The Format field determines how numeric fields are displayed and printed in Concordance Desktop.

To create a date field:

In the **Type** list, select the date format:

- · Date MMDDYYYY (month-day-year)
- · Date YYYYMMDD (year-month-day)
- · Date DDMMYYYY (day-month-year)

The date field format you choose is the date format that is displayed in Concordance Desktop.

You need to use the date format selected in the Type field when searching for dates and entering dates during data entry.

Concordance Desktop sorts date fields correctly, regardless of the date format you choose in the Type field.

⊟ To create a paragraph field:

In the **Type** field, click **Paragraph**.

Paragraphs fields can have up to 12 million characters. Even though paragraph fields are variable in length, Concordance Desktop only sorts paragraph fields by the first 60 characters in the first line of text.

b. For each field, select the check boxes for the properties that apply.

Image (Media) check box

An image/media field is used to link Concordance Desktop with the viewer. The Image check box needs to be selected for only one of the database's fields. It is best practice to select the Image check box for the BEGNO field or it's equivalent. This box should only be checked if you select to produce near native PDFs

When you view a document associated with a record in Concordance Desktop, the corresponding media/image is displayed in the viewer.

Key check box

Selecting the Key check box 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, but they do not require reindexing. When fields are designated as key fields, Concordance Desktop creates a database .key file, which is used in searching key fields.

Full-text paragraph fields are usually made into key fields for only one reason, which is to quickly locate empty paragraph fields.

For example, the search *author = ""*, where AUTHOR is full-text paragraph field, would normally perform slowly, but it will work quickly when the AUTHOR field is a key field. To locate records where this field is not empty use the search *author > ""*. Note that there are no spaces between the quotes.

So, why not make all fields key fields? The key field file takes up room. The more key fields your database has, the more room it will take up. Typically, full-text paragraph fields are not searched using comparison operators. Making full-text paragraph fields key fields is of marginal benefit and adds administrative overhead to the database management system. Also, if you have fixed-length fields that you do not need to search, it is best practice not to designate those fields as key fields.

Accession check box

Accession numbers are unique serial numbers internally assigned to each record in Concordance Desktop version 6.*x* or later 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.

The Accession check box only needs to be selected for one of the database's fields. To create accession numbers, create an accession field by adding a numeric field to your database and selecting the Accession check box. It is best practice to select the Accession check box for the ACCESSID field or it's equivalent. The internal accession number for each record will be displayed in the accession field you create.

System check box

System fields are created by Concordance Desktop. Concordance Desktop 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 check box

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 Desktop 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.

You can change the Indexed check box setting at any time, however changing the setting will not update the dictionary. Index the database after modifying the Indexed check box setting to update the dictionary files.

c. To add additional fields to the database, click the **New** button and define the field name and type settings.

d. To remove fields from the database, select the field you want to delete, and then click the **Delete** button.

e. Review the punctuation in the **Punctuation** field and add any other punctuation that is integral to your searches, such as **:;-@$**.

f. The Punctuation field defaults to the following punctuation: '.,/. The punctuation list is used in full-text searching, see About Punctuation.

g. To save these field settings so you can use them as a template, click the **Save to File** button, locate where you want to save the template file, give it a file name and then click **Save**. The file must be saved in Text (.txt) format.

14. When finished defining the database field names and type properties, click **OK**.

An Import Wizard - Fields window opens.
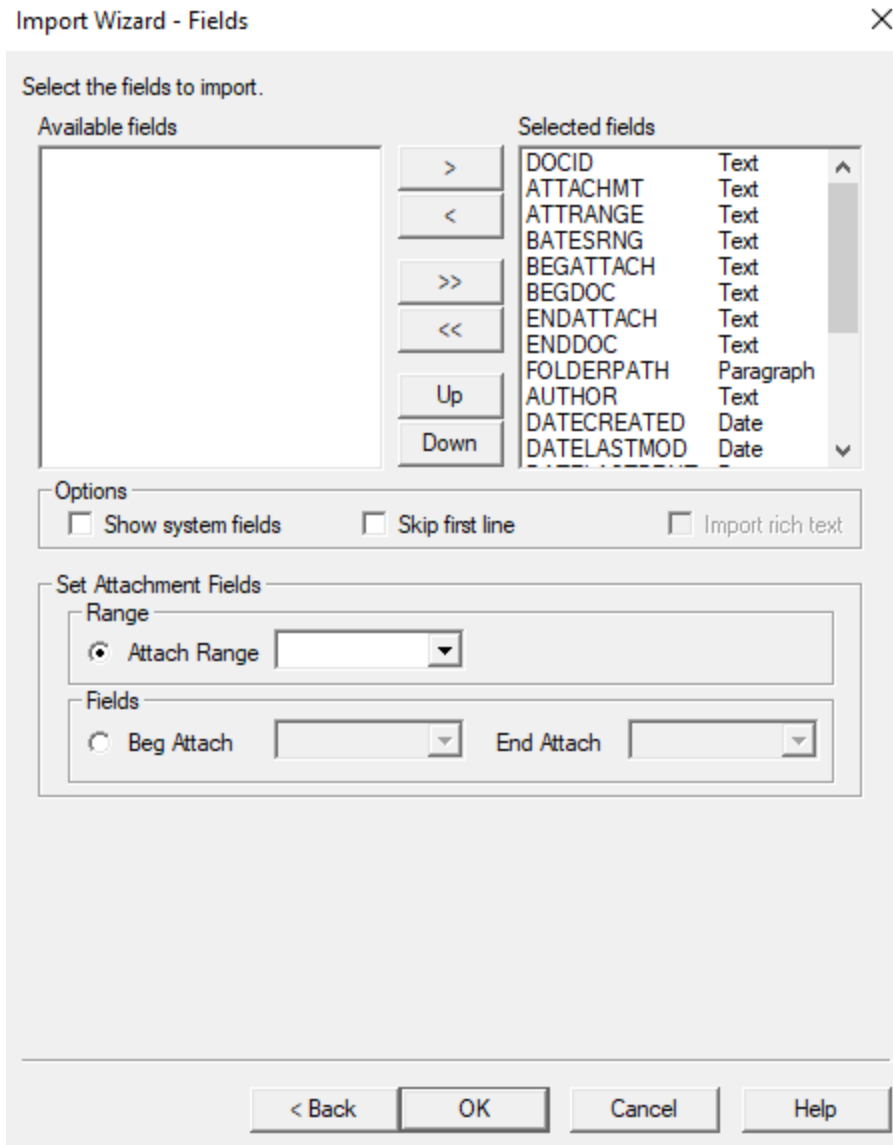
15. Select database fields to import.

    By default, all of the database fields are added to the Selected fields list for the import. In the Fields dialog box, you can also set up the fields associated with document attachments (Optional). The attachment fields can be set up or changed any time after the database is created. For more information, see Defining preferences.

    a. To only select some of the fields for the import, click the double arrow (**<<**) button to move all the fields to the **Available fields** list.

b. In the **Available fields** list, select the fields you want to include in the import, and click the right arrow (**>**) button to add the fields to the **Selected fields** list.

c. Once you have added the applicable fields to the **Selected fields** list, use the **Up** and **Down** buttons to make the field order match the field order of your delimited text file.

   The field order in the Selected fields list, must match the field order of your delimited text file. If you created the database fields using a DAT file and haven't made any modifications to the field names, the fields are listed in the same order in which they appear in the DAT file. However, it is recommended to open the DAT file to verify the fields are correct.

   Print a one-page copy of your delimited text file so you can reference your header row while determining the field order during the import.

   If the field structure that you enter in Selected fields list does not match the field structure of your delimited text files, the data won't transfer into Concordance Desktop properly.

16. To display system fields in the database, select the **Show system fields** check box.

   System fields are fields used by Concordance Desktop 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.

17. To prevent Concordance Desktop from creating a record for your field name row, select the **Skip first line** check box.

   The first line of a data file sometimes contains the field names used in creating the database, with each field name taking the place of the data for that record. When you select the Skip first line check box, Concordance Desktop ignores that line of data during the import.

18. If you are loading from a text file that includes Rich Text, and you want to include that Rich Text formatting, check the **Import rich text** check box.

   This option is only available when you are loading/importing a text file that includes Rich Text formatting.

19. To setup the attachment fields, in the Set Attachment Fields section, do any of the following:

   - To set a field to a range of attachments, select the Attach Range option, and then select the field to store the attachment range data.

- To set up the beginning and ending attachment fields, select the Fields option, and then from the Beg Attach and End Attach lists select the beginning attachment number and ending attachment number fields.

    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/reindex the database. For more information about the Find Attachments command, see Finding attachments.

20. When finished, click **OK**.

    You are returned to the Load File window.

21. Select or create an OPT file.

    If you have an OPT file to load, select it.

    a. Click the **Browse** button next to the **Select OPT File** field.

    b. Locate and select the .opt file you want to load.

    c. Click **Open**.

You are returned to the Load File window where the Select OPT File field is populated with the selection you just made.

If you do not have an OPT file to load, create one.

    a. Click the **Create** button next to the **Select OPT File** field.

    b. Click the ellipse button and select the location where you want to store the OPT file.

        We suggest that you enter a folder and sub-folder that is located in the same directory as the This should be in a sub-folder as your DAT file,and have the same name as. Alternatively, you can open Windows Explorer, locate and open the folder where the image files are, and then drag and drop the image files into the large box below the OPT file

    c. Open a Windows Explorer window.

    d. Locate and open the folder where the image (.TIF) files are located.

    e. Drag and drag the image files into the large box below the OPT file.

    f. Click **OK**.

        You are returned to the Load File where the Select OPT file is populated with the OPT file location you just entered.

22. Select **Pre-append path**. In the Pre-append dialog box the UNC path upto the image path in the .opt or browse out to the folder containing the image folder.

    What is a pre-appended path?

    For example, the path in the .opt is: Images\0001\T000001.tif

    The folder structure where the data was copied is: \ \uncpath\Matter001\Vol001\Images\0001\T000001.tif

Select Pre-append path and add \\uncpath\Matter001\Vol001\ in the Pre-append dialog box or browse to \\uncpath\Matter001\ and select Vol001.

The UNC path is added before the image path in the .opt during import.

Pre-append path assists the administrator in appending the path without having to change the structure of the .opt.

23. Click on the **Key** down-arrow and select the name of the field used to identify the beginning of new records.

An example would be BEGNO.

23. Click on the **OCR** down-arrow and select the name of the field to contain the document-level text of each record.

Some examples are TEXT1 or OCR1

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

24. (Optional) Click the **Customize Image/OCR** button if you want to change the default OCR method.

The Customize OCR dialog box opens.

Customize Image/OCR

```
┌─OCR────────────────────────────────────┐
│                                          │
│  ○ Use CN Desktop OCR                    │
│  ● Use OPT Files to load Text Files      │
│  ○ Use OCR Text Files from Folder:       │
│                                          │
│  [                        ]  [ Browse ]  │
│                                          │
│  ○ Use field containing file path to load Text Files │
│                                          │
│  [                ▼]                      │
│                       [ OK ]  [ Cancel ] │
└──────────────────────────────────────────┘
```

Options are:

- **Use CN Desktop OCR** - Use this option if you want Concordance Desktop to OCR all the files regardless of any existing OCR'ed text files. By default, Concordance Desktop does not OCR the text files.

- **Use OPT Files to load Text Files** - Use this option if you want Concordance Desktop to load the document-level text from files existing in designated folders that are referenced in the OPT file. Concordance Desktop does not OCR the document-level text, it simply takes the text from the text files and loads it into the associated records. This option can help save processing time.

- **Use OCR Text Files** - Use this option if you have text files that have already been OCR'ed and you want Concordance Desktop to use those OCR'ed text files. As with the Use OPT Files to load Text Files option, Concordance Desktop will not do any OCRing of the text, it will simply use load the text from the text files into the associated records. This option can help save processing time. When this option is selected, you also need to click the Browse button to locate and select the text files.

- **Use Field Containing File Path to load Text Files** - Use this option to import document-level text files if the DAT file references an OCR path. The OCR path needs to be edited to reflect the directory where the text files are located or edited to reflect a relative path. When using the relative path in the DAT file, the edited copy of the DAT file must be in the same directory as your text folders.

⚠ If the file path pointing to your text files is not accurate the text will not be imported.

25. If you want Concordance Desktop to create optimized PDFs of the native files during the import process, check the **Process to PDF**.

⚠ If the load file contains other file types than .tif or .pdf, then **Process to PDF** needs to be enabled for viewing those files.

By default, **Do not process to PDF** is checked, which helps to reduce processing time. When **Process to PDF** is checked, rendering of supported native file types is done on the fly as they are viewed in the viewer. Unsupported files types however, cannot be viewed in the viewer until they are optimized. For more information about optimizing, please see the Optimizing documents to PDF topic.

26. Click **Import** to start the import of the load files you have selected.

27. A status bar is displayed showing the import record currently in process during the load file import process.

28. If one or more files did not import properly, a dialog box displays telling you to see the log file. Click **OK**.

29. In the DAT Database dialog box:

- If all files imported properly (i.e., you did not see a dialog box stating one or more files imported properly) , click the **Open** button to open the database in Concordance Desktop.

- If any files did not import properly, click the **View Log** button to check the log for any files that did not import properly.

Creating a new e-documents database

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

When creating a database, Concordance Desktop automatically processes and normalizes the documents during import. The Concordance Desktop E-documents engine OCRs all the native files (e-documents) and generates a .PDF near-native version of the document for viewing in Concordance Desktop Viewer. 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 alpha-numerically. The Temp folder contains the .txt formatted files for the OCR text that was extracted from the document and is cleared when the import process is complete.

Name	Date modified	Type	Size
logs	12/3/2014 1:10 PM	File folder	
Natives	12/3/2014 1:10 PM	File folder	
NearNatives	12/3/2014 1:10 PM	File folder	
Temp	12/3/2014 1:10 PM	File folder	
DB1.CIB	12/3/2014 1:10 PM	CIB File	37 KB
DB1.DCB	12/5/2014 2:28 PM	Concordance Dat...	19 KB
Db1.Dct	12/5/2014 2:28 PM	Adobe Illustrator S...	248 KB
Db1.Editlayout	12/3/2014 1:06 PM	EDITLAYOUT File	4 KB
Db1.Fzy	12/5/2014 2:28 PM	FZY File	308 KB
DB1.IDB	12/3/2014 1:10 PM	IDB File	23 KB
DB1.Ini	12/5/2014 2:28 PM	Configuration sett...	1 KB
Db1.Ivt	12/5/2014 2:28 PM	IVT File	643 KB
DB1.Key	12/3/2014 1:10 PM	Keynote document	10 KB
Db1.Layout	12/3/2014 1:09 PM	LAYOUT File	4 KB
Db1.Ndx	12/5/2014 2:28 PM	NDX File	2 KB
Db1.Sortlayout	12/3/2014 1:06 PM	SORTLAYOUT File	4 KB
Db1.Tex	12/3/2014 1:10 PM	TEX File	397 KB
DB1.TRK	12/5/2014 2:09 PM	TRK File	21 KB
DB1_Persistent.txt	12/3/2014 1:06 PM	Text Document	0 KB
Db1-Notes.Dcb	12/5/2014 2:28 PM	Concordance Dat...	19 KB
Db1-Notes.Dct	12/5/2014 2:28 PM	Adobe Illustrator S...	4 KB

Concordance Desktop database folder structure

To create an E-documents database:

1. On the **File** menu, click **New**.

2. In the **New Database Creation Wizard** window, choose the viewer for the new database, and click the **E-documents** button.

    The Create E-Documents Database window opens.
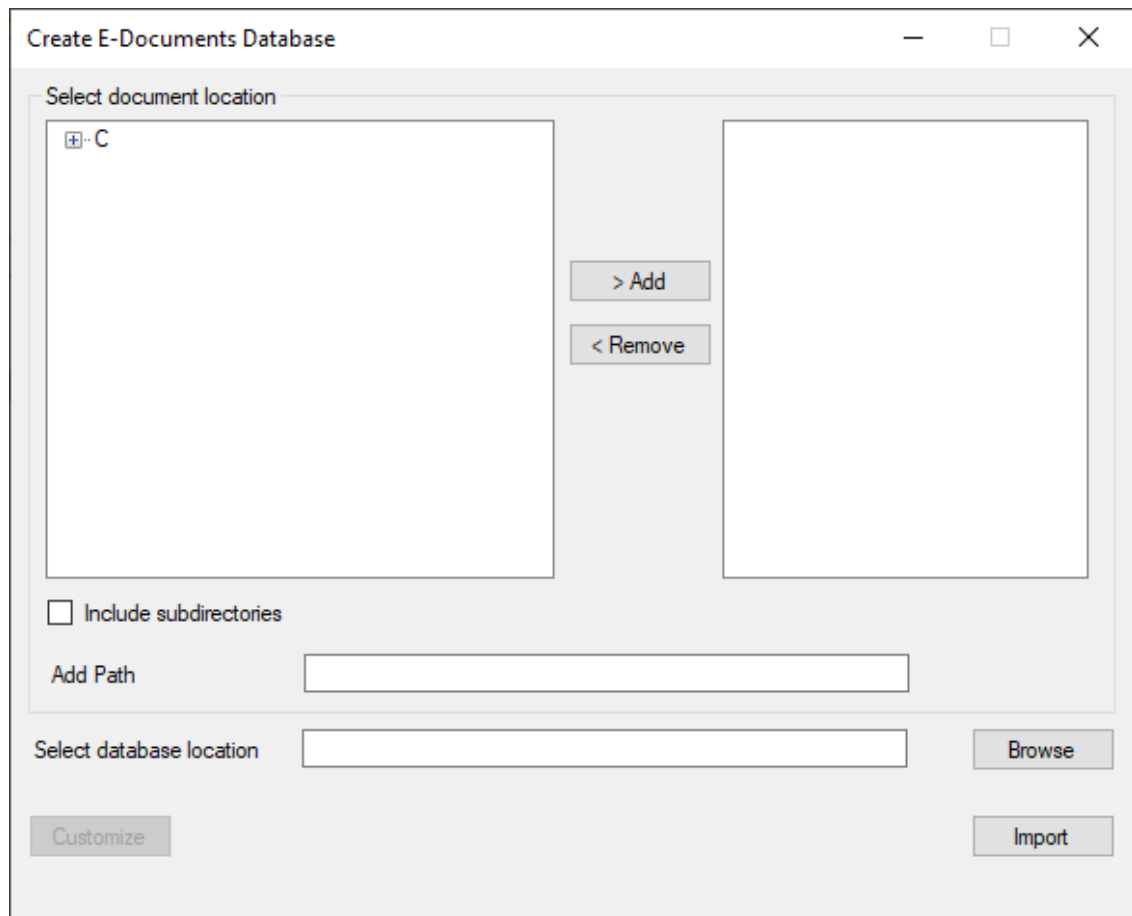
3. Select the location of the e-document files by either:

    *   Selecting the folder from the folder list:

        a. In the **Select document location** list, expand the folders.

        b. Navigate to the location where the documents you want to import are located.

        c. Click on the folder name you want to select.

        d. Click the **Add** button.

    *   Entering the full path of the folder:

        a. In the **Add Path** field, type the full path to the folder in which the files are located.

        b. Click the **Add** button.

4. Repeat step three for each set of documents you want to import into the database.

5. To include files from any sub-directories within the folder, select the **Include subdirectories** check box.

6. Select the location where you want to create the database.

    a. In the **Select database location** field, click the **Browse** button.

        It is recommended that each database be created in its own unique folder.

    b. Navigate to the location where you want to save the new database.

    c. In the **File name** field, type a name for the new database.

        The Concordance Desktop server does not support Unicode characters (such as Chinese or Japanese characters) in database names. Currently, only single-byte characters (such as English characters) are supported.

    d. Click **Open**.

7. To customize the import settings:

a. Click the **Customize** button, and then do any of the following:

- To use an existing database template

  1. Click the Choose Database Template **Browse** button.

  2. Locate the database template to use.

  3. Click **Open**.

- To change the document numbering defaults

  1. Click on the **Auto number documents** arrow to open that section, if it is not already open.

  2. In the **Starting Number** field, enter the number you want to begin with for numbering the documents. The default is 0000001.

Make sure to precede the starting number with enough zeros to cover the total number of records being imported. For example, if you are importing a DAT file that includes includes 999 records and you want to start numbering with 1, enter 001 as the starting number. If the file includes 550,500 records and you want to start the numbering with 1, enter 000001.

3. Optional: In the **Prefix** field, type the prefix you want to use in front of the numbers.

- To add Bates Stamping to the documents

   1. Click the **Bates Stamp** arrow to open that section, if it is not already open.

   2. To enable Bates stamping, click on the **Bates stamp documents** field. A down-arrow appears at the end of the field.

   3. Click the down-arrow and select **Yes**.

      The default is No, do not put Bates Stamps on the documents.

      After you select Yes, two other fields appear under the Bates Stamp section.

   4. Optional: In the **Bates prefix** field, enter the prefix you want to use in front of the Bates Stamp number.

      You cannot currently use Unicode characters in the Bates stamp prefix field. Doing so will not display the character correctly.

   5. In the **Bates starting number** field, enter the beginning Bates Stamp number you want to use.

- Specify whether to copy the original native files and store them

   You can specify whether to copy the original native files and store the copies in a Native Files folder with the database.

   1. Click on the **Native file** arrow to open that section, if it is not already open.

   2. Click on the **Copy original files** field to select it.

   3. Click the down-arrow and select **Yes** or **No**. The default is Yes.

      - **Yes** indicates that you want to copy the original files and store them in a Native Files folder with the database.
      - **No** indicates that you do not want to copy and store the original files.

- To change imported data (document metadata) mapping to Concordance fields

   1. Click on the **Field mapping** arrow to open that section, if it is not already open.

2. Click on a field that you want to change, to select it.

3. Click on the down-arrow and select the imported data type.

When importing E-Documents, Concordance Desktop createsa unique document ID and captures metadata where possible, including author, creation date, and last modified date. Concordance Desktop 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 Desktop field mappings.

Ensure that the documents import properly, the Document Text field must be set to the first OCR paragraph field with an alpha prefix and numeric suffix. For example, if you have TEXT01, TEXT02, and TEXT03, you must set the OCR paragraph field to TEXT01. Do not set the OCR field to any other type of paragraph field, as the text will not be imported.

The CREATEDATE and EDITDATE fields should not be set to <none>.

b. When finished customizing, click **OK**.

You are returned to the Create E-Documents Database window.

8. Click the **Import** button.

9. If one or more files did not import properly, a dialog box displays telling you to see the log file. Click **OK**.

10. In the E-Document Database dialog box:

- If all files imported properly (i.e., you did not see a dialog box stating one or more files imported properly) , click the **Open** button to open the database in Concordance Desktop.
- If any files did not import properly, click the **View Log** button to check the log for any files that did not import properly.

After the import is complete, it is recommended that you review the import log to verify document import success and failure messages.

Creating a new e-mail and attachments database

When creating an Email and Attachments database, Concordance Desktop uses a Database Creation Wizard to walk you through each step of the database creation process. Using the wizard, Concordance Desktop imports one or more .pst formatted files. When importing multiple .pst files, a new database is created for each .pst, and all database are automatically concatenated.

Concordance Desktop 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.

💡 If you need to export your e-mail from Concordance Desktop back to a .pst file, then consider using CloudNine's LAW software for processing before importing to Concordance Desktop.

📝 Some earlier versions of Microsoft Excel files are no longer supported through Microsoft and cannot be opened from Concordance Desktop.

To create an E-mail database:

The second step is to create a database and import the e-mail and attachment files.

1. In Concordance Desktop, on the **File** menu, click **New**. A logon dialog box opens.

2. Enter your logon name and password, and then click **Connect**.

3. In the **New Database Creation Wizard** window, choose the viewer for the new database, and click the **E-mail and Attachments** button.

    The Create E-Mail Database window opens.
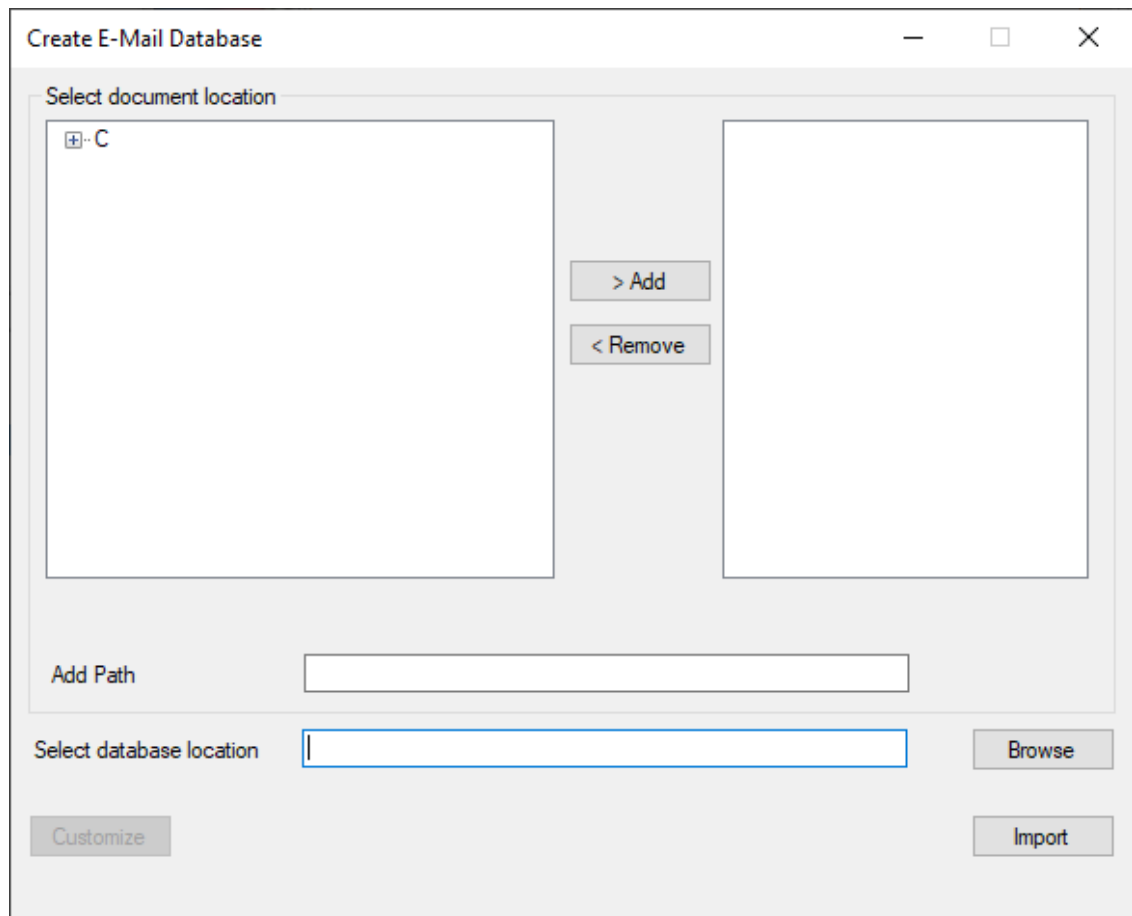
4. Select the location of the .pst files by either:

    - Selecting a .pst from the folder list:

        a. In the **Select document location** list, expand the folders.

        b. Browse to the location where the .pst file you want to import is located.

        c. Click on the .pst file to select it.

        d. Click the **Add** button.

        e. To add more .pst files, repeat the steps for each file.

    - Entering the full path and .pst file name:

        a. In the **Add Path** field, type the full path to the .pst file, including the .pst file name.

        b. Click the **Add** button.

        c. To add more .pst files, repeat the steps for each one.

5. Repeat step 3 for each .pst file you want to add to the import.

6. Select the location where you want to create the database.

    a. In the **Select database location** field, click the **Browse** button.

    b. Navigate to the location where you want to save the new database.

    c. In the **File name** field, type a name for the new database.

       The Concordance Desktop server does not support Unicode characters (such as Chinese or Japanese characters) in database names. Currently, only single-byte characters (such as English characters) are supported.

    d. Click **Open**.

7. To customize the import settings:

Customize Import Settings	— □ ✕

Choose Database Template [ ] Browse

⌄ **Auto number documents**	
Starting Number	0000001
Prefix	
⌄ **Bates Stamp**	
Bates stamp documents	No
⌄ **Path Display**	
Display Full Path of Attachments	Yes
⌄ **Duplicate Handling**	
Do not allow duplicate E-mails	Yes
⌄ **Field mapping**	
CNDCN	Document Control Number(Doc ID)
ATTACHMENT	Mail Attachment
CONVERSINDEX	Conversation Index
FROM	Mail From
TO	Mail To
CC	Mail CC
BCC	Mail BCC
TITLE	Title
SUBJECT	Subject
FILENAME	File Name
AUTHOR	Author
COMPANY	Company

Starting Number
Starting Number

OK   Cancel

a. Click the **Customize** button, and then do any of the following:

- To use an existing database template

    1. Click the Choose Database Template **Browse** button.

    2. Locate the database template to use.

    3. Click **Open**.

- To change the document numbering defaults

    1. Click on the **Auto number documents** arrow to open that section, if it is not already open.

    2. In the **Starting Number** field, enter the number you want to begin with for numbering the documents. The default is 0000001.

        Make sure to precede the starting number with enough zeros to cover the total number of records being imported. For example, if you are importing a DAT file that includes includes 999 records and you want to start numbering with 1, enter 001 as the starting number. If the file includes 550,500 records and you want to start the numbering with 1, enter 000001.

    3. Optional: In the **Prefix** field, type the prefix you want to use in front of the numbers.

- To add Bates Stamping to the documents

    1. Click the Bates Stamp arrow to open that section, if it is not already open.

    2. To enable Bates stamping, click on the **Bates stamp documents** field. A down-arrow appears at the end of the field.

    3. Click the down-arrow and select **Yes**.

        The default is No, do not put Bates Stamps on the documents.

        After you select Yes, two other fields appear under the Bates Stamp section.

    4. Optional: In the **Bates prefix** field, enter the prefix you want to use in front of the Bates Stamp number.

        You cannot currently use Unicode characters in the Bates stamp prefix. The Unicode character will not display correctly.

    5. In the **Bates starting number** field, enter the beginning Bates Stamp number you want to use.

- Specify whether to display the full path of attachments

    You can specify whether to display the full path of e-mail attachments.

1. Click on the **Path Display** arrow to open that section, if it is not already open.

2. Click on the Display Full Path of Attachments field to select it.

3. Click the down-arrow and select **Yes** or **No**. The default is Yes.

   - **Yes** indicates that you want to display the full path of attachments.
   - **No** indicates that you do not want to display the full path of attachments.

- Specify whether to allow duplicate e-mails

  Most e-mails have a unique message identifier called the message-id. This entry is stored in the MESSAGEID field. Before importing a message, the Import e-mail wizard checks to see if any previously imported e-mails have the same message-id. If the wizard finds another record with this message-id, it does not import the message.

  You can specify whether to allow duplicate E-mails to be included in the database.

  1. Click on the **Duplicate Handling** arrow to open that section, if it is not already open.

  2. Click on the Do not allow duplicate E-mails field to select it.

  3. Click the down-arrow and select **Yes** or **No**. The default is Yes.

     - **Yes** indicates that you do not want to allow duplicate E-mails to be included in the database.
     - **No** indicates that you want to allow duplicate E-mails to be included in the database.

To change imported data (document metadata) mapping to Concordance fields

1. Click on the **Field mapping** arrow to open that section, if it is not already open.

2. Click on a field that you want to change, to select it.

3. Click on the down-arrow and select the imported data type.

When importing .pst files, Concordance Desktop captures metadata when possible. Concordance Desktop 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 Desktop field mappings.

To ensure that the documents import properly, the Document Text field must be set to the first OCR paragraph field with an alpha prefix and numeric suffix. For example, if you have TEXT01, TEXT02, and TEXT03, you must set the

OCR paragraph field to TEXT01. Do not set the OCR field to any other type of paragraph field.

b. When finished customizing, click **OK**.

You are returned to the Create E-Mail Database window.

8. Click the **Import** button.

9. If one or more files did not import properly, a dialog box displays telling you to see the log file. Click **OK**.

10. In the E-Document Database dialog box:

   - If all files imported properly (i.e., you did not see a dialog box stating one or more files imported properly) , click the **Open** button to open the database in Concordance Desktop.

   - If any files did not import properly, click the **View Log** button to check the log for any files that did not import properly.

To verify the imported files:

Once you have created the email database, it is best practice to verify that the files imported correctly. After verification, you also need to index the database.

1. In Concordance Desktop, open the **Browse** view.

2. In the **Browse** view, verify that the e-mail messages you imported display properly.

3. If you have not already indexed the database, run a full index now.

For more information about indexing and reindexing databases, see Indexing and reindexing updates.

If you receive the following message, Dictionary file exists, overwrite?, click Yes.

Creating/updating a transcripts database

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

Transcript Import Guidelines

- The transcript database must be created from the Concordance Desktop Transcript template
- The maximum size for an imported transcript file is 11 MB
- On average, transcripts have 24-25 lines per double-spaced page

To create a transcript database

1. On the **File** menu, click **New**.

   You are asked to log onto the Concordance Desktop server where you want to create the Transcripts database.

   Note that you must either be logged into the physical server itself, or using Windows Remote Desktop to log into the server. You can only create databases when on the actual server computer itself.

   Note also that you must be a Concordance Desktop administrator on the server you are logging on to.

2. Type you **Logon** and **Password** for the specific Concordance Desktop server.

3. Type the **Host name** or IP address of the server and the **Port** you need to use to connect to it.

4. Click **Connect**. The New Database Creation Wizard dialog box opens.

5. Select the viewer for the new database and click the **Transcript** button.

6. Navigate to where you want to save the transcripts .dcb database file.

   A dialog box opens allow you to select the location for the new database, and a file name.

7. Optional: Create a new folder for the database files.

8. Type the database file name in the **File name** field, and click **Open**.

   📝 The Concordance Desktop server does not support Unicode characters (such as Chinese or Japanese characters) in database names. Currently, only single-byte characters (such as English characters) are supported.

   A Load Transcripts dialog box opens.

9. In the **Properties** section, review the information Concordance Desktop has extracted from each of the transcripts you are importing.

10. Navigate to where the transcript files are located.

    To view the transcript information for each transcript, click the transcript file name in the File column.

11. Make any necessary edits in the **Properties** section and click **Save**.

You can edit or add information in the Name, Date, Time, or Comments fields for each transcript before you save it. Use the preview pane at the bottom of the dialog box to locate information needed for those fields.

If you do not want to review the extracted transcript properties for each of the imported transcripts, and just want to save the extracted transcript properties as they are, select the Save all with default settings check box and click Save.

Clicking Save completes the transcript import.

12. To import additional transcript files, click the **Load** button.

13. To close the Load transcripts dialog box, click **Done**.

To import PTF or PCF transcript files:

1. On the **Documents** menu, point to **Import**, and click **Transcripts**.

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

   Clicking Transcripts opens the Load transcripts dialog box.

2. Locate and open the .pcf transcript files you want to import.

   Clicking Open opens the Load transcripts dialog box and automatically loads the transcript files into the transcript database.

   The process for importing .pcf transcript files is slightly different than importing TXT or .ptf transcript filess. Because .pcf files contain multiple transcripts, you are not able to edit and save individual transcripts within a file. Therefore, the step to edit and save the transcript metadata information is skipped in import process.

3. To import additional transcript files, click the **Load** button.

4. To close the **Load** transcripts dialog box, click **Done**.

To verify the imported files:

Once you have imported your transcript messages, it is best practice to verify the files imported correctly. After verification, you need to reindex or index the database.

1. In Concordance Desktop, open the **Browse** view.

2. In the **Browse** view, verify that the transcript messages you imported display properly.

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

    For more information about indexing and reindexing databases, see Indexing and reindexing updates.

    If you get a message prompt stating, Dictionary file exists, overwrite?, click Yes.

About Migrating Databases

Database migration preparation

Concordance databases that you want to open in Concordance Desktop need to first be migrated to Concordance Desktop. Before migrating however, there may be some additional preparation involved, based on the version of Concordance with which the database was built, as well as some other factors.

- Concordance databases created with Concordance versions 8.x or 9.x must first be converted to Concordance 10.x databases, before they can be migrated to Concordance Desktop databases.
- Only Concordance 8.x and 9.x databases can be converted to Concordance 10.x. If your database was built with an earlier version of Concordance, it cannot be converted to Concordance 10.x, and cannot be migrated to Concordance Desktop.
- If using Concordance Image, prior to converting a Concordance 8.x or 9.x database to 10.x, the imagebase must be converted from a version 4.0 imagebase to a version 5.0 imagebase in Concordance Image.
- Additional factors in determining how a database should be prepared for migration to Concordance Desktop:
  - The version of Concordance used to create the database
  - Whether Concordance Image was used to view native files
  - Whether Concordance Desktop Viewer was used to view near native files
  - Whether the database has been moved
  - Whether the native files (only if using Concordance Image) have been moved
  - Whether the near native files (only if using Concordance Desktop Viewer) have been moved

Only Concordance version 10.x SQLite databases can be migrated to the Concordance Desktop database format. Therefore, all databases created with Concordance 8.x or 9.x need to first be converted to version 10.x SQLite databases before attempting to migrate them to Concordance Desktop.

Prior to converting a Concordance 8.x or 9.x version database to 10.x, you must convert the imagebase in Concordance Image from a version 4.0 imagebase to a

version 5.0 imagebase. Only after this is done can you proceed with converting the database to Concordance version 10.x.

⚠ The migration is permanent and there is no process to convert a database back to a Concordance database. Therefore, we recommend that you **make backup copies of the databases before migrating** them to Concordance Desktop.

Do you plan on moving a database you want to migrate?

Concordance 10.x database (other than a 10.21 E-Documents database)

If you plan to migrate a Concordance 10.x database to Concordance Desktop, and also plan to move it to another server, drive, or folder, please follow the steps below, in the order they appear.

1. Move the database to its new location.

2. Open the database in Concordance 10.x. Doing this ensures that the notes DCB is properly linked to the parent DCB.

3. If the native files have been moved, edit the native file path (see Updating hyperlinks file path), and then recreate the hyperlinks in the records using the CreateHyperlinks CPL.

4. Re-index the database and test the hyperlinks to ensure they work.

5. Refer to the factors in the table below that apply to a Concordance 10.x database (other than a 10.21 E-Documents database).

Concordance 10.21 E-Documents database

If you plan to migrate a Concordance 10.21 E-Documents database, and also plan to move it to another server, drive, or folder, please follow the steps below in the order they appear.

1. Move the database to its new location.

2. Open the database in Concordance 10.21. Doing this ensures that the notes DCB is properly linked to the parent DCB.

3. If the native files have been moved, edit the native file path (see Updating hyperlinks file path), and recreate the hyperlinks in the records (see the CreateHyperlinks CPL topic).

4. Refer to the factors in the table below that apply to a Concordance 10.21 E-Documents database.

Database preparation checklist

Below is a checklist that provides the various preparations, based on the various factors listed above.

Database factor	Preparation
Concordance 7.x or below database	**YES:** The database cannot be migrated to Concordance Desktop. **NO:** Continue to next factor.
Concordance 8.x or 9.x database	**YES:** _Are you using Concordance Image?_ **Yes**: If using Concordance Image 4.0 (formerly Opticon), the imagebase must be converted to Concordance Image version 5.0, prior to converting the database to Concordance 10.x. _Is the imagebase currently a Concordance 5.0 imagebase?_ **Yes**: Convert the database to a Concordance 10.x database. See Converting databases on the Concordance Answer Center. **No**: Convert the imagebase to Concordance Image from version 4.0 to 5.0 first, then convert the database to Concordance 10.x. See Converting imagebases and Converting databases on the Concordance Answer Center. **No:** Concordance Image is not being used. There is no imagebase to convert. You are ready to convert the database to Concordance 10.x. See Converting databases on the Concordance Answer Center. _NOTE: Once the database has been converted to Concordance, 10.x, go to the Concordance 10.x (other than E-Documents) database factor below._ **NO:** It is not a Concordance 8.x or 9.x database. Continue to the next factor.
Concordance 10.x (other than a 10.21 E-Documents) database	If the database is a Concordance 10.x database, other than a 10.21 E-Documents database, then follow this set of preparations. **YES:** _Are you using Concordance Image?_ **Yes**: If the database folder contains a **[database name].DIR** file and a **[database name].VOL** file, it indicates that Concordance Image was used for the imagebase. _Do you want to maintain your redactions and notes when you migrate the database to Concordance Desktop?_ **Yes**: Use the Redline Migration Utility to migrate the database to Concordance Desktop. _CAUTION: When using the Redline Migration Utility to migrate a 10.x database to Concordance Desktop, all data from the database moves over, but only redactions and notes are moved over from the imagebase._ _NOTE: If you plan to move the database to another server, drive, or folder, move the database first, and_

Database factor	Preparation

	then open it in Concordance 10.x to reset the link between the DCB and the Notes DCB. Once these two steps are finished, you can migrate the database.
	
	No: There is no need to run the Redlines Migration utility. The database is ready for migration to Concordance Desktop.
	
	NOTE: If you plan to move the database to another server, drive, or folder, move the database first, then open it in Concordance 10.x to reset the link between the DCB and the Notes DCB, and then migrate the database.
	
	     No: *Are you using Concordance Desktop Viewer?*
	
	          Yes: If using Concordance Desktop Viewer, you can use any of the methods in the Migrating databases to Concordance Desktop topic, to migrate the database to Concordance Desktop.
	
	          *CAUTION: When migrating a 10.x database to Concordance Desktop, all data from the database moves over, but **markups** (redactions, notes, etc.)**are not moved ov**er. Markups will need to be either burned in prior to migration, or reentered through Concordance Desktop after migration. Please note that burned in markups cannot be edited, they are permanent.*
	
	          No: The database can be migrated, providing the database has not been moved. If the location of the database has changed since you last opened it in Concordance 10.x, please see the note above.
	
	NO: The database is not a Concordance 10.x database (other than an 10.21 E-Documents database). Continue to the next factor.

Concordance 10.21 E-Documents database	If the database is a Concordance 10.21 E-Documents database, there are two final determining factors that need to be addressed; whether the database was built with the old e-documents engine or with the new e-documents engine. The new e-documents engine creates databases that are completely compatible with Concordance Desktop, however, the old e-documents database engine does not.
	
	YES: *Does the database folder contain a **[database name].CIB** file and a **Near Natives** folder?*
	
	     Yes: This indicates that the database was built with the new 10.21 E-Documents engine, which is completely compatible with Concordance Desktop. The database is ready to be migrated.
	
	     *NOTE: When migrating a 10.21 E-Documents database that was built with the new E-Documents engine, all data is moved over, and **markups** (redactions, notes, etc.) **are also moved over**. Markups will need to be*

Database factor	Preparation
	reentered through Concordance Desktop after the database has been migrated. **No**: The database was created with the old E-Documents database engine. *CAUTION: When migrating a 10.21 E-Documents database that was built with the old E-Documents engine, all data is moved over, but **markups** (redactions, notes, etc.) **are not moved over**. Markups will need to be reentered through Concordance Desktop after the database has been migrated.* *NOTE: If you plan to move the database to another server, drive, or folder, move the database first, and then open it in Concordance 10.x to reset the link between the DCB and the Notes DCB. Once these two steps are finished, you can migrate the database.* **NO:** Return to the factor above that applies to the database version and type.

Migrating databases to Concordance Desktop

Migration of a 10.x database can be an easy process if the files have been properly prepared. Before attempting to migrate a database from Concordance to Concordance Desktop, please review the information in the Database migration preparation topic. Doing so will help to mitigate issues that could arise when attempting to migrate Concordance databases to Concordance Desktop.

When a database is ready to be migrated, the migration can be completed using any one of the following methods:

- Placing a folder, that contains all the files for the Concordance 10.x SQLite database, in the Registration Directory for automatic migration. Ensure that you do not place the folder inside another folder that contains a database. There can be only one database per folder, and each folder can reside under the Registration Directory.

- Registering a Concordance 10.x SQLite database with the Concordance Desktop server. See Registering/unregistering a database in the Answer Center or the Installation Guide for more information.

- Selecting File > Open in Concordance Desktop and selecting a Concordance 10.x SQLite database

- Double-clicking on a Concordance 10.x database on the Concordance Desktop server computer. This method will not work, if Concordance 8.x or 9.x is currently installed on the same server computer as Concordance Desktop.

- **Concordance Image ONLY**: If Concordance Image was used for the imagebase in Concordance 10.x, and you need to retain redactions and notes in the database, the Redlines Migration Utility should be used to migrate the database. Using any of the other four methods will not retain the redactions and notes.

Concordance Desktop provides the ability to convert version 10.x load file databases without near native conversion, thereby decreasing the time needed to migrate the databases.

⚠ If you plan to migrate an existing Concordance 10.x database to Concordance Desktop, but also want to move it to another server or folder, first move the database to its new location, then open it in Concordance 10.x. Doing so ensures that the notes DCB is properly linked to the parent DCB. Next, ensure that the image and native file links are updated in Concordance 10.x and that they are working properly. Once these steps are done, you can migrate the Concordance 10.x database to Concordance Desktop.

If you plan to migrate a Concordance 10.x database to Concordance Desktop, and also plan to move it to another server, drive, or folder, please follow do the following in the order they appear.

1) Move the database to its new location. Note that there can be only one database per folder. The folder can reside within another folder, but not within another database's folder.
2) Open the database in Concordance 10.x. Doing this ensures that the notes DCB is properly linked to the parent DCB.
3) Migrate the database to Concordance Desktop.

Placing a database folder in the Registration Directory for automatic migration

When you place a Concordance 10.x SQLite database folder (the folder containing all the files for the database) into the directory that has been designated as the "Registration Directory" in the Admin Console, Settings tab, the database is automatically migrated and registered on the Concordance Desktop server. A Registration Directory can be any directory on the server computer, even one that contains all your current Concordance 10.x SQLite databases in their respective folders. Only one Registration Directory can be designated per Concordance Desktop server. The default directory is named "DB Smart Path" and is located in the server computer's ProgramData directory (usually C:\ProgramData\LexisNexis\Concordance Desktop\DB Smart Path). See Changing the default Registration Directory for more information on how to designate a different directory as the Registration Directory.

To copy a database folder to the Registration Directory:

1. Before migrating a database, make a backup of all the files in the database. (Backup the whole folder, including all sub-folders.)

2. Open Windows Explorer and navigate to the your Registration Directory folder.

Th default Registration Directory folder is named "DB Smart Path" found in the .. \ProgramData\LexisNexis\Concordance Desktop\ folder on the Concordance Desktop server computer.

3. Open another Windows Explorer window, and navigate to to the location of a folder containing a Concordance 10.x SQLite database that you want to migrate to Concordance Desktop.

4. Copy the whole database folder and paste it into the Registration Directory folder.

   The next time you open Concordance Desktop, any databases the application finds in the Registration Directory will automatically be migrated and registered with the Concordance Desktop server.

   To ensure that a database has been migrated successfully, you can check its status in the Databases list in the Admin Console, under the Management tab. If the migration failed, you can check the log file for more information.

Migrating a database through registration

1. Before migrating a database, make a backup of all the files in the database. (Backup the whole folder, including all sub-folders.)

2. On the **File** menu, click **Administration** and then **Admin Console**.

3. Log onto the server where you want to register the database.

   You must be a Concordance Desktop administrator on the selected server in order to register a database.

4. Click on the **Management** tab.

5. Right-click on the **Databases** folder, and then click **Register database**.

6. In the field that appears, type the name of the database you want to register, and press **Enter**.

   An Open dialog box opens.

7. Locate and open the folder where the database is located.

8. Click on the database **DCB** file to select it.

9. Click **Open**.

   A dialog box opens stating that the database has been queued for imagebase migration. Or, depending on the database type, you may be asked if you are ready to migrate the database.

After the migration and registration processes are finished, the Databases pane opens on the right. The database you just registered displays at the bottom of the list. If the imagebase is being migrated, the status of the database will show "Converting" until the process finishes. This process may take a while, depending on the number of files in the database.

If the selected database is a Concordance Desktop database, after the registration process is finished, the Databases pane opens on the right. The database can be found at the bottom of the list.

The *Status* column indicates whether or not migration for the Concordance 10.x database was successful. If successful, the Status column displays "Online", of not successful, it displays "Conversion failed" or "Registration failed." More information about failures can be found in the server log file.

If Auto refresh is turned on (Auto refresh on), the database name appears under the Databases folder, after auto refresh runs.

Selecting File > Open to migrate a Concordance 10.x database

1. Before migrating a database, make a backup of all the files in the database. (Backup the whole folder, including all sub-folders.)

2. Open Concordance Desktop on the Concordance Desktop server.

3. From the **File** menu click **Open**.

4. Navigate to the location of a Concordance version 10.x SQLite Concordance database that you want to migrate.

   A dialog box opens notifying you that the database is not compatible with Concordance Desktop, and that the imagebase need to be updated. database must be migrated to Concordance Desktop before it can be opened.

5. Click **Yes**.

   The migration in progress dialog box opens. When the migration finishes, the database opens in **Concordance Desktop**.

Double-clicking a database to migrate it

Double-clicking on a Concordance 10.x SQLite database on the Concordance Desktop server computer. Concordance Desktop prompts you to migrate the database. Please note that if you still have Concordance version 9.x or 8.x installed on the same server/computer as the Concordance Desktop installation, this method will not work, as the database will be opened in Concordance instead of Concordance Desktop.

1. Before migrating a database, make a backup of all the files in the database. (Backup the whole folder, including all sub-folders.)

2. Open Windows Explorer and navigate to the folder containing the files for the database you want to migrate.

3. Double-click on the database **DCB** file.

   A dialog box opens stating that the database is not compatible, and asks if you want to update the imagebase.

4. Click **Yes**.

   A migration in progress dialog box opens. When the migration finishes, the database opens in Concordance Desktop.

To ensure the database has been migrated, registered, and indexed

1. From the **File** menu, click **Administration**, and then **Admin Console**, to open the Administration Console.

2. Click the **Management** tab.

3. Click on the **Databases** folder to display the list of databases on the server and their statuses.

   The database you just migrated displays at the bottom of the list displayed in the right side pane.

   📝 If after migrating, there are documents that do not display correctly or at all in the Concordance Desktop viewer, you can optimize those documents so that they do display correctly. See the Optimizing documents to PDF topic for more information.

How do I know a database migration was successful?

If the answer to the questions below are 'yes', then your database has migrated successfully.

- Are the images visible in the Concordance Desktop viewer?

  If **no**, the most likely cause is that the location of the images has changed. You will need to update the links to the images. See Renaming file paths and folders

- Are you able to launch the natives from the hyperlinks in the records?

  If **no**, the most likely cause is that the links to the native files were not updated. You will need to first update the links (see Renaming file paths and folders), and then run the CreateHyperlinks CPL (see CreateHyperlinks) to create new hyperlinks in the records.

Optimizing documents to PDF

Optimization is a process in which a native file is reprocessed to a PDF file, for more optimized viewing in the viewer. You can run optimization on a single document, a query, or all documents in a database. Optimization is most useful for the reprocessing of native file types that are not supported by the "on-the-fly" processing that occurs when you open a document in the viewer. A good example would be an HTML file, which is a file type not supported by the on-the-fly processor. In order to view an HTML file, the file needs to be reprocessed to PDF format. Once this optimization is done, the PDF can then be viewed in the viewer.

In some instances, the optimization may not be able to optimize a file, for example, when a file has become corrupt. When this occurs, the optimization process tags the file with an "Import Errors" tag. After optimization has completed, you can run a query on the Import Errors tag to find out what, if any, documents could not be optimized. You can then check the log file to find out why those files could not be optimized.

📝 When you optimize a document that has already been OCR'ed, any notes, issues, and issue tags in the OCR field of that document's record is removed. Notes, issues, and issue tag if fields other than the OCR field are not removed.

To optimize a single document:

1. In either Browse or Table view, select the document you want to optimize.

2. From the **File** menu, select **Administration**, then **Optimize**, and then **Optimize Current Document**.

   A dialog opens stating that you will lose markups and notes associated with the OCR fields, and asks if you want to continue.

3. Click **Yes**.

   The document conversion process runs. When it completes, the document-level text displays in the OCR field of the record, and the PDF copy of the native file can be viewed in the viewer.

4. Click on the 📷 **Camera** button to view the PDF copy of the document in the viewer.

To optimize a query:

You can use a query to locate specific documents, and then run the optimization on the results of the query.

1. Run a query to gather the documents you need to optimize.

2. From the **File** menu, select **Administration**, then **Optimize**, and then **Optimize Current Query**.

    A dialog opens stating that you will lose markups and notes associated with the OCR fields, and asks if you want to continue.

3. Click **Yes**.

    The document conversion process runs. When it completes, the document-level text displays in the OCR field of the record, and the PDF copies of the native files can be viewed in the viewer.

4. Click on the [camera icon] **Camera** button to view the PDF copies of the documents in the viewer.

To optimize all documents:

1. Open the database.

2. From the **File** menu, select **Administration**, then **Optimize**, and then **Optimize Entire Database**.

    A dialog opens stating that you will lose markups and notes associated with the OCR fields, and asks if you want to continue.

3. Click **Yes**.

4. Click on the [camera icon] **Camera** button to view the PDF copies of the documents in the viewer.

About Adding More Files to Databases

Typically, all data for a specific case is not processed or received at the same time. Subsequent data may arrive on an ongoing basis. Therefore, after a new database is created with its initial set of files, additional files can be added directly to the database using one of two methods, depending on the database. The first method is a simple Windows drag and drop action. This drag and drop functionality is available for all new databases created in Concordance Desktop, and for all migrated Concordance 10.21 E-Document databases. All other types of Concordance 10.21 databases that have been migrated to Concordance Desktop cannot support the drag and drop functionality. In addition, any databases that have been converted from a prior version of Concordance to Concordance 10.x, and then migrated to Concordance Desktop, as well as all Transcript

databases, are unable to support the drag and drop functionality. To add files to these types of databases, you use the "Import" feature in Concordance Desktop.

⚠ Databases created in Concordance Desktop cannot be added or appended to a migrated Concordance database, nor can they be concatenated with a migrated database.

About adding files using drag and drop

The drag and drop method is used for appending updates or adding files to existing databases that were created in Concordance Desktop, and for existing Concordance 10.21 E-Document databases that have been migrated to Concordance Desktop.

The follow table shows what types of files can be appended to each type of database.

Drag and Drop Append Chart			
File Type	Load File Database	E-Document Database	E-mail Database
DAT or CSV	X	X	
OPT	X		
E-document (DOC, PDF, XLS, etc.)	X	X	
PST			X
MSG	X*	X*	X
EML	X*	X*	X
DCB	X	X	X
*Does not process attachments.			

There are some limitations of which you need to be aware:

- Concordance Desktop Load File, Concordance Desktop E-Document databases, and migrated Concordance 10.21 E-Documents databases are the only databases that allow dropping (importing) of all types of electronic files (pdf, doc, ppt, image files, etc.), including msg and eml files. However, when msg or eml files are dropped (imported), attachments are not processed.

- Only email msg, eml, and PST files can be dropped onto a Concordance Desktop E-mail database.

- Both the email and attachment(s) (if any) are appended when you drag and drop a .msg or .eml file onto an E-mail database.

- DCB files can be dropped on any type of database.

- OCR files are no longer necessary for Load File databases. Instead, the OCR process is automatically run during the import, where a PDF copy is generated for each native file. This does not mean that you cannot include the OCR files. You still have the option to add them, and when you do, most often it results in a decrease of processing time.

When you drop an e-mail msg or eml file onto an existing Concordance Desktop E-Documents or E-Mail database, or migrated Concordance 10.21 E-Documents database, the import process appends the file as the last record(s) in that database, At the same time, the import process creates a PDF of the native file for viewing in the viewer. If the file is dropped on a database that is part of an existing concatenated (CAT) database set, then the file is appended to the end of the last database in the CAT set. Dropping an OPT file onto an existing database results in the same action - the files are appended to the end of the database, or the end of the last database in a CAT set. When you drop a DAT, DCB, or PST file onto an existing database, a new database is created from the dropped file, and that new database is automatically concatenated with the database on which it was dropped. The existing database becomes the "primary" database of the CAT set.

When you drag and drop a DAT or DCB onto a Concordance Desktop DAT database, a new DAT database is created and automatically concatenated with the existing DAT database. At the same time, the import process creates a PDF of the native files for viewing in the viewer. When you drag and drop an OPT file onto a Concordance Desktop DAT database, the files are appended to the end of that existing DAT database, and again, PDFs of the native files are automatically created.

About adding files with the Import feature

The import feature must be used for updating existing records or adding new files to Concordance 10.x Load File (DAT) or E-Mail databases that have been migrated to Concordance Desktop. It is also used when you need to append files to a DAT database that has been migrated from Concordance 10.x. To append files to databases created in Concordance Desktop, you must use the drag and drop method.

⚠ Do not use the import process if you are importing replacement data into a database created in Concordance Desktop, or into a Concordance 10.x E-Document database that was migrated to Concordance Desktop. Instead, use the Drag and drop method to add the replacement data.

About adding files to Concatenated databases

When you add an additional file to a concatenated database, the file is appended as the last record to the very last database in the concatenated set.

📝 Databases that are automatically concatenated either by a drag and drop, or by the import process when creating a new database with multiple record sets, should not be

removed from the CAT set. Removing a database from an automated CAT set can cause the record numbering in the CAT database to be sequentially inconsistent.

When adding files to a concatenated database set, always open the primary database and drop the files onto it. Also, never attempt to open any of the other databases in the set, as doing so can cause database corruption. To identify the other database in the set, look for the database name with -001, -002, etc. appended to the name. These are the other databases in the set. The primary database displays just the database name, without any added numbers.

Concatenated sets can be easily identified by how they appear in both the Admin Console and in Windows Explorer.

[Concatenated database set views](#)
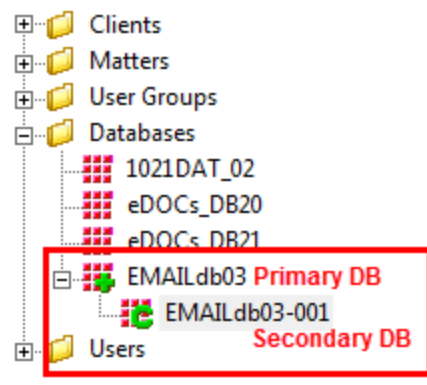
A concatenated set in the Admin Console
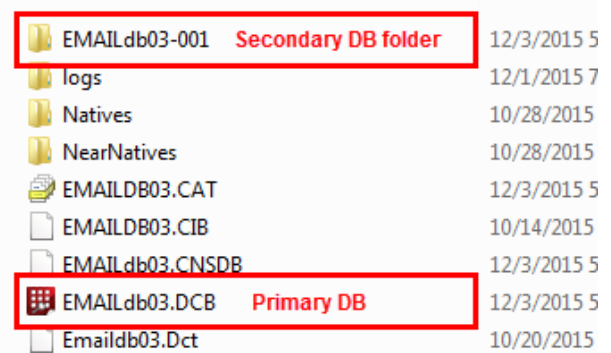
A concatenated set in Windows Explorer

Best Practices for successfully adding files

Regardless if you are dragging and dropping or importing, when adding additional files to a database, we recommend creating a duplicate database structure first, and then adding the new files to the duplicate. This step allows for further quality control before changing your main database. The final step is using the drag and drop functionality, or the Import feature to append and replace your new records by matching records using a common unique field.

When importing new data, consider the following:

- Run a test load by importing new data into an exported database or database structure

- Note the last record number on the status bar prior to importing the secondary database with the new data

- Reindex the database prior to loading the new data. After the data is loaded, on the Search menu, click Search for Edited Documents, to query only the records that you

just loaded for verification of the number of records that needed to be loaded or to isolate the records that need to be deleted if loaded improperly.

- Decide whether to load data into a secondary database structure and then concatenate it with the primary database

To find recently updated documents, on the Search menu, click Search for edited documents. Reindex prior to importing the updated records so the search query only includes changes made to the database by the matching import.

To create a duplicate database:

After reviewing the delimited text files, you need to create a copy of the database you want to add the additional text files. You will duplicate the database by exporting the database's structure.

To create a duplicate database:

1. In Concordance Desktop, open the database you want to copy.

2. On the **Documents** menu, point to **Export**, and click **Structure**.

3. Clicking **Structure** opens the **Copy Structure** dialog box.

4. Navigate to where you want to save the duplicate database, type the name of the database file in the **File name** field, and click **Save**.

Adding Files to Concordance Desktop DBs

Concordance Desktop is able to import a variety of electronic documents (eDocuments), including text, Adobe Acrobat PDF, Microsoft Word, PowerPoint, Excel, and Outlook or Outlook Express message files into an existing eDocuments database.

Electronic documents require that source file software, like Microsoft Office and Adobe Acrobat, are pre-installed on your network in order to extract the data from the file and import it into your Concordance Desktop database.

Concordance Desktop, however, does not allow importing of data from any zipped, encrypted, .exe, or system files. The files are imported but not the data contained with the file. You'll need to adhere to any forensic data processes as outlined by your organization or recommended for e-discovery processing.

Some earlier versions of Microsoft Excel files are no longer supported through Microsoft and cannot be opened from Concordance Desktop. For more information, please see the Microsoft website.

When using the Record Divider option, imported Microsoft Excel files that contain more than one sheet and viewed in the Concordance Desktop viewer will display only the first sheet for the database record. No view is available for the other sheets associated with the record.

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

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

Supported e-document file types

Concordance Desktop supports the following E-Document file types for creating and adding documents to an E-Documents database:

File Type	Description
*.tif, *.tiff	Tagged Image File
*.jpg, *.jpeg	Joint Photographic Experts Group
*.gif	Graphic Image File
*.bmp	Bitmap
*.asc	ASCII text
*.pcx	PC Paintbrush bitmap
*.csv	Comma-Separated Values
*.cal, *.cals	Facsimile
*.pdf	Adobe Portable Document Format
*.doc, *.dot, *.docx	Microsoft Word
*.ppt, *.pps, *.pptx, *.pptm	Microsoft PowerPoint®
*.xls, *.xlsx, *.xlw, *.xlt	Microsoft Excel®
*.msg	Microsoft Outlook 2010 or later Message File
*.eml	Microsoft Outlook Express
*.txt	ASCII Text
*.rtf	Rich Text Format
*.html, *.htm	Web/HTML (Only supported in e-document databases.)
*.pab	Microsoft Outlook Personal Address Book

*.wps	Microsoft Works

📝 When importing records using a DAT file, ensure that the carriage return delimiter is set to something other than "new line" (value 013). If the new line delimiter value 013 is set, change that delimiter in the DAT file before attempting to import the file.

⊟ **To add documents to a Concordance Desktop e-documents database:**

1. In Concordance Desktop, open the database to which you want to add additional records.

2. Open Windows Explorer and locate the folder that contains the documents you want to add to the database.

3. In the Windows Explorer folder, select the file(s) to add.

   To select multiple files, use SHIFT+click or CNTRL+click.

4. Drag the file(s) to the database open in the Concordance Desktop workspace.

5. If dragging a DAT file, a Dat File Drop Operation box opens. Click **Append**.

6. When asked if you are sure you want to add files to the current database, click **Yes**.

   The Import E-Documents progress dialog box opens.

7. In the **Browse** view, verify that each E-document you added displays properly.

8. If the database has already been indexed, reindex it. Otherwise, run a full index.

   For more information about indexing and reindexing databases, see Indexing and reindexing updates.

9. If you receive the following message, Dictionary file exists, overwrite?, click **Yes**.

📝 When adding documents to a database that is part of a concatenated set, the imported documents are appended to the end of the last database in the concatenated set.

When adding additional e-mails and attachments into a Concordance Desktop database, it is best to add them to an E-mail database because they contain unique internet account

type coding for the author and recipients, including a parent and child structure that needs to be preserved, and attachments that need to be retained. All of these components are critical metadata that can easily be altered, spoiling original records and damaging critical information regarding who knew what and when. Once damaged, this information is nearly impossible to restore and is irretrievable after the documents have been added to the database.

Concordance Desktop provides an E-mail database wizard, which includes typical metadata fields from Outlook and takes care of the field mapping for you. The import wizard automatically establishes parent-child relationships with the e-mail messages and their attachments. This provides efficient and comprehensive searching and saves time in document loading. The wizard also lets you create and modify fields as needed. For more information about creating an E-mail database, see Creating an E-mail and attachments database.

📝 When adding e-mail .msg or .eml files to a Concordance Desktop concatenated database, the e-mails are appended to the last database in the concatenated set. When adding an e-mail .pst file, a new e-mail database is created from the .pst file and the databases are automatically concatenated (CAT). The database onto which the .pst file was dropped becomes the primary database in the CAT set.

⚠ Drag and drop is not supported for databases that have been migrated from Concordance 10.x, and for DAT and Transcript 10.x migrated databases, Following the steps found under Importing extra e-mail & attachments to a Concordance 10.x E-mail database for adding e-mails and attachments to these migrated databases.

📝 Some earlier versions of Microsoft Excel files are no longer supported through Microsoft and cannot be opened from Concordance Desktop. For more information, please see the Microsoft website.

💡 If you need to export your e-mail from Concordance Desktop back to a .pst file, consider using Discover the Wave's Trident Pro software.

To add a PST file to a Concordance Desktop e-mail database:

⚠ When dropping multiple PST files onto an e-mail database, drop only one PST file at a time, and reindex the primary database prior to dropping the next PST file.

1. In Concordance Desktop, open the database to which you want to add the PST file.

2. Open a Windows Explorer window and navigate the location of the **PST** file.

3. Drag the PST file from the Windows Explorer window and drop it onto the E-mail database open in the Concordance Desktop window.

4. You are asked if you are sure you want to add the files to the database, click **Yes**.

The Import Email and Attachments progress dialog box opens.

5. When the import finishes, check to ensure that the e-mail messages and attachments, if applicable, were added and that they can be viewed in the viewer.

To add e-mail & attachments to a Concordance Desktop database:

E-mail is imported into a Concordance Desktop database using the drag and drop method. During the import, the Import e-mail wizard automatically establishes parent-child relationships with the e-mail messages and their attachments. This provides efficient and comprehensive searching and saves time in document loading.

📝 When adding e-mail .msg or .eml files to a Concordance Desktop concatenated database, the e-mails are appended to the last database in the concatenated set. When adding an e-mail .pst file, a new e-mail database is created from the .pst file and the databases are automatically concatenated (CAT). The database onto which the .pst file was dropped becomes the primary database in the CAT set.

1. In Concordance, open the E-mail database into which you want to import additional documents.

2. Open a Windows Explorer window and navigate to the location of the file(s) you want to append to the database.

3. Select the file(s) you want to add.

    To select multiple files, use SHIFT+click or CNTRL+click.

4. Drag the files and drop them onto the database you have open in Concordance Desktop.

    A dialog box opens asking if you are sure you want to add files to the current database.

5. Click **Yes**.

    The Import Email and Attachments progress dialog box opens.

6. When the import finishes, check to ensure that the e-mail (and attachment if applicable) was added to the database and that it can be viewed in the viewer. For multiple e-mails or attachments, we recommend you check each one.

To verify the added files:

Once you have imported your e-mail messages, it is best practice to verify that the files imported correctly. After verification, you need to reindex or index the database.

1. In Concordance Desktop, open the **Browse** view.

2. In the **Browse** view, verify that the e-mail messages you imported display properly.

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

   For more information about indexing and reindexing databases, see Indexing and reindexing updates.

   If you receive the following message, Dictionary file exists, overwrite?, click **Yes**.

In Concordance Desktop, you can drag and drop a DAT, CSV, DCB, MSG, or EML file onto a Concordance Desktop Load File (DAT) database to add the files to the existing database. To use the drag and drop functionality, you must either log onto the Concordance Desktop server/computer where the database you want to add to resides, or use Windows Remote Desktop to log onto that server/computer.

📝 If you need to update records that already exist in a Load File (DAT) database, you need to use the' Import' feature instead. For more information on the Import feature see, Importing updates to an existing database.

📝 When importing records using a DAT file, ensure that the carriage return delimiter is set to something other than "new line" (code 013). If the new line delimiter is set, change the delimiter in the DAT file before attempting to import the file.

⚠ Drag and drop is not supported for DAT databases that have been migrated from Concordance 10.x. To add additional files to a migrated DAT database, you must use the 'Import' feature. See Importing updates to a migrated DAT database for more information.

Before importing delimited text files into Concordance Desktop, be sure to review the Managing data files topic.

As an administrator, you should always make a practice of opening and reviewing your delimited text files when you receive them, as the files are not always prepared perfectly and may need to be modified.

Adding delimited text files

Following are the steps for adding delimited text files.

Step 1: Review and edit delimited text files

Review the delimited text file, and make any necessary corrections.

To review and edit a delimited text file:

1. Open the delimited text file in any text editor program.

   Example of a delimited text file opened in UltraEdit:
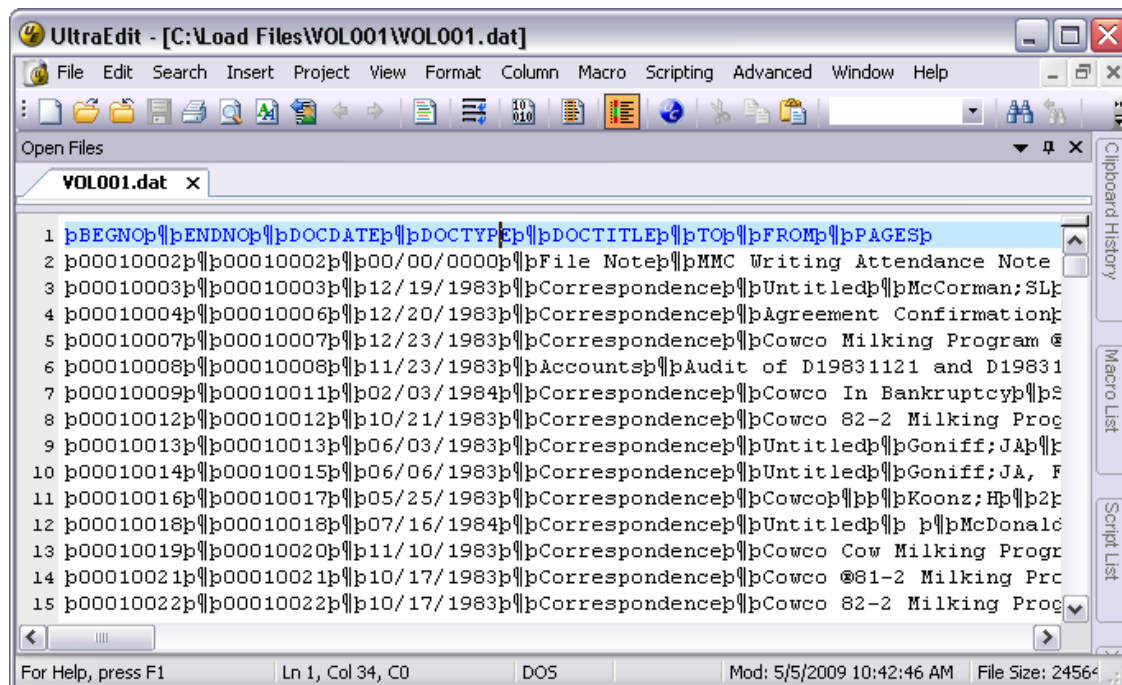
2. Review the delimited text file for the following elements:
   - The file must be a text-based format with an extension of .dat, .csv, .txt, .rtf, or any normal text file extension.
   - If there is no a header row containing field names, open the associated .tif file for the first record and match the data in the record to the data in the .tif file.
   - Note the delimiter used in the file. Concordance Desktop can handle any standard text delimiters.
   - Note the date format used in the file. Concordance Desktop can load dates containing slashes in any order with either 2- or 4-digit years, with a maximum of 8 digits. The only date formats Concordance Desktop can load without slashes is the universal date format of YYYYMMDD and the mm-dd-yyyy date format with dashes.
   - Is there a carriage return at the end of the record? If not, add a carriage return at the end of the record. Concordance Desktop will not load the last record if the carriage return at the end of the record is missing.

3. Make the necessary edits, if applicable.

4. Save the file.

5. Either print a copy of this file or leave the text editor program open so you can reference the field order when importing the files.

After reviewing the delimited text files and prior to continuing with step 2, we recommend that you create a duplicate of the database to which you want to add the additional files. This protects the original database, should any issues arise during the importing of the additional files. You can duplicate the database by exporting it to a Concordance Desktop database. See Exporting databases for more details.

<u>**Step 2: Drag and drop the delimited text files onto the Concordance Desktop DAT database**</u>

Before you drag and drop the delimited text files, review them to ensure that the data contains valid formats - those that are supported by Concordance Desktop databases.

When dropping a file onto a database, you must first open that database in Concordance Desktop and ensure that it is open in either Browse or Table mode on the Concordance Desktop workspace. Whatever database is currently open and has focus is the database to which the file will be appended. If no database is open, the drag and drop action will fail.

1. Open the Concordance Desktop application on the server where the database you need to add to is registered.

2. Open the database to which you need to add the DAT file, using one of the following methods:

   - From the File menu click Open. Locate and select the database, then click Open.

   - If the database is displayed in the Databases 'Recent' list, click on the database name to open it.

3. Open a Windows Explorer window and navigate to the location of the delimited text files you need to add to the database you just opened in Concordance Desktop.

4. Click and drag the DAT file from the Windows Explorer window and drop it onto the database displayed in the workspace pane of Concordance Desktop.

5. Do one of the following:

<u>**Append by Concatenation**</u>

When dropping a DAT file onto an existing DAT database, the import process creates a new database with the same name plus an appended numerical extension (example; DBNAME-001). Concordance Desktop then concatenates the new DB with the existing, and the existing becomes the primary database for that CAT set. As you drop more DAT files onto the primary database, each is named after the primary database and the appended extension is incremented by 1 (-002, -003, etc.).

   a.   Click **Append by Concatenation**.

The following dialog box opens.

b.   Click **Yes** to continue.

The load file dialog box opens.

The Enter Database Name field is populated with the name of the database you have open in Concordance Desktop. You cannot change this name.

The Select DAT file field displays the path and file name of the file you just dropped onto the DAT database. If you accidentally selected the wrong DAT file, you can click the Browse button to find and select the correct DAT file.

c. If you need to alter the format and delimiter settings, stop here and go to the Create a new database from load files using custom settings section for detailed instructions.

List of settings you can change when selecting to customize:

- **Load Field Names From:** Location from which to load Field Names. You can select to load Field Names from the DAT file you are loading, from a Template/Structure file, from a previously defined Settings File, or define a new set by manually creating all field names.

- **Select the delimited format to import or select custom values:** You can change the delimiter settings to match the settings in the load file, should they differ from the standard Concordance Desktop delimiters.

- **Select the date format for importing date fields:** You can change the date format, if the format in the load file differs from the standard yyyymmdd used in Concordance Desktop.

- **Load Tag List:** You can load a set of Tags from a saved Tag List file so that those tags are available in the new database.

- **Field Names:** You can add or modify field names.

- Change the order in which fields display in the database.

- **Show System Fields:** You can select to include the display of system fields in the database.

- **Skip first line:** The first line will usually list the fields in the DAT file and should not be imported as a record in the database.

- **Import rich text:** You can select to import rich text formatting when importing a text file.

- **See Attachment Fields:** You can select the email/attachment range field or the beginning and ending attachment number fields. Making either of these selections allows Concordance Desktop to identify the email and attachment family members.

d. Click **OK.**

You are returned to the Load File window where the Select DAT File field is populated with the information you entered in the Open window.

Append Direct

When importing new records using a DAT file, ensure that any new fields that are not currently in the existing database are added before you begin the append process by selecting **File** and then **Modify**. Additional OCR fields will not have to be added in the database.

a.   Click **Append Direct**.

The following dialog box opens.

b.   Click **Yes** to continue.

The load file dialog box opens.

The Enter Database Name field is populated with the name of the database you have open in Concordance Desktop. You cannot change this name.

The Select DAT file field displays the path and file name of the file you just dropped onto the DAT database. If you accidentally selected the wrong DAT file, you can click the Browse button to find and select the correct DAT file.

c. If you need to alter the format and delimiter settings, stop here and go to the Create a new database from load files using custom settings section for detailed instructions.

List of settings you can change when selecting to customize:

- **Load Field Names From:** Location from which to load Field Names. You can select to load Field Names from the DAT file you are loading, from a Template/Structure file, from a previously defined Settings File, or define a new set by manually creating all field names.

- **Select the delimited format to import or select custom values:** You can change the delimiter settings to match the settings in the load file, should they differ from the standard Concordance Desktop delimiters.

- **Select the date format for importing date fields:** You can change the date format, if the format in the load file differs from the standard yyyymmdd used in Concordance Desktop.

- **Load Tag List:** You can load a set of Tags from a saved Tag List file so that those tags are available in the new database.

- **Field Names:** You can add or modify field names.

- Change the order in which fields display in the database.

- **Show System Fields:** You can select to include the display of system fields in the database.

- **Skip first line:** The first line will usually list the fields in the DAT file and should not be imported as a record in the database.

- **Import rich text:** You can select to import rich text formatting when importing a text file.

- **See Attachment Fields:** You can select the email/attachment range field or the beginning and ending attachment number fields. Making either of these selections allows Concordance Desktop to identify the email and attachment family members.

d. Click **OK.**

You are returned to the Load File window where the Select DAT File field is populated with the information you entered in the Open window.

6. To preview the records prior to loading the file:

a. Click the **Preview** button to open the Preview window.
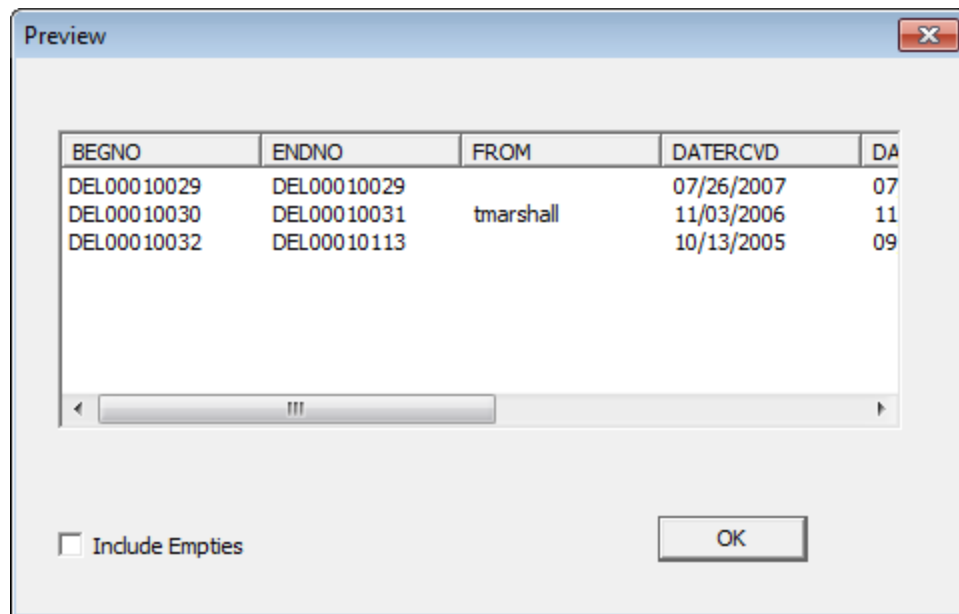
The preview window displays all fields in which there is data, along with a few records in the load file.

b. To turn on the visibility of empty fields, check the **Include Empties** check box.

When checked, empty fields are displayed in the preview, along with the populated fields.

c. When finished viewing the records, click **OK** to to close the Preview window.

7. Do one of the following:

If you have an OPT file to load, select it:

a. Click the **Browse** button next to the **Select OPT File** field.
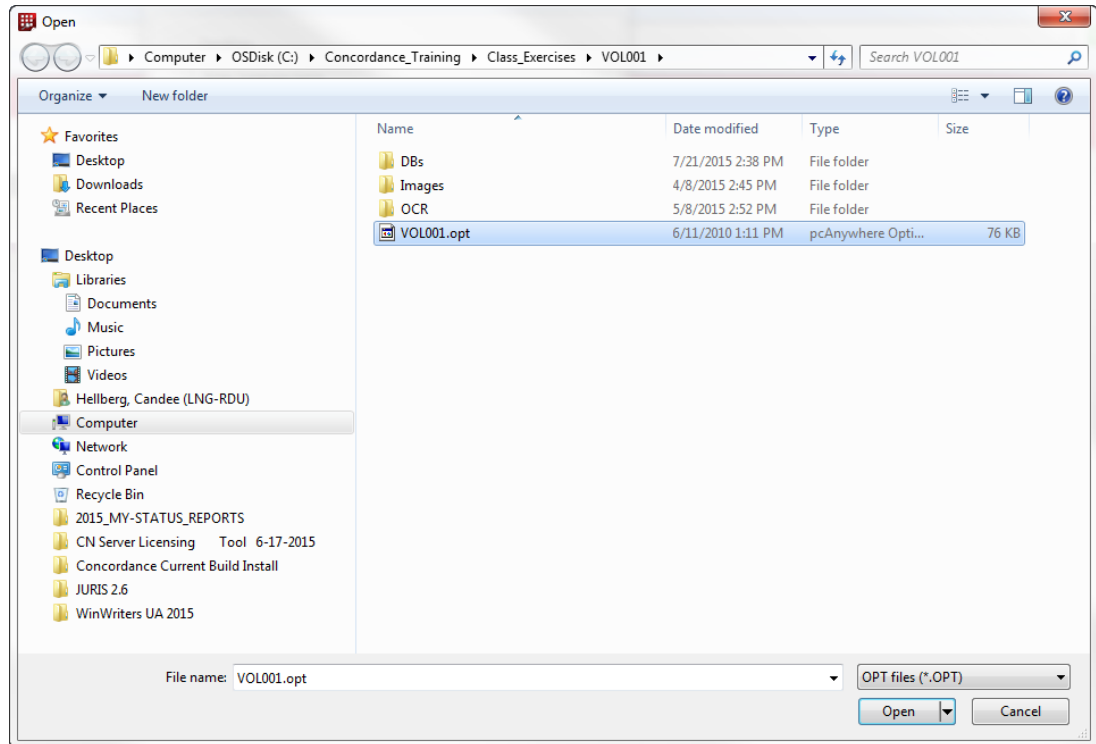
b. Locate and select the .OPT file you want to load.

c. Click **Open**.

You are returned to the Load File window where the **Select OPT File** field is populated with the selection you just made.

If you do not have an OPT file to load, you can create one:

Typically, the vendor who processed your documents supplies you with a corresponding load file (.opt, .log, or .txt) along with your documents and images. If you do not receive the OPT file, you can create one to use.

a. Click the **Create** button next to the **Select OPT File** field.

b. Click the ellipse button and select the location where you want to store the OPT file.

    We suggest that you enter a folder and sub-folder that is located in the same directory as the This should be in a sub-folder as your DAT file,and have the same name as. Alternatively, you can open Windows Explorer, locate and open the folder where the image files are, and then drag and drop the image files into the large box below the OPT file.

c. Open a Windows Explorer window.

d. Locate and open the folder where the image (.TIF) files are located.

e. Drag and drag the image files into the large box below the OPT file.

f. Click **OK**.

    You are returned to the Load File where the Select OPT file is populated with the OPT file location you just entered.

8. Click on the **Key** down-arrow and select the name of the field used to identify the beginning of new records.

    An example would be BEGNO.

9. If OCR text is included in the load file, check the **OCR contained in load file** check box, otherwise leave the check box blank.

10. Click on the **OCR** arrow and select the name of the field to contain the OCR text in the record.

Some examples are TEXT1 or OCR1

The wizard can import both single or multi-page OCR text files.

11. (Optional) Click the **Customize Image/OCR** button if you want to change the default OCR method. This option is not available when you check the 'OCR contained in load file' check box, as the OCR'ed text already exists.

The Customize Image/OCR dialog box opens.

Options are:

- **Use CN Desktop OCR** - Use this option if you want Concordance Desktop to OCR all the files regardless of any existing OCR'ed text files. By default, Concordance Desktop does not OCR the text files.

- **Use OPT Files to load Text Files** - Use this option if you want Concordance Desktop to load the document-level text from files existing in designated folders that are referenced in the OPT file. Concordance Desktop does not OCR the document-level text, it simply takes the text from the text files and loads it into the associated records.

- **Use OCR Text Files** - Use this option if you have text files that have already been OCR'ed and you want Concordance Desktop to use those OCR'ed files. As with the Use OPT Files to load Text Files option, Concordance Desktop will not do any OCRing of the text, it will simply load the text from the text files into the associated records. This option casn help save processing time. When this option

is selected, you also need to click the Browse button to locate and select the text files.

- **Use Field Containing File Path to load Text Files -** Use this option if you want Concordance Desktop to load the document level text from an OCR path referenced in the DAT file. This new import option allows you to import document level text if your DAT file references an OCR path. The OCR path needs to be edited to reflect the directory where the text is located or edited to reflect a relative path. When using the relative path in the DAT file, the edited copy of the DAT file must be in the same directory as your text folders.

⚠ If the file path pointing to your text files is not accurate the text will not be imported.

12. If you want Concordance Desktop to create optimized PDFs of the native files during the import process, uncheck the **Do not process to PDF** check box.

By default, the check box is checked, which helps to reduce processing time. When checked, rendering of supported native file types is done on the fly as they are viewed in the viewer. Unsupported file types however, cannot be viewed in the viewer until they are optimized. For more information about optimizing, please see the Optimizing documents to PDF topic.

13. Click **Import** to start the import of the load files you have selected.

14. If one or more files did not import properly, a dialog box displays telling you to see the log file. Click **OK**.

15. In the DAT Database dialog box:

- If all files imported properly (i.e., you did not see a dialog box stating one or more files imported properly) , click the **Open** button to open the database in Concordance Desktop.

- If any files did not import properly, click the **View Log** button to check the log for any files that did not import properly.

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

Typically, the vendor who processed your documents supplies you with a corresponding load file (.opt, .log, or .txt) along with your documents and images. If you do not receive this file, you can still load your documents and images into Concordance Desktop and select to create an OPT file during the import.

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

Before you load any additional OPT files, make sure that you review the file to ensure it meets the specifications for formatting. For more information, see Concordance Desktop imagebase load file formatting.

The OPT file can contain both documents and images that are either single-page or multiple-page files. Each file must contain a unique ID (media key). Before loading an OPT file, make sure that it provides an image media key, volume, file name with the path, and page break.

💡 When importing a multi-page image file, make sure that the file is formatted as a .tif file (.tif formatted files are the only image type file that recognizes document breaks). All other image formatted files (.jpg, .bmp, .gif, etc.) can only be imported as a single-page single image file. For example, a three page document for a single record should be loaded as a .tif formatted file in order for the viewer to display all three pages. If you load separate .jpg files for each page of the document, the viewer only displays the first .jpg file, as only one .jpg file can be associated with a record.

📝 Before you can drop a file onto a database, you must open that database in Concordance Desktop, and ensure that the database is open in either Browse or Table mode on the Concordance Desktop workspace. Whatever database is currently open and has focus is the database to which the file will be appended. If no database is open, the drag and drop action will fail.

To add an extra .opt file:

1. Open Windows Explorer and navigate to the folder where the opt file you need to add (load) is located.

2. Review the OPT file to make sure that the data contains a valid media (image) alias and file path for each document or image.

   Do not close Windows Explorer, as you will need to have access to the OPT file for step 5.

3. In Concordance Desktop, open the database to which you need to add the OPT file.

4. Click on the **Browse** view button to open the database in browser view.

5. Drag the OPT file in the Windows Explorer window onto the database in the Concordance Desktop window.

If you closed the Windows Explorer window you had opened in step 2, open it again and navigate to the folder where the opt file is located, then drag and drop the OPT file onto the database open in the Concordance Desktop window.

A dialog box opens asking if you are sure you want to add files to the current database.

```
Concordance Desktop                                      ⊠

Are you sure you want to add files to the current database?

                              Yes              No
```
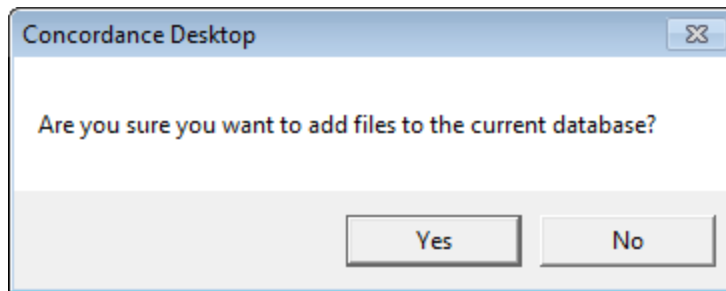
6. If you are sure you want to add files to the current database, click **Yes**.

    The files are imported and an optimized PDF is created for each native file.

7. When finished, locate the first document associated with the OPT file you dropped on the database.

8.   On the **Dynamic** toolbar, click the **View Image** (Camera) button to open the document in the viewer.

    If the document is a supported file type, the viewer opens and displays the document.

    If the document is not a supported file type, the viewer opens and displays a page stating that the document cannot be viewed in the viewer. You can view the document in its originating software by clicking on the document link in the record displayed in Concordance Desktop, providing you have the originating software application installed on your computer.

You may receive new image load files and images to replace existing images after creating your database. The overlay option loads images into the existing imagebase without adding additional images. Verify the filename and path information in the image load file is correct before performing this task.

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

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

<u>**To overlay image files:**</u>

1. From the File menu, click **Administration, Image Base Management** and then **Overlay/Append OPT.**

2. Click the **Browse** button, locate and open the .OPT file you want to load.

3. Click **Overlay**. A prompt will appear to confirm overlay:

⚠ All existing markups, including redactions, will not be transferred to replacement images. If the image file wasn't there previously then it will be appended to the database.

Concordance Desktop   ✕

Overlay will be peformed using CNDCN field as imagekey. All existing markups, including redactions, will not be transferred to replacement images.
Do you wish to continue?

     Yes   No
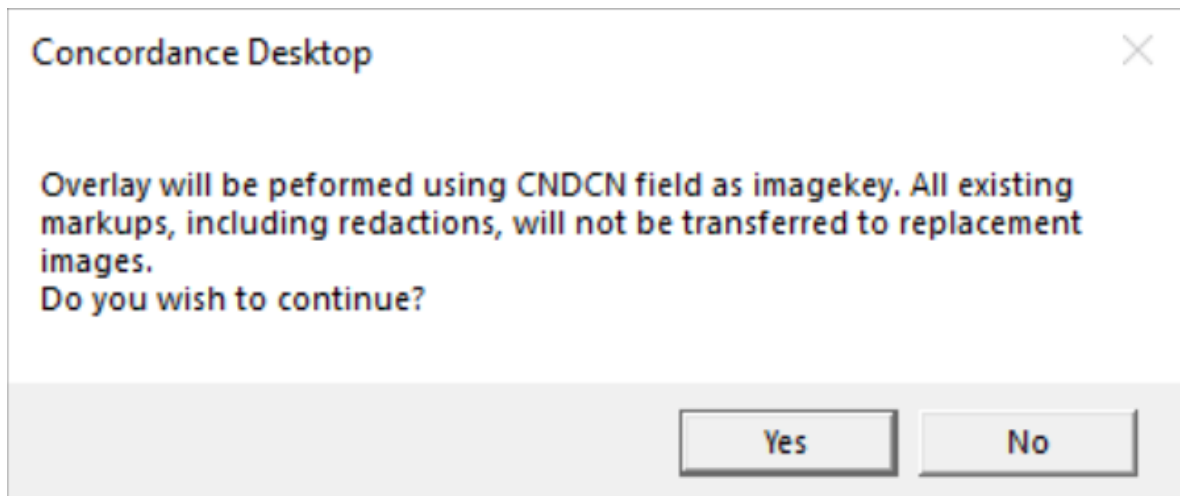
📝 In load file databases, the imagekey field was selected during the initial import when the database was created. The imagekey values in your load file must match the values in this field in the database.

Click **Yes** to continue.

💡 If any errors occur, a log file will be saved in the Logs folder where the database is saved in Windows.

In Concordance Desktop, open a record to view your image files.

Adding Files to Migrated Concordance 10.x DBs

Concordance Desktop is able to import a variety of electronic documents (eDocuments), including text, Adobe Acrobat PDF, Microsoft Word, PowerPoint, Excel, and Outlook or Outlook Express message files into an existing eDocuments database.

Electronic documents require that source file software, like Microsoft Office and Adobe Acrobat, are pre-installed on your network in order to extract the data from the file and import it into your Concordance Desktop database.

Concordance Desktop, however, does not allow importing of data from any zipped, encrypted, .exe, or system files. The files are imported but not the data contained with the file. You'll need to adhere to any forensic data processes as outlined by your organization or recommended for e-discovery processing.

📝 Some earlier versions of Microsoft Excel files are no longer supported through Microsoft and cannot be opened from Concordance Desktop. For more information, please see the Microsoft website.

📝 When using the Record Divider option, imported Microsoft Excel files that contain more than one sheet and viewed in Concordance Desktop Viewer will display only the first sheet for the database record. No view is available for the other sheets associated with the record.

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

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

📝 Some earlier versions of Microsoft Excel files are no longer supported through Microsoft and cannot be opened from Concordance Desktop. For more information, please see the Microsoft website.

Supported e-document file types

Concordance Desktop supports the following e-document file types for creating and adding documents to an e-documents database:

File Type	Description
*.tif, *.tiff	Tagged Image File
*.jpg, *.jpeg	Joint Photographic Experts Group
*.gif	Graphic Image File
*.bmp	Bitmap
*.asc	ASCII text

*.pcx	PC Paintbrush bitmap
*.csv	Comma-Separated Values
*.cal, *.cals	Facsimile
*.pdf	Adobe Portable Document Format
*.doc, *.dot, *.docx	Microsoft Word
*.ppt, *.pps, *.pptx, *.pptm	Microsoft PowerPoint®
*.xls, *.xlsx, *.xlw, *.xlt	Microsoft Excel®
*.msg	Microsoft Outlook 2010 or later Message File
*.eml	Microsoft Outlook Express
*.txt	ASCII Text
*.rtf	Rich Text Format
*.html, *.htm	Web/HTML
*.pab	Microsoft Outlook Personal Address Book
*.wps	Microsoft Works

📝 When importing records using a DAT file, ensure that the carriage return delimiter is set to something other than "new line" (value 013). If the new line (value 013) delimiter is set, change the delimiter in the DAT file before attempting to import the file.

To add extra documents to an existing Concordance 10.x database:

1. In Concordance Desktop, click **Documents**, click **Import**, then click **e-documents**.

2. Select whether to import by file type(s) or by specific files.

3. Select how you want to import the files.

   To import by file type:

   a. Select the Import by file type option, then click **Next**.

   b. Select the file extensions you want to import.

   Import all extensions (*.*) indicates that all files, regardless of the extension, are to be imported. If you select this option, you can still exclude some of the files by clicking the **Exclude** button.

Import selected extensions allows you to select only specific file types to import. If your file type is not listed (for example, docx), you can add it by clicking the **Add custom** button.

c. When finished selecting the file types, click **Next**.

d. Go to the folder where the files are located.

e. Click **Add** to add the folder to the Directory pane.

   To select another folder, repeat the step above.

f. (Optional) To import files from sub-folders in the folder you have selected, check the **Import files from subdirectories** button.

g. Click **Next**.

<u>**To Import specific files:**</u>

a. Select the **Import specific files** option, then click **Next**.

b. Go to the folder where the files are located and select the files.

   To select multiple files, use SHIFT+click or CNTRL+click.

c. Click **Add**.

d. Click **Next**.

e. Continue on with step 4.

4. Select the field mappings for your database, and click **Next**. For fields that do not match, leave them set to <none>.

5. Select the appropriate options for the files you are importing.

6. Match metadata field names

7. Store file name without full path

8. Create hyperlinks to original document

9. View e-Docs in Concordance Desktop Viewer

10. Auto-number documents with a DOCID (document ID)

11. If you select to auto-number DOCID, you need can setup a Prefix to precede the number, and the number to begin with. Ensure that you precede the starting number with zeros.

12. (Optional) To create a plain text file for messages produced during the import, click Browse to setup a log file name and location to capture the messages.

13. (Optional) If importing plain text files, enter the **Record divider**. If the record divider is anchored, also check the **Divider is anchored** check box.

14. Click **Next**.

15. Click **Import**.

16. When the import finishes, click **Done**.

When adding additional e-mails and attachments to a Concordance 10.x database that has been migrated to Concordance Desktop, it is best to if the database you are adding them to is a Concordance 10.x migrated E-mail database, they contain unique internet account type coding for the author and recipients, include a parent and child structure that needs to be preserved, and attachments that need to be retained. All of these components are critical metadata that can easily be altered, spoiling original records and damaging critical information regarding who knew what and when. Once damaged, this information is nearly impossible to restore and is irretrievable after the documents have been added to the database.

Concordance Desktop provides an E-mail database wizard, which includes typical metadata fields from Outlook and takes care of the field mapping for you. The import wizard automatically establishes parent-child relationships with the e-mail messages and their attachments. This provides efficient and comprehensive searching and saves time in document loading. The wizard also lets you create and modify fields as needed.

📝 When adding e-mail and attachment files to a Concordance 10.x migrated concatenated database, the e-mails are appended to the last database in the concatenated set. When adding a whole e-mail .pst file, a new e-mail database is created from the .pst file and the databases are automatically concatenated (CAT). The database into which you are importing the .pst file becomes the primary database in the CAT set.

💡 If you need to export your e-mail from Concordance Desktop back to a .pst file, then consider using Discover the Wave's Trident Pro software.

To add e-mail and attachments to a Concordance 10.x migrated e-mail database:

The third step in importing e-mail and attachments is to import the e-mail and attachment files into your e-mail database. E-mail is imported into Concordance using the Import e-mail wizard. The Import e-mail wizard automatically establishes parent-child relationships with the e-mail messages and their attachments. This provides efficient and comprehensive searching and saves time in document loading.

📝 When importing e-mails into a concatenated database, e-mails are updated when the fields of an imported e-mail match an existing email. When the fields do not

match, the imported email is appended to the last database in the concatenated set.

1. In Concordance, open the E-mail database into which you want to import additional documents.

2. On the **Documents** menu, click **Import**, and then click **E-mail and Attachments**.

3. In the **Choose Profile** dialog box, from the **Profile Name** list, select the name of the e-mail profile you created, and click **OK**.
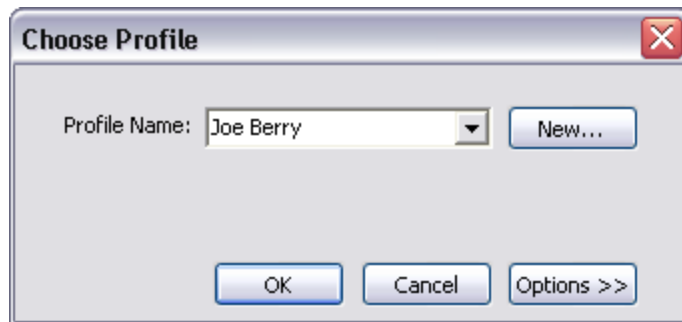
4. In the **Import e-mail - Folder** dialog box, click the .pst folder associated with the e-mail profile you created.

   To import the entire .pst file, be sure to click the .pst file's top-level folder. If you select a folder that does not contain e-mail messages, such as the Microsoft Outlook calendar or contacts, the folder can be imported, but the records created will not be complete because the Import e-mail wizard only imports information related to e-mail messages.
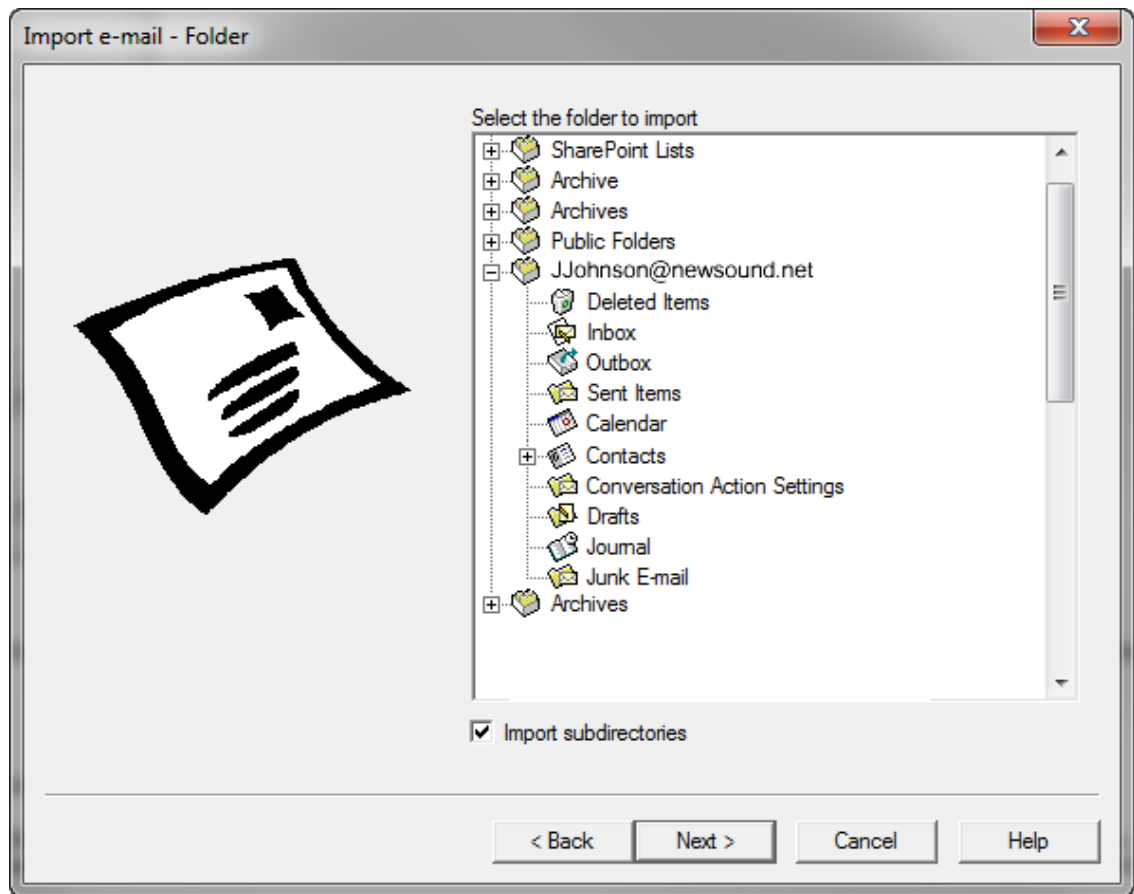
5. To include the folder's subdirectories, make sure that the **Import subdirectories** check box is selected.

6. Click **Next.**

7. In the **Import e-mail - Attachments** dialog box, specify any of the following:
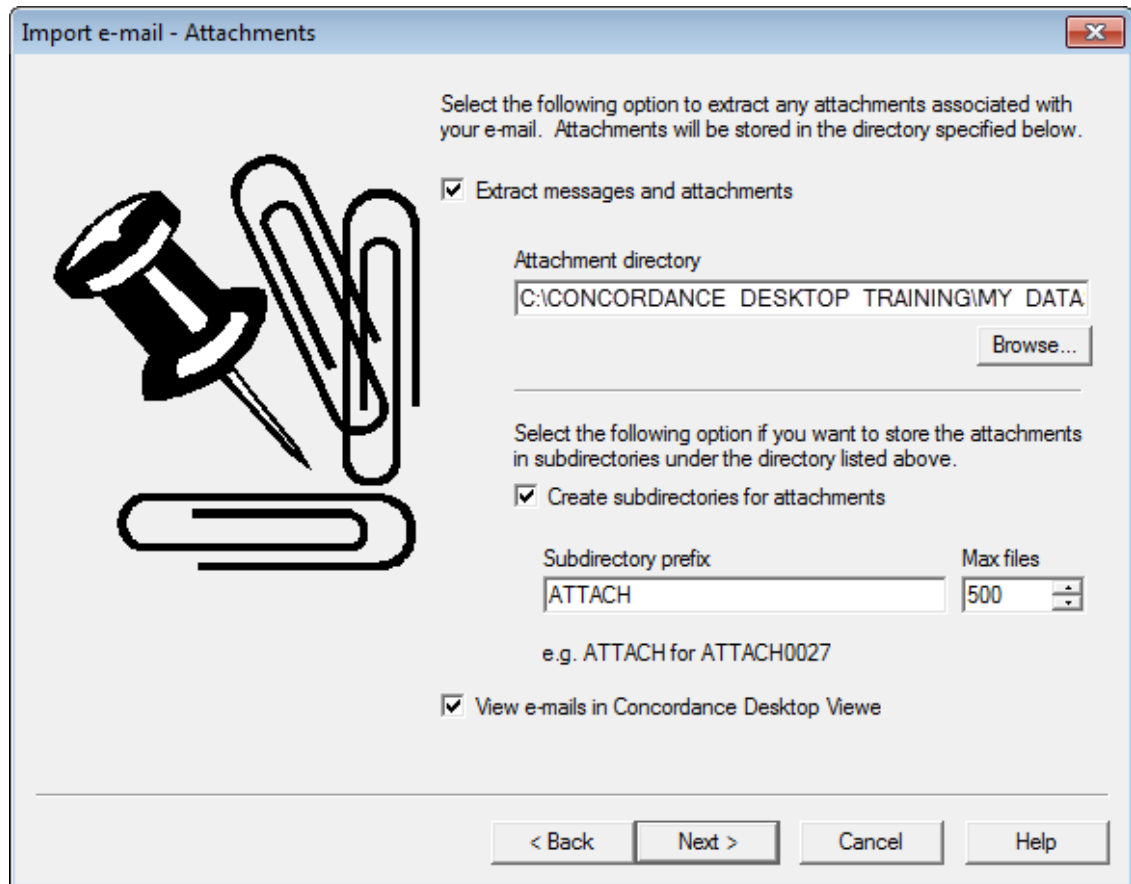
- To extract attachments, make sure that the **Extract .MSG files and attachments with e-mail** check box is selected, and browse to the directory where you want to store the extracted email files and attachments.

  E-mail .msg files and attachments can be extracted and saved to a specific directory.

  By default, the Extract .MSG files and attachments with e-mail and Create subdirectories for attachments check boxes are selected. The Attachment directory field defaults to the e-mail database's directory, the Subdirectory prefix field defaults to ATTACH, and the Max files field defaults to 500.

  It is best practice to store attachments in subdirectories, especially when you are managing large numbers of attachments.

- To store email .msg files and attachments in subdirectories of the directory displayed in the **Attachment directory** field, make sure that the **Create subdirectories for attachments** check box is selected. In the **Subdirectory prefix** field, type the prefix you want to use for the subdirectory folder names, and in the **Max files** field, type or scroll to the maximum number of files allowed in each subdirectory.

  Subdirectories are named using a prefix and a number. For example, if you specify the prefix *ATTACH* and the maximum files to store as 500, the first subdirectory

created will be *ATTACH0000*. After that directory is filled with 500 files, the import creates the *ATTACH0001* directory, and proceeds to store attachments in the *ATTACH0001* directory until it reaches 500 files. This process continues until all the attachments are extracted.

- To display e-mails in the viewer for review, select the **View e-mails in Concordance Desktop Viewer** check box.

  Selecting this option creates the Concordance Imagebase (CIB) file that is needed to link the view of the e-mail files with the corresponding record in Concordance. You must modify the database and make DOCID the image key field. To modify the database fields, see

6. When finished, click **Next**.

7. In the **Import e-mail - Date range** dialog box, specify any of the following:

- To import all e-mail messages in the selected .pst folder, select the **Import all e-mails** option.

- To import only the e-mail messages for a specific data range in the selected .pst folder, select the **Import e-mails from a specific date range** option and then specify the Begin Date and End Date.

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   6/ 3/2014

  < Back   Next >   Cancel   Help

---
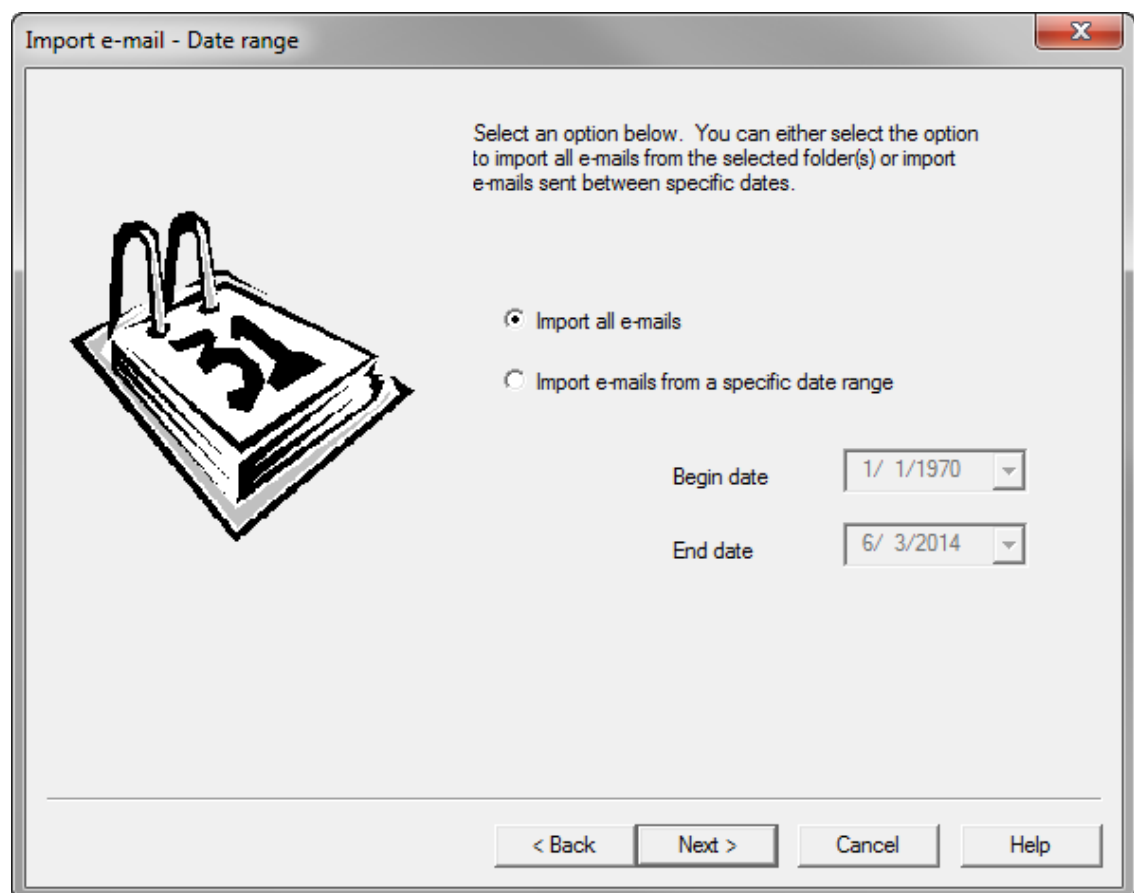
8. When finished, click **Next**.

9. In the **Import e-mail - Fields** dialog box, specify any of the following:

   You can map specific e-mail fields, such as the sender and recipient, to Concordance database fields. Using the E-mail and Attachments template to create your e-mail database ensures all fields exist for accurate mapping between e-mail messages and the Concordance fields. The E-mail and Attachments database template has all the fields necessary to import and store e-mail messages.

   The left column displays the e-mail message fields, and the right column displays the database fields.

   If your e-mail database was created from the E-mail and Attachments template, the database fields are automatically mapped to the correct e-mail message fields.

   If your e-mail database was not created from the E-mail and Attachments template, select the database fields you want to map to the e-mail message fields.
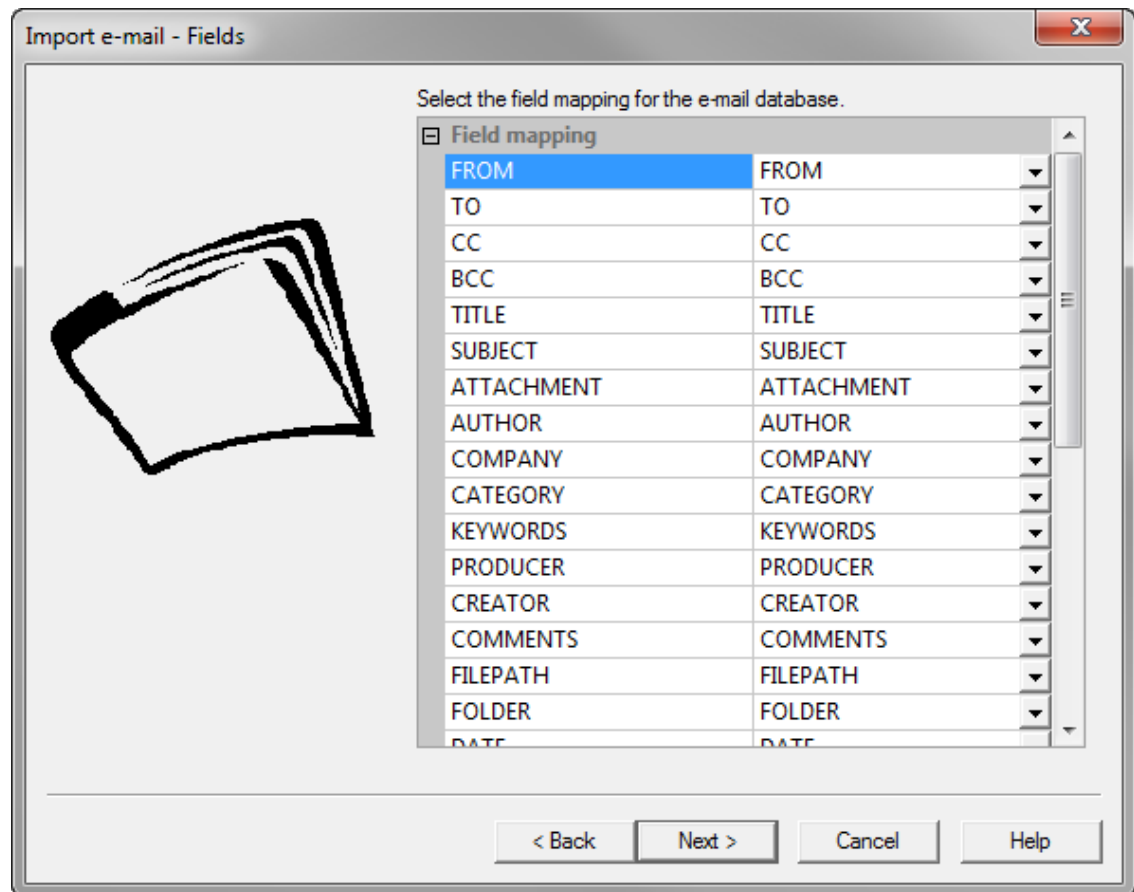
10. When finished, click **Next**.

11. In the **Import e-mail - Options** dialog box, specify any of the following:
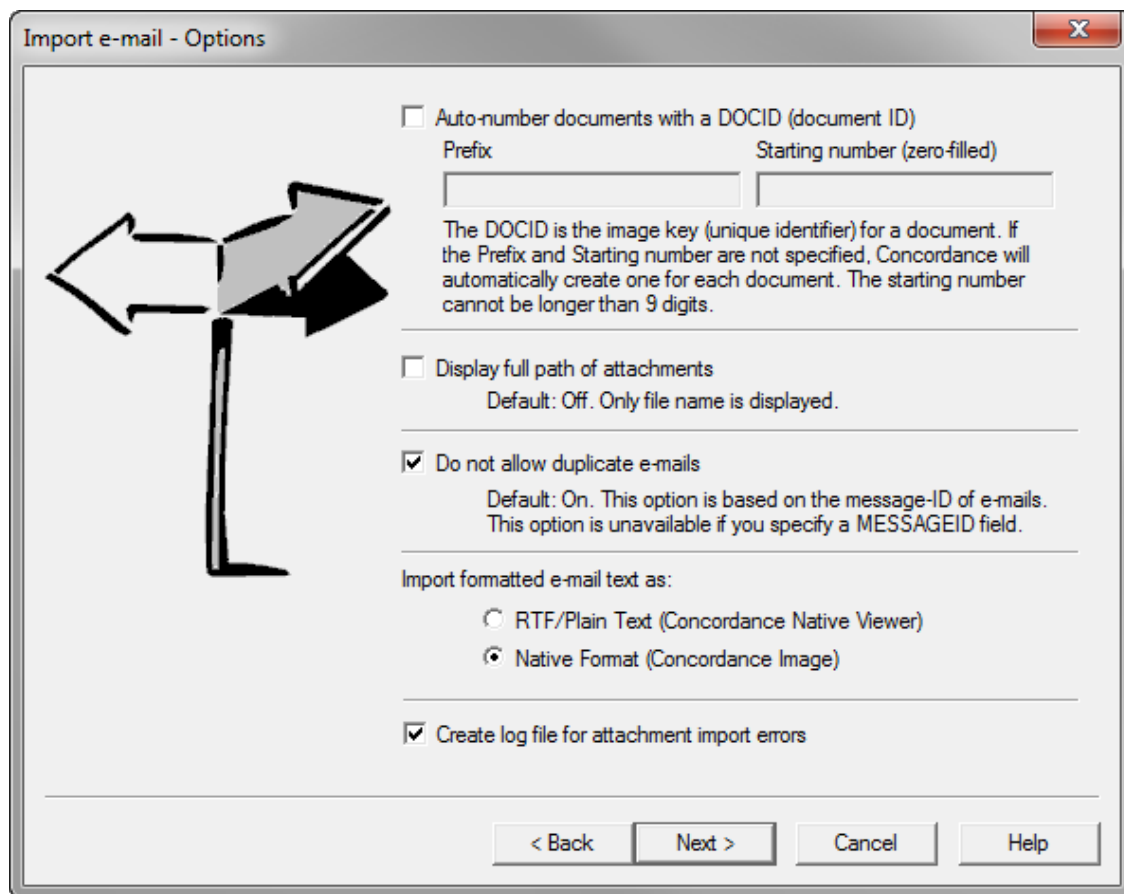
- To auto number the imported e-mail messages, select the **Auto-number documents with a DOCID (documentID)** check box, and then enter the **Prefix** and **Starting number (zero-filled)**.

   Auto-numbering your documents when importing e-mail messages provides a prefix and starting number for each e-mail message and any attachments, while also tracking family groups in a DOCID and PARENT_DOCID field. If the option is selected and the Prefix and Starting number are not specified, Concordance will automatically create one for each document.

   ✎ The Auto Number documents with DOCID option must be selected to successfully view the documents in Concordance Desktop Viewer.

- Select the **Display full path of attachments** check box to display the full path to attachments.

   By default, only the file name is displayed.

- Select the **Do not allow duplicate e-mails** check box if you do not want to import duplicate e-mails.

   Most e-mails have a unique message identifier called the message-id. This entry is stored in the MESSAGEID field. Before importing a message, the Import e-mail wizard checks to see if any previously imported e-mails have the same message-

id. If the wizard finds another record with this message-id, it does not import the message.

- Select the **Import HTML formatted e-mail text as** check box to import the body of HTML formatted e-mail messages as RTF/Plain text or Native Format formatting, and then select the text format to use to convert the format.

- Select the **Create log file for attachment import errors** check box if you want the import to create an import error log.

12. When finished, click **Next**.

13. In the **Import e-mail - Finish Import** dialog box, click the **Import** button to start the import.
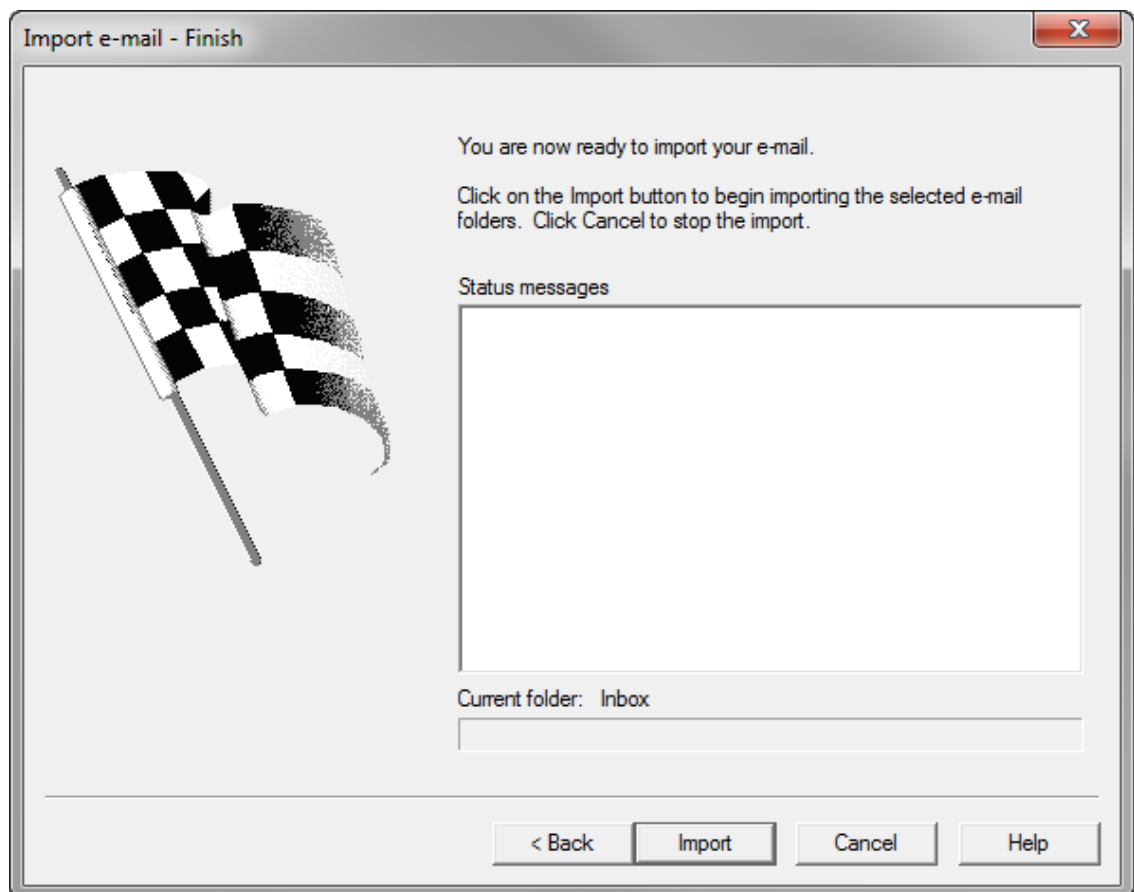
14. When the import is completed, click the **Done** button.

To verify the imported files:

Once you have imported your e-mail messages, it is best practice to verify that the files imported correctly. After verification, you need to reindex or index the database.

1. In Concordance Desktop, open the **Browse** view.

2. In the **Browse** view, verify that the e-mail messages you imported display properly.

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

   For more information about indexing and reindexing databases, see Indexing and reindexing updates.

   If you receive the following message, Dictionary file exists, overwrite?, click **Yes**.

Due to a database formatting difference between Concordance 10.x DAT databases and Concordance Desktop DAT databases, there is no method available for updating or appending records to a Concordance 10.x DAT database that has been migrated to Concordance Desktop. Therefore, if additional records need to be added to a migrated Concordance 10.x DAT database, you must do so by creating a new DAT database with the new/updated data, and then concatenate that new DAT database with the migrated Concordance 10.x DAT database.

For information on creating a DAT database, refer to the Creating a new database from load files topic.

For information on concatenating databases, refer to the Joining multiple databases (concatenating databases) topic.

Setting data validation

Once you have created your database, you can define the data validation attributes for your database fields in the Data Entry Attributes dialog box. Data validation attributes are settings that define how data is entered in fields within the Edit view.

For example, you can define a field that only allows upper case letters for field values or you can make a field read only. You can also define the parameters for authority lists, which are field value lists. Your data validation selections are stored in the database's [database name].ini file.

For more information about authority lists, see Creating word lists.

Updating existing database records

In Concordance Desktop, you can drag and drop a DAT update file onto a Concordance Desktop Load File (DAT) database, an e-Document database, or an e-mail and attachments database to add information to existing records. To use the drag and drop functionality, you must either log onto the Concordance Desktop server/computer where the database you want to add to resides, or use Windows Remote Desktop to log onto that server/computer.

When importing records using a DAT file, ensure that the carriage return delimiter is set to something other than "new line" (value 013). If the new line (value 013) delimiter is set, change the delimiter in the DAT file before attempting to import the file.

Prior to dropping a DAT file onto a database, ensure that the document file path listed in the DAT file is the same as the document file path in the database, as document file paths do not update. If the file paths are different, when you click on a document link it will open the old document in the database as opposed to the updated document.

To update existing database records:

1. In Concordance Desktop, open the database in which you need to update records.

2. In Windows Explorer, open folder containing the updated DAT file.

3. Drag the updated DAT file onto the database in the Concordance Desktop workspace.

   A DAT File Drop Operation box opens.
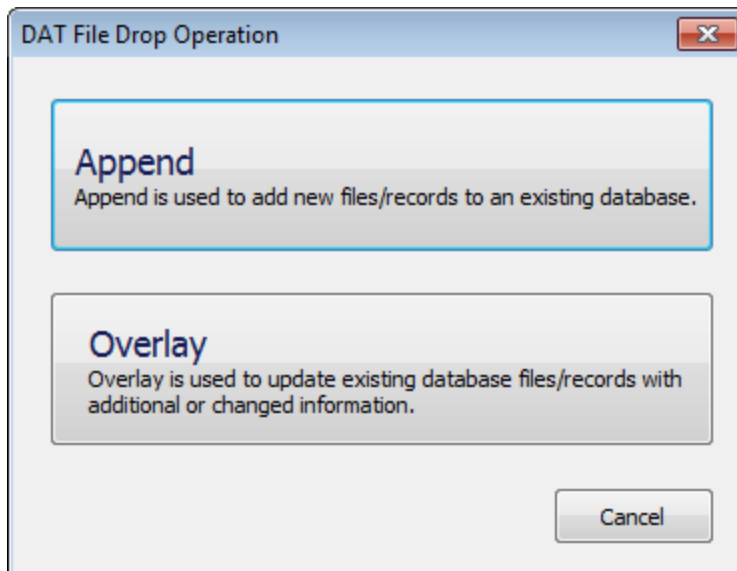
4. Click the **Overlay** button.

If the database is part of a concatenated set of databases, a Databases for overlay box opens. If not, skip to step 6.
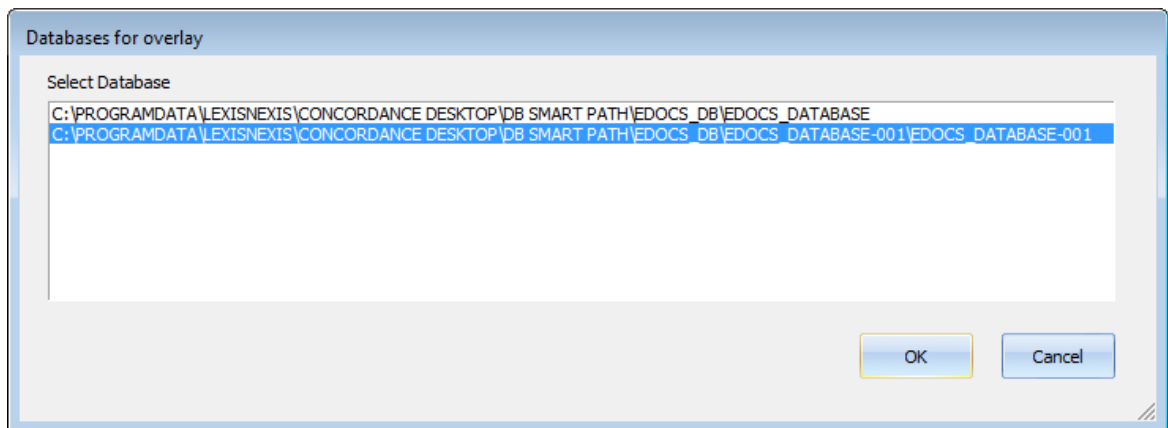
5. Select the database to update, and click **OK**.

An Overlay Database box opens.
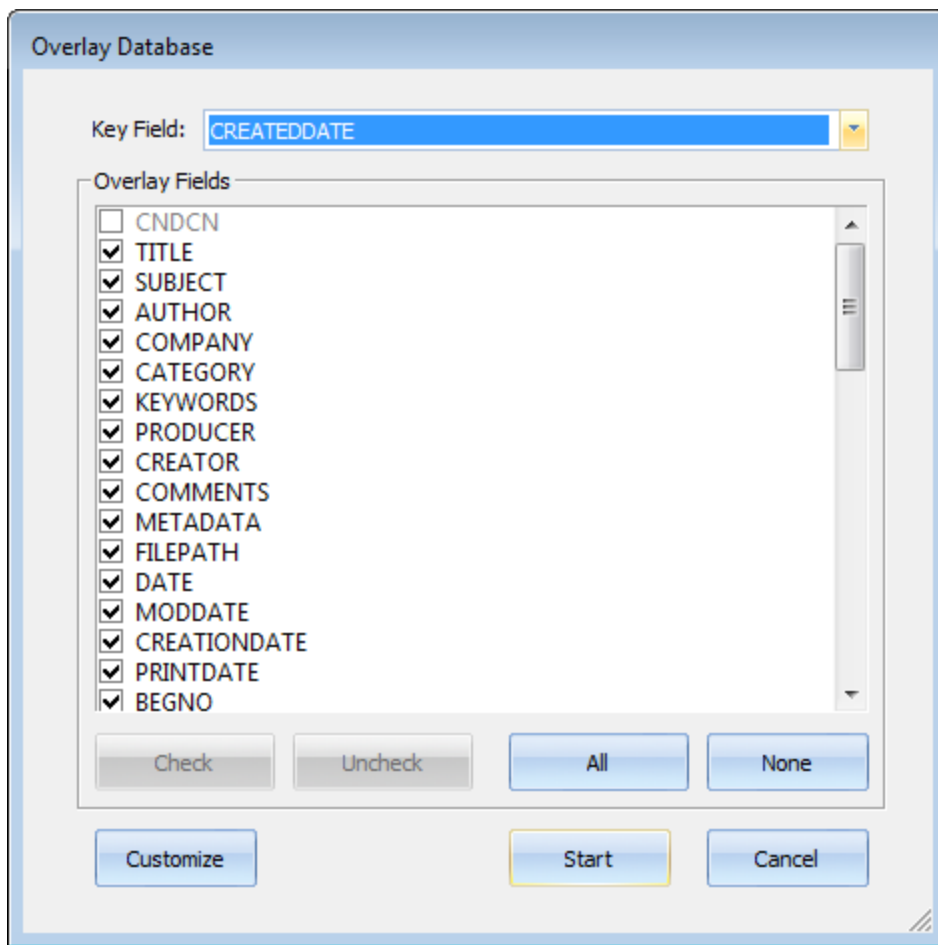
The import process attempts to determine which field to use as the indicator that a record has an update, and then preselects that field in the Key Field box.

If the delimiters in the update DAT file match those in the database, all fields currently containing information in the database are selected (checked) for updating. System fields, and any fields in the DAT file that do not have a corresponding field in the database, are grayed out.

If the delimiters in the update DAT file do not match those in the database, no fields are checked in the box. Please see the 'Using the Customize Load File Preview' section below if no fields are checked. Once you are done in the customize window, you can continue on with step 6 below.

6. If the preselected field in the **Key Field** box is not correct, click the down-arrow and select the appropriate field.

7. Do one of the following to select the fields you want the import process to update, if you do not want all fields to be updated.

    - To deselect only a few fields: Remove the check mark from each field you do not want to update.

    - To select only a few fields: Click the **None** button to remove the check mark from all fields, and then check only those fields you want to update.

    If you click the None button in error, click the **All** button to re-check all the fields.

8. Click **Start**.

The updated information from the fields in the updated DAT file replace the information in the fields in existing matching records.

<ins>Using the Customize Load File Preview</ins>

If your update DAT file field delimiters do not match those in the database, you can change the delimiters in the load file to match those in the database by using the Customize button.

1. After the Overlay Database box opens, click the **Customize** button.

    A Load File Preview box opens displaying the first three lines of the DAT file. Within those lines, only fields that can be found, based on the delimiters being used, are displayed. If no fields are displayed, it indicates that the fields cannot be found because the delimiters are not matching those found in the database. If this happens, you need to correct each delimiter until all fields are displayed in the view.
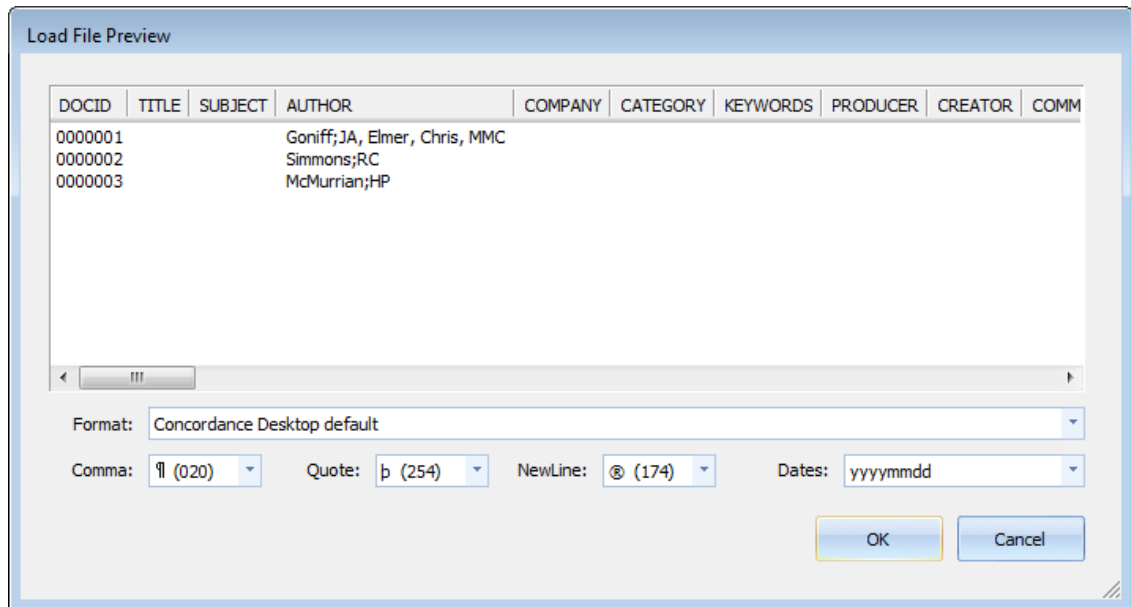
2. Click the **Format** down-arrow and select the format of your update DAT file.

   If all fields appear, you are finished – go to the last step.

   If only some of the fields appear, please continue with the next step.

3. Click on the down-arrow of the delimiter that appears to be causing the issue, and select the appropriate code.

4. Repeat step 3 until all fields appear in the display area.

5. Click **OK**.

   You are returned to the Overlay Database box where you can continue one with step 6 (in the section above) to complete the import of the overlay files.

Creating a database template

Database templates are stored in the Concordance Desktop Templates folder and its subfolders: C:\ProgramData\CloudNine\Concordance Desktop\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 Desktop comes with some 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.

Predefined Database Templates

Predefined Database Templates	
Folder Name	**Template Name**
Templates*	Blank
	Generic 20 Field
	Research Bibliography
	*The Templates folder is displayed as the General tab in the Create database from template dialog box.
E-DOCS	E-Documents
	E-mail And Attachments
LEGAL	Litigation Document Production
	Transcripts

Creating a database template is great for building future Concordance Desktop 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. User Management settings are not included in the template.

To create a database template:

1. In Concordance Desktop, open the database from which you want to create a database template.

2. From the **Documents** menu, click **Export**, and then **Structure**.

   Clicking Structure opens the Copy Structure dialog box.

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.

Moving a registered database

If you need to move the location of a database that has already been registered in Concordance Desktop, you need to complete several steps.

To move a registered database:

1. Unregister the database in Concordance Desktop. See Registering/unregistering a database

2. Move the database folder (including the natives folder) to the new location.

3. Open the Concordance Desktop Admin Console. See Opening the Admin Console

4. Register the database. See Registering/unregistering a database

5. Close the Admin Console.

6. Open the database in Concordance Desktop. See Opening a database

7. Update the path to the Native files. See Renaming file paths and folders

8. Reindex the database. See Indexing and reindexing updates (This step may not be necessary, but suggested)

9. Run the CreateHyperlinks CPL. See CreateHyperlinks

10. Test the path in Concordance Desktop. Open the database again and test a few of the hyperlinks.

Indexing Databases

A Concordance Desktop database must be indexed prior to searching. When an index is run during the creation of a new database, it is actually creating and populating the Concordance Desktop dictionary and index files for the first time. How your database records are indexed ultimately affects how reviewers search for information:

- Full-text searching works only on indexed fields
- Relational searching is for non-indexed fields or keyed fields
- Paragraph fields are indexed by default

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

Indexing versus Reindexing:

- Indexing is performed when the initial database is built, and needs to be performed after every database modification, including changes in fields, punctuation or the stopwords list. Indexing is an exclusive process.

- Reindexing is performed when new records are added to the database or when there are new annotations and modifications to record content. Reindexing appends new information to both the index and dictionary files.

Indexing considerations

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

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

Example: airforce1 or ABC00001

Both *airforce1* and *ABC000001* qualify as index entries and are searchable. Concordance Desktop considers both examples, including both the letters and numbers, to be a word, because there is no space between the characters. Spaces between characters would disqualify them as words; a space between *airforce* and *1* would be read as two words.

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

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

📝 If indexing or reindexing processing speeds seem slow, you may want to increase your Concordance Desktop server's RAM and check your Indexing cache settings on the Settings tab in the Admin Console.

Index files

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

The dictionary file is stored in the database directory folder. The .dct file contains all dictionary words and their hit and document counts.

The inverted text file is accessed along with the .dct file when reviewers perform searches. The .ivt file contains a path to all words, along with the applicable number for each record, field, line, and word for each word in the .dct file.

Both the .dct and .ivt files contain a B-tree data structure, and the size of each file is important. When full-text searches are performed, this process only accesses these two files.

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

Indexing Process

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

Embedded Punctuation

User definable embedded punctuation is provided so that hyphenated words, dates, decimal numbers, and contractions are not split into two or more words. By default Concordance Desktop uses ` . , / characters for embedded punctuation. Note that the hyphen is not included in the default set. You may want to include them, but it is recommended that you leave them out. Proper names, such as *Mary Smith-Jones*, would only be searchable under the Smith prefix if hyphens were used as embedded punctuation. Use the Punctuation field in the Modify dialog box to change the default characters.

Case Sensitivity

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

Word Length

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

Stopwords

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

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

For more information about stopwords, see Updating the stopwords list.

Indexing and reindexing updates

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

During the creation of a load file database, you can select the option to run the index automatically after the import process. However, if that option is not selected, have an option to have the database automatically indexed during the

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

For information about indexing and reindexing concatenated databases, see Indexing and reindexing concatenated databases.

Indexing databases

Running a full index is necessary after you create a new database, if the database status in the Admin Console displays that the database has not been indexed. However, there will also be times when you need to perform full index updates to include modifications to the dictionary, stopwords list, and punctuation settings. Running a full index is an exclusive process and only the administrator can access the database at that time.

When performing a full index, please consider the following:

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

💡 You may find it useful to maintain an email distribution list for the review team for times when you need to ask everyone to exit a database.

On the **File** menu, Concordance Desktop adds a check mark next to the Index command:

File		
New	Ctrl+N	
Open...	Ctrl+O	
Connect...		
Snapshot		▶
Close		
Modify		
Reindex		
✓ Index		
Dictionaries		▶
Administration		▶
Page setup...		
Print preview		
Print...		
Send to		▶
Properties...		
Begin program...		
Edit program...		
1 C:\Users\...\TestEmail.DCB		
2 C:\Users\...\TestEDOC.DCB		
Exit		
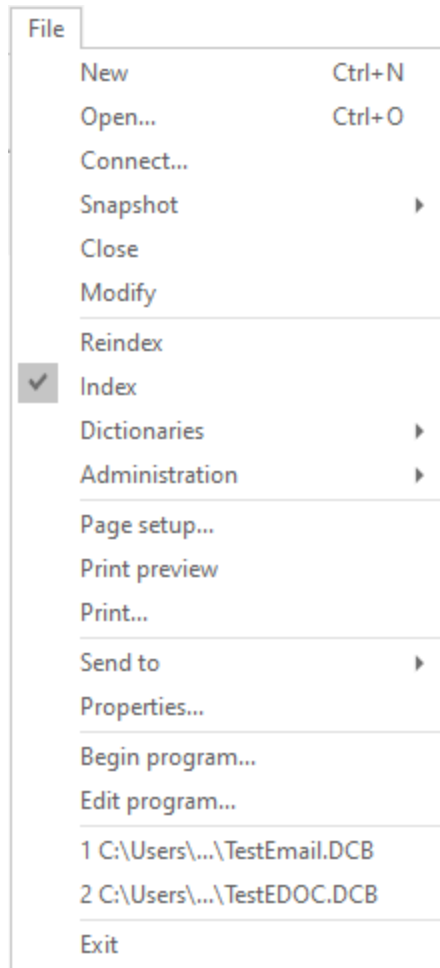
In the **Databases** task pane, *Needs Reindexing* is displayed in the Current Databases panel:
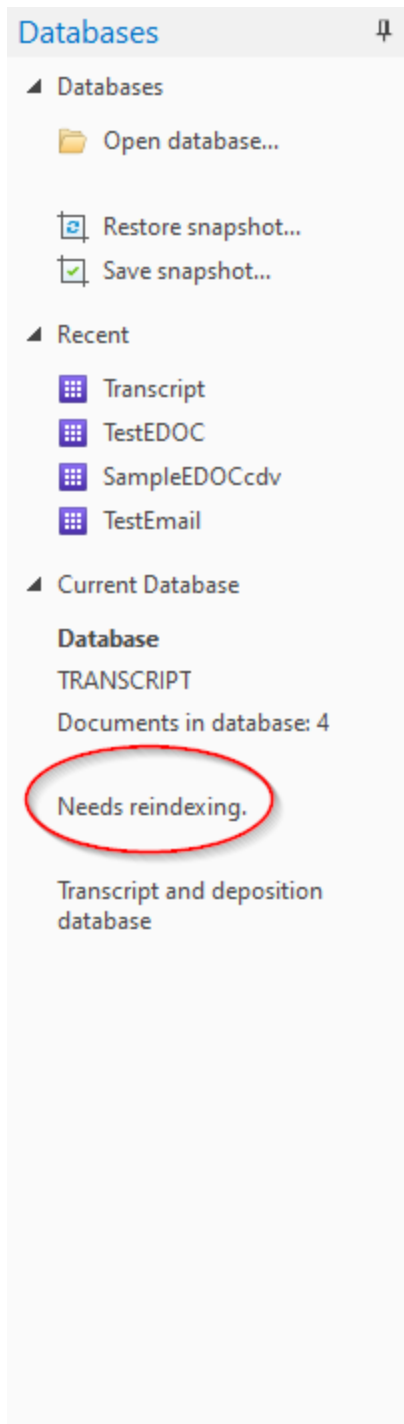
In the Admin Console, under the **Management** tab when you click on the **Databases** folder:
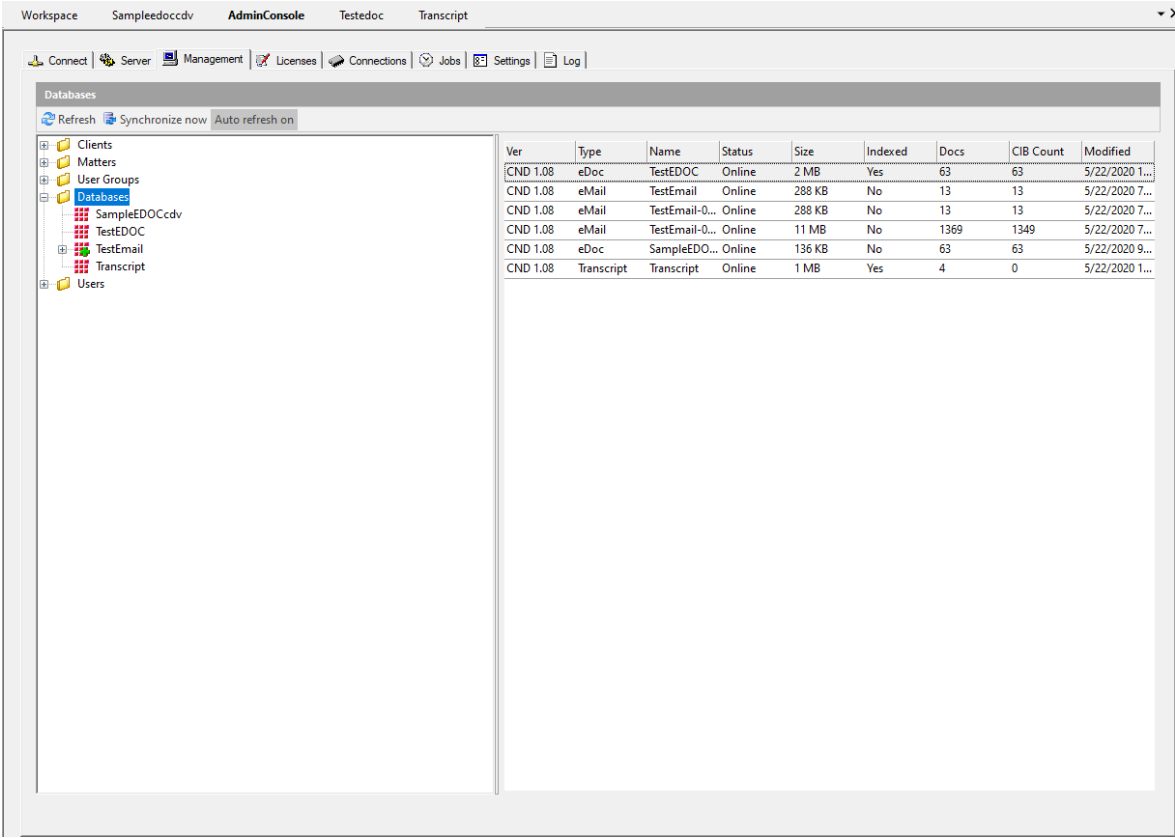
In the Indexed column in the table on the right, *Yes* indicates that the database has been indexed, while *No* indicates that it needs to be.

In the Admin Console, under the **Management** tab, when you click on the **Databases** folder, and then click on a **database name**.
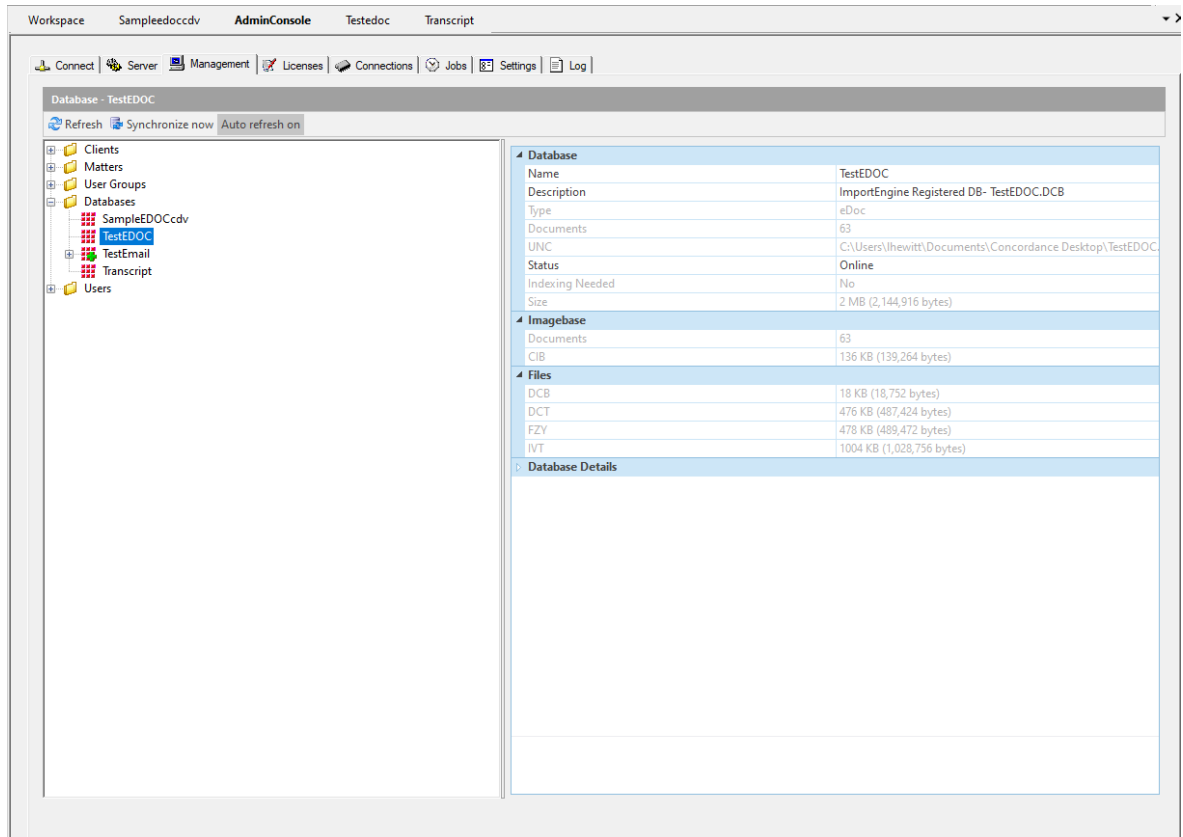
Under the Database heading in the pane on the right, there is a row for *Indexing Needed*. A *Yes* in this column indicates that the database needs to be indexed, while a *No* indicates that the database has already been indexed.

<u>**To index a database:**</u>

On the **File** menu, click **Index**.

<u>**Reindexing Databases**</u>

You can determine whether a database needs reindexing on the File menu and the Databases task pane, or in the Admin Console when you have the Management tab open and you click on the Databases folder. A database needs reindexing whenever the database dictionary is not current with the additions or changes that have been made to the database since the database was last indexed or reindexed.

On the **File** menu, Concordance Desktop adds a check mark next to the Reindex command:

File		
New	Ctrl+N	
Open...	Ctrl+O	
Connect...		
Snapshot		▶
Close		
Modify		
Reindex		
✓ Index		
Dictionaries		▶
Administration		▶
Page setup...		
Print preview		
Print...		
Send to		▶
Properties...		
Begin program...		
Edit program...		
1 C:\Users\...\TestEmail.DCB		
2 C:\Users\...\TestEDOC.DCB		
Exit		
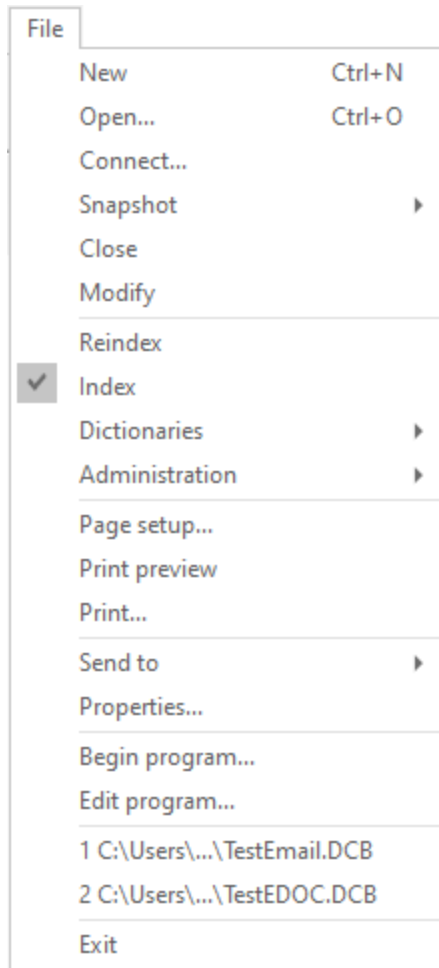
In the **Databases** task pane, *Needs Reindexing* is displayed in the Current Databases panel:
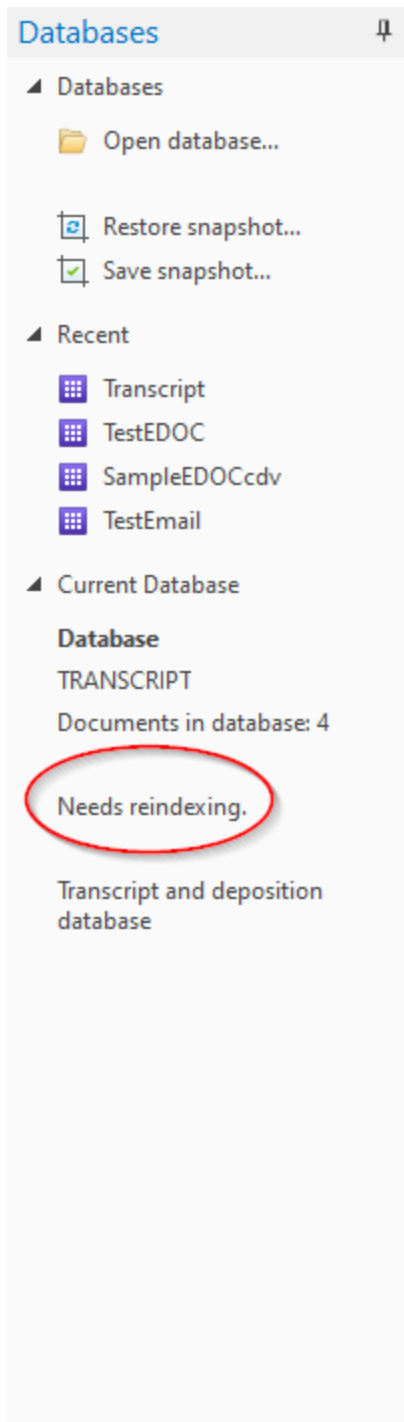
When performing a reindex, please consider the following:

- Run a query on edited records or those marked for deletion. To do this, on the Search menu, click Search for edited documents.

To reindex a database:

On the **File** menu, click **Reindex**.

Finding the database indexing time

Knowing the indexing time for databases can help you plan your indexing schedules. Once you have built your databases, you can find out how long it takes to index each database by checking the Concordance Server.log file. The Concordance Server.log file is stored in the Working Path directory usually found at C:\ProgramData\LexisNexis\Concordance Desktop\Working Path.

To find a database's indexing time:

1. Navigate to the Concordance Desktop Server Working Path folder containing the **Concordance Server.log** file.

   The default directory is C:\ProgramData\LexisNexis\Concordance Desktop\Working Path.

2. Right-click the **Concordance Server.log** file, click **Open With**, and then **Notepad** or another text editor program to open the **.log** file.

3. Locate the database name and indexing time.

The indexing time is listed after the database name. The .log file also displays the amount of cache used during processing, the number of database records, and the user who performed the index.

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

Updating the stopwords list

Stopwords are the most common words in the English language (and, the, but, etc.). Stopwords are not words that are generally searched for by reviewers. Eliminating stopwords from the index ensures that searches run much faster and efficiently. Stopwords are stored in the [database name].STP file. Concordance Desktop automatically creates a list of 141 stopwords in .STP file.

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

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

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

To update the stopwords list:

1. On the **File** menu, click **Dictionaries**, and then **Stopword list**.

   Clicking Stopword list opens the Stopwords dialog box.
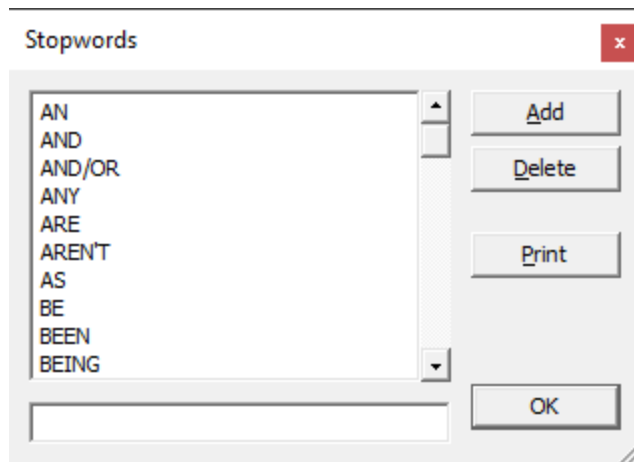
2. To add a word to the Stopword list, type the word you want to add in the field below the Stopword list, and click the **Add** button.

   Wildcards can be used with stopwords to eliminate large groups of words. For example, adding 9* to the stopwords list eliminates every word or number beginning with the character 9 from the database dictionary.

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

3. To search for a stopword, type all or part of the word in the field below the Stopword list.

   As you type, the list scrolls to the word closest to the word you are typing. You can also use the scroll bar and buttons to find a word in the list.

4. To delete a word from the Stopword list, click the word in the list, and click the **Delete** button.

5. To print the Stopword list, click the **Print** button.

6. Click **OK** to save your changes.

7. Index the database to update your database.

   Stopword list changes will not apply to searches until a full index is run.

Adjusting punctuation settings

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

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

- Punctuation is listed in the Punctuation field on the New or Modify dialog box to be indexed
- Punctuation is embedded in a string of characters

You can find what punctuation is full-text searchable in a database, when it's embedded in a string of characters, by checking the Punctuation field in the database properties dialog box. By default, Concordance Desktop includes the apostrophe, period, comma, and forward slash. You may want to add symbols like the ampersand and the at sign for e-mail databases.

Examples: Embedded Punctuation

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

To adjust punctuation settings:

1. On the **File** menu, click **Modify** to open the **Modify** dialog box.

2. In the **Punctuation** field, add or delete the applicable punctuation.

3. Click **OK** to save your changes.

4. Run a full index to update the database dictionary with the punctuation changes.

Reviewing the dictionary

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

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

For example, creating a word that includes the file name and path can create a word longer than 64 characters that is not found in the database.

You can review dictionary entries in three areas:

- The database properties dialog box displays the number of words included in your dictionary and the punctuation that is indexed.
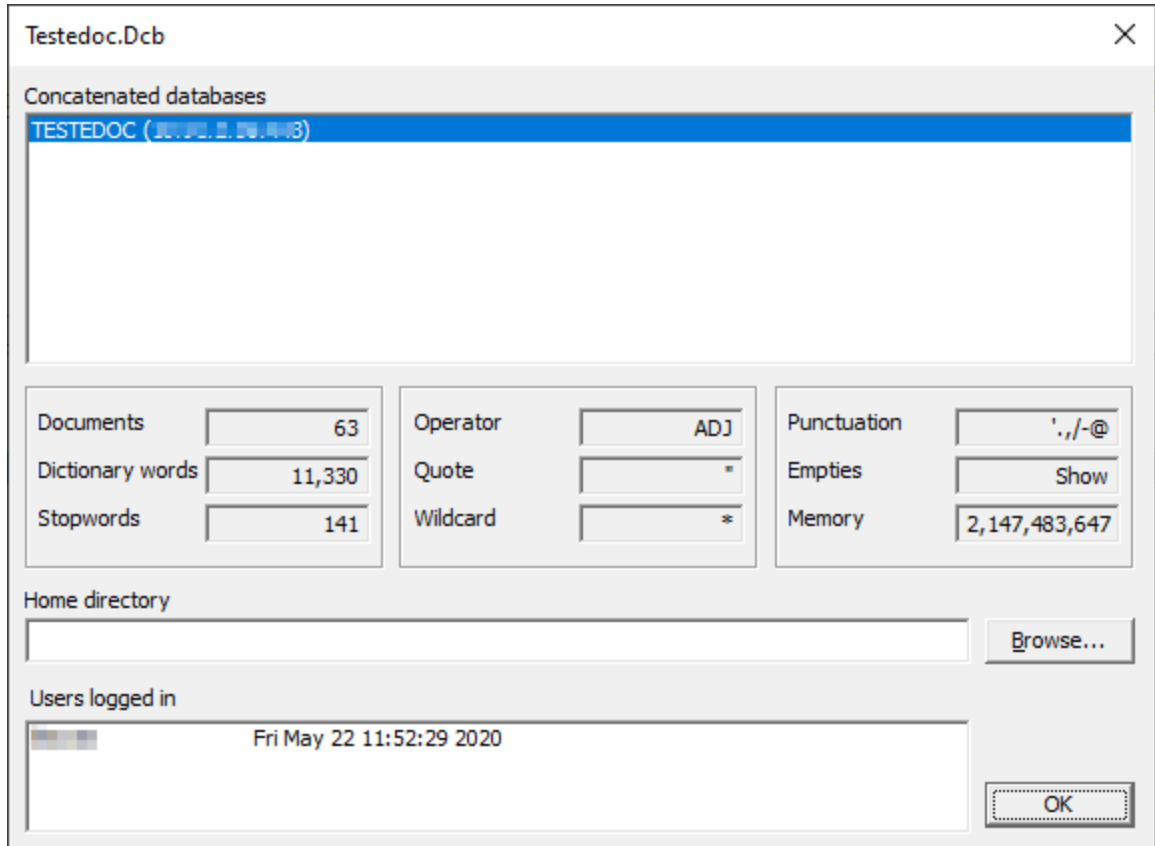
- The Dictionary dialog box accessed from the File menu provides a complete listing of all the words included in the dictionary, the number of documents each word appears in, and how many word hits there are for each word in the dictionary.

  To search for a word in the dictionary, type all or part of the word in the field below the word list.

Word	Hits	Doc...
ACADEMY	2	2
ACADEMY	10	4
ACADIAN	2	1
ACCELERATING	1	1
ACCELERATION	1	1
ACCENTS	2	2
ACCEPTABLE	13	4
ACCEPTANCE	3	3
ACCEPTED	5	4
ACCEPTING	2	2
ACCEPTS	6	3
ACCESS	47	15
ACCESSED	60	8

Print

From [   ]

To [   ]

Print to file ☐

[Print...]

[OK]
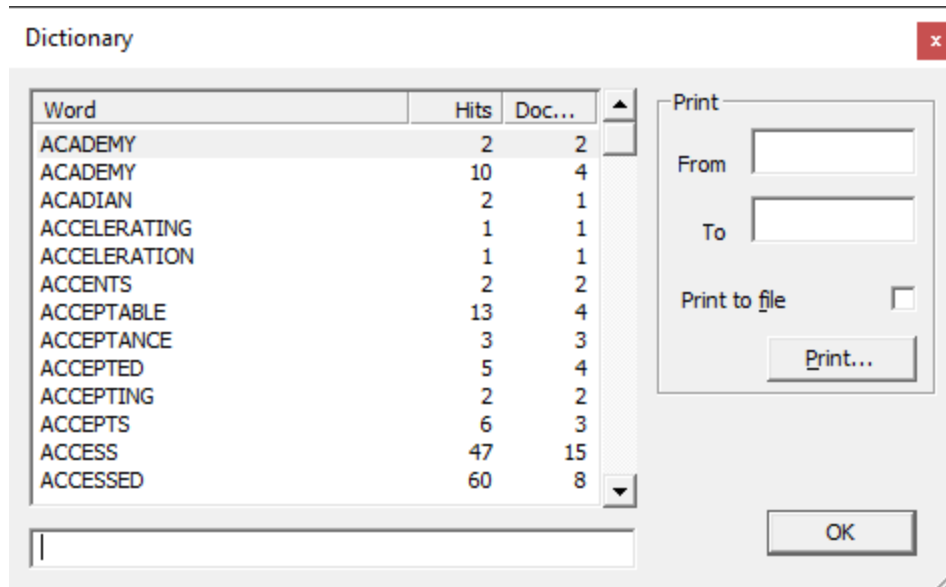
To print the words in the dictionary:

1. On the **File** menu, click **Dictionaries**, and then **Database dictionary**.

2. To print a range of words, in the **From** field, type the first word in the range, in the **To** field, type the last word in the range, and click the **Print** button.

   To print all words in the dictionary, leave the From and To fields blank, and click the Print button.

   To print the dictionary words to a .txt text file, select the Print to file check box before clicking the Print button.

- The Dictionary dialog box accessed from the *Search* pane allows reviewers to select words from the dictionary and add them directly into search logic in the Advanced Search panel.

Creating and Managing Tags

Typically a Concordance Desktop Administrator or Litigation Support Manager works with a lead attorney to build a set of tags for case review that include standard naming conventions and that adhere to internal guidelines for a case review. These tags are often organized into folder structures that indicate phases of review, case topics, or are designated by reviewer. Once tagging conventions are determined, as the administrator

you will most likely be setting up these tags and folders after you build the database so the review team can be begin searching and tagging immediately.

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

Managing tags in Concordance Desktop requires the following:

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

For more information about basic and advanced tagging and tagging strategies, see the topics in the Basic Tagging and Advanced Tagging books under the Using Concordance Desktop book.

Creating tags

Tags can be used to categorize documents for any purpose. Use tags to mark documents for status, witnesses, issues, exhibits, keywords, reviewer assignments, or anything else you want to mark. You can group similar tags or issues by creating a folder and adding tags or issues to that folder. Multiple levels of folders can be created to simplify document reviews. You can also create personal folders and sub-folders to help organize your personal tags and issues.

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

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

There are six ways you can create tags:

- In the Tags task pane
- On the Add/Delete tab in the Tag and Issue Management dialog box
- By writing tags directly in the TRK file

- By writing tags directly in the INI file
- Writing tags from field data
- Importing Tags

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

📝 For a tag folder to exist in Concordance Desktop, it must have at least one tag created in it. There is no known maximum limit on the number of tags you can create and apply in Concordance Desktop.

💡 To create a folder for administrative tags, name it zAdmin so it displays at the end of the tag/folder tree and does not distract reviewers.

📝 A tag name cannot contain more than 199 characters.
When creating tags and folders, the folder and tag string cannot exceed 199 characters.
Example:
The following folder/tag combination would be translated as a total of 45 characters.
001_Reviewer_Assignment
↳Proposal
  ↳Cary_Grant
001_Reviewer_Assignment>>Proposal>>Cary_Grant = 45 characters

To create tags and tag folders in the Tags task pane:

1. Open the **Tags** task pane.

2. To create a new tag folder, right-click the **Tags** task pane, point to **New**, and and then do one of the following:

   - To create a new folder, click **Folder**.
   - To create a subfolder, right-click to select the parent folder, point to **New**, and click **Folder**.

3. Type the name of the new folder and press Enter.

📝 When you are creating a folder, you must add at least one tag to the folder, or the folder will not be saved when you end your Concordance Desktop session. You cannot create empty folders.

Personal folders are pink and can only be viewed by the user who created the folder and the administrator. All public folders are yellow.

For more information about creating personal folders and tags, see Organizing tags.

4. To create a new tag, do one of the following:

    • To create a tag in a folder, right-click to select the folder, point to **New**, and
      then click **Tag**.

    • To create a tag outside of a folder, without selecting a folder, right-click in the
      Tags task pane, point to **New**, and click **Tag**.

5. Type the name of the new tag and then press **Enter**.

To create tags and tag folders in the Tag and Issue Management dialog box:

1. On the **Tools** menu, click **Manage Tags/Issues**.
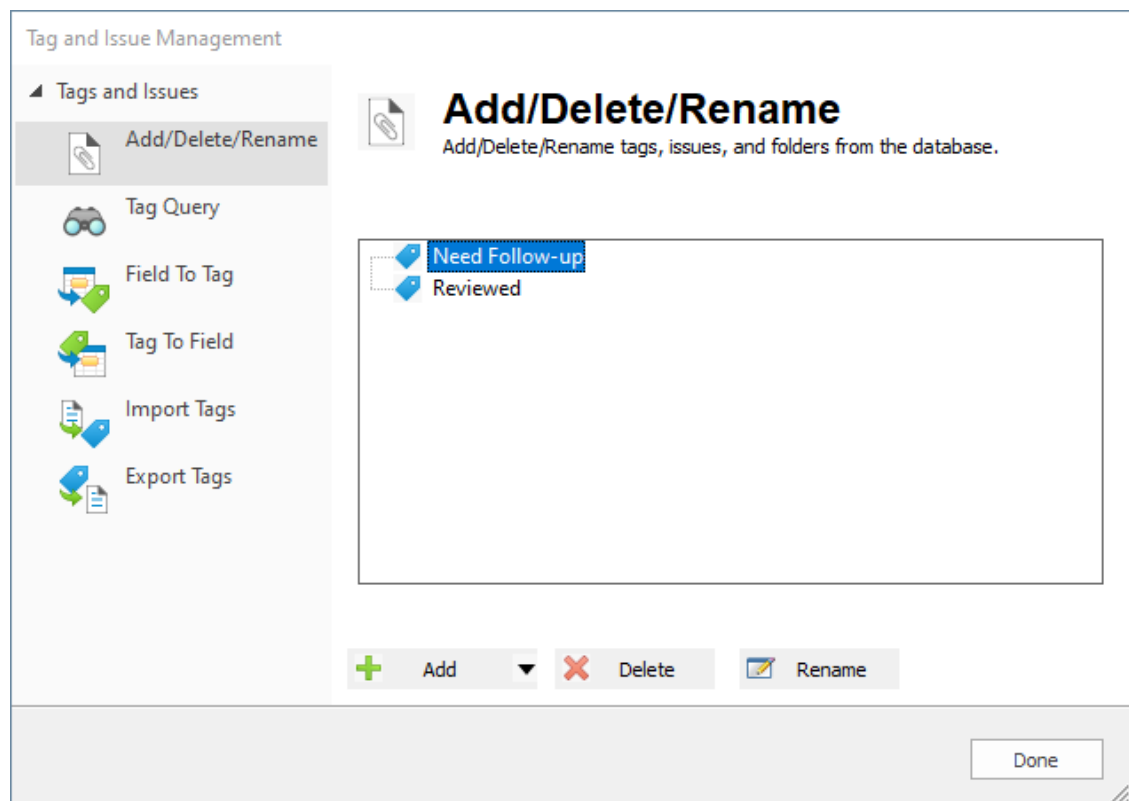
2. In the **Tag and Issue Management** dialog box, to create a tag folder, do one of
    the following:

    • To create a tags folder, click the arrow next to the **Add** button, and click **Folder**.

    • To create a tags subfolder, click the parent folder, then click the arrow next to
      the **Add** button, and click **Folder**.

3. Type the name of the new folder and press Enter.

When you are creating a folder, you must add at least one tag to the folder, or the folder will not be saved. You cannot create empty folders.

4. In the **Tag and Issue Management** dialog box, to create a tag, do one of the following:

   - To create a tag in a folder, click the folder, click the arrow next to the **Add** button, and click **Tag**.

   - To create a tag outside of a folder, without selecting a folder, click the arrow next to the **Add** button, and click **Tag**.

5. Type the name of the new tag and press Enter.

6. When you are finished adding the tags and/or folders, click **Done** .

Your new folders and/or tags are displayed in the Tags panel in the Tags task pane.

To delete tags and folders:

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

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

1. On the **Tools** menu, click **Manage Tags/Issues**.

2. In the **Tag and Issue Management** dialog box, click **Add/Delete**, select the tag you want to delete, and then click **Delete**.

3. When prompted, verify whether or not you want to delete the tag.

5. When finished, click **Done**.

The deleted tags are removed from the database and the Tags panel in the Tags task pane.

Organizing tags

Folders are used to organize similar types of tags, allowing you to easily focus on the tags that matter to you at that moment. Once a review has begun, you can review tag history and statistics to see what tags are applied to a document, who applied the tags and

when. You can also perform queries on multiple tags or folders, allowing you to use a document's tag status as part of a complex search.
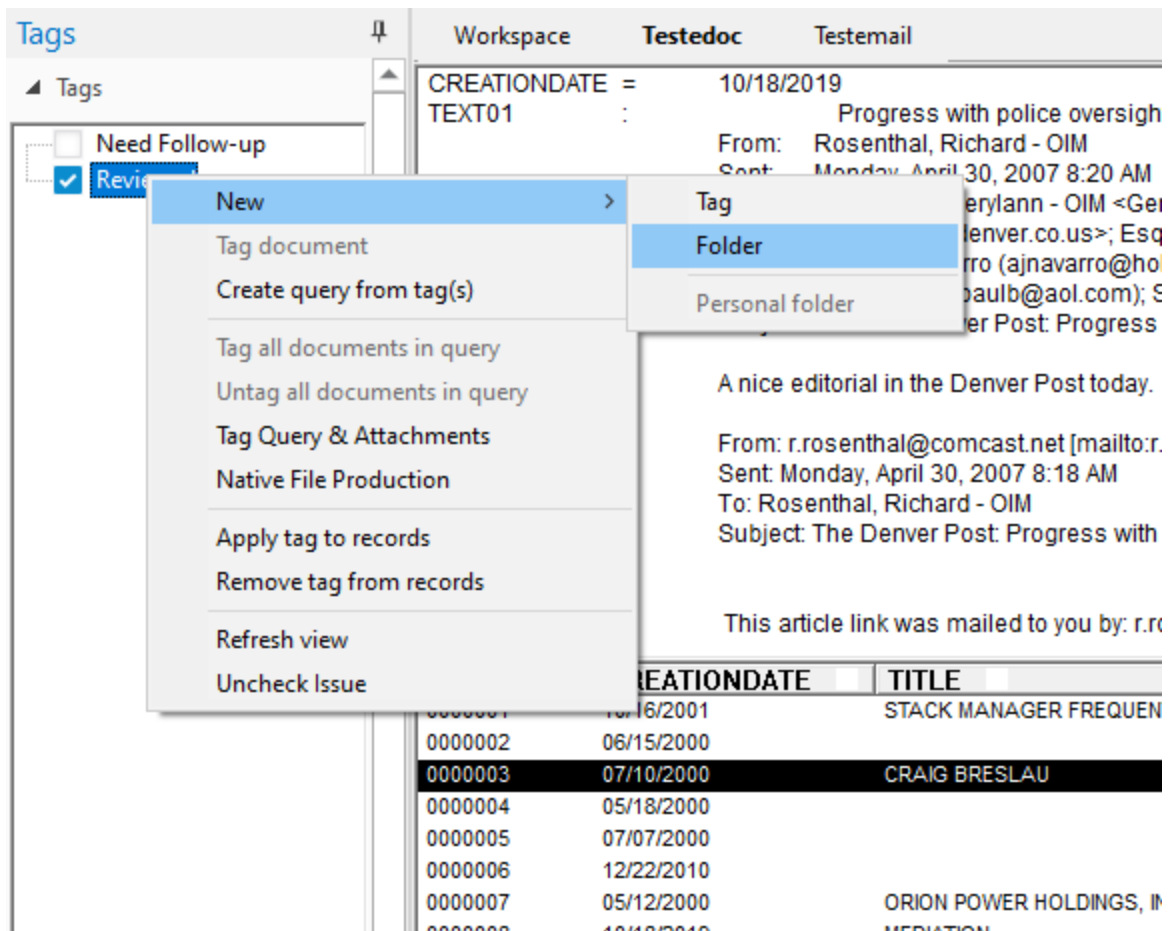
Creating folders

When you create a folder you must add at least one tag to the folder, or the folder will not be saved. You cannot create empty folders.

To create a folder:

1. Open the **Tags** task pane.

2. In the **Tags** task pane right-click, point to **New**, and then click **Folder**.

3. Type the name of the new folder and then press Enter.

4. Right-click the new folder, point to **New**, and then click **Tag** to create a tag within the folder.

5. Type the name of the new tag and then press Enter.

When you are creating a folder, you must add at least one tag to the folder.

To create a folder and set of tags for your individual review of documents, you can easily do so. For more information, see Creating Personal Folders and Tags.

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

Creating Personal folders and tags

To keep the tag panel uncluttered for all users, 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.

1. Open the **Tags** task pane.

2. In the **Tags** task pane right-click, point to **New**, and then click **Folder**.

3. Type the name of the new folder, and then press Enter.

   Personal folders are pink and can only be viewed by the user who created the folder and the administrator. All public folders are yellow.

4. Right-click your personal folder, point to **New**, and then click **Tag** to create a tag within the folder.

5. Type the name of the new tag, and then press Enter.

   When you are creating a folder, you must add at least one tag to the folder, or the folder will not be saved when you end your Concordance Desktop session. You cannot create empty folders.

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

Reorganizing tags and tag folders

1. Open the **Tags** task pane.

2. In the **Tags** task pane, do any of the following:

   - To move a single tag from one folder to another folder, select the tag and drag to the new folder.
   - To move multiple tags, press CTRL and click the tags to move, and then drag the tags to the new folder.

- To move a folder and all the tags in the folder, click the folder and drag to the new location.
- To move multiple folders, press CTRL and click the folder to move, and then drag the folders to the new location.

⚠ For a tag folder to exist in Concordance Desktop, it must have at least one tag in it. If you move all the tags out of a folder, the folder will be deleted.

Importing and Exporting Tags

The Import Tags and Export Tags commands in the Tag and Issue Management dialog box provide the necessary tools to quickly copy tag structures between databases without having to create them manually. You can create a text file from scratch that contains a list of tags and folders similar in format to adding tags using the .INI file. The » ASCII character » (ASCII 187) is used to identify the folder structure for the tags.

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

When creating a tag file, each line represents a tag and every folder must have a tag. The text file format should be written as follows:

Type	Structure	Example
Single Tag	Tag	Junk
Tag with Folder	Folder»Tag	Status»Reviewed
Nested Folders	Folder»Folder»Tag	Production»Production001»To_Produce

```
Database_Tags.txt - Notepad
File  Edit  Format  View  Help
Junk
Production»Production 001»To_Produce
Production»Production 002»To_Produce
Status»Not Reviewed
Status»Privileged
Status»Production
Status»Redacted
Status»Responsive
Status»Reviewed
Witness Kits»Goniff
Witness Kits»Hauser
Witness Kits»Weller
```

Example Tags .txt file for importing tag lists

If you have an existing tag list setup in a Concordance Desktop database, you can export the tags and then import the file into any new or existing database. Only public folders and tags are exported, no personal folders and tags.

<u>**To import tags from a text file:**</u>

1. Make sure that the text file you want to import is formatted correctly.

2. On the **Tools** menu, click **Manage Tags/Issues**.

3. In the **Tag and Issue Management** dialog box, click **Import Tags**.
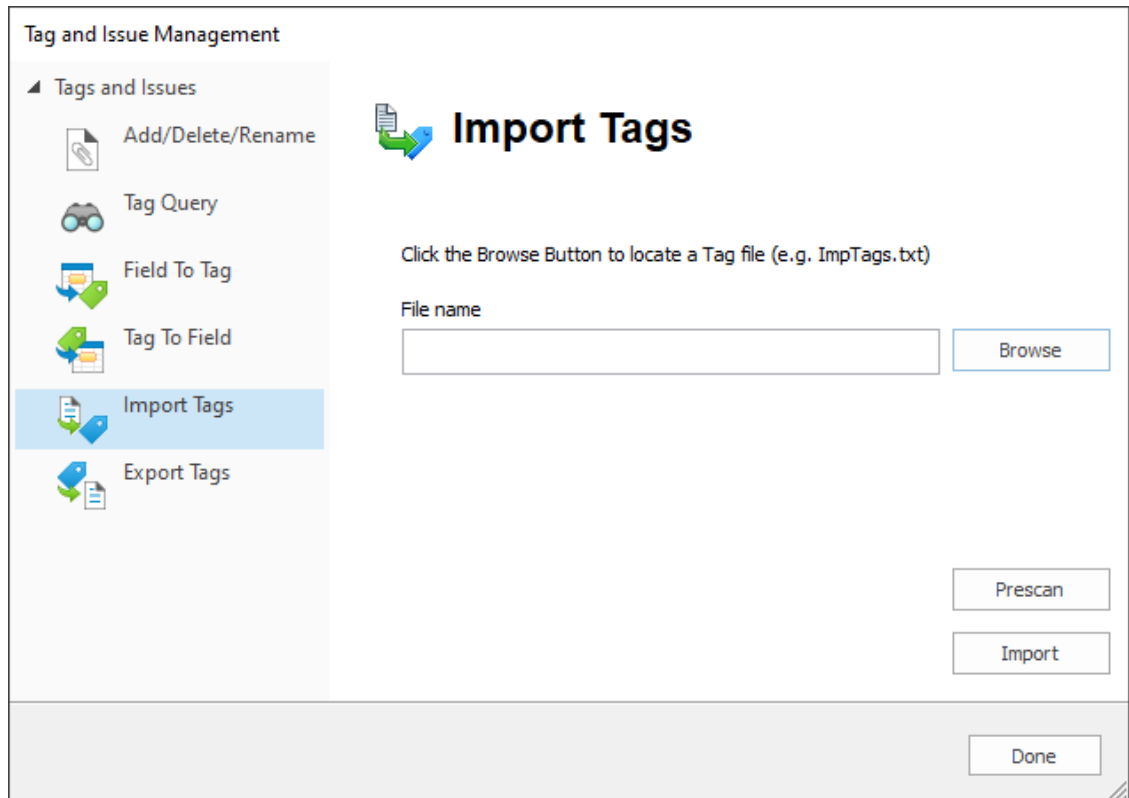
4. Click the **Browse** button, locate and select the text (.txt) file for the tags you want to import, and then click **Open**.

5. (Optional) Click the **Prescan** button to scan the file for unsupported characters, tag names that are longer than 199 characters, and any delimiter issues.

6. When the Prescan is complete, do one of the following:

   - If no errors are found, click **Done** to close the Prescan dialog box.

- If errors are displayed in the dialog box, click the **Export** button to export the list to a comma separated (.csv) formatted file, find and fix any errors, and then rerun the **Prescan** to ensure all the errors have been resolved.

8. Click the **Import** button.

9. When finished, click **Done** and then verify that the **Tags** pane contains the tags imported from the text file.

To export tags to a text file:

1. On the **Tools** menu, click **Manage Tags/Issues**.

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

2. In the **Tag and Issue Management** dialog box, click the **Export Tags** button.
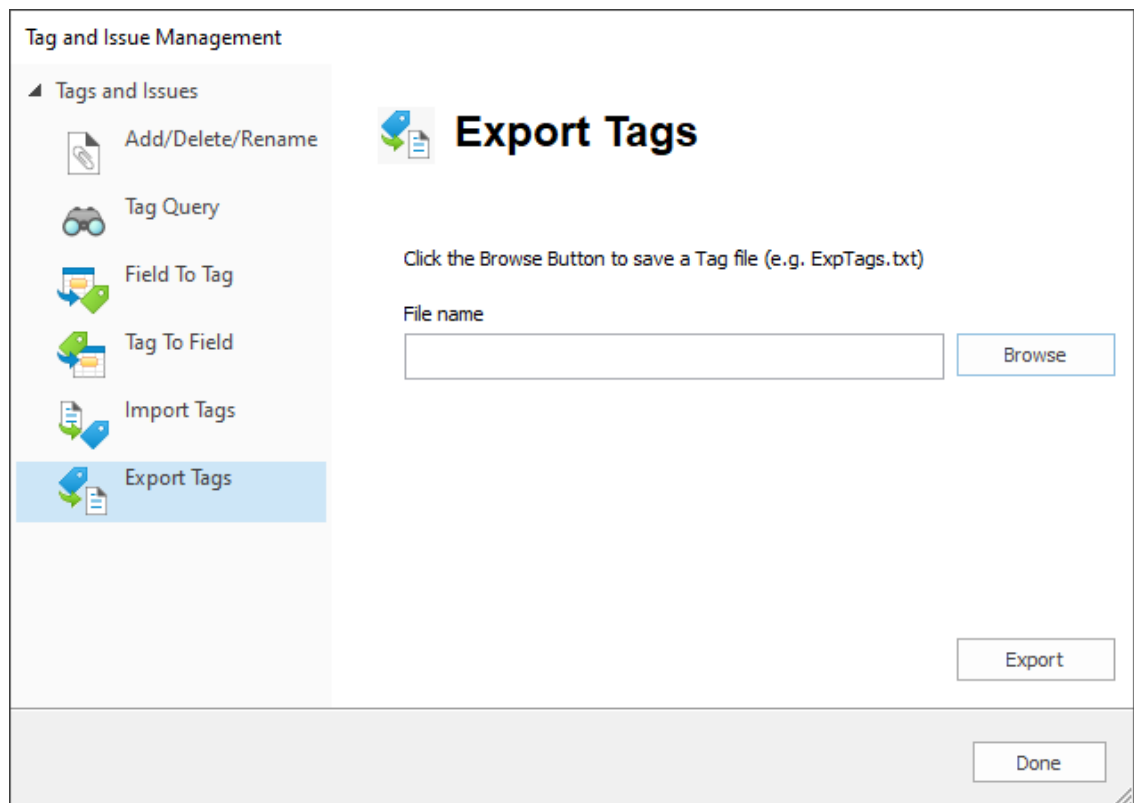
3. Click the **Browse** button, navigate to the location where you want to save the tags text (.txt) file, and then then click **Open**.

4. Click the **Export** button.

5. When finished, click **Done**, and then open the exported text file, and review the exported folders and tags.

Writing tags in the TRK file

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

You can manually add individual tags to a database's .trk file, or can copy the tags from one database's .trk file to another database's .trk file.

<u>**To manually add a tag to a .trk file:**</u>

1. In Concordance Desktop, open the database you want to add a tag.

2. On the **Tools** menu, click **Manage List Files** to open the List File Management dialog box.
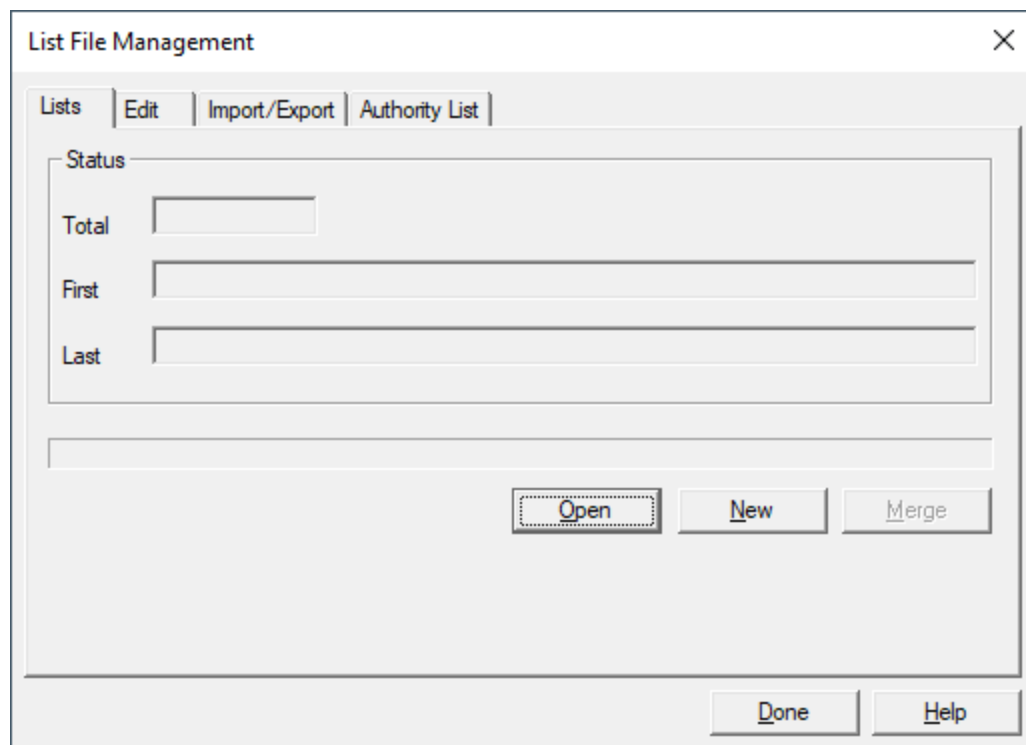
3. On the **Lists** tab, click the **Open** button.

4. In the Open dialog box, locate and open the database's .trk file.

The selected .trk file's data is loaded into the List File Management dialog box.

5. Click the **Edit** tab to view all of the records in the database's .trk file.

6. In the **Key** field, replace the existing text in the field with the new tag name, make sure that the tag name begins with the $ symbol.

   To add the tag to an existing tag folder or create the tag in a new folder, add the folder name before the tag name and separate the folder name and tag name with the » ASCII character 187. The character is used to identify the folder structure of the tag.

   For more information about delimiter characters, see About delimiter characters.

   Examples:

   To add a tag, type $Tag Name.

   To add a tag to an existing or new tag folder, type $Folder Name»Tag Name.

7. If this is a new tag that has not been applied to any documents in the database, type a zero in the **Data value** field.

8. Click the **Add** button.

   Clicking the Add button adds the tag to the database's .trk file, and the record list on the Edit tab.

9. Click the **Done** button to close the List File Management dialog box.

10. Open the **Tags** task pane or **Tag and Issue Management** dialog box to verify that the new tag and tag folder are now displayed.

    If the Tags task pane was open while you added the tag, the newly added tag and folder will not be displayed until you leave and reopen the Tags task pane. For example, open the Databases task pane and then reopen the Tags task pane.

To copy tags from one database to another:

To copy tags from one database to another, you first need to export the tags and then import the tags into the other database.

To export tags from a database:

1. In Concordance Desktop, open the database you want to copy tags from.

2. On the **Tools** menu, click **Manage List Files**.

Clicking Manage List Files opens the Lists tab in the List File Management dialog box.

3. Click the **Open** button.

4. Locate and open the database's .trk file.

   Clicking Open loads the selected .trk file's data into the List File Management dialog box.

5. Click the **Import/Export** tab.

6. Select the **Export** option in the **Import/Export** section.

   By default, in the Data value delimiter section, the Include data values check box is selected, the Comma delimiter option is selected.

   List files exported or imported with both the key value and the data value must use a delimiter to separate them. The key entry is always first, followed by a delimiter, and then the numeric data value.

7. To export the database's tags, leave the **Include data values** check box selected, and select the applicable delimiter.

   If the delimiter is not a comma or tab, click the Other option and select the applicable delimiter from the delimiter list.

   The delimiters available from the delimiter list may appear as square symbols or may not be displayed. How this list is displayed depends on the computer's language environment. The delimiters listed in the About delimiter characters topic use the Tahoma font, which displays the characters regardless of the language environment. All of the characters listed in the delimiter character list can be selected as the delimiter, even if the symbols they represent do not appear in the delimiter list.

   To see the list of available delimiter characters, see About delimiter characters.

8. In the **Range** section, select one of the following:

   - **All entries –** All entries in the database's .trk file are exported
   - **Range –** Only the range defined in the **From** and **To** fields is exported from the database's .trk file. If you select **Range**, in the **From** field type the first entry in the range, and in the **To** field, type the last entry in the range.

9. Click the **Export** button.

   Clicking the Export button opens the Save As dialog box.

10. Browse to where you want to save the .txt file generated by the export, type the .txt file name in the **File name** field, and click **Save**.

Clicking Save saves the .txt file in the directory you selected and closes the Save As dialog box.

11. Click the **Done** button to close the **List File Management** dialog box.

12. In any text editor program, navigate to and open the exported .txt file.

Delimited text files can be opened with any text editor program, such as Notepad. We recommend using an advanced text editor program like TextPad or UltraEdit.

All Concordance Desktop database tag and tag folder entries in the exported .txt file begin with a $ symbol.

13. Select all records in the .txt file that do not begin with the $ symbol, and delete them.

There should now only be tag and tag folder records in the .txt file.
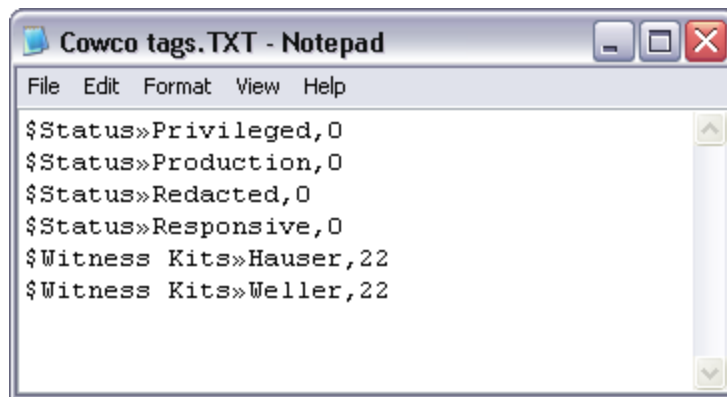
14. Save the modified .txt file and close the file.

If you do not want to overwrite the originally exported .txt file, be sure to save the modified .txt file with a different file name.

To import tags from another database:

1. In Concordance Desktop, open the database you want to copy the tags from.

2. On the **Tools** menu, click **Manage List Files**.

Clicking Manage List Files opens the Lists tab in the List File Management dialog box.

3. Click the **Open** button.

4. Locate and open the database's .trk file.

   Clicking open loads the selected .trk file's data into the List File Management dialog box.

5. Click the **Import/Export** tab.

6. In the **Import/Export** section, select the **Import** option.

   By default, in the Data value delimiter section, the Include data values check box is selected, the Comma delimiter option is selected.

   List files exported or imported with both the key value and the data value must use a delimiter to separate them. The key entry is always first, followed by a delimiter, and then the numeric data value.

7. To import the tags .txt file from the other database, leave the **Include data values** check box selected, and select the applicable delimiter option.

   If the delimiter is not a comma or tab, click the Other option and select the applicable delimiter from the delimiter list.

   The delimiters available from the delimiter list may appear as square symbols or may not be displayed. How this list is displayed depends on the computer's language environment. The delimiters listed in the About delimiter characters topic use the Tahoma font, which displays the characters regardless of the language environment. All of the characters listed in the delimiter character list can be selected as the delimiter, even if the symbols they represent do not appear in the delimiter list.

   To see the list of available delimiter characters, see About delimiter characters.

   The options in the Range section are not used during the import.

8. Click the **Import** button.

   Clicking the Import button opens the Open dialog box.

9. Browse to where you saved the modified tags .txt file, click the file name, and click **Open**.

   Clicking Open imports the tags and tag folders in the modified tags .txt file into the database.

10. Click the **Done** button to close the **List File Management** dialog box.

11. Open the **Tags** task pane or **Tag and Issue Management** dialog box to verify that the imported tags and tag folders are now displayed.

If the Tags task pane was open while you imported the tags, the imported tags will not be displayed until you leave and reopen the Tags task pane. For example, open the Databases task pane and then reopen the Tags task pane.

Writing tags in the INI file

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

When tags are created in Concordance Desktop or in the TRK file, the tags are not automatically written to the .ini file. To add tags to the .ini file, you need to manually write them into the file. Once tags are written in the .ini file and available in the Tags task pane. Once a tag is applied, the tags are automatically written to the .trk file.

The » ASCII character is used to identify the folder structure of the tag. The ASCII character for this symbol is 187. You can create a shortcut for the symbol in Microsoft Word on the Symbols tab in the Symbol dialog box. For example, you can create a shortcut of F10+K for this character.

For more information about delimiter characters, see About delimiter characters.

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

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

To write tags in the .ini file:

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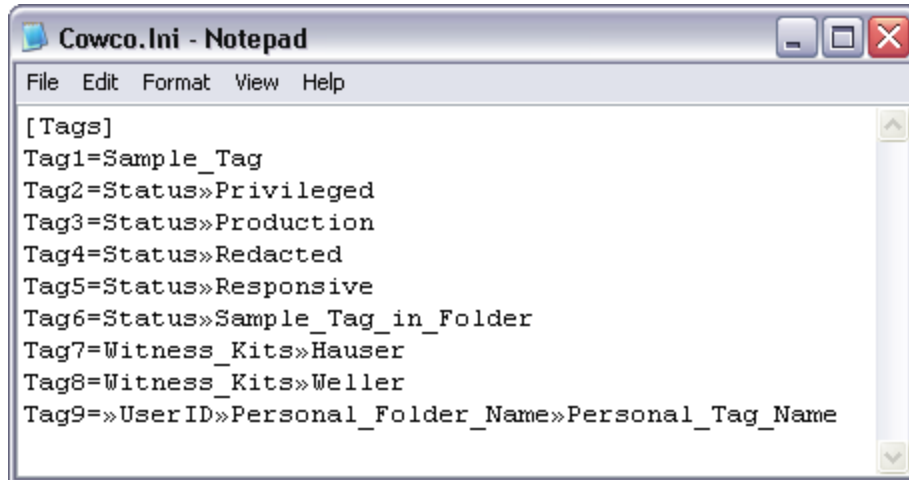
    The .ini file is stored in the same directory as the database .dcb file.

2. Open the .ini file in any text editor program.

✎ INI files can be opened with any text editor program, such as Notepad. We recommend using an advanced text editor program like TextPad or NotePad ++.

In the .INI file, the different database configuration settings are designated by the [] symbols around the configuration category. For example, field groups are listed under [FieldGroups], and added menu items are listed under [AddedMenuItems].

Tags are added after the [Tags] category, and each tag has a separate line in the .ini file.

```
[Tags]
Tag1=Sample_Tag
Tag2=Status»Privileged
Tag3=Status»Production
Tag4=Status»Redacted
Tag5=Status»Responsive
Tag6=Status»Sample_Tag_in_Folder
Tag7=Witness_Kits»Hauser
Tag8=Witness_Kits»Weller
Tag9=»UserID»Personal_Folder_Name»Personal_Tag_Name
```

3. If the .ini files does not have a tags list, type **[Tags]** in a new line to create the tags list.

4. Add the tags below the **[Tags]** line using the following format:

   - To add a tag outside of a folder, type: **Tag#=Tag_Name**

   - To add a tag within a folder, type: **Tag#=Folder_Name»Tag_Name**

   - To add a personal folder and tag, type:
     Tag#=»UserID»Personal_Folder_Name»Tag_Name

   Use underscore characters to indicate spaces in a tag or folder name.

📝 To enter the ASCII character, **»**, press ALT+0187 on the number pad. If you are using a laptop, press ALT+FN+0187 (blue numbered keys - UILKJ and M).

   In the image above, one tag, *Sample tag*, was created outside of a folder. There are five tags, Privileged, Production, Redacted, Responsive, and Sample Tag in Folder, created in the Status Folder, there are two tags, Hauser and Weller, created in the Witness Kits folder, and a personal folder and tag.

5. Save and close the modified .ini file.

6. Open the database in Concordance Desktop.

7. Open the **Tags** task pane to verify that the tags and folders you added are displayed.

If the Tags task pane was open while you wrote tags to the database's .ini file, the tags you added will not be displayed until you leave and reopen the Tags task pane. For example, open the Databases task pane and then reopen the Tags task pane.

Creating tags from data

The Field To Tag feature copies the contents within a selected field to a create tags in the Tags pane.

📝 When selecting a field to create a tag from, ensure that you select a field that is listed before your OCR numbered fields.
Example:
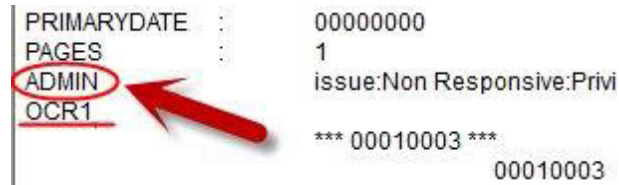
In this example, we are selecting the ADMIN field, which appears before the OCR1 field.

📝 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 are prompted to make corrections. The Prescan option scans the field data for any invalid tag names.

Creating tags from data within a specified field

1. On the **Tools** menu, click **Manage Tags/Issues**.

2. In the **Tag and Issue Management** dialog box, click the **Field To Tag** button.
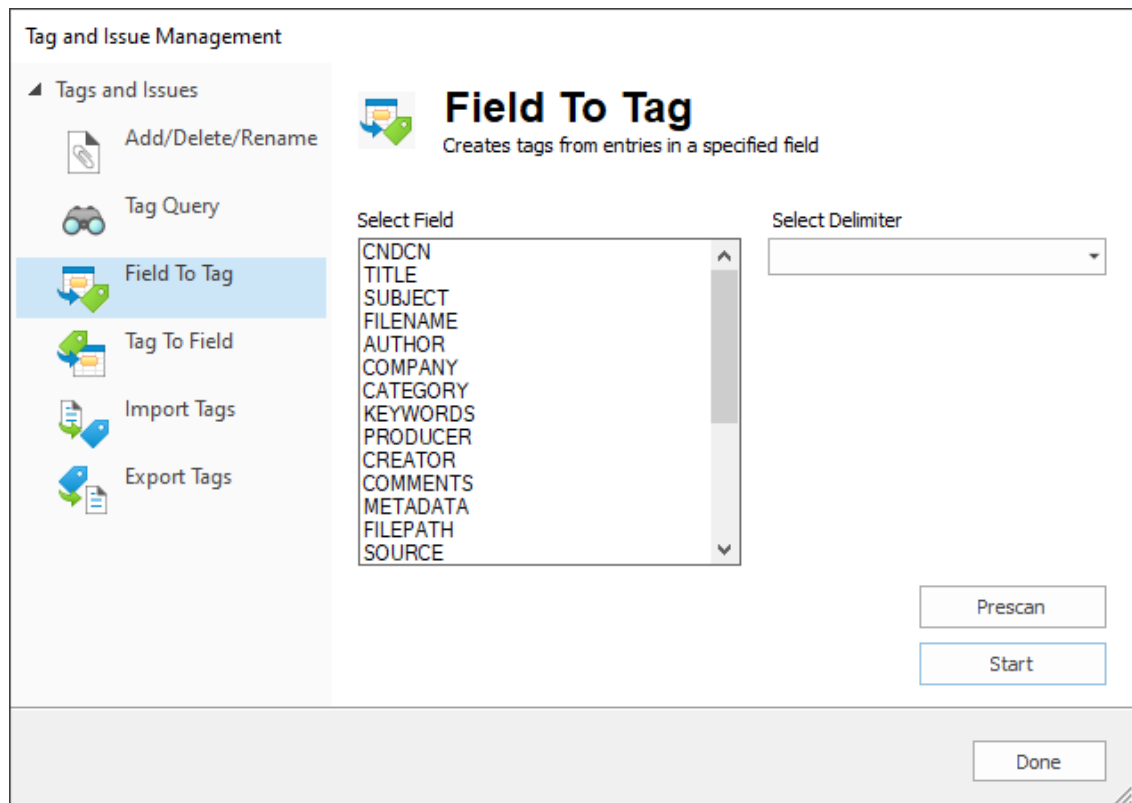
3. From the **Select Field** list, select the field for the values you want to convert to tags.

4. From the **Select Delimiter** list, select the delimiter to use to separate the tags in the field.

5. (Optional) Click the **Prescan** button to scan the data in the specified field for unsupported characters, tag name size (limited to 199 characters) and delimiter issues.

    Any resulting errors are displayed in the Prescan dialog box.

6. When the Prescan is complete, do one of the following:

    - If no errors are found, click **Done** to close the Prescan dialog box.
    - If errors are found, click the **Export** button to export the list to a comma separated (.csv) formatted file, find and fix any errors, and then rerun the **Prescan** to ensure all the errors have been resolved.

7. Click the **Start** button.

8. When finished, click **Done**, and then verify that the Tags pane contains the tags that match the values in the specified field. For every value in the field, you should have a matching tag.

Applying tags to queries

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

To apply tags to queried documents:

You can apply tags to queried documents from the Tags task pane and the Tag and Issue Management dialog box. For more information about adding or removing tags from queries in the Tags task pane, see Tagging records.

1. Run a search for the documents you want to locate and tag.

    For more information about searching, see Available search tools.

2. On the **Tools** menu, click **Manage Tags/Issues**.

    Clicking Manage Tags/Issues opens the Add/Delete tab in the Tag and Issue Management dialog box.

3. Click the **Tag Query** tab.
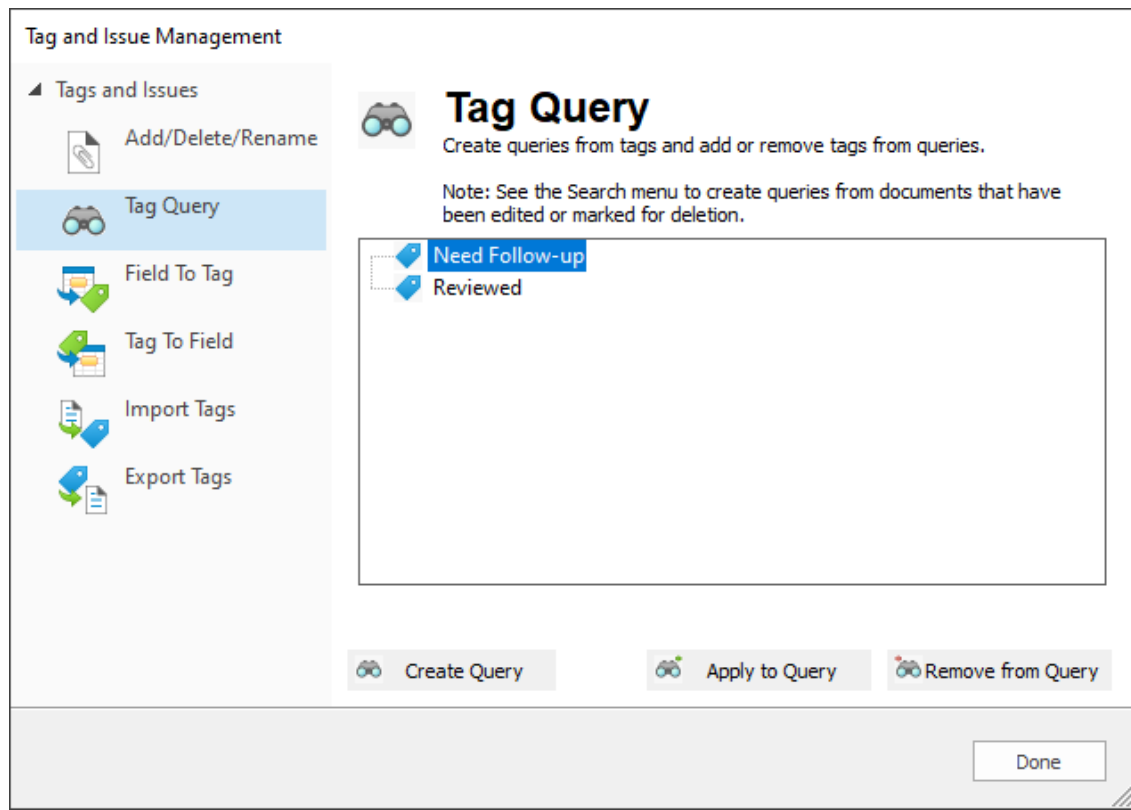
4. Click the tags you want to apply to the documents in the query you ran.

    To select multiple tags, use CTRL+click or SHIFT+click.

5. Click the **Apply to Query** button.

    The number of tags applied displays in the bottom right corner of the dialog box.

    To remove tags from the current query, select the tags on the Tag Query tab and click the Remove from Query button.

Querying tags and folders

Running a query from a tag is a simple way to locate all records that have a particular tag applied to them. You can also query a tag folder to locate all tagged documents within a folder.

To query tags and folders:

You can query tags and folders from the Tags task pane and the Tag and Issue Management dialog box. For more information about querying tags and folders in the Tags task pane, see Creating queries from tags.

1. On the **Tools** menu, click **Manage Tags/Issues**.

   Clicking Manage Tags/Issues opens the Add/Delete tab in the Tag and Issue Management dialog box.

2. Click the **Tag Query** tab.
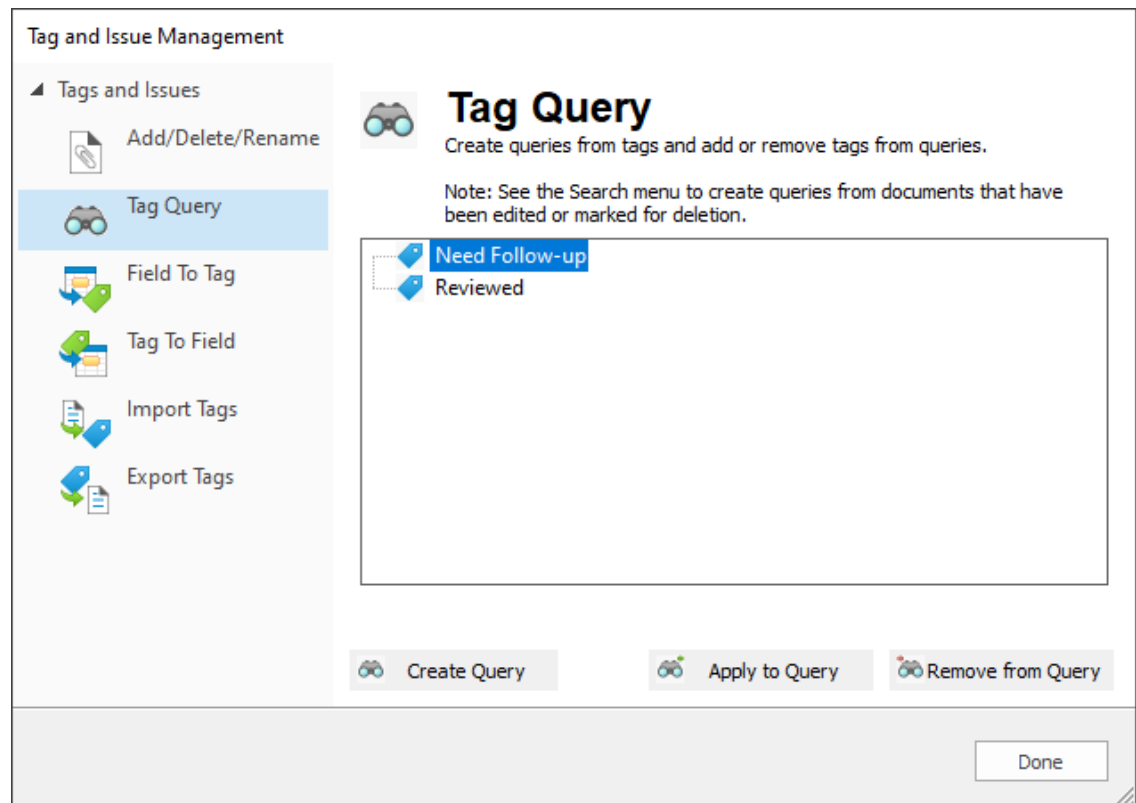
3. Click the tags and/or folders you want to create a query.

   To select multiple tags and folders, use CTRL+click or SHIFT+click.

4. Click the **Create Query** button.

   Clicking the Create Query button generates the query for the selected tags and/or folders. The number of documents found in the query is displayed in the bottom right corner of the Tag and Issue Management dialog box.

   Concordance Desktop stores all searches from a current session in the Review view. Your new query is listed in the query list in the Review view.

Managing tags and folders

On occasion you may need to add/remove, reorganize, or rename a tag or tag folder due to a misspelling or shift in document categorization during case review phases. This process is not the same as renaming a folder or tag in a Microsoft Word or Outlook menu tree. In Concordance Desktop the process should be controlled by administrators to ensure that ample backups and tag history is captured before the tag and folder structure is altered.

For more information about reviewing and capturing tag history, see Storing tag history.

For more information about backing up tags, see Backing up tags.

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

📝 Before renaming a tag or tag folder, it is best practice to run the TagHistoryandStoreIt.cpl to capture a current query of all tag history before transferring documents to a new tag.

📝 The maximum length for tag names is 199 characters.

Reorganizing tags and tag folders:

1. On the **Tools** menu, click **Manage Tags/Issues**:

2. In the Tag and Issue Management dialog box, on the **Add/Delete/Rename** tab, do any of the following:

   - To move a single tag from one folder to another folder, select the tag and drag to the new folder.
   - To move multiple tags, press CTRL and click the tags to move, and then drag the tags to the new folder.
   - To move a folder and all the tags in the folder, click the folder and drag to the new location.
   - To move multiple folders, press CTRL and click the folder to move, and then drag the folders to the new location.

   ⚠ For a tag folder to exist in Concordance Desktop, it must have at least one tag in it. If you move all the tags out of a folder, the folder will be deleted.

To rename tags and tag folders:

1. Run the **TagHistoryandStoreIt.cpl** to capture a current query of all tag history before transferring documents to a new tag.

   The default directory for the CPL folder installed with Concordance Desktop is *C: \Documents and Settings\All Users\Application Data\LexisNexis\Concordance Desktop\CPL (Windows XP) or C:\ProgramData\LexisNexis\Concordance Desktop\CPL (Windows 7)*. For more information about CPLs, see About the Concordance Desktop Programming Language Reference and TagHistoryAndStoreIt.

2. On the **Tools** menu, click **Manage Tags/Issues**.

3. In the **Tag and Issue Management** dialog box, click the tag or folder you want to rename, and then click **Rename.**

4. Enter the new tag or folder name.

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

5. Repeat steps three and four for each tag or folder you want to change.

6. When finished, click **Done**.

   Concordance Desktop automatically updates all tagged records with the new tag name.

7. Review the queried records to ensure the tag or folder name is updated.

Viewing tag history

The Tag history panel displays two types of information:

- **Added Tags -** tags that exist on the current document record, including who applied the tag and when it was applied.
- **Deleted Tags -** tags that previously existed on the current document record, but are now removed, including who deleted the tag and when.

As you navigate records, your tag history changes to reflect the history of each selected document.
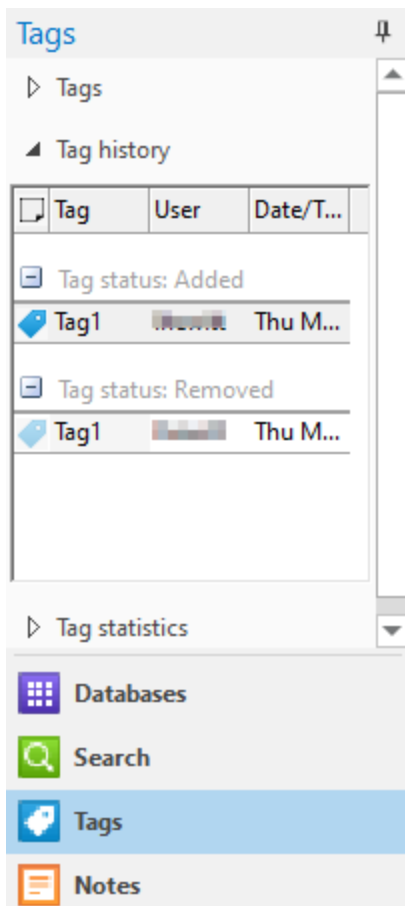
To review tag history:

1. Select a document record that has been tagged.

2. Open the **Tags** task pane and select the **Tag history** panel.

3. Scroll to view all tags that are applied and removed from the current document.

4. Click the plus or minus sign next to the tag status to view or hide a category listing.

Storing tag history

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

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

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

For more information about the exporting Concordance Desktop databases, see backing up databases and Exporting databases.

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

If your database has an existing field named TAGINFO, then you do not need to modify the CPL before running the CPL.
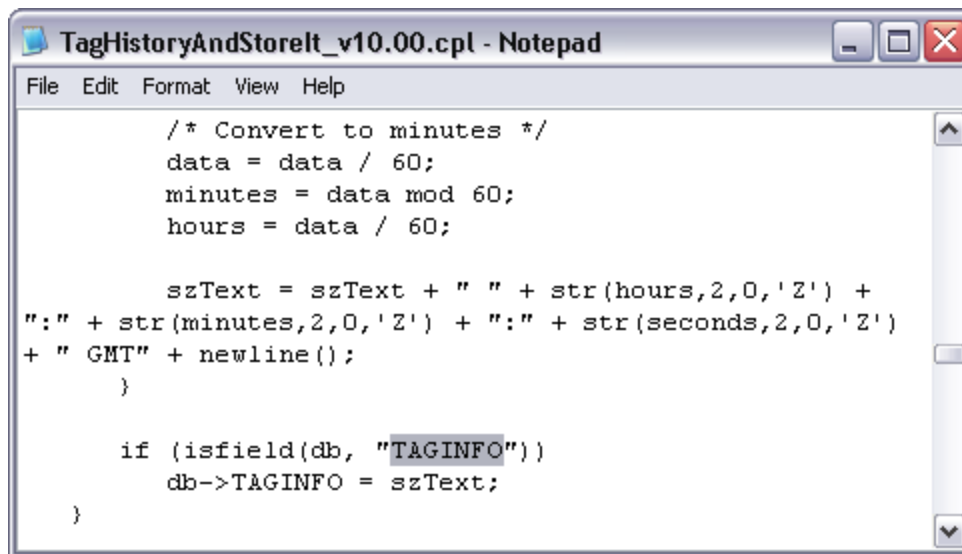
To change the tag history field in the CPL:

1. Open the CPL using a text editor.

   To open the CPL, right-click the **TagHistoryAndStoreIt.cpl** file, point to **Open**, and click **Notepad** or any other text editor program you have.

   Delimited text files can be opened with any text editor program, such as Notepad. We recommend using an advanced text editor program like TextPad or UltraEdit.

2. Search and replace all references to the TAGINFO field with the name of the field you want to use to store your tag history. If you have an existing field named TAGINFO, then you will not need to modify the cpl.

```
TagHistoryAndStoreIt_v10.00.cpl - Notepad          _ □ ✕

File  Edit  Format  View  Help

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

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

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

3. Save your changes and close the **TagHistoryAndStoreIt.cpl** file.

To store tag history:

1. In Concordance Desktop, on the **Standard** toolbar, click the **All** button to query all records in your database.

2. On the **File** menu, click **Begin program**.

3. Navigate to the CPL directory installed with Concordance Desktop, and click the **TagHistoryAndStoreIt.cpl** file.

    The default directory for the CPL folder installed with Concordance Desktop is *C: \ProgramData\LexisNexis\Concordance Desktop\CPL (Windows 7)*. For more information about CPLs, see About CPLs and TagHistoryAndStoreIt.

4. Click **Open**.

    After clicking Open, the CPL automatically extracts your tag history from each database record and adds the tag history to the TAGINFO field, or its equivalent, for each record.

5. Open the **Browse** view and locate the field where you placed the tag history.

    The tag history lists the tags that were added to and removed from the record, when the tags were added or removed, and by whom.

```
TAGINFO          :      Record number: 1
                        Accession number: 1
                        Serial number: [RZ8RBB-1] 1248899837 USER

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

                        Tags deleted:
                        -[RZ8RBB-1] 1248899837 USER   Witness Kits»Goniff      UserID
                        on 07/29/2009 23:14:36 GMT
```

Viewing tag statistics

The Tag statistics panel allows you to monitor the tags applied, in categories by tag or reviewer, for a certain time frame. This feature is useful when monitoring an individual's review progress.
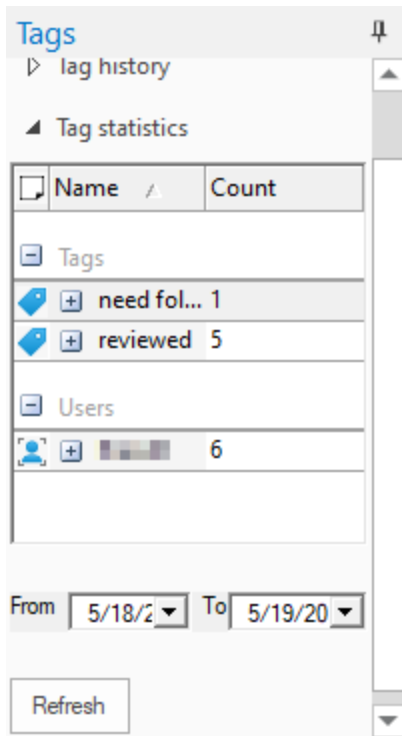
<u>**To review tag statistics:**</u>

1. Open the **Tags** task pane and select the **Tag statistics** panel.

2. In the **From** and **To fields**, select the date range you want to review.

3. Click the **Refresh** button to display the tag statistics.

4. Scroll to view all tags and users listed.

   The Tags list displays the name of the reviewers who applied the tag, and how many records the tag was applied to by the user.

   The Users list displays the tags applied by each reviewer, and how many times the user applied each tag.

5. Click the plus or minus sign next to the users and tags to view or hide the statistics.

Tracking tags in the TRK file

To track and manage your tags, you can review the .trk file that references all tags set in the system at a given time. All tag information is stored in the .trk file, which includes three sections:

- **Index Section -** Review the index to see how many tags a document has applied to it. For example, if there are 10 documents in a database with three tags applied to each document, then there would be 30 records in this section. Every record in the index begins with a hash mark (#).
- **Tag List** - Review this list to locate tag names in your database. One record exists for each unique tag name in the database. So if there were three tags in the database, there would be three records in the tag list. Each record stored in this list begins with a dollar sign ($).
- **Tag History** - Review these items for added and deleted tags. Every record in this section begins with a plus or minus sign (+ or -).

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

  - Personal folders are displayed in the following format:

    »UserName»Personal Folder Name»Tag Name

  - Public folders are displayed in the following format:

    Folder Name»Tag Name

<u>**To review the .TRK file:**</u>

1. On the **Tools** menu, click **Manage List Files**.

   Clicking Manage List Files opens the Lists tab in the List File Management dialog box.

2. Click the **Open** button to open the **Open** dialog box.

3. Browse to and click the database's .trk file, and click **Open**.

   Clicking Open loads the selected .trk file's data into the List File Management dialog box.

4. Click the **Edit** tab.

   All of the records in the database's .trk file are listed on the Edit tab.

5. Review the tag information in the .trk file.

6. When finished, click **Done** to close the **List File Management** dialog box.

Scheduling tag backups

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

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

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

Keep the following in mind when scheduling the TRK backup:

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

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

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

To setup a tag backup schedule:

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

2. **To setup a backup folder to store the files:**

   a. Click the **Add** button.

   b. In the **Configure Backup Directory** dialog box, click the **Browse** button.

   c. In the **Browse for Folder** dialog box, locate and select the directory or folder that contains the database(s) you want to backup tags, and then click **OK**.

      The path for the directory or folder is displayed in the Backup Root Directory field.

      The path for the directory or folder should not exceed 251 characters in length.

   d. From the **Frequency** list, select how ofter to run the backup utility.

   e. In the **Start Time** box, specify the start time for the backup utility.

   f. In the **Maximum # of backup files per DB** field, type the maximum number of backup files to store in the folder for the database.

      When the backup folder reaches the maximum limit, the oldest backup file is replaced with the latest version.

   g. When finished, click **Apply**.

3. **To setup the email notifications:**

   a. In the **Notification** section, select any of the following:
      • Select the **Send Notification when TRK file stops responding** check box to receive an email for non-functioning TRK files.
      • Select the **Send backup summary email after each run** to receive an email outlining the latest backup processes.

   b. Click the **Configure** button.

      c. In the **SMTP Server** field, type the e-mail server to send e-mail notifications.

      d. In the **SMTP Server Port** field, type the port number to use for outgoing mail transport.

      e. In the **Username** field, type the name you want to appear as the author of the e-mail.

      f. In the **Email Address** field, type the email address for the author.

      g. In the **Recipient** field, type the email address for the individual who will receive the email notification.

      h. To verify the email address is valid, click the **Test** button.

         If the email is valid, a message is displayed stating the test was successful and the recipient will receive a test email .

      i. When finished, click **Apply**.

4. When finished, click **Enable Tag Backups**.

5. In the **Backup Service Login** dialog box, do one of the following, and then click **OK**:

   - Select **Local System Account** to run the service from the local system account.
   - Select **This Account**, and then type the domain name and username in the **Username** field, and the password in the **Password** field.

6. When finished, click **OK** to exit the utility.

To view the backup summary report:

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

2. Click the **Last Backup Summary** button.

3. Review the summary report, and then do one of the following:

   - Click **OK** to close the Backup Summary Report.
   - Click **Print** to print a copy of the report.

4. When finished, click **OK** to exit the utility.

To change a tag backup schedule:

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

2. In the **Backup Folder** section, select the folder path you want to modify.

3. Click the **Modify** button.

4. In the **Configure Backup Folder** dialog box, make any necessary changes, and then click **Apply**.

5. To make changes to the email notification, click the **Configure** button, make any necessary changes, and then click **Apply**.

6. When finished, click **Enable Tag Backup**.

7. In the **Backup Service Login** dialog box, do one of the following, and then click **OK**:

   - Select **Local System Account** to run the service from the local system account.
   - Select **This Account**, type the **Username** and **Password** in the corresponding fields.

8. When finished, click **OK** to exit the utility.

To delete a scheduled backup folder:

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

2. In the **Backup Folder** section, select the folder path you want to modify.

3. Click the **Delete** button.

4. When prompted, click **Yes** to confirm the deletion.

5. When finished, click **OK** to exit the utility.

Restoring tags from a backup

The Backup and Restore Tag Utility can be used to set up a list of databases to be monitored for tag integrity. When a TRK file becomes damaged or is no longer functioning, the affected database is listed on the Restore tab with a list of backups allowing you to restore the TRK file to an earlier point in time.

To restore a damaged TRK file:

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

2. In the Backup and Restore Tag Utility dialog box, click the **Restore** tab.

3. In the **Damaged TRK file(s)** section, select the TRK file to restore.

4. From the **Restore Tags From** list, select the date and time to restore the TRK file.

5. Click the **Restore** button.

6. When finished, click **OK**.

Additional tag backup tools

The following tools are available for backing up tags:

- Tag To Field command
- TagSaver CPL

Running the Tag To Field command

The Tag To Field command in the Tag and Issues Management dialog box writes the tag names to a specified field in the database separating the tag name with the selected delimiter. To restore tags stored in a field, see the Creating tags from data within a specified field procedure in Creating and applying tags.

To write tag names to a field:

1. On the **Tools** menu, click **Manage Tags/Issues**.

2. In the **Tag and Issue Management** dialog box, click the **Tag to Field** button.
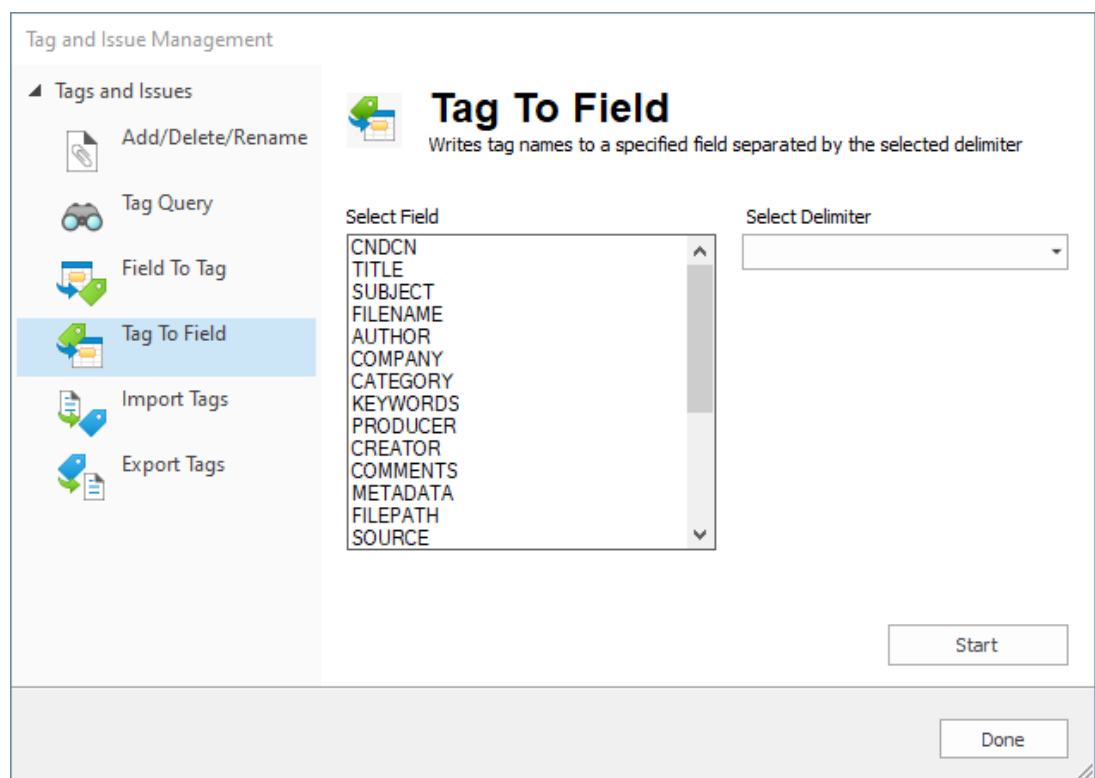
3. From the **Select Field** list, select the field you want to copy the tag names.

4. From the **Select Delimiter** list, select the delimiter to separate the tag names in the field.

5. Click the **Start** button.

6. When prompted, do one of the following:

   - Click **Yes** to confirm that you want to write the tag names in the selected field.

   - Click **No** to append the tag names to the existing field contents.

   - Click **Cancel** to abandon the changes.

7. When finished, click **Done**, and verify that the selected field displays the tag names separated by the selected delimiter.

Running the TagSaver CPL

You can create a backup file of your tags or restore the backed up tags into another database using the TagSaver.cpl. We recommend running this CPL script once or twice daily, depending on how much active reviewing is occurring. The tag back-up is stored in a database's .GAT file and the tag data is retrievable, when needed.

TagSaver CPL benefits:

- You can move tag application information to different databases

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

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

To backup tags in a database:

1. In Concordance Desktop, click the **All** button on the **Standard** toolbar to query all records in your database.

2. On the **File** menu, click **Begin program**.

3. Navigate to the CPL directory installed with Concordance Desktop, and click the **TagSaver.cpl** file.

   The default directory for the CPL folder installed with Concordance Desktop is *C:\ProgramData\LexisNexis\Concordance Desktop 10\CPL (Windows 7)*. For more information about CPLs, see and the TAGSAVER.cpl.

4. Click **Open** to open the **Tag Saver Options** list.

```
Tag Saver Options
Save tags
Retrieve tags
Print error log
Open database
Browse database
Quit
```
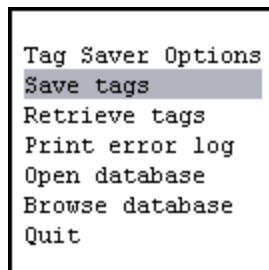
5. Click **Save tags** or press Enter.

    Clicking Save tags or pressing Enter opens the field list. Use the arrow keys on
    your keyboard to scroll through the field list.

6. Click or press Enter on the field you want to associate with the tags.

    You need a common field with a unique value, such as the Begno (Bates number)
    field. Do not use the Access ID field when exporting tag history.

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

    After you select the field, the CPL creates the [database name].GAT file in the
    same directory as the database's .dcb file. The [database name].gat file contains
    your tag backup.

    After the CPL process is finished, the Tag Saver Options list is displayed.

7. Click **Quit** to return to Concordance Desktop.

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

To restore tags from a .GAT file to a database:

1. Copy the .GAT file containing the tags you want to add to your database, and paste the file into the database directory for the database you want to add the tags.

2. Rename the .GAT file you copied to the database directory using the same name as the database's .dcb file.

    For example if the database's .dcb file is Cowco.dcb, the .gat file needs to be named Cowco.gat.

3. In Concordance Desktop, open the database you want to add the tags.

4. On the **Standard** toolbar, click the **All** button to query all records in your database.

5. On the **File** menu, click **Begin program**.

6. Navigate to the CPL directory installed with Concordance Desktop, and click the **TagSaver.cpl** file.

    The default directory for the CPL folder installed with Concordance Desktop is *C: \ProgramData\LexisNexis\Concordance Desktop\CPL (Windows 7).* For more information about CPLs, see Concordance Desktop Scripts and the TAGSAVER.

7. Click **Open** to open the **Tag Saver Options** list.

    ```
    Tag Saver Options
    Save tags
    Retrieve tags
    Print error log
    Open database
    Browse database
    Quit
    ```
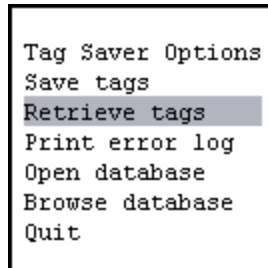
8. Click **Retrieve tags**.

    When you click Retrieve tags, the CPL adds the tags for all the records that were tagged in the .gat file to the database.

    After the CPL process is finished, the Tag Saver Options list is displayed.

9. Click **Quit** to return to Concordance Desktop.

10. Open the **Tags** task pane to verify the tags were added and applied correctly to the database.

Setting Preferences

Preferences for reviewers and administrators involve three main topics:

- Preferences – various settings that affect all users using Concordance Desktop.
- Table Layout – custom setting options available and accessible by all users to create both private and public table layouts.
- Custom Menus – custom menus added by administrators so tools are accessible from the Menu bar, such as CPL scripts or query files.

Defining 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 ease browsing by offering more record detail onscreen, and changing the red highlight color for keywords.

The Preferences dialog box contains seven tabs:

- **General** - settings used when starting and closing Concordance Desktop, 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.
- **Import** - import settings related to numbering and indexing.
- **CPL** - settings for CPLs, such as the CPL font selection.

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

To set General preferences:

1. Do one of the following:

   - On the **Tools** menu, click **Preferences**.
   - On the **Standard** toolbar, click the **Tools** button, and then click **Preferences**.

   Clicking Preferences opens the General tab in the Preferences dialog box.
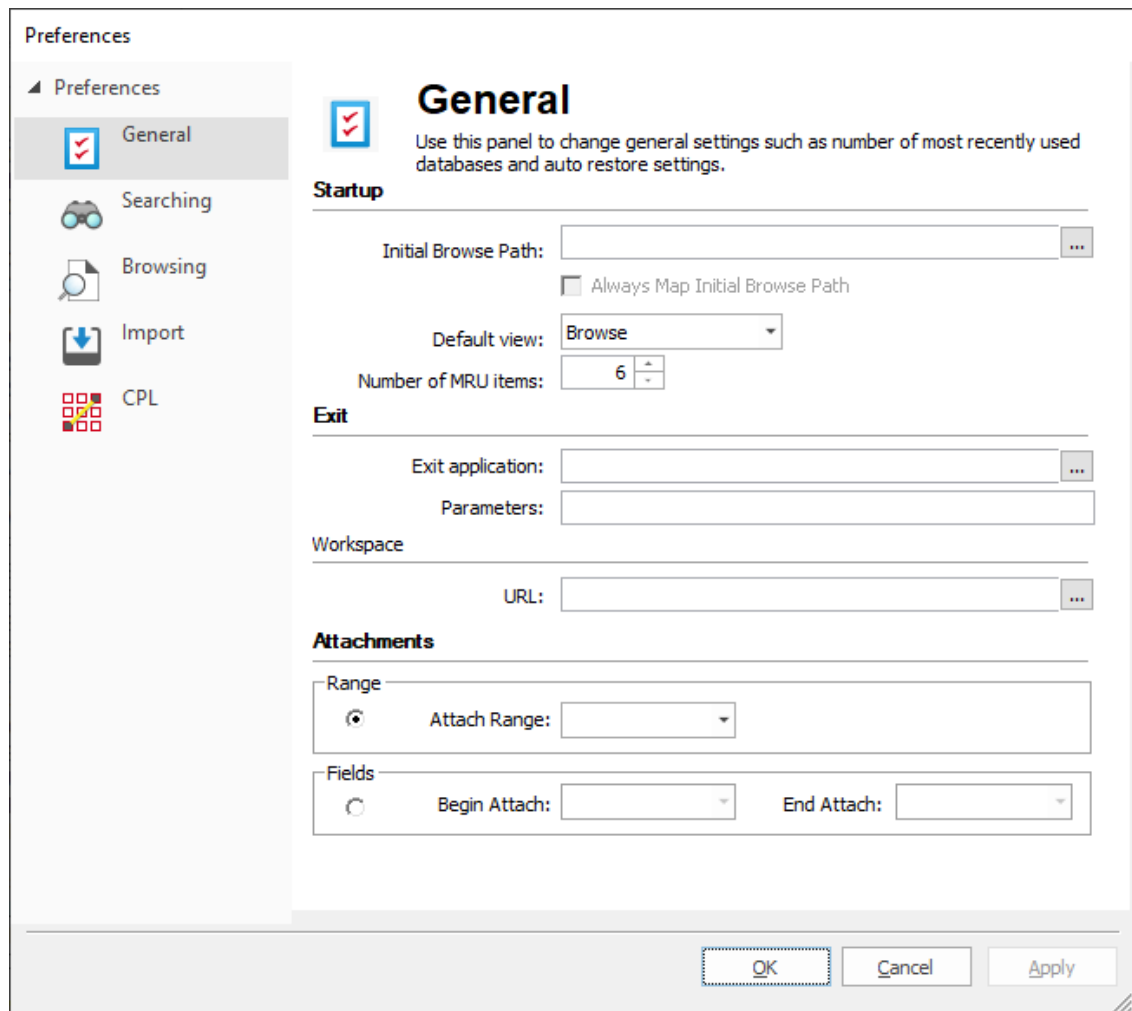
The *Startup* section defines the startup view when opening Concordance Desktop and databases.

For more information about customizing the start-up view in Concordance Desktop, see Customizing the start-up view.

The Initial Browse Path field is used to determine the initial folder that opens when you browse for a file or open a new database. For example, entering C: \CloudNine\MyDatabases opens the MyDatabases folder when selecting Open database from the Databases task pane. During each Concordance Desktop session, the browse path is a dynamic setting and remembers the last folder opened. The next time you browse for a file or select Open database, the previous folder location opens. Each time you close and restart Concordance Desktop, Concordance Desktop resets the browse path to the original Initial Browse Path field setting.

☑ You need to restart Concordance Desktop for this change to take affect.

2. To define the initial browse path, click the ellipses (**...**) button next to the **Initial Browse Path** field, to open the **Browse For Folder** dialog box.

3. Navigate to and click the folder you want to open when you browse for a file or open a new database, and click **OK**.

    Clicking OK adds the folder path to the Initial Browse Path field.

4. To ensure all workstations installs open the path in the Initial Browse Path field, select the **Always Map Initial Browse Path** option.

    The Default view field determines whether the Browse or Table view automatically opens when you open a database in Concordance Desktop.

5. To define the default view, in the **Default view** field, click **Browse** or **Table** from the view list.

    The Number of MRU items field determines the number of database files listed in the most recently used (MRU) file list. The MRU file list is displayed on the File menu and the Recent panel in the Databases task pane. The Number of MRU items field defaults to 6. You can display up to nine files in the list.

📝 If a user's Recent panel or Recent Files list is blank, your company may have a policy preventing the user's computer from writing to the MRU registry key.

📝 You need to restart Concordance Desktop for this change to take affect.

6. To modify the number of database files listed, in the **Number of MRU items** field, type or scroll to the number of files to list in the most recently used (MRU) file list.

    The Exit section defines what happens when you close Concordance Desktop.

    The Exit application field allows you to set up an application to automatically launch after Concordance Desktop is closed, like a reviewer time card application. Concordance Desktop launches the application when it terminates normally. Any additional parameters for the application file are entered in the Parameters field.

7. To launch an application after Concordance Desktop closes, click the ellipses (**...**) button next to the **Exit application** field, to open the **Open** dialog box.

8. Browse to and click the application executable file, and click **Open**.

    Clicking Open adds the application's file path to the Exit application field.

9. In the **Parameters** field, type any additional parameters for the application.

    The Workspace section controls the Workspace tab settings in Concordance Desktop.

    By default, the Workspace tab is displayed and contains links to the CloudNine Web site. You can customize your Workspace tab to display internal or external Web

pages simply by adding a link to an external HTML web page or to a locally stored .HTM or .HTML file with information you'd like to publish for user reference.

10. In the *Workspace* section of the **General** tab, the **Enable workspace** check box is selected by default. To continue displaying the **Workspace** tab in Concordance Desktop, leave the **Enable workspace** check box selected. If you do not want to display the **Workspace** tab, clear the check box.

11. To add a link to an external HTML Web page, in the **URL** field, enter the Web site URL. Be sure to include http:// or https:// in the URL. For example: http://www.google.com.

    To add a link to an internal internal .HTM file located on your server, in the URL field, enter the full UNC path. For example: J:\CloudNine\Internal_Links.htm or \ \MyServer\MyFolder\myhtm.htm.

12. In the *Attachments* section, if the attachment fields were not set up during the database creation process, to specify the fields to use with the Find Attachments feature, do one of the following:

    • To set a field to a range of attachments, select the **Attach Range** option, and then select the field that contains the attachment range data.

    • To set up the beginning and ending attachment fields, select the **Fields** option, and then from the **Beg Attach** and **End Attach** list select the fields that contain the attachment data for the beginning attachment number and ending attachment number.

    💡 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/reindex the database. For more information about the Find Attachments feature, see Finding attachments.

13. Click **OK** to save your changes.

To set Searching preferences:

1. Do one of the following:

    • On the **Tools** menu, click **Preferences**.
    • On the **Standard** toolbar, click the **Tools** button, and then click **Preferences**.

2. Click the **Searching** tab.

    The settings on the Searching tab define settings for your search query results.
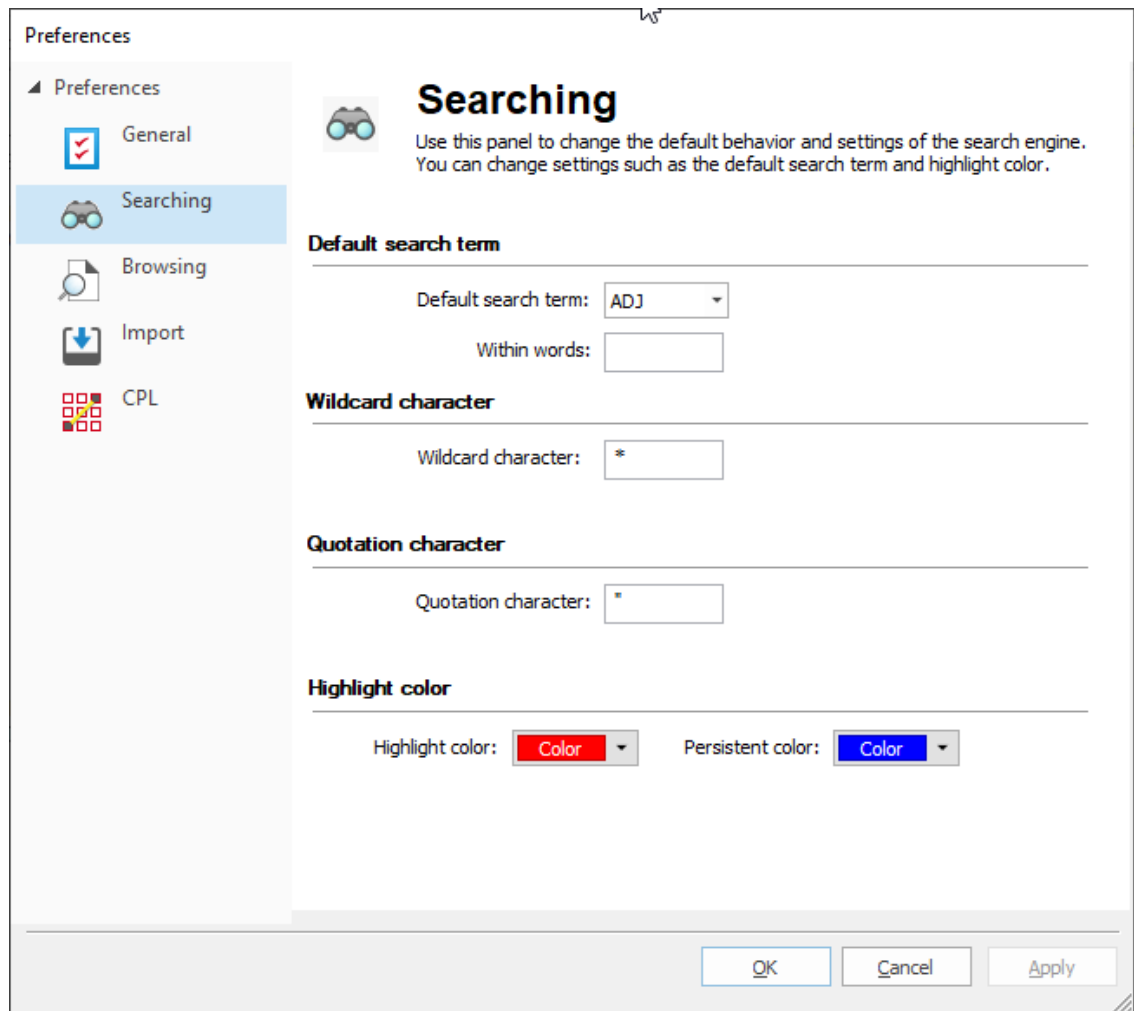
The *Default search term* section determines which search operator is used when two search terms are entered without an intervening search operator, and the number of words within the search. The search operator selected in the Default search term field is automatically inserted when Concordance Desktop encounters this scenario. The Default search term field defaults to the adjacent (ADJ) search operator.

For example, searching for *Anza Borrego* is interpreted as *Anza ADJ Borrego*.

3. To change the default search operator, in the **Default search term** field, select the default search operator you want to use.

4. To expand the number of words included in the search results, in the **Within words** field, type the number of words to include within the search.

   For example, if ADJ is selected in the Default search term field and you enter 3 in the Within words field, Concordance Desktop searches for *Borrego* within 3 words of *Anza*.

The *Wildcard* character field determines the wildcard character for searches. The wildcard character is used as a prefix or suffix mask when running a search. The Wildcard character field defaults to an asterisk (*). You can change this character to any non-alphanumeric character.

5. To modify the wildcard search character, in the **Wildcard character** field, type the non-alphanumeric character you want to use.

Quote characters are used when your search query includes numbers or special characters, such as periods (.), asterisks (*), and spaces. The quotation character can be redefined as any non-alphanumeric character, such as the apostrophe. The quotation character is not included in the dictionary unless it occurs as embedded punctuation. To search for the quote, use this option to change the character recognized as the quote, then do the search.

The *Quotation* character field defaults to the quotation mark (") character. It is best practice to leave the quotation mark character in the Quotation character field, which is necessary for locating punctuation in relational searches.

For more information about quotes in searches, see Running relational searches.

📝 On occasion you may need to search for a quote. To do so, you must first change this setting to a non-alphanumeric character, like an apostrophe, so that the quotation mark is searchable. To search for the word *"and"*, you need to use quotes in your query *"AND"*, otherwise it is read as a search operator by Concordance Desktop.

6. To change the quotation character, in the **Quotation character** field, type the non-alphanumeric character you want to use.

The *Highlight* color field determines the color used to display search hits from searches performed using the Quick, Simple, Form, and Advanced Search features. The Persistent color highlights the terms found in the record from the list of terms in the *<databasename>_Persistent.txt* file when the Persistent Search feature is enabled. 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. The Highlight color field defaults to red. The Persistent color defaults to blue.

7. To change the hit color, do any of the following:
   - For search hits using Quick, Simple, Form or Advanced searching, click the **Highlight color** list, in the color selection box, click the color you want to use.
   - For Persistent Search hits, click the **Persistent color** list, in the color selection box, click the color you want to use.

   Clicking OK opens the *Changes may not be reflected until Concordance Desktop is restarted* message.

8. Click **OK**.

To set Browsing preferences:

1. Do one of the following:

   - On the **Tools** menu, click **Preferences**.
   - On the **Standard** toolbar, click the **Tools** button, and then click **Preferences**.

2. Click the **Browsing** tab.

   The settings on the Browsing tab define the browse settings by database and field data parameters.
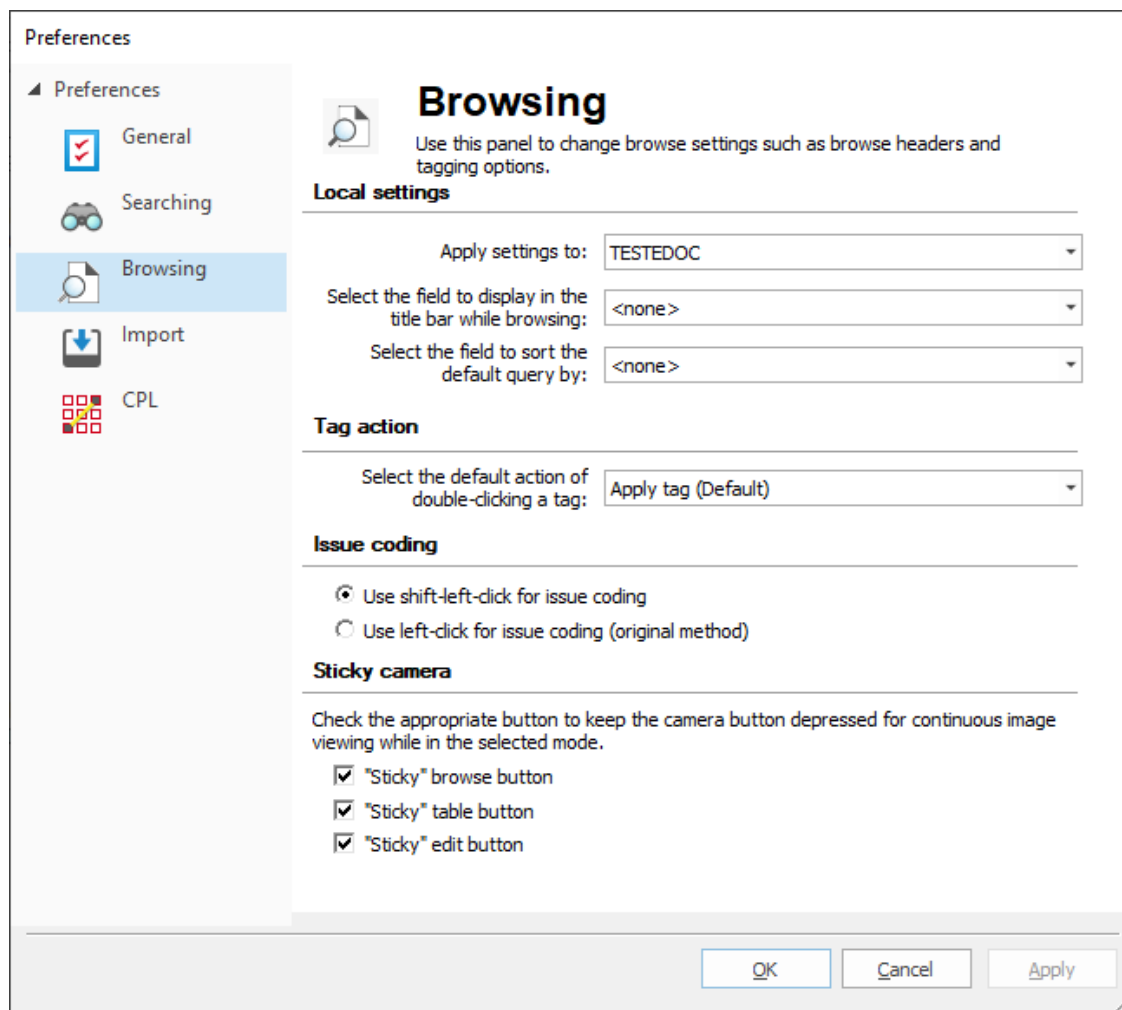
   The *Local settings* section determines where the browse settings are applied. The browse settings can be applied to any database in a group of concatenated databases.

3. In the **Apply settings to** field, select the database you want to apply the settings.

   In the Select the field to display in the title bar while browsing field, you can select a field to display on the Title bar for the current document. The field is displayed on the Title bar in the Browse, Table, and Edit views.

Having a field's content displayed on the Title bar can help when viewing long documents, such as depositions, where you may be deep within the document and forget the deponent's name or the document's title. It can also help you see relevant document information when scrolling through records in the Table view.

For transcript databases, Concordance Desktop automatically displays the name, date and volume of the current document in the Title bar.

Use the Select the field to display in the title bar while browsing field to select a field for other non-transcript databases.

💡 For concatenated databases, you can choose a different Title bar field for each database.

In the Select the field to sort default query by field, you can modify the default field sort order of a database when the database is opened and before running a search. This is called the "default query." The database is sorted in ascending order by the field selected in the Select the field to sort default query by field. The field can be any field designated as a key field on the New or Modify dialog box. For more information about key fields, see Creating databases.

Selecting <none> sorts the database by the document number.

4. To adjust the default sort order of a database, in the **Select the field to sort default query by** field, click the field you want to use for the default sort order.

In the Select the default action of double-clicking a tag field, you can determine whether double-clicking a tag applies the tag to or removes the tag from a document or whether double-clicking a tag opens the tagging options menu. The Select the default action of double-clicking a tag field defaults to Apply tag (Default).

Regardless of the Select the default action of double-clicking a tag field's setting, clicking directly on the tag's check box will apply or remove the tag as usual, and you can always access the tagging options menu in Concordance Desktop by right-clicking a tag.

5. To modify tagging actions, in the **Select the default action of double-clicking a tag** field, click **Apply tag (Default)** to apply a tag when you double-click a tag or click **Displays menu** to open the tagging options menu when you double-click a tag.

Double-clicking a tag applies the tag to a document or removes it from the document if it's already selected. You can change this action to display the tagging options menu, which is usually displayed by right clicking a tag.

The *Issue coding* section determines how issues are applied in Concordance Desktop. By default, issues are are applied to highlighted text in a document using SHIFT+left-click. You can change the setting to apply issues using only left-click.

6. To modify the issue coding setting, in the **Issue coding** section, click the **Use shift-left-click for issue coding** or **Use left-click for issue coding (original method)** option.

   If you change the issue coding setting, the change will not take effect until you close and reopen Concordance Desktop.

   In the *Sticky camera* section, you can determine whether the View Image (camera) button on the Dynamic toolbar automatically stays selected, also known as "sticky," for continuous image viewing in the Browse, Table, and/or Edit views.

   When a "Sticky" [view name] button check box is selected, the View Image button is automatically selected in the view. When the check box is cleared, users manually have to click the View Image button to view the images associated with the documents in the viewer.

   By default, the Sticky browse button, Sticky table button, and Sticky edit button check boxes are selected.

7. To turn off **"Sticky" [view name] button** function for a view, clear the check box for the view.

8. Click **OK** to save your changes.

   Clicking OK opens the *Changes may not be reflected until Concordance Desktop is restarted* message.

9. Click **OK**.

To set Import preferences:

1. Do one of the following:

   - On the **Tools** menu, click **Preferences**.
   - On the **Standard** toolbar, click the **Tools** button, and then click **Preferences**.

2. Click the **Import** tab.
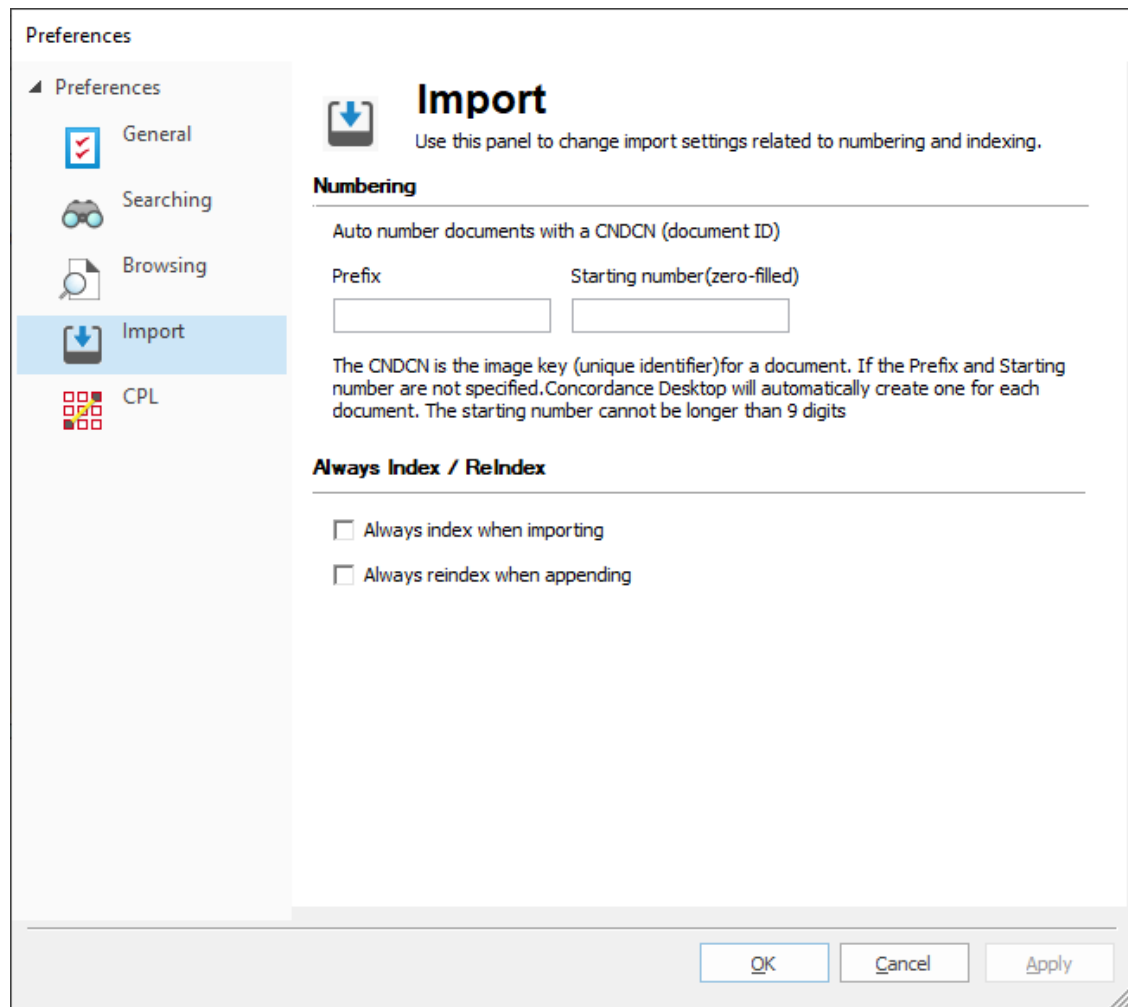
The settings on the Import tab allow you to define import settings related to numbering and indexing.

3. In the **Prefix** field, type the prefix you want to precede the production number.

    The prefix can be any combination of letters, numbers, or punctuation that are valid folder or file names. You can use up to 57 characters.

4. In the Starting Number field, type the number you want to use to start numbering the production files.

    Zero fill your starting number to determine the desired number width. You can use up to 9 digits.

    Clicking OK opens the *Changes may not be reflected until Concordance Desktop is restarted* message.

5. Click **OK**.

To set CPL preferences:

1. Do one of the following:

   - On the **Tools** menu, click **Preferences**.
   - On the **Standard** toolbar, click the **Tools** button, and then click **Preferences**.

2. Click the **CPL** tab.
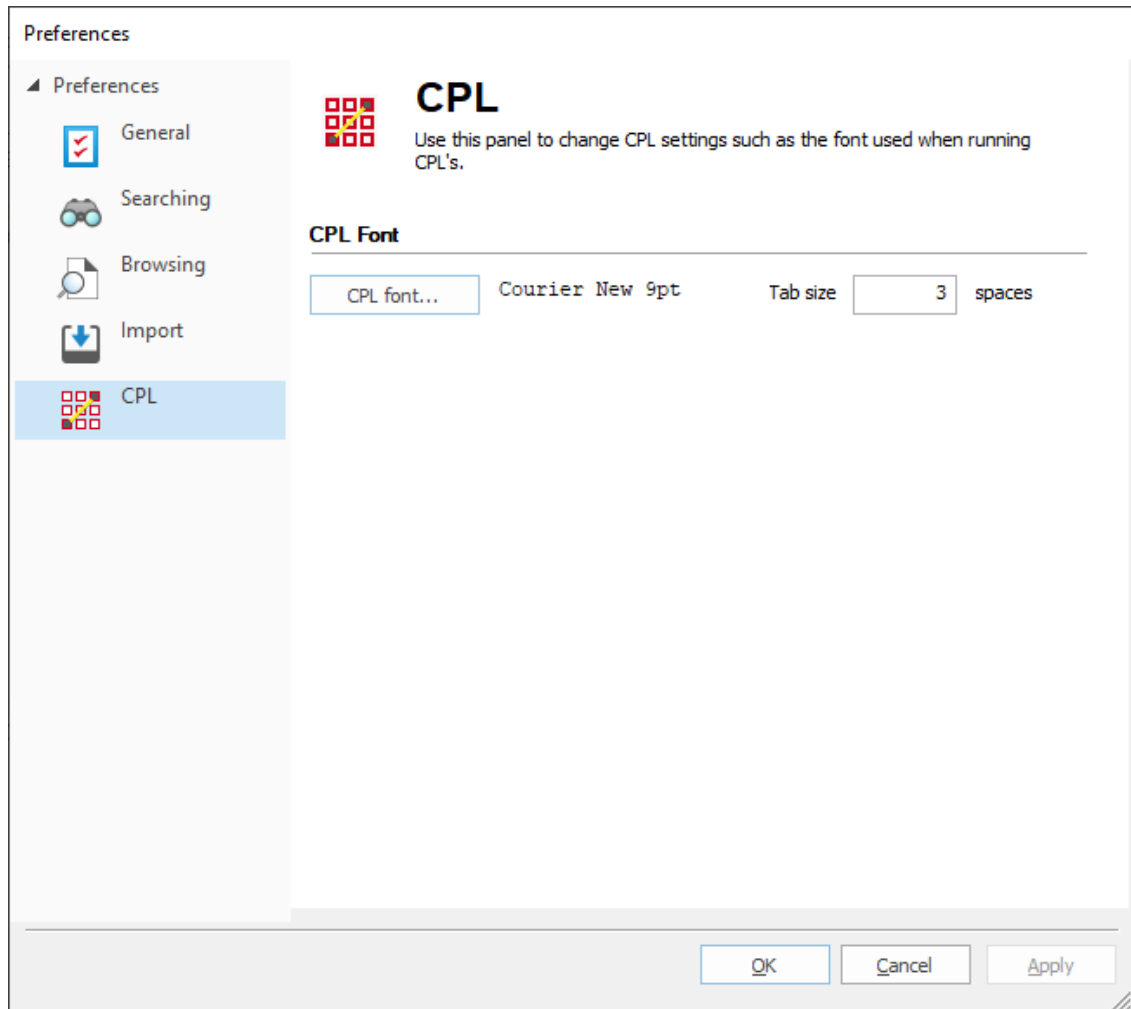
The CPL tab determines the font and tab size settings used when running Concordance Desktop Programming Language (CPL) programs.

The CPL font field defaults to Courier New 9pt and the Tab size field defaults to 3 spaces.

3. To change the CPL font, click the **CPL font** button. The **Font** dialog displays.

4. Modify the settings and click **OK**.

Clicking OK closes the Font dialog box, and adds the font settings to the CPL font field.

5. To change the tab size, in the **Tab size** field type the number of spaces you want a tab to contain.

6. Click **OK** to save your changes.

Clicking OK opens the *Changes may not be reflected until Concordance Desktop is restarted* message.

7. Click **OK**.

Using table layouts

The Table view uses table layouts to determine the fields and order of the fields displayed within the view. Table layouts can be used to customize viewing preferences or to support sort methods specific to a review.

Table view layouts are created and maintained on the Table Layout dialog box. For each database, each user has one private layout, that is accessible only to the 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 in the database.
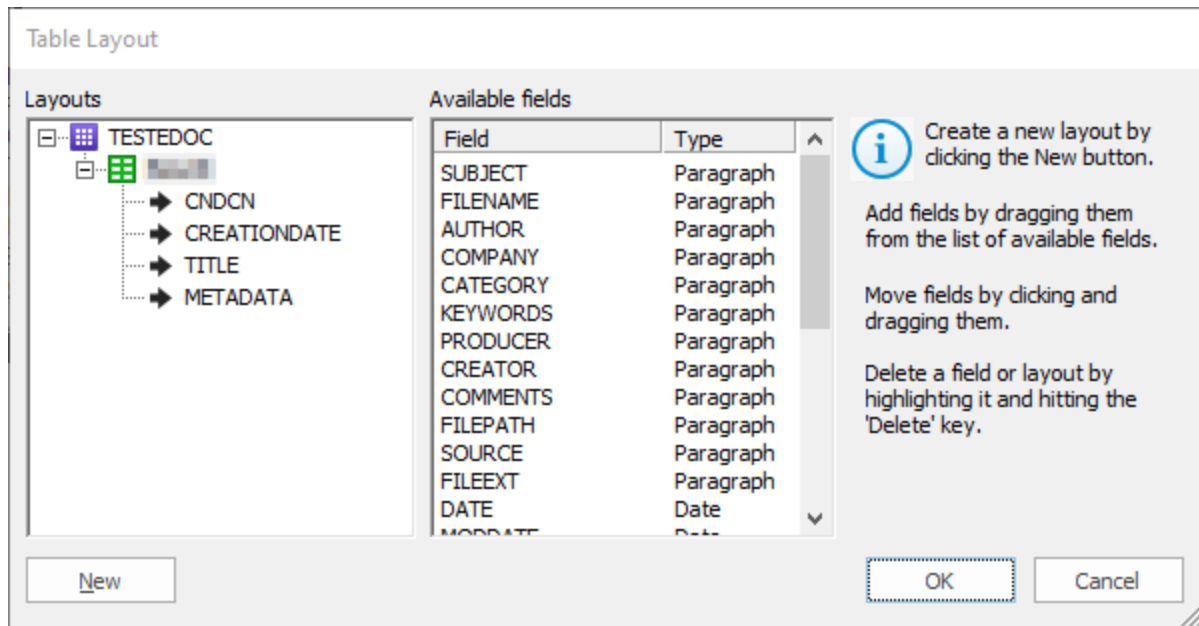
📝 Be selective when creating table layouts for a database. Too many table layouts in a database can slow down the database's processing speed.

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.

💡 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. Then use those fields for Table View. By selecting only fixed length text, date or numeric fields, large full text portions are not loaded. This improves performance for long document types.

📝 It is recommended that the .layout file not be marked as Read-Only as this will prevent users from creating or switching layout views.

<u>To create a table layout:</u>

You can only make new layouts for the database currently selected. Any layouts created in addition to your private table layout are accessible to all reviewers, and can be altered or deleted by them as well.

1. On the **Standard** toolbar, click the **Table** button arrow, and then click **Table layout** to open the Table Layout dialog box.

    In the Table Layout dialog box, the green box with your Windows User ID is your private table layout that is customizable and viewable only by you.

    Users are permitted one private table layout per database.

2. In the **Layouts** tree, click the **New** button to create a new layout .

3. Type the name of the new layout.

4. To add fields to the layout, in the **Available fields** list do any of the following:

    -   Drag a field to the new layout.
    -   Double-click a field to add the field to the new layout.
    -   Press CTRL+click or SHIFT+click to select multiple fields and then drag the fields to the new layout.

    The order the fields are listed in the Layouts tree is the order in which the fields appear in the Browse and Edit views.

5. To change the order of the fields in the layout, click a field in the layout and drag it to the desired position in the **Layouts** tree.

6. When finished, click **OK**.

7. To view a saved layout, on the **Standard** toolbar, click the arrow next to the **Table** button, and then click the layout name.

☑ The Table view layout is not persisted if a sorting layout is applied to the view. Creating a sorting layout will automatically apply a Zero query, returning all documents and sorting the records based on the specified sorting layout.

To modify a table layout:

1. On the **Standard** toolbar, click the **Table** button arrow and click **Table layout** to open the Table Layout dialog box.

2. To change the order of a field in a table layout, click a field in the layout and drag it to the desired place in the **Layouts** tree.

3. To remove a field in a table layout, right-click a field in the layout and click **Delete**.

    You can also double-click a field in the layout to remove the field.

4. Click **OK** to close the **Table Layout** dialog box and apply your changes to the **Table** view.

To view other table layouts:

In the Table view you can switch between the different table layouts created for the selected database.

On the **Standard** toolbar, click the arrow to the right of the **Table** button then click the layout name for the layout you want to view in the **Table** view.

The check mark next to a layout indicates the layout currently displayed in the Table view.

To delete a table layout:

Only public table layouts can be deleted in Concordance Desktop. 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. The Delete command in the Table Layout dialog box is unavailable for private table layouts and the table layout currently displayed in the Table view.

To delete the public table layout currently displayed in the Table view, you first need to display a different layout in the Table view.

1. On the **Standard** toolbar, click the **Table** button arrow, and click **Table layout** to open the Table Layout dialog box.

2. Right-click the layout you want to delete in the **Layouts** tree and then click **Delete**.
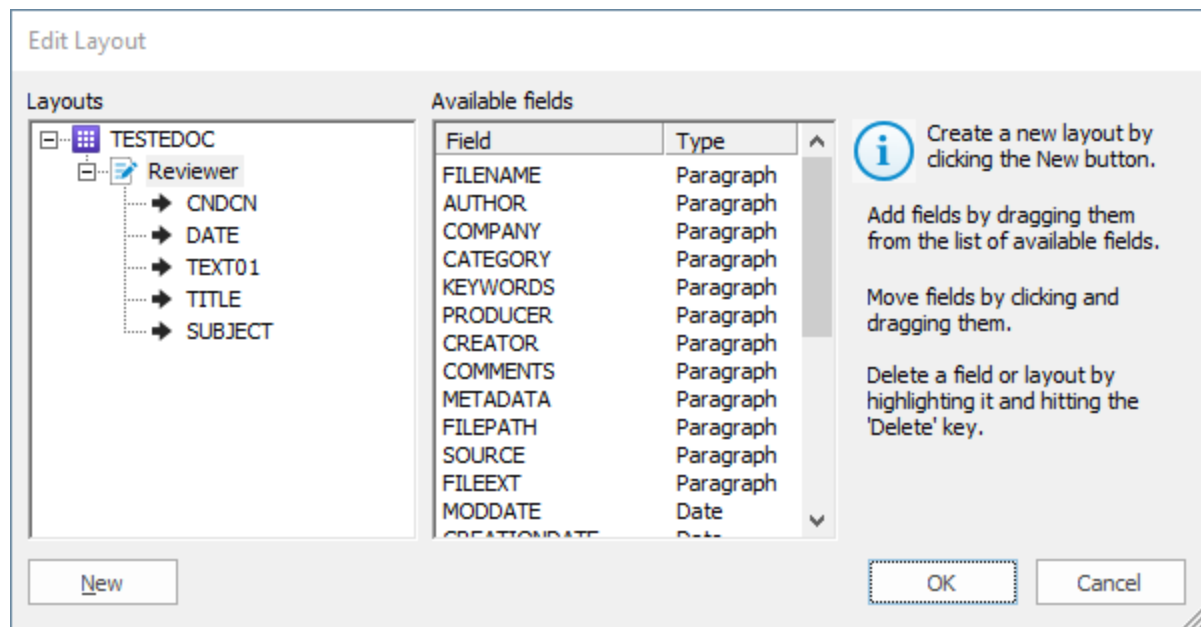
Using sorting layouts

The Sorting feature in Concordance Desktop determines the order records are displayed in the Browse view. The fields selected in the Sorting Layout dialog box define the order the records are returned for viewing. For example, if you select to sort the records by the fields: BEGNO, DOCDATE, and AUTHOR, then the records are first sorted by the records BEGNO number, then the document date and then by the document's author. You can also choose whether the field is to sort in Ascending or Descending order.

Sorting layouts are created and maintained in the Sorting Layout dialog box and saved as a .Sortlayout file on your local machine 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 for which they were created.

Sorting layouts are specific to a database and user. 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 fields 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.

It is recommended that the .Sortinglayout file not be marked as Read-Only as this will prevent the ability to create or switch layout views.
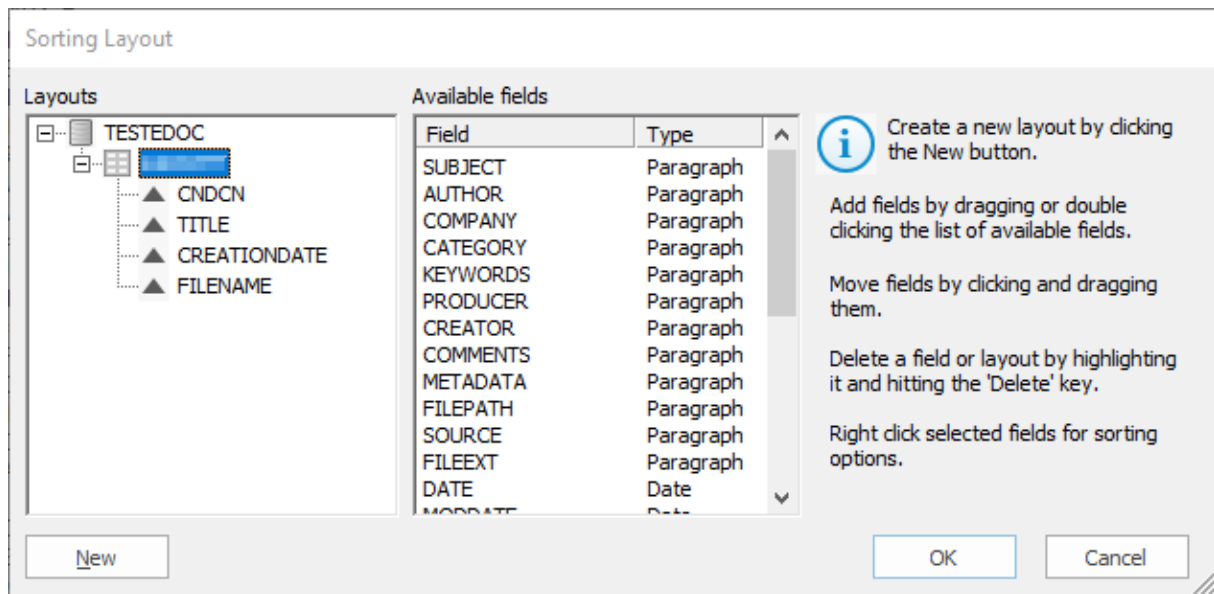
Sorting layout dialog box

Icon	Description
Single Database and Compatible Concatenated Databases	
🗋	Primary database
⊞	Available sort layout
▼	Field sort order - Descending
▲	Field sort order - Ascending
Incompatible Concatenated Databases	
⊞⚠	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)

To create a sort layout:

1. On the **Standard** toolbar, click the **Sorting** button.

2. In the **Layouts** tree, click the **New** button.

3. Type the name of the new layout.

4. To add fields to the layout, in the **Available fields** list, do one of the following:
   - Drag a field to the new layout.
   - Double-click a field.
   - Press CTRL+click or SHIFT+click to select multiple fields and then drag the fields to the new layout.

5. To change the order of the fields sort the database in the layout, in the **Layouts** tree, drag a field to the desired position.

6. To set sort order for the field data, right-click the field, and then click either **Ascending** or **Descending**.

7. When finished, click **OK**.

To modify a sort layout:

1. On the **Standard** toolbar, click the arrow next to the **Sorting** menu, and then click **Sort layout** to open the Sorting Layout dialog box.

2. To change the field order, drag a field in the Layout tree to the desired location.

3. To remove a field, in the Layout tree, do any of the following:
   - Right-click a field, and then click **Delete**.
   - Double-click a field.

4. When finished, click **OK** to apply your changes.

To view a sort layout:

Do one of the following:
- From the **View** menu, click **Sorting**, and then click the layout name.
- On the **Standard** toolbar, click the arrow next to the **Sorting** menu, and then click the layout name.

To delete a sort layout:

1. On the **Standard** toolbar, click the **Sorting** button arrow, and click **Sort layout** to open the Sorting Layout dialog box.

2. Right-click the layout you want to delete in the **Layouts** tree and then click **Delete**.

<u>**To rename a sort layout:**</u>

1. On the **Standard** toolbar, click the **Sorting** button arrow, and click **Sort layout** to open the Sorting Layout dialog box.

2. Click the layout name to change, and then type a new sort layout name.

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

Creating edit layouts

To make editing easier, Concordance Desktop 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 Desktop uses edit layouts to determine the fields and order of the fields displayed within the view. Edit layouts are created and maintained on the Edit Layout dialog box and stored in the <databasename>.Editlayout file. An edit layout can be created or edited by anyone in the database. However, only the Concordance Desktop Administrator or person who created the layout have permissions to delete it.

Edit Layout			
Layouts	**Available fields**		
☐ ⊞ TESTEDOC	Field	Type	ⓘ Create a new layout by clicking the New button.
☐ 📝 Reviewer	FILENAME	Paragraph	
➡ CNDCN	AUTHOR	Paragraph	Add fields by dragging them from the list of available fields.
➡ DATE	COMPANY	Paragraph	
➡ TEXT01	CATEGORY	Paragraph	
➡ TITLE	KEYWORDS	Paragraph	Move fields by clicking and dragging them.
➡ SUBJECT	PRODUCER	Paragraph	
	CREATOR	Paragraph	
	COMMENTS	Paragraph	Delete a field or layout by highlighting it and hitting the 'Delete' key.
	METADATA	Paragraph	
	FILEPATH	Paragraph	
	SOURCE	Paragraph	
	FILEEXT	Paragraph	
	MODDATE	Date	
	CREATIONDATE	Date	
New		OK	Cancel

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.

⚠ The .Editlayout file should never be marked as Read-Only, as this will prevent users from creating or switching layout views.

To create an edit layout:

You can only make new layouts for the database currently selected. All edit layouts are accessible to all reviewers and can be altered by them as well.

1. Do one of the following:

   - On the **View** menu, click **Edit View**, and then **Edit Layout**.
   - On the Standard toolbar, click the **Edit** button arrow, and then click **Edit layout**.
   - On the Standard toolbar, click the **Edit** button, right-click within a field, point to **Layout** and then click **Edit Layout**.

2. In the **Edit Layout** dialog box, click the **New** button to create a new layout .

3. Type the name of the new layout.

4. To add fields to the layout, in the **Available** fields list do any of the following:

   - Drag a field to the new layout.
   - Double-click a field to add the field to the new layout.
   - Press CTRL+click or SHIFT+click to select multiple fields and then drag the fields to the new layout.

   The order the fields are listed in the Layouts tree is the order the fields appear in the Edit view.

5. To change the order of the fields in the layout, in the **Layouts** tree, click a field and drag it to the desired position.

6. When finished, click **OK**.

   The new layout view is displayed in the Edit view.

To modify an edit layout:

1. Do one of the following:

   - On the **View** menu, click **Edit View**, and then **Edit Layout**.
   - On the Standard toolbar, click the **Edit** button arrow, and then click **Edit layout**.
   - On the Standard toolbar, click the **Edit** button, right-click in a field, point to **Layout** and then click **Edit Layout**.

2. In the **Edit Layout** dialog box, from the **Layouts** tree, select the layout you want to edit.

3. Do any of the following:

    - To change the field order, click a field and drag it to the desired location in the **Layouts** tree.

    - To remove a field, right-click a field in the **Layouts** list, and then click **Delete**.

    You can also double-click a field in the layout to remove the field.

4. When finished, click **OK**.

📝 If all the fields are removed from a layout, then the layout itself is removed. The active layout cannot be deleted.

To view saved edit layouts:

In the Edit view you can switch between the different edit layouts created for the selected database.

Do any of the following:

- On the **View** menu, click **Edit View**, and then click the layout name to view.

- On the Standard toolbar, click the **Edit** button arrow, and then click the layout name to apply..

- On the Standard toolbar, click the **Edit** button, right-click in a field, point to **Layout** and then click the layout name to view.

The check mark next to a layout indicates the edit layout currently displayed in the Edit view.
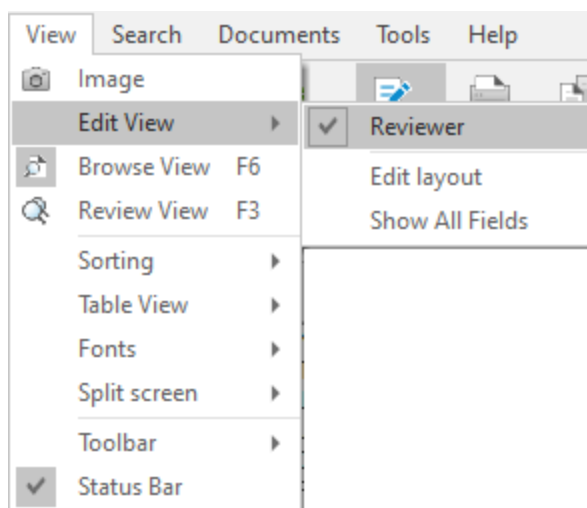
Adding custom menus

Adding custom menus and custom menu commands to Concordance Desktop is one of the many features you have available to make your administration job much easier. Having CPL scripts and databases accessible as a shortcut in a menu provides instant access to the tools you need to use frequently. You can apply these menus and menu commands to the current database or all databases. You can add custom menu commands to existing or custom Concordance Desktop menus. By default, all users will be able to use and access the custom menu and menu command. To restrict custom menus and menu commands to a specific user, you need to add the user and the custom menu command for the user in the Added Menu Items dialog box.

If you are familiar with programming and took a Concordance Desktop CPL class, you can add your own CPL scripts to a custom menu, which launches these programs without having to navigate to their directory folder.

📝 Custom menu commands are not listed in the Security dialog box for enabling and disabling menu access. If you need to restrict access to custom menus and menu commands, be sure to add the custom menu command to specific users in the Added Menu Items dialog box.

The following file types can be opened from Concordance Desktop custom menus:
- Database file (.dcb, .fyi)
- CPL file (.cpt, .cpt)
- Report file (.arp)
- Print file (.fmt)
- Concatenation file (.cat)
- Snapshot file (.snp)
- Query file (.qry)
- PDF file (.pdf)

To add a custom menu and menu command:

1. In Concordance Desktop, open the database you want to add a custom menu and custom menu command.

2. On the **File** menu, click **Administration**, and then **Added menu items**.

   The User field comes with a pre-defined Default user ID.

   The Default user ID works on databases that do not have security enabled or and databases with a default user ID defined in the Security dialog box.

   Creating a custom menu and/or menu command for the Default user ID allows all users to view and access the menu and menu command.

   To restrict access to the custom menu and/or menu command, you need to add each of the users you want to have access to the menu and/or menu command to the User field, and create the custom menu and/or menu command for each of the users you created. The users you create must already be added to the database, and the user IDs you create in the User field must match the users' database user IDs in the Security dialog box.

📝 When a user is added as a database user and then added to the User field in the Added Menu Items dialog box, the custom menu commands assigned to the Default user ID in the Added Menu Items dialog box will not be available to this user. You will have to assign the same custom menu commands to the individual user in order for the user to access these menu commands.

3. To add a user to the **User** field, select all the text in the user list, and type the new user name, and click the **Add** button.

📝 Adding a user to the **User** field in the **Added Menu Items** dialog box does not add the user to the database. To add a user to the database, see Adding/modifying users.

To add a custom menu and/or menu command for an existing user ID in the User field, in the User field, click the applicable user ID.

In the Database field, located in the Added menu items section, the current database name is displayed. The custom menu and/or menu command will be created in the current database unless you want to add the custom menu and/or menu command to all databases. If the current database is part of a concatenated database group, you can also add the custom menu and/or menu command to any database in the concatenated group.

4. To add the custom menu and/or custom menu command to all databases, in the **Database** field, click **All databases**.

To add the custom menu and/or custom menu command to database in a concatenated database group, in the Database field, click the applicable database.

5. In the **Menu item** section, click the **New** button to create the custom menu and/or menu command.

6. Click the **File** button to open the **Open** dialog box.

7. Browse to and click the file you want to launch from the custom menu command, and click the **Open** button.

Clicking the Open button, adds the file name and path to the File field.

Concordance Desktop custom menus can open the following file types:

- Database file (.dcb, .fyi)
- CPL file (.cpl, .cpt)
- Report file (.arp)
- Print file (.fmt)
- Concatenation file (.cat)
- Snapshot file (.snp)
- Query file (.qry)
- PDF file (.pdf)

The Added Menu Items feature only works with specific IPRO CPL scripts. Be certain to verify the supported IPRO scripts before loading them into a database.

You can add a custom menu command to a custom menu or an existing Concordance Desktop menu.

8. To add the custom menu command to an existing Concordance Desktop menu, in the **Menu** field, click the menu you want to add the custom menu command.

   To add the custom menu command to a custom menu, in the Menu field, type the name of the custom menu you want to create. The menu name you type in the Menu field is the menu name that will be displayed on the Concordance Desktop Menu bar.

   For custom menus, the Position field determines where the menu is displayed on the Menu bar.

   For custom menu commands in an existing Concordance Desktop menu, the Position field determines where the custom menu commands is displayed in the menu.

   The Position field defaults to -1.

9. In the **Position** field, type the position number you want the custom menu and/or custom menu command to be displayed.

   When you are creating a custom menu, zero is the first position on the left on the Menu bar. For example, if you typed 0 in the Position field, the custom menu will be displayed to the left of the File menu. Positive position numbers will move the custom menu the number of places to the right. For example, if you type +3 in the Position field, the custom menu will be displayed 3 places to the right. Typing -1 places the custom menu to the right of the Help menu.

   Negative position values start at the right and work their way left on the Menu bar. Positive position values start at the left and work their way right on the Menu bar.

   When you are creating a custom menu command, zero is the first position at the top of the menu. Positive position numbers will move the custom menu command the number of places down from the top of the menu. For example if you add a custom menu command to the File menu and type 3 in the Position field, the custom menu command will be displayed between the Snapshot and Close commands on the File menu. Typing -1 places the custom menu command at the bottom of the menu.

   Negative position values start at the bottom and work their way up the menu. Positive position values start at the top and work their way down the menu.

10. In the **Display name** field, type the custom menu command name as you want it to appear in the menu.

    If the custom menu command opens a CPL program file, you can have Concordance Desktop run a specific function within the program file by adding the function value to the Function field. This should be a complete and valid CPL function call, such as

main() or myfunction("Hello", 1, 2, 3). This allows you to create a single CPL file with a complete set of functions to handle different menu items.

📝 Display names that contain the ampersand "&" or parenthesis "()" characters will not display correctly. Spell out the word "and" to include it in the display name.

11. To run a specific function within the CPL program file selected for the custom menu, in the **Function** field, type the full CPL function call.

For all other custom menu commands, leave the Function field blank.

Once you have finished adding a custom menu and/or custom menu command, it is listed in the Added menu items section. If you are creating multiple custom menus and/or custom menu commands, you can organize the display order of the custom menus, and the custom menu commands within the same menu by clicking the Move up and Move down buttons.

When determining the display position of custom menus and/or custom menu commands in relation to each other, sometimes it is easier to leave the Position field set to -1 for each menu and menu commands, and just use the Move up and Move down buttons to position them.

💡 The custom menu and menu command list in the Added menu items section has a shortcut menu to make menu customization easier. The shortcut menu allows you to cut, copy, paste, and select all custom menu items. To open the shortcut menu, right-click one or more of the menus and/or menu commands in the list. You can select multiple menus and menu commands using SHIFT+click or CTRL +click.

With the cut, copy, and paste features you can create a set of menu items, copy them, and paste them into other user's profiles or other database profiles. This is the easiest way to replicate menus in the Added Menu Items dialog box.

12. Click **OK** to save your custom menu and/or custom menu command.

You may need to close out of Concordance Desktop and log back in to activate the new menu settings.

Managing Databases

Ongoing maintenance of your Concordance Desktop databases is standard practice as an administrator. Refer to this module to review database management guidelines and tips, and for general maintenance processes.

Database management includes the following procedures for quality control and maintenance:

- Assigning database administrators
- Taking databases offline
- Synchronizing databases
- Backing Up and Archiving Databases
- Subsequent loads
- Performing data entry and editing
- Creating Authority word lists
- Performing global replacements
- Checking for duplicate records
- Packing the dictionary
- Packing databases
- Zapping databases
- Modifying database field structure

Exclusive Administrator Processes

Some database management tasks require that all other users are logged out of the database when they are performed. The administrator is the only user allowed in the database when the following processes are occurring:

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

📝 To verify whether any users are currently logged on to Concordance Desktop, you need to log into the Concordance Desktop server computer.

- To see users currently logged in, Open the Admin Console, and click the Connections tab. The Server tab displays all users who are access what databases on the server.
- To disconnect users: Call them and ask them to save their work and close the database(s) they have open. If it is an emergency and you need to take the database offline immediately, you can disconnect users from the Connections tab by highlighting their name and clicking the large red X in the Active Connections toolbar. Note that when you do this, the users will lose any of the work they have done in the database if they haven't saved it.

Assigning database administrators

The easiest method for assigning administrators to a specific database is to use the Admin Console to setup a matter and assign the database to that matter. Then setup a user group, assign the administrator users to that group, and then assign that user group to the same matter. You can also quickly assign users as administrators for all databases using the Admin Console. While the Admin Console works well for these types of scenarios, it can be cumbersome if you just need to setup one user as an administrator on one database. For setting up administrators on a one user to one database basis, the easiest method is to select the database, and then use the User Management feature to assign that specific user as the administrator for that specific database. You can setup multiple administrators using this same method, however it may become time consuming if you have several users to assign as administrators to several databases, as assignments must be applied on a per user per database basis. Which tool you use depends on how many administrators you need to setup, on how many databases. The default, when adding users to a Concordance Desktop server in the Admin Console, is set to allow all users "Supervisor" privileges across all Concordance Desktop databases on the server. If however users are added to the server when a database has been migrated to Concordance Desktop

When you assign database administrators, take into account each of their roles and schedules for managing database processes and ongoing database maintenance tasks.

To assign database administrators using the Admin Console

This method is usually used to assign a user as an administrator across several, or all the databases on this Concordance Desktop server. This is the default for all users when you add them to the server, unless you change their License Type, Field Rights and/or Menu Types.

1. Click on the **Workspace** tab.

2. On the **File Menu**, click **Administration** and then **Admin Console**.

3. Click the **Management** tab, to open the Management pane.

4. Click the **Users** folder to display the list of all users.

5. Locate and click on the user you want to assign as an administrator.

6. Click the **License Type** down-arrow, and select **Administrator**.

7. Change the **Field Rights** setting only if you need to restrict the user's Write access to the database. Otherwise, leave the default of Read and Write.

8. Click the **Menu Type** down-arrow and select either **Supervisor** or **Administrator**, depending on the menus you want the user to have access to as the administrator of the database.

Supervisor - Access to all menus and menu commands. A supervisor can add users in the Admin Console and then restrict field-specific rights and limit their menu access on a database by database basis from the User Management screen.

Administrator - Access to all menus and menu commands except the Modify, User Management, and Zap menu commands.

9. If you want to assign this user as an administrator across all databases on this Concordance Desktop server, click the **Assign settings for this user to all DB's** button.

10. Click the **Synchronize now** button to save and synchronize the changes.

To assign database administrators using the User Management feature

This method is usually used to assign one administrator to a single database. Though it can also be used to assign multiple administrators to a single database.

1. Open the database to which you need to assign an administrator user, by using one of the following methods.

   - Select the database from the Databases **Recent** list
   - Select the database from the Databases **Current Database** list.
   - From the **File** menu, click **Open** (if the database is not listed in the Recent or Current Database lists).

2. On the **File Menu**, click **Administration** and then **User Management**.

3. Type your own administrator **User** name and **Password**, and then click **OK**, to gain access to the User Management screen for the selected database.

4. Click the **Menu access** tab.

5. Click on the login ID of the user you want to assign as an administrator of the database.

6. Under the Presets section, click on either **Supervisor** or **Administrator**, depending on the menus you want the user to have access to, as the administrator of the database.

7. To further define the menu access for this administrative user, click on the check box next to a menu option to add or remove a check mark. A check mark indicates that the user has access to that menu, while no check mark indicates they do not have access.

   To set restrictions on sub-menus, click on the main menu option's plus sign to box to display the list of sub-menus, and then add and remove check marks as necessary.

8. Do one of the following:

- Click **Apply** to apply the setting to the selected user. You'll want to use Apply if you need to add more administrators.
- Click **OK** to apply the setting to the selected user and close the User Management screen. If adding multiple administrator users, click OK only after the very last user assignment.

9. Repeat all the steps for each user you want to assign as an administrator of the database.

Taking a database offline

When you perform processes such as indexing and packing a database in Concordance Desktop, you should always take the database offline prior to starting the process. Failure to do so could cause corruption of the database if users have the database open and are working with it.

For more information about indexing and Concordance Desktop server, see Indexing and reindexing considerations.

Databases can be taken offline from the Management tab in the Admin Console.

<u>**To take a database offline**</u>

1. In Concordance Desktop, click on the **Workspace** tab.

2. On the **File Menu**, click **Administration** and then **Admin Console**.

3. Click the **Management** tab, to open the Management pane.

4. On the **Management** tab, click the **Databases** folder, to display the list of databases registered on the server.

5. Click on the database you want to take offline.

6. Click in the **Status** field on the right.
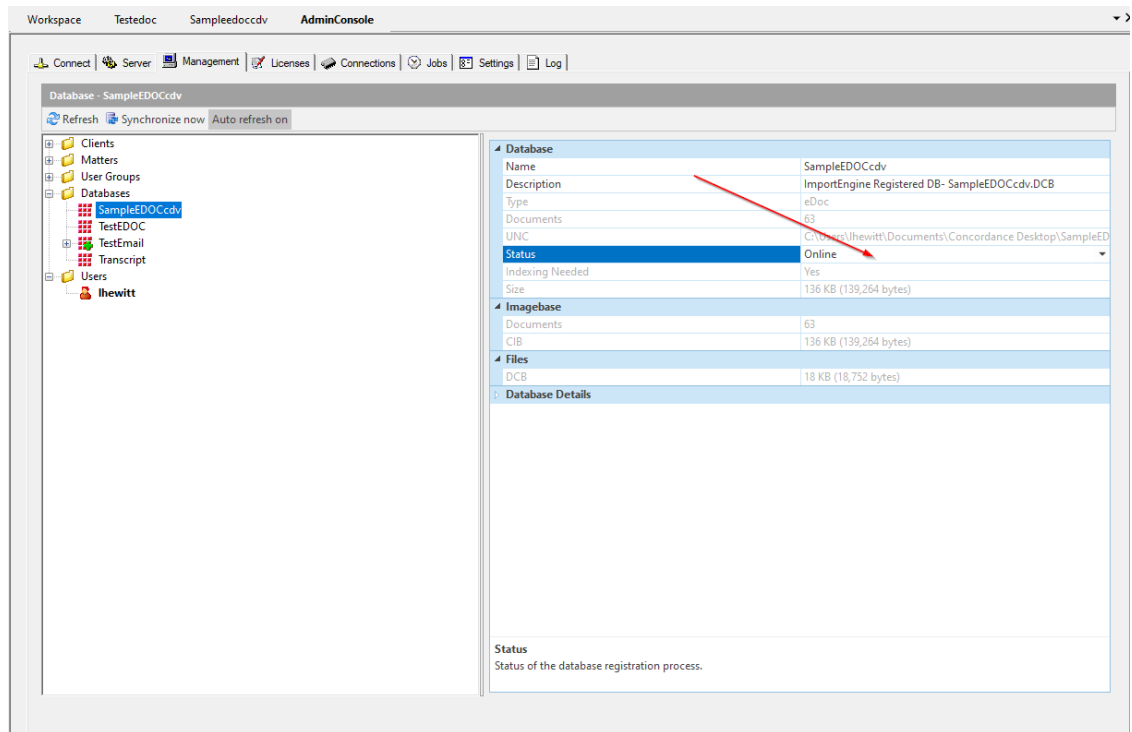
7. Click the **Status** field down-arrow and select **Offline**.

To put the database back online, follow the same steps, but select **Online** in step 7 above.

Reloading databases

The Refresh button saves any changes made in the Admin Console, and also refreshes the tree view on the Management tab with any synchronized updates.

When you are working on the Management tab in the Admin Console it is recommended that you refresh the view so you can see your change. If you do not have Auto refresh turned on, make sure that you click the **Refresh** button before leaving the tab so that all changes are saved.

Registering/unregistering a database

In Concordance Desktop, a database must be registered with the server before it can be opened or worked with. When you create a new Concordance Desktop database, the database is automatically registered with the server during the import process. Databases

created in Concordance 10.21 are also automatically registered with the server during the import process. However, if you have converted Concordance 10.20 or older version 10.x databases to Concordance Desktop databases, those databases are not automatically registered. In order to register the converted databases, some interaction on your part is necessary. To register a Concordance 10.20 or older version 10.x converted database, you can need to use the manual method described under To manually register a database.

If you have unregistered a database and now need to access that database again through Concordance Desktop, you need to manually register the database again with the Concordance Desktop server.

When you are moving a database to archive, assigning it to another server for access, or if a mobile license has taken control of the database for private/single user review, you can unregister the database on its current server so that the database does not appear in the list of available databases on that server. When you unregister a database, the database is not physically removed from the server, it's name is simply removed from the Database List on the current server.

After converting a Concordance 10.21 database to a Concordance Desktop database, you can automatically register the converted database by placing it in the DB Smart Path folder/directory.

To manually register a database

Before you can register a database on a Concordance Desktop server, you must physically move (or copy) the database onto that server's local hard-drive.

1. On the **File** menu, click **Administration** and then **Admin Console**.

2. Log onto the server where you want to register the database.

   You must be a Concordance Desktop administrator on the selected server in order to register a database.

3. Click on the **Management** tab.

4. Right-click on the **Databases** folder, and then click **Register database**.

5. In the field that appears, type a name for the database you want to register, and press **Enter**.

   An Open Database window opens.

6. Locate and open the folder where the database is located.

7. Click on the database to select it.

8. Click **OK.**

If the selected database is a Concordance 10.x database, you are asked if you are ready to migrate it. If you have done a backup and are ready, Click **OK**, otherwise just close the dialog box. After the migration and registration processes are finished, the Databases pane opens on the right. At the bottom of the list you should see the name of the database you just registered. The database can be found at the bottom of the list.

If the selected database is a Concordance Desktop database, after the registration process is finished, then the Databases pane opens on the right. The database can be found at the bottom of the list.

The *Status* column indicates whether or not registration (migration for Concordance 10.x database) was successful. If successful, the Status column displays "Online", of not successful, it displays "Conversion failed" or "Registration failed." More information about failures can be found in the server log file.

If Auto refresh is turned on (Auto refresh on), the database name appears under the Databases folder, after auto refresh runs.

To un-register a database

1. On the **File** menu, click **Administration** and then **Admin Console**.

2. Log onto the server where you want to register the database.

   You must be a Concordance Desktop administrator on the selected server in order to unregister a database.

3. Click on the **Management** tab.

4. Double-click on the **Databases** folder to open it.

5. Right-click on the database you want to un-register, and then click **Unregister database**.

6. You are asked to confirm that you want to un-regisrter the database, click **Yes**.

The database is un-registered from the Concordance Desktop server. The database remains on the server in the same location, unless you physically remove it, or move it to another location. However, it cannot be accessed through Concordance Desktop unless you manually register the database.

Synchronizing databases

The 'Synchronize now' button on the Management tab in the Admin Console automatically synchronizes changes to users, user groups, and matters with the associated registered databases on the Concordance Desktop server.

To synchronize changes that you have made in the Admin console that affect databases on the Concordance Desktop server:

1. Click on the Admin Console **Management** tab, if not already opened.

2. Click the **Synchronize now** button at the top of the Management tab pane.

About editing records

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

The editing tool is also useful when there is limited information in the database to search. Sometimes a paralegal or staff member may be assigned to add missing information, such as the dates, authors, and recipients, to every document in a database to help locate documents authored by a particular individual to another individual within a specific time frame during searches.

When the Edit view is opened, record data is displayed for editing in the Workspace pane and the Edit toolbar opens at the bottom of the Workspace. By default the Edit view includes all fields to which you have access. Edit Layout can be used to customize the view to display only those fields you want to edit and in the order you want to see them. Only those fields to which you have full rights can be edited. Read-only fields are displayed in grey and cannot be edited.

📝 The customization of the Edit view is not available for the Append and Ditto features.
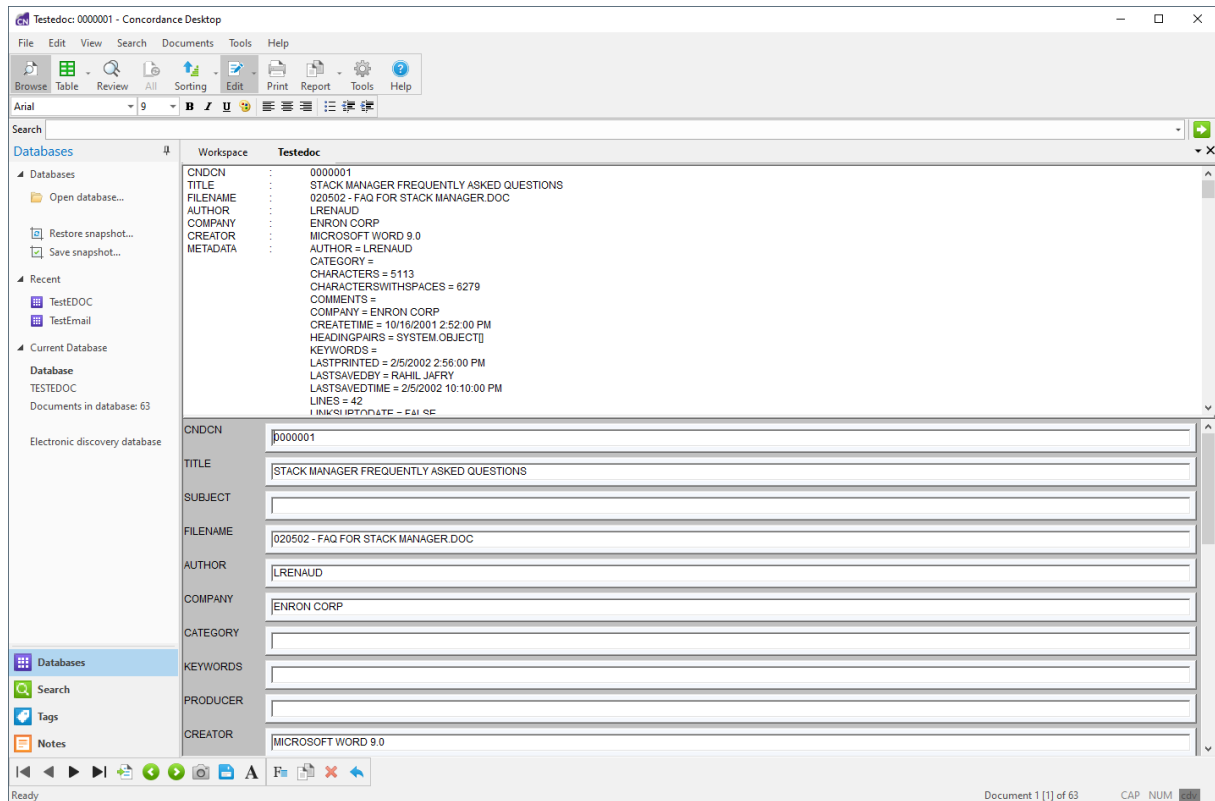
Edit View

Edit tools

When you click the Edit button on the Standard toolbar, the four Edit view tools on Dynamic toolbar are displayed:

- **Fields -** accesses a field listing to insert data from another field
- **Ditto** - allows you to copy field data from another record Note that Ditto can on be used on migrated 10.x DAT, E-mail and Attachment, or Transcript databases. Ditto cannot be used for Concordance 10.21 E-document databases, and all databases created in Concordance Desktop.
- **Delete** - mark or unmark document for deletion
- **Undo** - allows you to undo or abandon edits

Rich Text toolbar

When you click the Edit button on the Standard toolbar, the Rich Text toolbar displays under the Standard toolbar. On the Rich Text toolbar you can adjust the font size, color, and spacing in edit form fields.

Edit Mode options

When opening up a record in edit mode in the Edit view, Concordance Desktop has formatting options that can be applied to data within a specific field. These formatting options include: **Upper** case, **Lower** case, **Capitalize**, and **Reset field formatting**.

To change the format of existing data within a field:

1. In the **Edit** view, select the word or blocks of text that you want to format.

2. Right-click the text and click the applicable formatting option.

   Your changes are saved when you navigate to another record or view in Concordance Desktop.

Editing records

Editing existing records is done most often when records are added to Concordance Desktop but are missing information that needs to be captured in the system to identify it, 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 display in gray. Other data entry restrictions may be placed on fields by your Concordance Desktop administrator.

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

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

For more information about field lists containing word selections that reduce data entry time, see Using Word Lists.

⚠ Editing = coding. Use caution when working in the Edit view. You can spoliate documents if you are not careful, damaging the integrity of your original database records and impacting the search results of others.
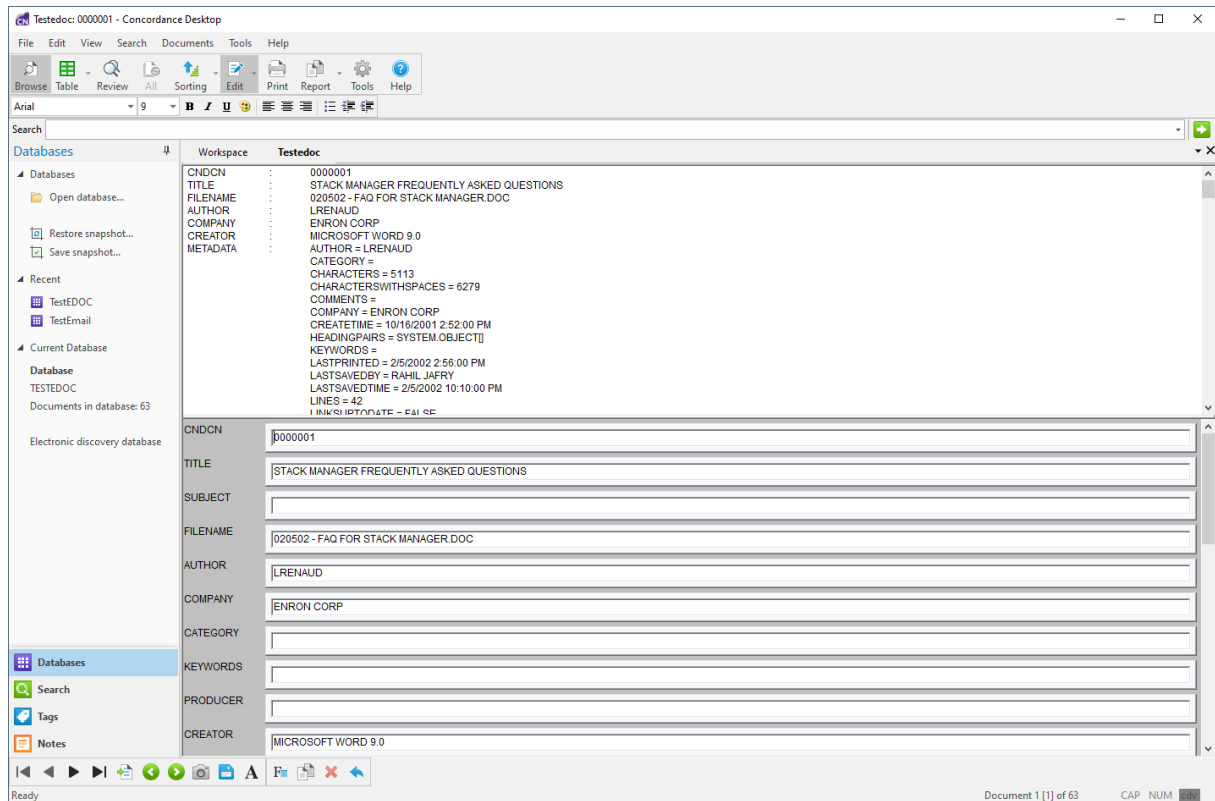
To edit an existing record:

1. In the Browse or Table view, select the record .

2. On the Standard toolbar, click the **Edit** button to activate edit mode for the record.

    By default, all the fields are displayed in the Edit view. Some fields may be gray because you don't have permission to edit these fields.

3. To apply an edit layout, do one of the following:

    -   On the **View** menu, click **Edit View**, and then click the layout name to apply.
    -   On the Standard toolbar, click the **Edit** button arrow, and then click the layout name to apply.
    -   In the Edit view, right-click within a field, point to **Layout** and then click the layout name to apply.

    For more information about Edit Layouts, see Creating edit layouts.

4. To resize a field in the Edit view, select the bottom border box of the field and drag it down the page to expand the field size. The fields are distinguishable by having a raised border and can be resized during data entry to make editing easier.

5. Make your edits.

Concordance Desktop automatically saves your edits as soon as you navigate to another record or change your view in Concordance Desktop.

Changes are immediately viewable. However, in order to run full-text searches on the edits in the record, the database needs to be reindexed. Once this action is performed all reviewers can search the updates.

💡 To ensure that your edits are searchable in a timely manner, coordinate with your Concordance Desktop administrator regarding the reindexing schedule. If any edits are made that require a reindex, a check mark displays in the File menu next to Reindex.

6. To reindex the database, on the **File** menu, click **Reindex**.

Using Word lists

In most document databases, some data entry work is unique, like attorney review comments, but much of it is repetitive. For example, if you are cataloging correspondence between the principal players in a case, the same names are repeated again and again.

Having these names or other repetitive words available in word lists allows you to insert them in respective database fields reducing the amount of typing necessary. This feature also minimizes data entry errors. For example, you can pick *Wocjieweiski* from a list instead of having to remember how to spell it each time you need to enter the name into a field.

Word lists can be used for any repetitive data entry fields, such as document type (letters, memos, reports, etc.), privilege (attorney client privilege, trade secret, etc.), or any field where the same set of terms is used over again.

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

There are numerous ways to open a word list in Concordance Desktop. You can only open a word list when you are in the Edit view.

To open a word list:

For fields associated with a word list, the first time you click in the field, the associated word list automatically opens. To open the word list if the word list does not automatically open, begin typing the value or right-click in the field to open the associated word list.

For fields not associated with a word list, do one of the following:

- Press **CTRL + L**, select the word list, and click **Open**.

- Right-click in the field and click **Word Lists** or the associated field list. If you select Word Lists, navigate to and open the word list file.
- On the Edit menu, click **Lists,** then **Word Lists**, and then navigate to and open the word list file.

To populate a field using a word list:

1. In the Browse or Table view, select the record.

2. On the Standard toolbar, click the **Edit** button to open the Edit view and activate edit mode for the record.

   By default, all the fields are displayed in the Edit view. Some fields may be gray because you don't have permission to edit these fields.

3. To apply an edit layout, do one of the following:

   - On the **View** menu, click **Edit View**, and then click the layout name to apply.
   - On the Standard toolbar, click the **Edit** button arrow, and then click the layout name to apply.
   - In the Edit view, right-click within a field, point to **Layout** and then click the layout name to apply.

   For more information about Edit Layouts, see Creating edit layouts.

4. For fields associated with a word list, the first time you click in the field, the associated word list automatically opens in the **Word List** dialog box. To open the word list if the word list does not automatically open, begin typing the value or right-click in the field to open the associated word list.

   For fields associated with a word list, you can also populate the field with a value from a different word list. To use a value from a different word list, click the field. From the Edit menu, point to Lists, and click Word Lists. Navigate to and open the word list file.

   For fields not associated with a word list, click field you want to populate and open a word list. To open a word list do one of the following:

   - Press CTRL + L, click the word list, and then click **Open**.
   - Right-click in the field and select **Word Lists** or the associated field list. If you click Word Lists, navigate to and open the word list file.
   - On the Edit menu, click **Lists**, then **Word Lists**, and then navigate to and open the word list file.

5. Select a value from the word list and click the **Add** button.

   For long word lists, you can quickly locate the value you are looking for by typing the first couple letters or characters of the value in the field below the word list. For example, typing *S* takes you to the values beginning with the letter *S*.

The Add button adds the selected value to the field and closes the Word List dialog box.

Concordance Desktop automatically saves your edits as soon as you navigate to another record or change your view in Concordance Desktop.

Changes are immediately viewable. However, in order to run full-text searches on the edits in the record, the database needs to be reindexed. Once this action is performed all reviewers can search the updates.
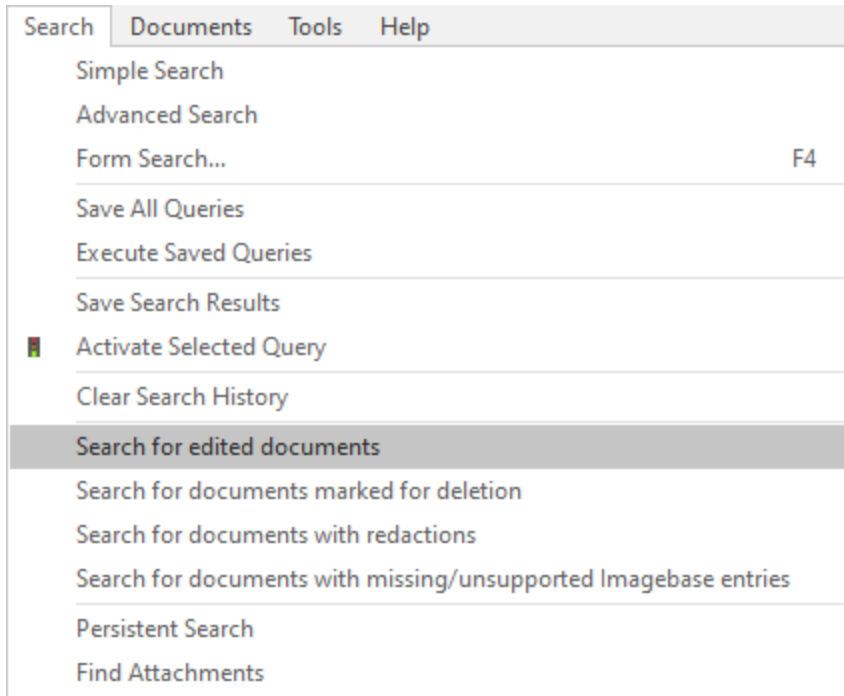
To ensure that your edits are searchable in a timely manner, coordinate with your Concordance Desktop administrator regarding the reindexing schedule. If any edits are made that require a reindex, a check mark displays in the File menu next to Reindex.

6. To reindex the database, on the **File** menu, click **Reindex**.

To add a new entry to a word list:

1. Open a word list.

2. Type the value you want to add to the list in the field below the word list.

3. Click the **Insert** button.

To delete a value from a word list:

1. Open a word list.

2. Select the value you want to delete from the word list.

3. Click the **Delete** button.

Removing rich text from multiple records

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

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. When you use the Bulk Field

Format Reset feature, Concordance Desktop removes all rich text formatting in the selected field and changes the text in the field to plain text in all records in the database.

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

⚠ When using the Bulk Field Format Reset, make sure that no other users are in the database at the time.

To reset the rich text format to plain text for multiple records:

1. On the **File** menu, click **Administration**, then **Bulk Field Format Reset**.

   The Bulk Field Reset Format dialog box opens.

Bulk Field Reset Format	✕

   Options

   ⦿ Check for RTF Data (Recommended)
   Resets field data for the specified field if RTF data exists.

   ○ Reset Field Format
   Automatically resets field data for the specified field within the entire database.
   This may take several minutes.

   [OK]   [Cancel]
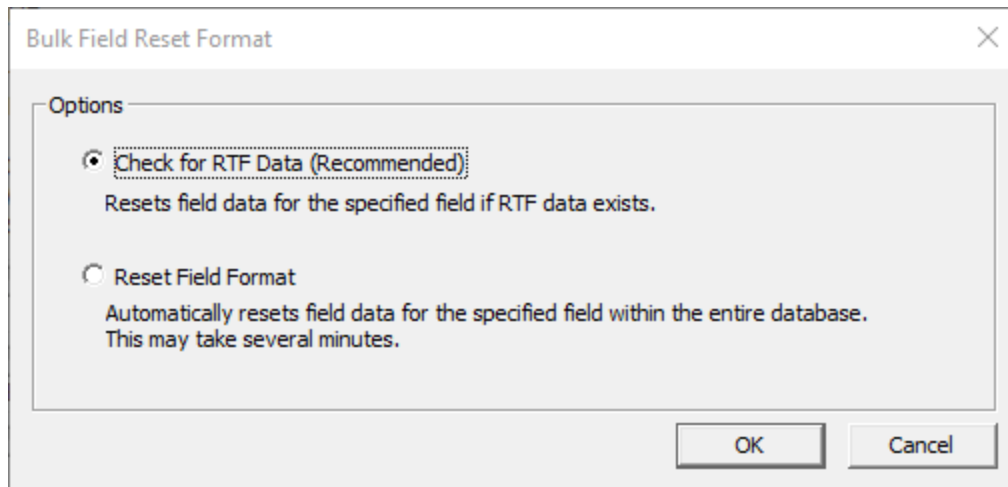
2. Select one of the following options:

   Check for RTF Data (Recommended): If you select this option, the process checks the specified field in each record for Rich Text formatted data, and resets the data in only those records in with there is RTF formatted data. If no RTF data is found in the specified field in a record, the data is not reset.

   Reset Field Format: If you select this option, the process does not check for Rich Text formatted data prior to resetting the data. Instead, it resets the data for the specified field in every record. This process actually takes longer, as it has to reset the data in the field on every record, not just those records that contain RTF data. through every record in the database and resets the data in the specified field, whether or not it needed to be reset.

3. Click **OK**.

   The Bulk Reset Format dialog box opens.
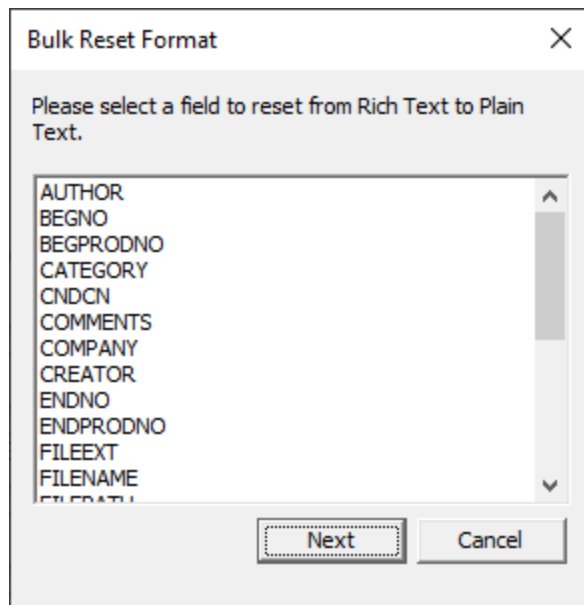
4. In the field list, click the field containing the rich text formatting that you want to change to plain text.

5. Click **Next**. A confirmation message displays regarding the field you selected.

6. Click **OK**.

   If rich text formatting in found in the field, the process removes the rich text formatting and replaces it with plain text in all records in the database. When it finishes, click **Cancel** in the Bulk Reset Format dialog box to close it.

   If the process does not find any rich text formatting in the field in any of the records, when the process finishes, a *Selected field does not contain RTF text* message displays. Click **OK** to close the message, and then click **Cancel** in the Bulk Reset Format dialog box to close it.

   After running Bulk Field Format Reset, the changes are immediately viewable in Concordance Desktop and all single byte and Unicode character sets are retained; however you need to reindex your database to see the red search hit highlighting again during searches.

   💡 To ensure that your edits are searchable in a timely manner, coordinate with your Concordance Desktop administrator regarding the reindexing schedule. If any edits are made that require a reindex, a check mark displays in the File menu next to Reindex.

7. Reindex the database, (From the **File** menu click **Reindex**.)

Using Ditto to copy field data from record to record

📝 **IMPORTANT NOTE:** Ditto cannot be used on databases created in Concordance Desktop, or on Concordance 10.21 E-document databases that have been migrated to Concordance Desktop. The information below is provided only for the use of Ditto on other Concordance 10.x databases that have been migrated to Concordance Desktop.

Ditto is a tool that can be used for repetitive data entry. When using Ditto, it opens a Duplicate dialog box that allows you to copy fields of data from one record to another, minimizing data entry errors. The Ditto feature is only available in the Edit view.

Ditto offers the following options through the Duplicate dialog box:

- **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 a document to a field containing data in the current document, when you select Copy previous or Copy from another, the data for the selected fields in 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.
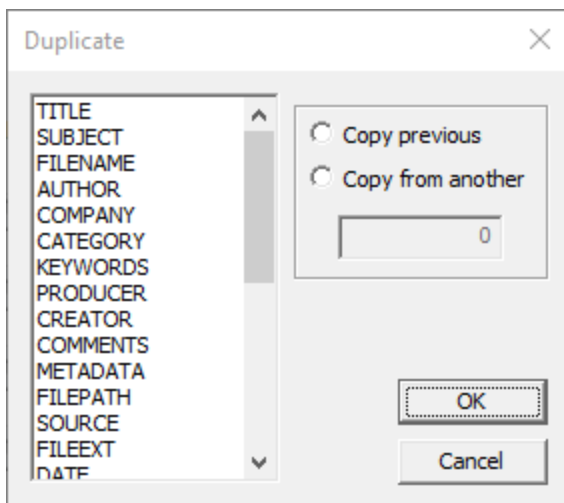
To copy field data from one record to other records:

1. In the **Browse** or **Table** view, select the record containing the fields you want to populate from another record.

2. On the **Standard** toolbar, click the **Edit** button to open the **Edit** view.

3. To open the **Duplicate** dialog box, do one of the following:

4. From the Field list, select the fields containing the data you want to copy to the record.

- On the **Edit** menu, click **Ditto (Edit View)**.
- On the **Dynamic** toolbar click the **Ditto** button.

5. From the Field list, select the fields containing the data you want to copy to the record.

    You can select multiple fields by pressing the SHIFT or CTRL key while selecting multiple fields.

    DO NOT select the **DOCID** field, as this field is used by Concordance Desktop as the unique record identifier. Selecting to duplicate (copy) this field will corrupt your database.

6. Do one of the following:

    - To copy the data from the previous record, click **Copy previous**.
    - To copy the data from another record, click **Copy from another** and type this document's current record number.

7. Click **OK**.

    Clicking OK copies the data from the selected fields in the other document to the fields in the current document.

8. Repeat steps 1 through 7 for each record you want to populate with field data from another record.

9. On the **Standard** toolbar, click the **Edit** button to turn off edit mode and save your record.

    Concordance Desktop automatically saves the new record as soon as you close the Edit view or navigate to another record.

    Changes are immediately viewable. However, in order to run full-text searches on the edits in the record, the database needs to be reindexed. Once this action is performed all reviewers can search the updates.

💡 To ensure that your new records are searchable in a timely manner, coordinate with your Concordance Desktop administrator regarding the reindexing schedule. If any edits are made that require a reindex, a check mark displays on the File menu next to Reindex.

⚠ It is best practice to close out of the Edit view by clicking the Edit button after you are done adding or editing records – and before you exit Concordance Desktop – to ensure that all new records have been saved. If you do not close the Edit view before exiting, you may lose your work.

9. To reindex the database, on the **File** menu, click **Reindex**.

Searching for edited records

To query the database for any documents that have been edited use the Search for edited documents command. When you select Search for edited documents, all documents that have been edited since the last database reindex or index are displayed in Browse or Table view.

Search	Documents	Tools	Help	
Simple Search				
Advanced Search				
Form Search...				F4
Save All Queries				
Execute Saved Queries				
Save Search Results				
▐ Activate Selected Query				
Clear Search History				
Search for edited documents				
Search for documents marked for deletion				
Search for documents with redactions				
Search for documents with missing/unsupported Imagebase entries				
Persistent Search				
Find Attachments				

Adding field groups to the .INI file

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

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

Example: Aliasname = fieldname1, fieldname2

ALLDATES = DATE, DOCDATE

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

The CREATEDATE and CREATIONDATE fields, or their equivalents, cannot be included

in a field group because of the validation settings applied to them.

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

To add a field group to the .ini file:

1. In Microsoft Windows Explorer, navigate to the database .ini file you want to add a field group.

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

2. Right-click and open the .ini file in any text editor program.

3. Scroll to the bottom of the file.

4. In the next line after the last record, type **[FieldGroups]** and press Enter.

5. Type the Aliasname = fieldname1, fieldname2, fieldname3.

   For example: Date = DOCDATE,DATE,GMT_DATE,MODDATE,PRINTDATE

You can add as many fields as you need to the field group.

6. Save the .ini file.

7. To test the field group you created, in Concordance Desktop, run a search for the field group alias you created.

   For example: Date = ??/??/1982, ??/??/2000.

   Your search results should include the applicable data from the fields within the field group you created.

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

concatenated database set, Concordance Desktop searches the all the fields in the field group in each of the databases in the concatenated set.

Creating authority word lists

Authority word lists are lists of words and phrases that open in the Edit view when you place your cursor in a field associated with a word list or right-click a field and click the list in the shortcut menu. Typing text automatically scrolls the list to the word or phrase nearest in spelling. Most words and phrases are retrieved with just a few keystrokes. Authority list entries are always inserted at the current cursor location in the Edit view.

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

Authority lists are special files, similar to the database dictionary, which provide fast retrieval and maintenance of alphabetized entries. The authority lists used in Edit view have the .lst file extension.

Authority lists are created in the List File Management dialog box. Once an authority list is created, the list is assigned to a field or fields in the Data Entry Attributes dialog box.

You can create authority list values in three ways:

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

To manually create an authority list:

1. On the **Tools** menu, click **Manage List Files**.

2. In the **List File Management** dialog box, click the **Lists** tab, click the **New** button.

    Clicking the New button opens the *Allow duplicates in new list file?* message.

3. To allow duplicate values in the authority list, click **Yes**.

    If you do not want to allow duplicate values, click No.

    Clicking Yes or No opens the *Create a case sensitive list file?* message.

4. To set the authority list to be case sensitive, click **Yes**.

    If you want the authority list to not be case sensitive, click No.

Clicking Yes or No opens the Save As dialog box.

5. Navigate to the directory where you want to store the authority list's .lst file, type the name of the authority list file in the **File name** field, and click **Save**.

    Clicking Save opens the new authority list in the List File Managment dialog box.

6. Click the **Edit** tab.

7. In the **Key** field, type the first list value.

    The Key field is case sensitive and allows up to 240 alpha-numeric characters.

    The Data value field is not used when creating an authority list. Leave the default 0 value in the Data value field.

8. Click the **Add** button to add the new list value.

9. Repeat steps 7 and 8 for each list value.

10. When you have finished creating the authority list, click the **Done** button to save your new list.

To create an authority list from field data:

1. On the **Tools** menu, click **Manage List Files**.

    Clicking Manage List Files opens the Lists tab in the List File Management dialog box.

2. On the **Lists** tab, click the **New** button.

    Clicking the New button opens the *Allow duplicates in new list file?* message.

3. To allow duplicate values in the authority list, click **Yes**.

    If you do not want to allow duplicate values, click No.

    Clicking Yes or No opens the *Create a case sensitive list file?* message.

4. To set the authority list to be case sensitive, click **Yes**.

    If you want the authority list to not be case sensitive, click No.

    Clicking Yes or No opens the Save As dialog box.

5. Navigate to the directory where you want to store the authority list's .lst file, type the name of the authority list file in the **File name** field, and click **Save**.

    Clicking Save opens the new authority list in the List File Management dialog box.

6. Click the **Authority List** tab.

7. In the **Field** list, click the fields containing the values you want to use for your authority list.

    To select multiple fields, use SHIFT+click or CTRL+click.

    The Delimiter section determines which delimiter is used to separate the list values from each other in the authority list's .LST file. The Delimiter section defaults to Comma. If each value needs to be on a new line by itself, select the Newline option.

    For more information about delimiters, see About delimiter characters.

8. In the **Delimiter** section, select the delimiter option you want to use in the .lst file.

    The Case conversion section determines whether or not Concordance Desktop converts the text of the value selected in the authority list to all upper case or lower case characters in the Concordance Desktop field. The Case conversion section defaults to *No conversion*.

9. In the **Case conversion** section, select the conversion option you want to use.

    The Documents section determines whether the authority list values are created from the field values in the current query or the entire database.

10. In the **Documents** section, select the **Current query** or **Entire database** option.

11. Click the **Load** button to add the field values to the authority list.

12. To view, add, or delete the new list values, click the **Edit** tab and do any of the following:

    - To add a new value, in the **Key** field, type the new value and click the **Add** button.
    - To delete a value, click the value in the value list and click the **Delete** button.

13. When you have finished creating the authority list, click the **Done** button to save your new list.

To create an authority list from an ASCII file:

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

1. On the **Tools** menu, click **Manage List Files**.

    Clicking Manage List Files opens the Lists tab in the List File Management dialog box.

2. On the **Lists** tab, click the **New** button.

    Clicking the New button opens the *Allow duplicates in new list file?* message.

3. To allow duplicate values in the authority list, click **Yes**.

If you do not want to allow duplicate values, click No.

Clicking Yes or No opens the *Create a case sensitive list file?* message.

4. To set the authority list to be case sensitive, click **Yes**.

   If you want the authority list to not be case sensitive, click No.

   Clicking Yes or No opens the Save As dialog box.

5. Navigate to the directory where you want to store the authority list's .lst file, type the name of the authority list file in the **File name** field, and click **Save**.

   Clicking Save opens the new authority list in the List File Management dialog box.

6. Click the **Import/Export** tab.

7. In the **Import/Export** section, click the **Import** option.

   The Data value delimiter section determines which delimiter is used to separate the list values from each other in the authority list's .lst file. By default, the Include data values check box and Comma option are selected in the Data value delimiter section.

   For more information about delimiters, see About delimiter characters.

   Data values are not used by the authority list. For the authority list, it does not matter whether the Include data values check box is selected. If it is selected, the import populates the Data value field on the Edit tab in the List File Management dialog box with any data values in the ASCII file.

8. In the **Data value delimiter** section, select the delimiter option you want to use in the .lst file.

9. Click the **Import** button.

   Clicking the Import button opens the Open dialog box.

10. Navigate to and open the ASCII .txt file you want to use for the authority list.

    The values in the .txt file are added to the authority list.

11. To view, add, or delete the new list values, click the **Edit** tab and do any of the following:
    - To add a new value, in the **Key** field, type the new value and click the **Add** button.
    - To delete a value, click the value in the value list and click the **Delete** button.

12. When you have finished creating the authority list, click the **Done** button to save your new list.

To associate an authority list with a field:

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

1. On the **Edit** menu, click **Validation**.

   Clicking Validation opens the Data Entry Attributes dialog box.

2. In the **Field Name** list, click the field you want to add the authority list.

3. In the **Authority lists** section, click the **File** button.

   Clicking the File button opens the Open dialog box.

📝 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.

4. Navigate to and open the authority list file, **.lst**.

5. Select the check boxes that apply to the authority list in the field.

   Authority lists check box definitions

   - **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 only allows one field value from the list to populate the field. If a user clicks another field value from the list, the original value is replaced by the newly selected value. You can select both the Single entry check box and the Required for data entry check box to ensure users only populates the field with one field value from the authority list.
   - **List updateable by user**- Users can add and delete field values from the authority list assigned to the field. If you do not want users to modify the authority list, be sure 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 Desktop 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.

6. 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.

7. Click **OK** to save your changes.

   For more information about the Data Entry Attributes dialog box, see Setting data validation.

<u>**To test an authority list:**</u>

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

1. In the **Browse** or **Table** view, select a record.

2. On the **Standard** toolbar, click the **Edit** button to open the record in the **Edit** view in edit mode.

3. Click the field you associated with the authority list.

   If the Required for data entry check box is selected for the authority list in the Data Entry Attributes dialog box, the authority list automatically opens when you click in the field if the field is empty. If the field is already populated, the authority list opens when a user clicks the right mouse button or attempts to type in the field.

   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.

   If the Required for data entry check box is not selected for the authority list in the Data Entry Attributes dialog box, users can right-click in the field to open the shortcut menu, and click the authority list file name to open the authority list associated with the field.

Making global replacements

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

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

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

To make global replacements:

1. Back up your database before running the global replacement.

    For more information see backing up databases.

2. Run a search query to located the records that need a global edit.

    For more information about searching, see Available search tools.

3. On the **Edit** menu, click **Global Replace**.

    Clicking Global Replace opens the Global Replace dialog box.
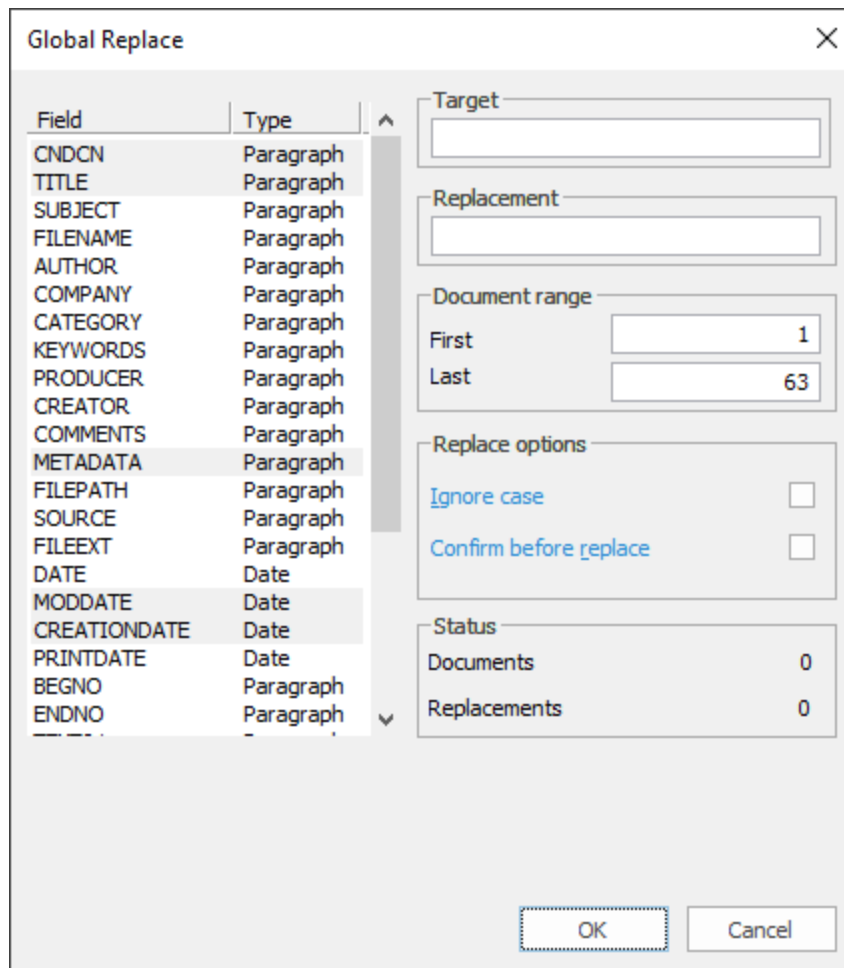
4. In the **Field** list, click the fields containing the text you want to replace.

    To select multiple fields, use SHIFT+click or CTRL+click.

    During a global replacement, Concordance Desktop will only search the fields currently selected in the Field list.

5. In the **Target** field, type the text you want to replace.

6. In the **Replacement** field, type the text you want to add to the field.

    To search or replace empty fields:

    To replace empty fields in the database with the text in the Replacement field, leave the Target field blank.

    To remove the text in the Target field from the selected fields in the database, leave the Replacement field blank.

An empty target will replace all fields selected with the replacement text, if the field is empty. Since all fields are automatically selected by default in the Field list, it is important to only select the fields you want to replace in the Field list.

To search or replace hard carriage returns:

To search or replace hard carriage returns in you data, type *n* in the Target or Replacement field to represent a hard carriage return. If you need to search or replace the actual *n* character combination in your data, instead of a hard carriage return, then type *n* in the Target or Replacement field. Typing *n* lets Concordance Desktop know that you are searching for the*n* character combination and not a hard carriage return.

To search or replace dates:

To search or replace dates in date fields, the format of the dates entered in the Target and Replacement fields must match the date format set up for the selected date fields.

A date field's date format is set in the Type field in the New dialog box when creating a database or in the Modify dialog box when modifying databases.

For example, if you are performing a global replacement for the DOCDATE field and the Type field for the DOCDATE field is set to DateMMDDYYYY in the New or Modify dialog box, the dates entered in the Target and Replacement fields in the Global Replace dialog box must use the same MMDDYYYY format.

Dates should be zero filled. For example, if the date format is MMDDYYYY, July 17, 1960 is entered as 07171960. It is also valid to use partial dates as targets and replacements, such as 1013 for October 13, but do not use a partial date to replace a complete target. This will result in invalid date field entries.

In the Document range section you can specify a document range within the current query to have Concordance Desktop search and replace text only within this range. The First field defaults to the first document in the current query and the Last field defaults to the last document in the current query.

7. In the **First** field, type the first document in the current query to search for the global replacement.

8. In the **Last** field, type the last document in the current query to search for the global replacement.

   By default, the Ignore case check box is not selected. When the Ignore case check box is not selected, field text must exactly match the text in the Target field, including capitalization, before Concordance Desktop will attempt a replacement.

9. To enforce case sensitivity during global replacements, leave the **Ignore case** check box blank.

To ignore upper and lower case lettering during global replacements, select the Ignore case check box.

By default, the Confirm before replace check box is not selected. When the Confirm before replace check box is not selected, Concordance Desktop automatically searches and replaces the text in the documents in the current query without asking for confirmation before each replacement.

10. To make the global replacements with out confirmation, leave the **Confirm before replace** check box blank.

   To request confirmation before replacing text, select the Confirm before replace check box.

11. Click **OK** to make the global replacements.

   If the Confirm before replace check box is selected in the Global Replace dialog box, each time Concordance Desktop locates the text in the Target field during the global replacement, Concordance Desktop displays the text found in the Text Found dialog box.

12. In the **Text Found** dialog box, do one of the following:

   - Click **Yes** to replace the text.
   - Click **No** to ignore the currently found text and continue the global replacement process.
   - Click **All** to replace all additional targets without confirmation.
   - Click **Cancel** to cancel the global replacement process.

   Once the global replacement process finishes, in the Status section, the Documents field displays the number of documents searched and the Replacements field displays the number of replacements made. The field below the Field list and Status section displays the replaced text.

13. Click the **Done** button to close the **Global Replace** dialog box.

   Changes are immediately viewable. However, in order to run full-text searches on the edits in the record, the database needs to be reindexed. Once this action is performed all reviewers can search the updates.

   💡 To ensure that your edits are searchable in a timely manner, coordinate with your Concordance Desktop administrator regarding the reindexing schedule. If any edits are made that require a reindex, a check mark displays in the File menu next to Reindex.

14. To reindex the database, on the **File** menu, click **Reindex**.

About attachments

When paper documents are scanned to TIFF formatted files, the documents are unitized according to their physical or logical boundaries. When loaded into Concordance Desktop, parent documents and their attachments may be broken out into separate records.

If a document and its attachments were scanned as one entire document, there may be only a Begin and End Bates number field for each record in the database that reflect whole documents. If parent documents and attachments have been broken out into separate records, there may be a Begin and End Bates number field, 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 files, in which case, they could be treated the same as paper documents .tiff 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.

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 more information about setting up the fields for the Find Attachment command for the database, see Defining preferences.

💡 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/reindex the database. For more information about the Find Attachments command, see Finding attachments.

Document and attachment field examples:

The following examples show some possible document and field scenarios in a Concordance Desktop database:

Example 1 - Parent Document with Two Attachments
1st Record (Parent Document)
BEGDOC: DSC0000001
ENDDOC: DSC0000001
BEGATTACH: DSC0000001
ENDATTACH: DSC0000010

Example 1 - Parent Document with Two Attachments

2nd Record (First Attachment)

BEGDOC: DSC0000002

ENDDOC: DSC0000004

BEGATTACH: DSC0000001

ENDATTACH: DSC0000010

3rd Record (Second Attachment)

BEGDOC: DSC0000005

ENDDOC: DSC00000010

BEGATTACH: DSC0000001

ENDATTACH: DSC0000010

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

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

1st Record (Parent Document)

BEGDOC: DSC0000001

ENDDOC: DSC0000002

ATTACHRANGE: DSC0000001- DSC0000010

2nd Record (First Attachment)

BEGDOC: DSC0000003

ENDDOC: DSC00000010

ATTACHRANGE: DSC0000001- DSC0000010

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

1st Record (Parent Document)

DOCID: DSC00000001

PARENTDOCID: DSC0000001

2nd Record (First Attachment)

DOCID: DSC0000002

PARENTDOCID: DSC0000001

In this scenario, the PARENTDOCID field establishes the parent to attachment relationship for this document. Notice there are many field naming conventions and other possible styles for Parent and Attachment fields in a Concordance Desktop database.

To locate documents and related attachments:

1. Run the appropriate search to locate the documents for review.

    The search results are returned.

2. 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 .

Updating hyperlinks file path

Hyperlinks often require updating or replacement if you move the database or the native files to another network directory. Hyperlinks are stored in the [database name]-Notes.dcb file for each database. For example, if you move your native documents or attachments from one drive to another, you need to globally replace the drive letter in the NOTEATTACHED field of the Notes.dcb. If your attachment includes the full directory file path in the main database, you also need to replace the drive letter in the FILEPATH field.

If you have moved your database and can no longer launch the native files from the links in the database records, first update the native file path so that it points to the new location of the Native files, and then re-create the hyperlinks in the records so they point to the new location.

To update the native file path:

1. Make a backup copy of your database. See backing up databases for instructions.

2. Open the database in Concordance Desktop, if not already open.

3. From the menu, click **Edit** and then **Global Replace**.

   The Global Replace dialog opens.
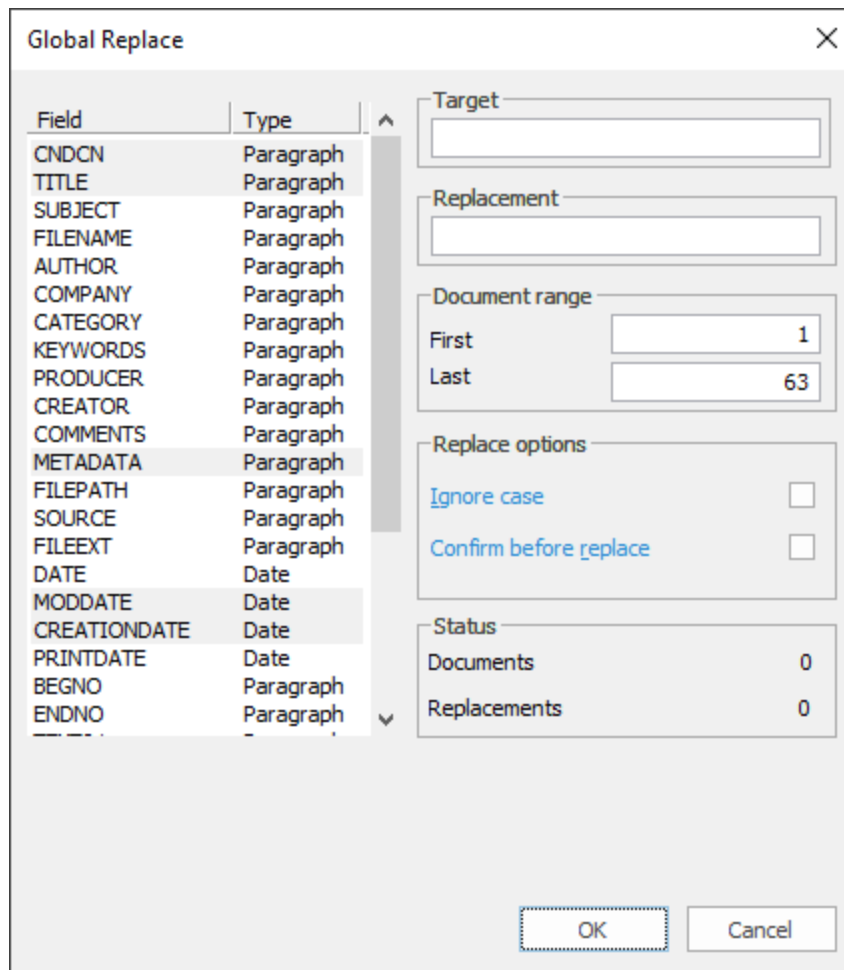
4. In the Field list, locate and select the field that contains the hyperlink.

   The field name is FILEPATH for databases created in Concordance Desktop, but may be named NOTEATTACHED or something else in Concordance 10.x databases that have been migrated to Concordance Desktop.

5. In the **Target** box, type the file path to the original location of the Native files folder.

   The Native files folder is named Natives for databases created in Concordance Desktop, but may be named something else for databases that were migrated from Concordance 10.x.

6. In the **Replacement** box, type the file path to the new location of the Native files folder.

   For databases created in Concordance Desktop, the 'Natives' folder usually resides in the same folder as the database (.DCB), unless the Native files have been previously

7.   Ensure that the file paths are correct before proceeding, as the update is immediately committed to the database once you click OK.

8. Click **OK**.

   The update process begins. When the status shows that all documents have been updated, the updates are complete.

9. Click **Done**.

You are ready to run the CreateHyperlinks CPL to regenerate the updated links in the database records.

Checking for duplicate records

After importing records, you may want to check for duplicates in Concordance Desktop. Duplicates are identified by comparing the content in selected fields. When Concordance Desktop finds duplicate records, Concordance Desktop tags each of the duplicate records. Give some forethought to what fields you want to use to check for duplicates. Before checking for duplicate records, make sure that there are not any records that were tagged in a previous duplicate check before you start the process again.

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

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

The duplication detection categorizes documents in three ways:

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

To check for duplicate records:

1. Run a search query to locate the records you want to search for duplicate records.

   For more information about searching, see Available search tools.

   When Concordance Desktop checks for duplicate records, Concordance Desktop only checks the records in the current query. If you want Concordance Desktop to

check for duplicates in the entire database, be sure to run the Zero Query before checking for duplicates.

For more information about the Zero Query, see Reviewing search queries.

2. On the **Tools** menu, click **Check for duplicates**.

Clicking Check for duplicates opens the Duplicate Detection dialog box.
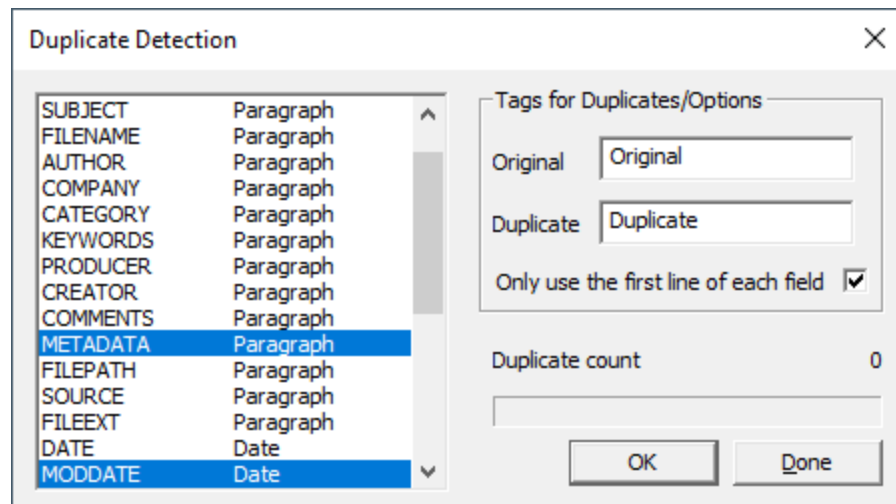
3. In the field list, click the fields you want Concordance Desktop to compare to identify duplicate records in the database's current query.

To select multiple fields, use SHIFT+click or CTRL+click.

You can select as many fields as you want, but there is a limit of 245 characters that can be compared. Paragraph fields count as sixty characters.

When you first open the Duplicate Detection dialog box, the Original field defaults to Original and the Duplicate field defaults to Duplicate. The Original field determines the name of the tag applied to the first record encountered in a duplicate record set, and the Duplicate field determines the name of the tag applied to the second record in a duplicate record set. You can modify the tags names in the Original and Duplicate fields to any tag name you want Concordance Desktop to use for duplicate records.

4. Before checking for duplicate records in the database, make sure that the database does not have any records that were already tagged with these tag names from a previous check for duplicate records.

5. If you selected a paragraph field in the field list, it is best practice to select the **Only use the first line of each field** check box.

If you do not want Concordance Desktop to compare all of the text in a field, up to the 245 character limit, clear the Only use the first line of each field check box.

6. Click **OK** to check for duplicate records.

The Duplicate count field displays the number of duplicate records found during the duplicate record check. Any duplicate records are tagged.

7. Click the **Done** button to close the **Duplicate Detection** dialog box.

8. To view the duplicate records, query the **Original** and **Duplicate** field tags.

For more information about querying tags, see Creating queries from tags.

Tallying duplicates:

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

For more information about the Tally feature, see Searching by tally.

About deleting records

You may need to delete records if there are duplicate records or opposing counsel unintentionally produced privileged documents. Deleting records is a two-step process: mark for deletion, then pack the database to permanently remove the records. Reviewers can flag records for deletion, but they are not permanently removed from the database until the database is packed. Packing a database permanently deletes the records from the database, and there is no undo function for this process, therefore the Pack Database menu command should only be available to administrators.

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

Deleting Records Overview:

- Deleting is a three-step process: mark for deletion, remove tags from the records marked for deletion, and then pack the database
- Make a back-up copy of records marked for deletion by exporting those records to another Concordance Desktop database
- Packing is permanent; there is no Undo button
- Packing the database is an exclusive process

Deleting records in Concordance

Deleting records is a two-step process: records are marked for deletion, then the database is packed to permanently remove the records. Packing a database permanently deletes the records from the database, and there is no undo function for this process.

Before permanently deleting any records, you first need to run a query for all records marked for deletion to review the documents. It is recommended that you remove any tags applied to the deleted records. For more information, see About deleting records.

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

To mark records for deletion:

> For step-by-step instructions to mark individual and multiple records for deletion, see Deleting records in the Using Concordance Desktop module.

To search for deleted records:

1. On the **Search** menu, click **Search for documents marked for deletion**.

2. Clicking **Search for documents marked for deletion** creates a query of the records currently marked for deletion in the database.

   When a record is marked for deletion, DEL is displayed on the Status bar.

3. In the **Browse** or **Table** view, review the records in the query to determine whether the records should be permanently removed from the database.

4. If any records in the query should not be permanently deleted, remove the delete status from the applicable records.

   To remove the delete status from a record, see *To unmark individual records for deletion* in the Deleting records topic.

5. If you removed the delete status from any records in the query, click **Search for documents marked for deletion** on the **Search** menu again to update the query to only include the records you want to permanently delete.

To export the records marked for deletion:

> After reviewing the records marked for deletion and updating the query to only include the records that will be permanently deleted, it is best practice to export these records to another database.

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

Use the Export As a Concordance Desktop database menu command to export the records marked for deletion. When you use the Export As a Concordance Desktop database menu command, Concordance Desktop exports all the records in the current query to a new database. For more information and step-by-step instructions, see Exporting databases.

To pack the database:

After backing up the records marked for deletion, you are ready to permanently remove the records from the database.

⚠ Remember, there is no undo function for this process. Records are immediately and permanently removed from the database, unless you export a copy of your deleted records.

⚠ You cannot pack a concatenated set of databases remotely, you must perform packing from the Concordance Desktop server machine.

1. On the **File** menu, click **Administration**, then **Pack**, and then **Database**.

2. Clicking Database opens the Administration dialog box.

3. In the **User** field, type the administrator's user ID.

4. In the **Password** field, type the administrator's password.

5. Click **OK**.

   Clicking OK opens the Pack dialog box and starts the pack process.

   When Concordance Desktop finishes permanently deleting the records marked for deletion, the Pack dialog box closes.

6. Verify that the records were deleted.

   To verify the records were deleted, open the **Table** view and scan your record listing. The records marked for deletion should no longer be listed.

📝 If you have an ACCESSID field in your database, you will notice that the accession number does not readjust for deleted records. This allows you to view gaps in your database records.

It is best practice to pack the dictionary after packing the database. For more information, see Packing the dictionary.

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

⚠ It is best practice to not give users access to the Zap menu command due to the risks involved in deleting all records in a database. There is no undo function for this process.

1. On the **File** menu, click **Administration**, and then **Zap**.

   Clicking Zap opens the Administration dialog box.

3. In the **User** field, type the administrator's user ID.

4. In the **Password** field, type the administrator's password.

5. Click **OK**. A confirmation dialog displays.

6. Click **Yes** to zap the database.

   Click No to cancel the zap process.

   After the zap process completes, *No documents in query* is displayed on the Status bar.

Packing the dictionary

Packing the dictionary is similar to defragmenting your hard drive; it gets rid of unnecessary entries to keep your system running faster and smarter. Good routine maintenance is to pack the dictionary after you pack the database and also each time you reindex.

Packing the database regularly:

- Increases database processing and search speed
- Increases reindex speed by up to 6X
- Optimizes the dictionary file and makes it smaller

For more information about packing databases, see Deleting records in Concordance Desktop.

To pack the dictionary:

1. On the **File** menu, click **Administration**, then **Pack**, and then **Dictionary**.

2. Clicking Dictionary opens the Administration dialog box.

3. In the **User** field, type the administrator's user ID.

4. In the **Password** field, type the administrator's password.

5. Click **OK**.

   Clicking OK opens the pack status dialog box and starts the pack process.

   When Concordance Desktop finishes packing the dictionary, the status dialog box closes.

About modifying databases

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

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

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

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

Certain changes that do not require a database rebuild:

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

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

💡 If you are renaming a field and moving or changing the field's type, it is best not to rename it at the same time. Instead, change a field name in one step. Then come back and modify the field type or location in another step.

Remember the 3 Change Rule for databases: We recommend that you not make more than three changes to a database before indexing. After making three changes in the Modify dialog box, click OK to save your changes, and then index the database. For more information about indexing databases, see Indexing and reindexing updates.

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

Database modification guidelines

Database Modification Guidelines	
Risk	**Activity**
Less Dangerous	Adding/removing punctuation
	Changing a field's length
	Changing field properties (index or key)
	Changing data types (text to paragraph)
	Adding a new field at the end of the list
	Inserting a new field in the middle of the list
	Renaming a field – A common cause of database corruption!
	Delete or insert a field elsewhere – common cause of database corruption.

Database Modification Guidelines	
Risk	**Activity**
More Dangerous	Making more than one change to the same field, at the same time

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

How to modify a database:

1. Make a back-up copy of the database you are modifying. Do not proceed to step 2 until you have completed this procedure.

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

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

For more information see backing up databases.

2. Once your database backup copy is secure, open the database you want to modify and close all other databases.

3. On the **File** menu, click **Modify**.

The Modify dialog box opens.

4. Make the necessary changes.

    For more information about database fields, see About fields.

    For more information about filling out the Modify dialog box, see the Basic database fields topic.

💡 If you are renaming a field and moving or changing the field's type, it is best not to rename it at the same time. Instead, change a field name in one step. Then come back and modify the field type or location in another step.

   Remember the 3 Change Rule for databases: We recommend that you not make more than three changes to a database before indexing. After making three changes in the Modify dialog box, click OK to save your changes, and then index the database. For more information about indexing databases, see Indexing and reindexing updates.

5. Click **OK** to save your changes and close the **Modify** dialog box.

6. Run a full index.

    For more information about indexing databases, see Indexing and reindexing updates.

🖉 Whenever you add or rename a field in the database, it is added to the database with full field access rights. If you need to restrict one or more user's field rights to

the database, you will need to set the field privileges for the new or renamed field for users already added to the Concordance Desktop server.

For more information about field access rights, see Restricting user access on databases.

Managing Persistent Search

One method for storing search terms is to write the terms directly to a text file that is stored with the database. The Persistent Search feature searches for the terms included in the <databasename>_Persistent.txt file and highlights term(s) in each record where they are found.

Persistent Search, when enabled, remains active even after the results are returned. When new records are added to a database and the Persistent Search feature is enabled, simply reindex the database and then the new records are automatically included in the search results if the records meet the criteria.

If a query is run in conjunction with the Persistent Search enabled, the search results are returned for both the query and the persistent search, and the terms are highlighted in the Browse view. The search query results are displayed in a different color than those found from the Persistent Search. The color settings are defined on the Searching tab of the Preferences dialog box, see Defining preferences.

📝 The Persistent Search feature may be run in conjunction with the Quick, Simple, Form, and Advanced Search queries to refine the search results even further. However, when combining search queries a maximum number of 255 characters is allowed. If a search is performed and then Persistent Search is activated make sure that the total number of characters does not exceed 255 to ensure the correct results are returned.

To add search terms to the Persistent Search file:

1. Navigate to the database's Persistent.txt file.

    The .txt file is stored in the same directory as the database .dcb file.

2. Open the Persistent.txt file in any text editor program.

📝 Persistent.txt files can be opened with any text editor program, such as Notepad.

3. In the Persistent.txt file, type a search term, and then press **Enter**.

☑ The maximum number of characters per search term is 64.

4. Repeat step three for each term you want to include in the text file.

5. When finished, save the file and close the text editor.

Publishing Databases Using Shortcut (.fyi) Files

Working with Concordance Desktop shortcut (.fyi) files

In the Concordance Desktop Admin Console, you can create shortcut (.fyi) files that allow users to launch Concordance Desktop and open remote databases through the Concordance Desktop Server.

Concordance Desktop needs to be installed on the client's computer and Internet access needs to be available. Users can access PDF copies of native documents and/or images if a Full Reviewer license is added to the server and they are provided with the log in credentials for that server.

Concordance Desktop shortcut (ifyi) users have full functionality, with the exception of modifying the database structure, providing an account has been setup for them on the server. Concordance Desktop shortcut (.fyi) users cannot access the Modify command on the File menu.
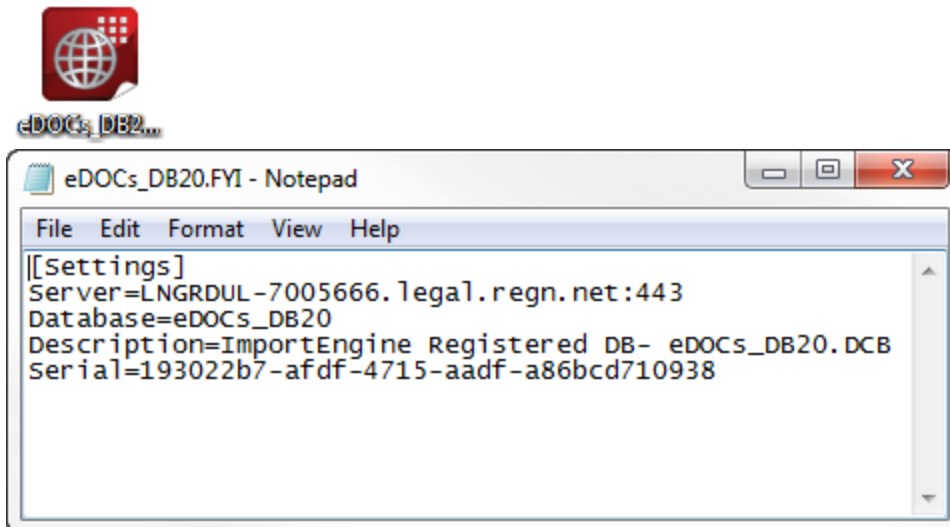
The shortcut (.fyi) file, which can be opened in any text editor, contains the connection information needed to address the Concordance Desktop server and request the database. It includes the server/host name and port number, the database name and description,

and a specific serial number. Users receive access when you email them the shortcut (.fyi) file pointing to the database, along with their Concordance Desktop user name.

For more information about the Concordance Desktop shortcut (.fyi) file, see Working with shortcut (.fyi) files and Distributing the shortcut (.fyi) file to users.

Supporting Concordance Desktop shortcut (.fyi) files

Once databases have been registered and published from the Admin Console, there are some steps you will need to take to ensure that your users have the necessary information they need to get started with the Concordance Desktop shortcut (.FYI) files.

For more information about distributing shortcut (.FYI) files, see Distributing the shortcut (.fyi) file to users.

For more information about supporting reviewers, see Supporting reviewers.

Concordance Desktop server system requirements for shortcut (.fyi) files

The minimum system requirements include:

- Internet access
- Must have client port open to inbound and outbound traffic on the server/computer (port 443 by default)

Creating shortcut (.fyi) files

In the Concordance Desktop Admin Console, you can create shortcut (.fyi) files that allow users to open remote databases in Concordance Desktop.

Concordance Desktop needs to be installed on the user's computer and Internet access needs to be available.

The shortcut (.fyi) file contains the connection information needed to address the Concordance Desktop server and request the database. The shortcut (.fyi) file includes the server/host name and port number, which can be viewed in a text editor program. Users can access the shortcut (.fyi) file when you e-mail them the file pointing to the database, along with their Concordance Desktop user name.

When working with shortcut (.fyi) files, consider the following:

- Shortcut (.fyi) files can be viewed in a text editor program where you can manually change the server/host name, port listing and database description.
- Do not modify the serial number contained in the Shortcut .fyi file as this invalidates the file.

- There is no limit to the number of shortcut (.fyi) files that can be generated.
- When distributing shortcut (.fyi) files from a concatenated set, only the primary database needs to be published to a Shortcut (.fyi) file, as long as the other joined databases are registered on the same Concordance Desktop server.

A new shortcut (.fyi) file is needed when the following occurs:

- The port address changes
- A database is unregistered or registered
- The server's name (computer name) changes

To create a shortcut (.fyi) file

1. Log onto the **Admin Console** of the Concordance Desktop server where the database is registered.

2. Click the **Management** tab.

3. Double-click on the **Databases** folder to open the database list.

4. Right-click on the database for which you need to create a new shortcut (.fyi) file, and select **Create Database Shortcut file**.

   A Save .FYI [database name] dialog box opens.

5. Select the appropriate **Server Address**.

6. Click **Next**.

7. Click the ellipses button to select the folder and file name for the new shortcut (.fyi) file.

8. Click **Finish**.

The shortcut (.fyi) file is saved under the file name and location you entered.

Distributing the shortcut (.fyi) file to users

Users cannot access remote Concordance Desktop databases without having the .fyi file distributed to them. You must also ensure that the port setting is entered in the Admin Console and is open for inbound and outbound traffic. The shortcut (.fyi) file does not need to be redistributed to users unless the serial number or port address changes.

Concordance Desktop shortcut (.fyi) distribution checklist

Checklist: Concordance Desktop Shortcut (.fyi) Distribution

E-mail Template

☐ Prepare an e-mail template for distributing the Concordance Desktop shortcut (.fyi) file to users to ensure that this process is fast and easy the next time a user needs access.

☐ Include the sohrtcut (.fyi) file in the e-mail and instruct users to save the file to their computer desktop.

Logons and Passwords

☐ Include the user's logon, as well as the server or host name and port (usually 443), they need when opening the shortcut (.fyi) file on their compute desktop.

Launching Concordance Desktop

☐ After users have saved the shortcut (.fyi) file to their desktop, they can double-click the file to launch the Concordance Desktop application.

☐ Once users have entered their logon and password, and entered the server/host name and port, the database opens in Concordance Desktop.

*If a user receives an error message stating that the server is unreachable or other message or pop-up, instruct them to contact you. The error is probably due to an incorrect server address and you will need to verify whether the port setting is correct and open.

User Session Timeout Allotments

☐ Inform users of the user session time allotment you have designated for them. Users should know that when their user session timeout period is nearly finished, they will receive an announcement indicating that they should save their work. If a user is logged on, but not actively working, the Concordance Desktop application on the server will then disconnect them from the database and Concordance Desktop, and they risk losing data. To re-open a user session, a user should save their work, exit Concordance Desktop and re-launch the application, thereby opening a new user session period.

About snapshots

Snapshots are a point-in-time picture of a user's work history and helps them 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. Snapshots only store historical data, such as searches, the last record selection, and the last sort performed during a user's Concordance Desktop session.

When a saved snapshot file is restored, Concordance Desktop automatically opens the databases associated with the file, with all queries and sorts preserved. These snapshots can only be restored in the original database they were created in.

Users may also choose to have the Auto-restore feature turned on which is a similar feature to saving a snapshot. This snapshot file contains that last record selection and last record viewed at the end of a Concordance Desktop session, so when users next access Concordance Desktop they can resume. The Auto-restore feature is enabled by default. The Auto-restore setting can be found under File > Snapshot in Concordance Desktop.

Managing Imagebases

The Concordance Desktop Image Base (CIB) database is a SQLite database that stores information on all native documents and image files in a Concordance Desktop database. The .cib file stores information such as folder path location, markup history, and preferences settings for the viewer.

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

⚠ **Do not delete the .CIB file**. Doing so can corrupt the database. The .CIB file contains vital information that the database requires in order to allow the database to be opened and its records to be accessed.

Managing the Concordance Desktop Image Base includes the following:

- Renaming/deleting media paths and folders
- Renaming/deleting media keys (aliases)
- Exporting the imagebase database to an OPT file
- Calculating or updating document page count
- Converting Concordance Desktop Viewer Imagebases to Concordance Viewer

📝 If you are on the Concordance Desktop server machine, and the Image Base Management tools are not available from the File > Administration menu, then you have not been given access privileges. If you need access, please contact your Concordance Desktop Administrator.

Renaming file paths and folders

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

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

To rename media paths and folders:

1. Open the database you want to change the media path or folder.

2. From the **File** menu, click **Administration**, **Image Base Management,** and then **CIB Management**.
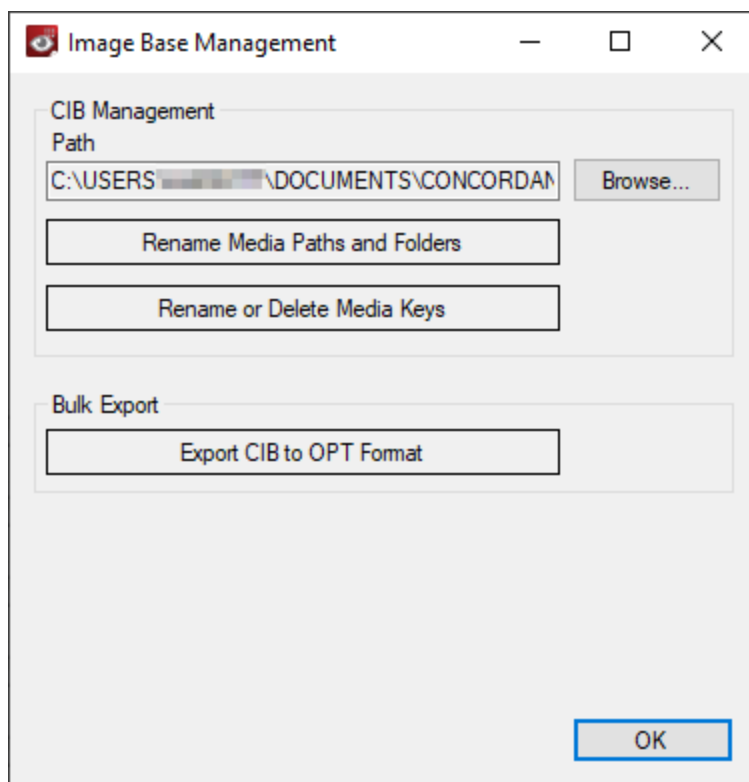
3. Click the **Browse** button to locate and open the **.CIB** file for which you need to rename paths and folder.

4. In the **Image Base Management** dialog box, click the **Rename Media Paths and Folders** button.
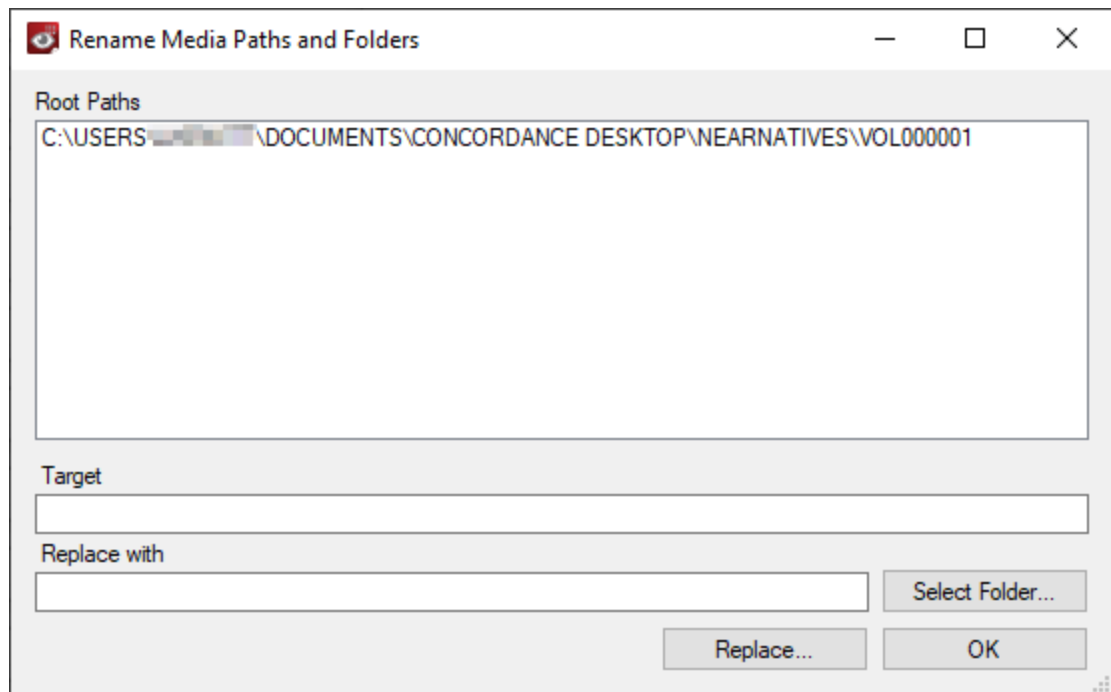
The current file paths are listed at the top of the Rename Media Paths and Folders dialog box.

5. To specify a **Target** path, do one of the following:

   • From the Root Paths list, select an existing file path.
   • Enter a partial path in the **Target** field.

6. To set the **Replace with** path folder, do one of the following:

   • Click the **Select Folder** button and select a new root path folder.
   • In the **Replace With** field, enter the new root path.

   File paths and folder are case-sensitive. Make sure the target and replace case matches the actual locations, to ensure they are properly replaced.

7. When finished, click **Replace**.

8. In the **New Root Paths** dialog box, do one of the following:

   • Click **Confirm** if the new path is correct.
   • Click **Cancel** to return to the Rename Media Paths and Folders dialog box and make any necessary corrections.

⚠ The New Root Path dialog box displays the new path. If the path is displayed with red text, this indicates that the folder does not currently exist. It is recommended that you cancel the rename and choose an existing folder or create one prior to renaming the path.

8. When finished click **OK**.

Editing media keys

Your load file's alias format for should match the media (image) key information in the corresponding Concordance Desktop database. Concordance Desktop stores this key in order to reference the image for viewing in the viewer. For more information about the Image (Media) check box, see About fields.

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

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

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

To edit media keys:

1. Open the database for which you need to change the media keys.

2. From the **File** menu, click **Administration**, **Image Base Management,** and then **CIB Management**.
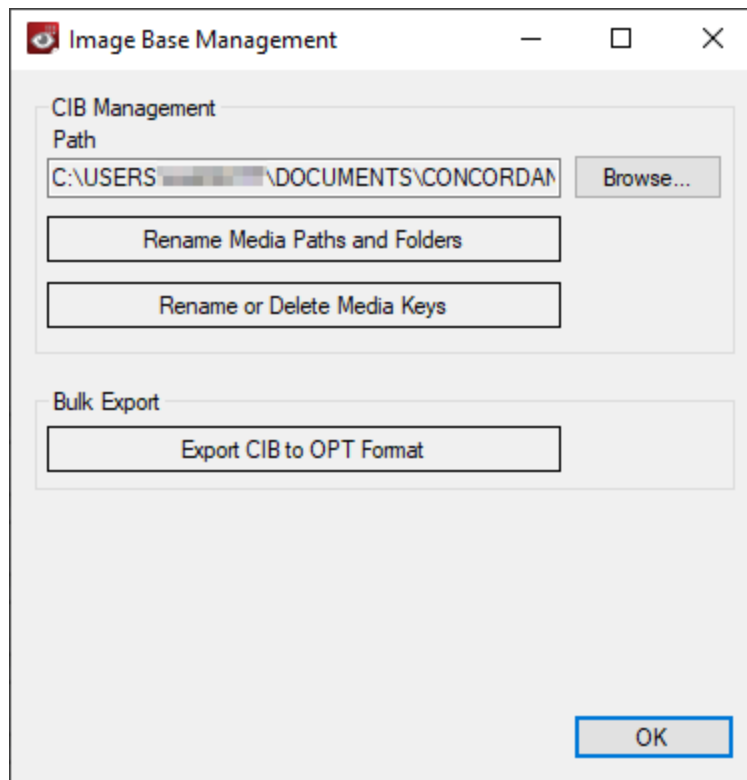
3. Click the **Browse** button to locate and open the **.CIB** file for which you need to edit media keys.

4. Click the **Rename or Delete Media Keys** button.

5. Do any of the following:

   - Locate and click the media key from the media keys listed.
   - Enter the media key alias and then click **Search**.

6. In the **New Alias** field, enter the new media key.

7. Click **Save Alias**.

8. Repeat steps 5 through 7 for each media key you want to edit.

9. When finished, click **OK**.

To delete media keys:

1. Open the database for which you need to change the media keys.

2. From the **File** menu, click **Administration**, **Image Base Management,** and then **CIB Management**.
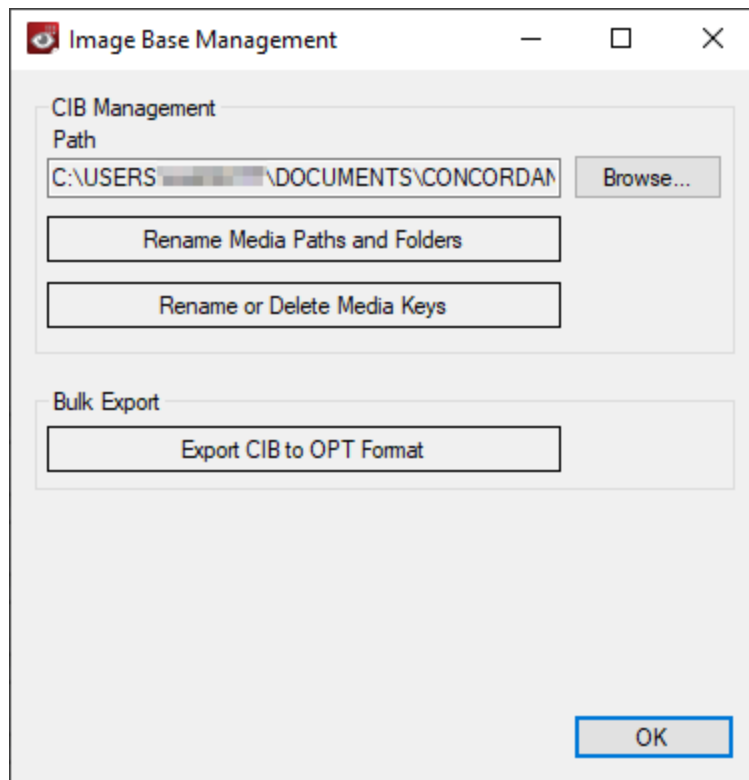
3. Click the **Browse** button and then locate and open the .CIB file for which you need to delete media keys.

4. Click the **Rename or Delete Media Keys** button.

5. Do any of the following:

   - Locate and click the media key from the media keys listed.
   - Enter the media key alias and then click **Search**.

5. Click **Delete**.

6. Repeat steps four and five for each media key you want to delete.

7. When finished, click **OK**.

Exporting a CIB file to OPT format

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

⚠ If you plan to export the imagebase database more than once, make sure that you delete or rename the existing .opt file(s) prior to exporting as Concordance Desktop will not overwrite the file(s). The exported .opt file does not include markup history.

To export a .cib file to an .opt file:

1. From the **File** menu, click **Administration**, **Image Base Management,** and then **CIB Management**.
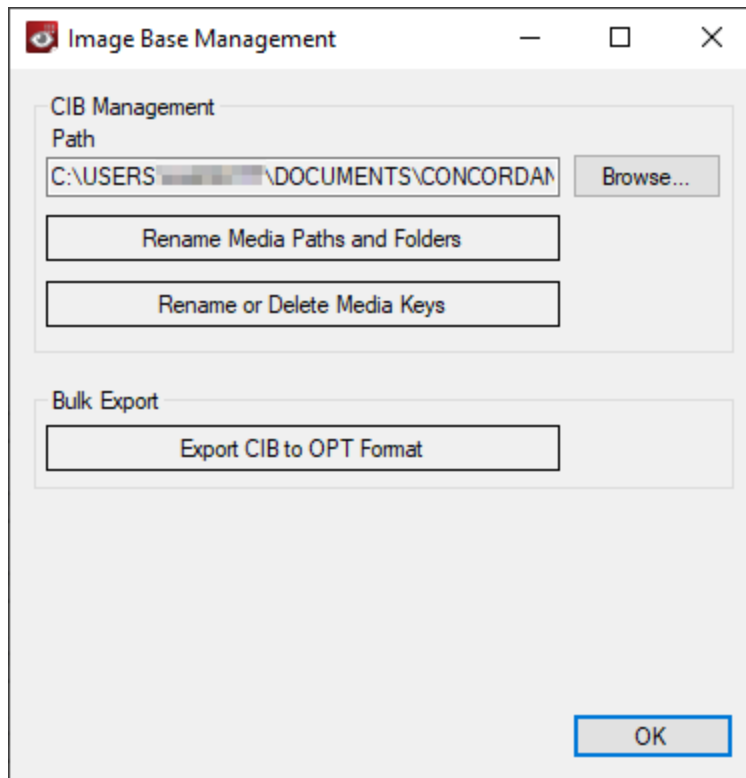
2. Click the **Browse** button to locate and open the **.CIB** file that you need to export.

3. Click the **Export CIB to OPT Format**.

4. Click **Add**, and then locate and open the .cib file you want to export.

5. In the **Output Folder** field, click **Browse**.

6. Locate and select the folder where you want to export the OPT file.

7. Click **Export**.

8. When finished, click **OK**.

<u>**To export multiple .cib files to an .opt file:**</u>

1. From the **File** menu, click **Administration**, **Image Base Management,** and then **CIB Management**.
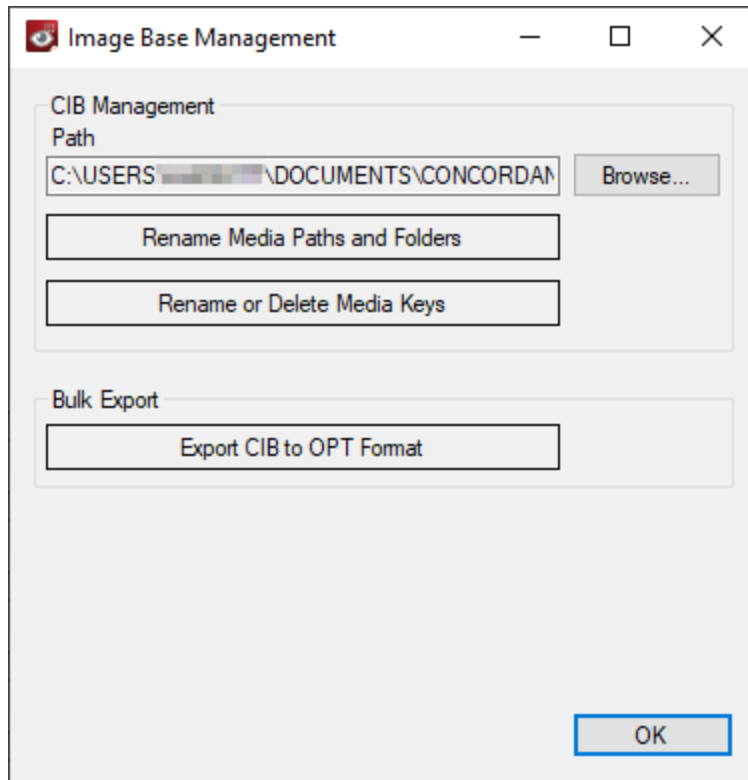
2. Click the **Browse** button to locate and open the **.CIB** file that you need to export.

3. Click the **Export CIB to OPT Format** button.

4. For each CIB file you want to export, click **Add**, and then locate and open the .CIB files you want to export.

5. In the **Output Folder** field, click **Browse**.

3. Locate and select the folder where you want to export the OPT files.

4. Click **Export**.

5. When finished, click **OK.**

   Each CIB file is exported to a separate OPT formatted file, and placed in the designated folder.

Converting existing CI imagebases

If you need to convert Concordance Image imagebase files to Concordance Desktop, please contact Support.

Converting Concordance Desktop Viewer Imagebases to Concordance Viewer

Concordance Desktop provides a feature to convert an imagebase from the original Concordance Desktop Viewer to the new Concordance Viewer. This feature is only available for databases that are linked to the Concordance Desktop Viewer and contain supported filetypes for the new viewer.

It is not recommended to convert the imagebase to the new viewer if any of the following are true:

- The imagebase contains file types that are not supported in the new viewer.

- Markups include text-based underlines, highlights and strikethroughs. These markups are not converted in the process.

- Markups include stamps. While stamps do convert, they may appear distorted in the new viewer.

- The database is part of a concatenated set in which other databases cannot be converted to the new viewer.

- The database review is in progress and changing to a new viewer, as well as new production and printing processes would be disruptive and result in possibly inconsistent output.

📝 Document redactions and markups placed in the original viewer are stored in .xrl files located in the same Windows folder as the image, near-native or native file to which it applies. Markup history is stored in the .cib file located in the database folder. The conversion process will make a copy of the .cib file and rename the .xrl files in their locations.

To convert an imagebase from Concordance Desktop Viewer to Concordance Viewer:
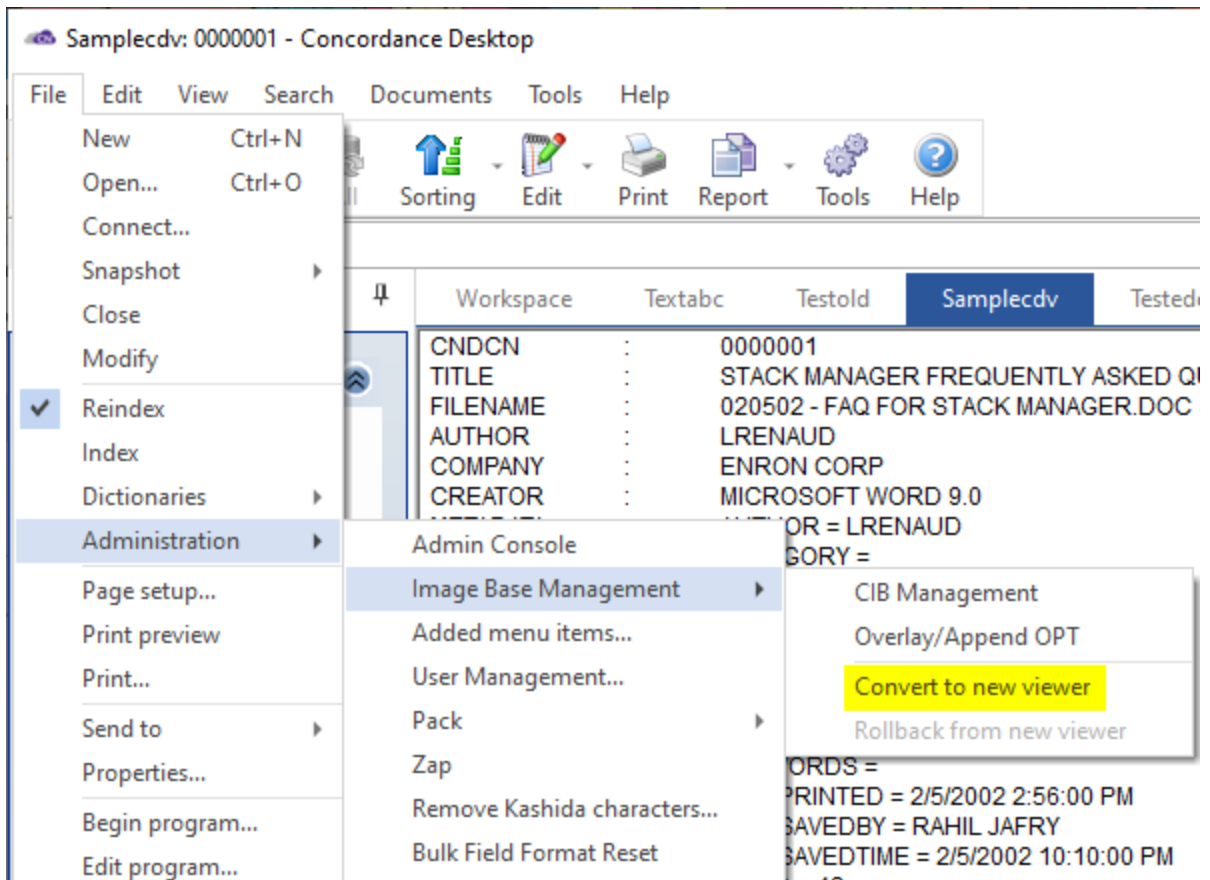
1. Verify that no other users are logged into the database. You may take the database off-line in the Admin Console to ensure that users will not access the database during the conversion process.

2. From the **File** menu, click **Administration**, **Image Base Management**, and then **Convert to new viewer**.

3. An informational message box is displayed with details about the conversion process. Select **OK** in the dialog to continue the conversion process.
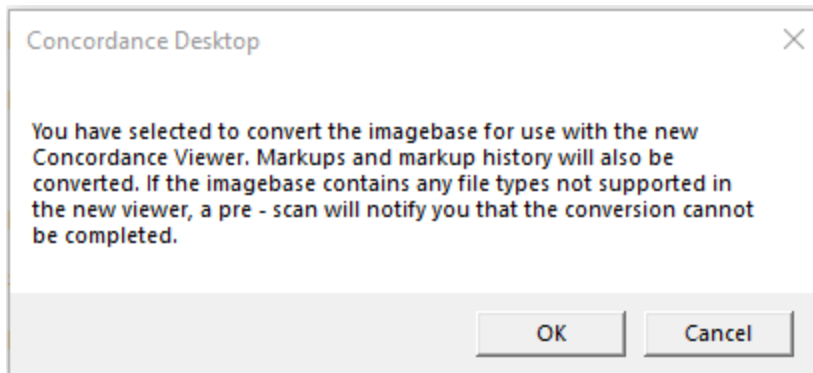
4. Upon completion, the **Concordance Desktop Redaction Converter** window is displayed. This window displays details about what was converted.

Concordance Desktop Redaction Converter

Complete

57/63: 0000057 (no markups)
58/63: 0000058 (no markups)
59/63: 0000059 (no markups)
60/63: 0000060 (no markups)
61/63: 0000061 (no markups)
62/63: 0000062 (no markups)
63/63: 0000063 (no markups)
The migration has successfully completed.

View Log   View Report   Done   Cancel
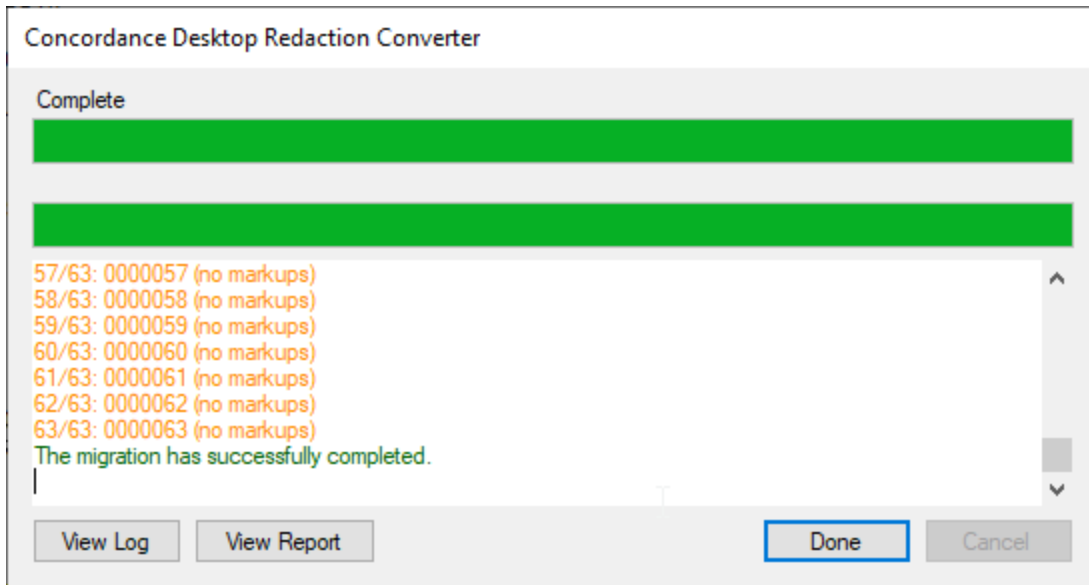
4. The window displays details about what was converted. Use the scrollbar on the right to review the details.

5. Click **View Log** to display the redaction conversion log in a separate text editor window.

6. Click **View Report** to display a comma separated log of markups that were converted in a separate window. Each record in this report includes CNDCN, Page, Type, Reason for Redaction, and Status.

7. Click **Done** when you are ready to start working with your converted imagebase and the new Concordance viewer. The new viewer will automatically launch when users click on the camera button. New printing and production wizards associated with the new viewer will also launch when these menu options are selected.

Should they be needed later, both the conversion .log and .csv report are saved in the Logs folder where the database files are stored.

📝 The **Convert to new viewer** menu option will only be available for databases that are associated with the Concordance Desktop Viewer.

Concatenating Databases

Concatenation is the joining together of two or more Concordance Desktop databases, allowing users to view multiple databases as if they were one database in Concordance Desktop.

There are three main reasons for joining databases:

- Very large record collections are often broken into smaller databases for administrative maintenance needs and need to be joined for the review team to access all case documents

- Databases that are separated based on record and/or file type, still make up the case's record collection and need to be searched together during particular review projects

- Attorneys may request that records are separated by category, yet still need to combine the databases during case review

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.

Members of the review team, 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 having concatenated databases in which they can save appropriate search queries during the discovery process. Every tag and issue, entered by all users will be viewable, 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

⚠ Databases that have been converted from Concordance 10.x cannot be concatenated with new databases created in Concordance Desktop. In addition, you cannot drag and drop a migrated database onto a new database created in Concordance Desktop, or vice versus.

With database concatenation users can:

- Search up to 128 databases simultaneously. Concordance Desktop treats them as a single large file (not including Notes and Redlines databases).

- Open transcript and non-transcript databases together

- Use drop-down database lists on fields with selection functions

- Save indexing time when new records need to be imported into Concordance Desktop, by having a secondary database created and joined with the primary database

- Save maintenance time when indexing databases. With concatenation, you can 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)

Benefits of concatenated databases

- Large record collections can be broken into smaller databases that can then be concatenated for review.
- You can organize a record collection for review by creating databases based on document type, custodian, etc.
- Users can share tags across all the databases in the concatenated set.
- Users can search across all the databases in the concatenated set.

Things to know about manually concatenated databases:

- Concatenation is not a structural change, records in each database remain the same.
- Concatenation does not have to be permanent. Databases can be removed from the concatenated set, or the concatenation itself can be removed.
- Concatenated databases do not have to have any fields in common, unless you need to create a production from the set. For productions, the field names must be common across all the concatenated databases.
- The .cat file is saved in the same folder as the primary database's .dcb file. When the pimary database is launched, all other databases in the concatenated set are opened.
- Packing, database modifications, indexing and reindexing are done in the primary database only, all others are automatically updated.
- You must be on the Concordance Desktop server machine in order to pack a concatenated set of databases.
- You should never delete the CAT file itself. Instead you should clear the concatenation through Concordance Desktop.
- Searches search each dictionary file one by one.

Things to know about automatically concatenated databases:

- Concatenation is not a structural change, records in each database remain the same.
- Concatenated databases do not have to have any fields in common, unless you need to create a production from the set. For productions, the field names must be common across all the concatenated databases.
- The .cat file is saved in the same folder as the primary database's .dcb file. When the pimary database is launched, all other databases in the concatenated set are opened.

- Packing, database modifications, indexing and reindexing are done in the primary database only, all others are automatically updated.
- You must be on the Concordance Desktop server machine in order to pack a concatenated set of databases.
- You should never delete the CAT file itself. Instead you should clear the concatenation through Concordance Desktop
- When you create a new database based on multiple record sets, the import process creates a new database for each record set and then concatenates the databases so they appear as one database.
- You should never delete the .CAT file of a concatenated database set. If you need to remove a database from the set, or remove concatenation, you need to do so through Concordance Desktop.
- Automatically concatenated databases do not have to have any fields in common
- Automatically concatenated databases are saved in a single folder so that all databases open when the primary database is opened in Concordance Desktop. Packing, database modifications, indexing and reindexing are done in the primary database and automatically performed on the rest of the databases in the concatenated file set.
- Searches search each dictionary file one by one.

How to recognize a concatenated database set
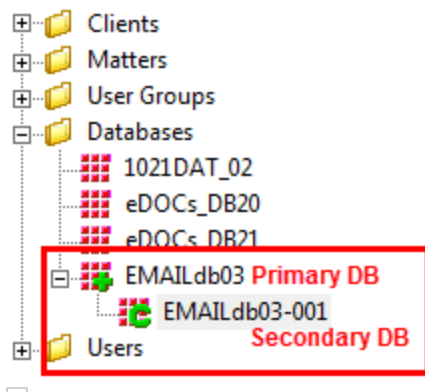
A concatenated set in the Admin Console
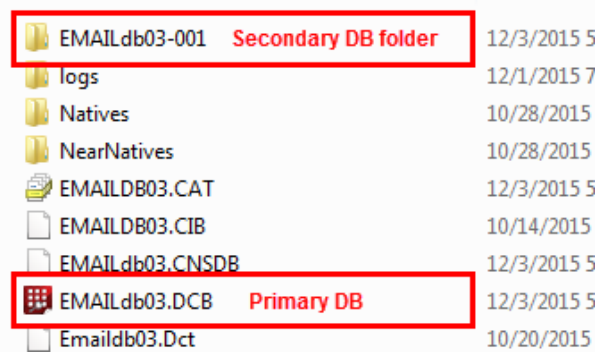
A concatenated set in Windows Explorer

The image on the left shows how a concatenated database set is displayed in the Admin Console under the Management tab. The plus sign (+) indicates that a database is the primary of a concatenated set. Secondary databases are indicated by a 'C' and are indented directly below the primary database.

The image on the right shows how a concatenated database set is saved and displayed in Windows Explorer. Note how a folder is created for the secondary database, labeled the same name as the primary, with an extension beginning with 001. If you look at the database in the folder, it too will be named the same as the primary, with a dash and then sequential number, beginning with 001.

Designing concatenated databases

When large databases are split into multiple databases and then concatenated for ease of maintenance, all databases can be created with the same structure. The following Concatenated Database Sample table illustrates how this architecture is created.

As the administrator, this database design serves both you and the reviewer. The generic naming of the primary database prevents confusion for the reviewers because they can simply launch the primary database (Columbia.dcb) without having to be concerned about multiple databases. The design also benefits you because databases are similarly named and the structure allows for ease of maintenance when indexing or reindexing is needed.

Organizing document types

There are various ways to organize the different types of documents imported into databases. Transcripts must be organized in a separate database because of the template structure required to import these files. In order to search a paper document database with transcript content, the two databases must be concatenated.

When various database types are concatenated, all databases in the set automatically launch when the primary database is accessed in Concordance Desktop.

Managing concatenated databases

When managing concatenated databases, be aware of the following:
- Index and reindexing need only be done on the Primary database; all others are automatically indexed/reindexed.
- Pack need only be done on the primary database; all others are automatically packed.
- File updates and data imports, either from drag and drop or the Import feature, append to the very last database in the file set.
- DCB, DAT, and PST files that are dragged and dropped onto the primary database are automatically added to the concatenated file set.
- Exports only use a selected database's field structure from a concatenated set.
- Each users' field rights and menu access settings need to be the same for every database in the concatenated file set.
- Productions can be run for a concatenated file set by running them on the Primary database only; all other database in the file set are automatically included

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

Limitations for concatenated databases

Using concatenated databases includes the following limitations:

- You can join databases with differing structures and they can be edited, sorted, and printed. However, the structures must be identical to use certain options such as Overlay and Export.
- When exporting concatenated databases, only the data in fields that are identically named and formatted in the concatenated set will be exported.
- When importing records into a concatenated database, records are updated when the fields of an imported record match an existing record. When the fields do not match, the imported record is appended to the main database, which is the first database in the concatenated set. However, when using the Overlay option, importing records with mismatched fields can cause a loss of data.
- Only the "Primary" database of a concatenated file set can be opened. If a user attempts to open a database that is part of a concatenated file set, they receive a message stating that they cannot open a "non-primary" database.

User Management guidelines for concatenated databases

Setting up user management for concatenated databases includes the following guidelines:

- Each users' user name and password must be the same for all databases in the concatenated set.
- When the user name and password in the primary database does not exist in a secondary database, the concatenated database will not open. The user receives a message that they do not have access rights to the specific database.

Automatically launching concatenated databases

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

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 Desktop indexes each database in the set. 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. Collaborate with the review team lead to ensure that reindexing schedules coordinate with case review objectives.

Joining multiple databases (concatenating databases)

Administrators on the Concordance Desktop server can concatenate databases using either Concatenate Database function in the Databases task pane, selecting the Concatenate option from the File menu, or by dragging and dropping a DCB, DAT or PST onto an existing database. Please note that only those who are assigned as administrators on the Concordance Desktop server where the concatenation needs to be performed, have the ability to concatenate databases.

📝 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 Desktop automatically writes that tag into the record's corresponding database.

⚠ Databases that have been converted from Concordance 10.x cannot be concatenated with new databases created in Concordance Desktop. In addition, you cannot drag and drop a migrated database onto a new database created in Concordance Desktop, or vice versus.

To concatenate databases:

You can only concatenate databases if you are a Concordance Desktop Administrator on the server where the databases reside.

1. Do one of the following:

- On the **File** menu, click **Administration**, then **Concatenate**, and then **Edit concatenation**.
- Drag and drop a DCB, DAT, or PST file onto an existing database

The Concatenated Databases dialog box opens.

If the database you have open is already the primary database in a concatenated file set, the list displays all the database files in the set.

If the database you have open is not in a concatenated file set, this list shows only that database.

2. Click the **Add** button.

3. Locate and **Select** the database file you want to join with your current database.

   The file path is added to the Concatenated Databases box.

   The Current Database panel in the Databases task pane displays all the concatenated databases, the total number of documents in the concatenated set, and whether the databases need reindexing.

   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, click **Administration**, then **Concatenate**, and then **Clear Concatenation**. You can only use this method if you are a Concordance Desktop Administrator on the server where the databases reside.

🖊 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 Desktop 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.

Opening a concatenated file set

When you open the primary database file of a concatenated file set, Concordance Desktop automatically opens each of the databases joined together in the file, and lets you search and review the set of databases as if they were all one database.

<u>**To open a concatenated file set:**</u>

- In Concordance Desktop, open the "Primary" database of the concatenated file set or from the File menu, click Connect and then select the primary database.

  The "Primary" database is the database that was opened first and to which the other databases were joined.

Deleting a concatenated file set

If users no longer need databases to be joined in a concatenated file or they no longer need them to automatically launch each time the primary database is launched, you can remove the concatenated file set from within Concordance Desktop. In order to delete a concatenated file set, you must be an administrator on the Concordance Desktop server where the databases of the concatenated file set are registered.

<u>**To remove a concatenated file set**</u>

1. In Concordance Desktop, open the "Primary" database of the concatenated file set.

   The "Primary" database is the database that was opened first and to which the other databases were joined.

2. From the **File** menu, click **Administration**, then **Concatenate**, and then **Clear Concatenation**.

   Note that you must be an administrator user in order to delete a concatenated file set.

3. You are asked to confirm the action, click **Yes**.

Removing a database from a conatenated file set

You can only remove a database from concatenated set, or delete a concatenated file set if you are a Concordance Desktop administrator on the Concordance Desktop server where the concatenated databases are registered. When you delete a concatenated file set, it removes the concatenation only. The databases still remain on the server and become individually accessible.

⚠ When you remove a database from an automatically concatenated set of databases, record numbering across the remaining databases will no longer be sequential. This is due to the removal of numbered records in the database that was removed, thus causing a break in the sequential order of the numbering.

To remove a database from a concatenated file set:

1. In Concordance Desktop, open the "Primary" database of the concatenated file set.

   The "Primary" database is the database that to which all the other databases were joined.

2. On the **File** menu, click **Administration**, then **Concatenate**, and then **Edit concatenation**.

   The Concatenated Databases dialog box opens.

3. Click on the database you want to remove from the concatenated file set.

4. Click the **Delete** button.

5. Repeat **steps 3 and 4** for each database you want to remove from the concatenated set.

Reviewing concatenated databases

When reviewing concatenated databases, it can sometimes be difficult to distinguish data from each database at-a-glance in the Table view. In the Table view, you can change the text font and color for each database and use table layouts to help you review concatenated databases.

Applying tags to concatenated databases is as simple as applying tags to individual databases. You can even add tags from one database to another database in a concatenated set.

Reviewing concatenated databases in the Table view

When you are viewing a concatenated database set, you can change the font color or size in the Table view for individual databases to help you differentiate between the databases at a glance.

DATE	GMT_DATE	MODDATE ▾	CREATIONDATE	PRINTD...	MESSAGE...	
00010278	00010280	10/13/1983	Correspondence	3	121	04/25/200
00010306	00010306	10/25/1983	Telex	1	126	04/25/200
00010319	00010319	10/20/1983	Correspondence	1	130	04/25/200
00020023	00020028	10/17/1983	Financial Report	6	166	04/25/200
Felten, Edward	10/03/1998	09:30:00 a.m.	I	1	25	0
Colburn, David M.	10/03/1998	09:40:00 a.m.	I	1	25	0
Decker, Stephen A.	10/14/1998	01:05:00 p.m.	I	1	25	0
Dertouzos, Michael	10/02/1998	09:40:00 a.m.	I	1	24	0
02/03/2003	02/03/2003	00/00/0000	00/00/0000	00/00/0000	0000000008	
02/06/2003	02/06/2003	00/00/0000	00/00/0000	00/00/0000	0000000001	
02/06/2003	02/06/2003	00/00/0000	00/00/0000	00/00/0000	0000000002	
02/06/2003	02/06/2003	00/00/0000	00/00/0000	00/00/0000	0000000003	
02/06/2003	02/06/2003	00/00/0000	00/00/0000	00/00/0000	0000000004	

You can identify a database in a concatenated set in the following ways:

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

When you are searching data on multiple databases, the query results from a same name field intermingle in the Table view. The easiest way to distinguish between database information in the Table view is by font color and size.

Example: If each database has a same name DATE field, you can run a search on this field to gather subsets of documents by date.

date = 10/??/1983,10/??/1998,02/??/2003

This query located all documents within three different databases with a date of October 1983, October 1998, and February 2003. As shown in the example above, the Table view listings the black query results are from a paper database, the purple results are from a transcripts database, and the blue results are from an e-mail database.

Reviewing concatenated databases using Table Layouts

You can also adjust your Table view layouts if field names are similar to sort across the joined databases. Each concatenated database will be listed in the Table Layout dialog box with private and any public layouts that have been created. You will need to manually rearrange fields to have them display in the same columns for sorting purposes.

💡 Copy the .LAYOUT file from one database to other concatenated databases to use the same table layouts in the Table view.

Tagging and concatenated databases

When databases are concatenated, all tags from both databases are displayed in the Tags task pane. If a reviewer applies a tag from one database to a document residing in another database, the tag is then added to the database where it never existed before.

Saving searches in concatenated databases

When searching concatenated databases, Concordance Desktop 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.

Adding field groups to the INI file

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

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

Example: Aliasname = fieldname1, fieldname2

ALLDATES = DATE, DOCDATE

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

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

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

To add a field group to the .ini file:

1. In Microsoft Windows Explorer, navigate to the database .ini file you want to add a field group.

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

2. Right-click and open the .ini file in any text editor program.

3. Scroll to the bottom of the file.

4. In the next line after the last record, type **[FieldGroups]** and press Enter.

5. Type the Aliasname = fieldname1, fieldname2, fieldname3.

    For example: Date = DOCDATE,DATE,GMT_DATE,MODDATE,PRINTDATE

    You can add as many fields as you need to the field group.

6. Save the .ini file.

7. To test the field group you created, in Concordance Desktop, run a search for the field group alias you created.

    For example: Date = ??/??/1982, ??/??/2000.

    Your search results should include the applicable data from the fields within the field group you created.

    To use a field group for concatenated databases, add the same field group to the other databases in the concatenated database set. When you search the concatenated database set, Concordance Desktop searches the all the fields in the field group in each of the databases in the concatenated set.

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 Desktop, you need to designate the database you are printing from, on the Fields tab in the Print documents dialog box.

<u>**To open the Print documents dialog box:**</u>

1. From the standard toolbar, click the **Print** button.

2. Optional: From the **Field** tab, select the fields you want to print and/or arrange the field order for printing.

For more information about printing standard reports, see Printing standard reports.

Backing Up and Archiving Databases

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

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

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

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

It is best practice to use the following methods for routine backup procedures:

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

- To create a backup of a Concordance Desktop database, use the Export Wizard provided in Concordance Desktop. Exported databases do not include tag history, redlines, or the imagebase. To retain this data in your back up, you should replicate

the database. To include tag history, run the TagSaver.cpl and TagHistoryandStoreIt.cpl. Either way, you are storing a backup of your database files in the event they need to be restored later. To save your redlines and imagebase, backup the .CIB file separately. In lieu of using the wizard, you can backup the whole database folder by copying and pasting the whole folder to another location.

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

- If user management is applied at the database level, back up the .sec files

- Back up tags using the TagSaver.cpl and TagHistoryandStoreIt.cpl

- Back up redlines and imagebase by using another backup method to backup the .CIB file.

- Do not forget to copy over your list files, queries, exported user management, and .gat files, etc.

- Verify that your anti-virus does not scan any of the following file types: .trk, .key, .dct, .dir, .fzy, .layout, .sec, .cib

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

About Concordance Desktop database files

When you create a database, you import the initial load files to populate the database with records. These initial files can be either PST files, electronic documents, or delimited text files prepared by a vendor (or other party), and can be imported as you create the new Concordance Desktop database. Concordance Desktop provides a Creation Wizard to help you create and import the documents all together.

- You can import the following types of files:
- Delimited text file
- Native files
- Electronic documents
- E-mails and attachments
- Transcripts
- Concordance Desktop databases

Each Concordance Desktop 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, and text file (.ndx), the text file (.txt), and the user management file (.sec). 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.

For more information see backing up databases.

- 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 Desktop uses SQLite. SQLite is an embedded relational database engine, which brings more stability to the functions of the .TRK file. Because SQLite is an embedded database, SQLite does not increase the required maintenance and administration of Concordance Desktop.

Concordance database files

Concordance Desktop Database Files			
Name	**File Description**	**Usage**	**File Type**
.cat	Concatenation	Stores a list of concatenated databases	Text file
.cib	Imagebase	Stores association between media keys and native and image files including markup history	SQLite file
.cpl	CPL script	Store Concordance Desktop Programming Language (CPL) scripts	Script file
.cpt	CPL script	Stores compiled versions of CPL script	Script file
.csv	User management	Stores field and menu access for all users (when exported by user)	Text file
.dat	Delimited text	Contains metadata and sometimes OCR for document records	Text 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	B-tree file
.fmt	Print settings	Saves print settings for reports generated using the standard print feature User generated file	

Concordance Desktop Database Files

Name	File Description	Usage	File Type
.fyi	Concordance Desktop Concordance Desktop server database	A link file that opens a database on a remote Concordance Desktop server	Text file
.fzy	Fuzzy search dictionary	The fuzzy search dictionary contains homonyms for words in the search dictionary This file is created and updated by indexing and reindexing	B-tree file
.gat	Back Up	A tag backup file that stores tagging information. Generated by running the TagSaver.cpl	
.ini	Configuration settings	Stores various configuration settings	Text file
.ivt	Inverted text	Used with the dictionary during searches	
.key	Key fields	Field storage for fast relational searching	B-tree file
.layout	Table layout	Stores the defined table layouts	B-tree file
.sortlayout	Sorting layout	Stores the defined sorting layouts for the current database	
.editlayout	Editing layout	Stores the defined editing layouts for the current database	
.lst	Word lists	Contains predefined values that can be selected from a list when editing fields When a list is assigned to a specific field, it's called an Authority List	B-tree file
.ndx	Numeric, date, and text fields	Stores data for the fixed length field types: Numeric, Date, and Text	
.opf	Print settings	A Concordance Desktop Image print file that stores print settings for print jobs generated by Concordance Desktop Image *(Opticon)* User generated	

Concordance Desktop Database Files			
Name	**File Description**	**Usage**	**File Type**
.qry	Query	Stores search query strings	
.sec	User management control	Stores user management settings	B-tree file
.snp	Snapshot	Stores search history and auto-restore settings	
.stp	Stopwords	Contains the noise words that are ignored during database indexing	B-tree file
.syn	Synonyms	Stores the user defined synonyms	B-tree file
.tex	Text	Full text paragraph field storage	Text file
.trk	Transaction tracking	Relational SQLite file structure that stores tags and tag histories, security (field and menu access for all users) and replication data	SQLite file
.xrl	Markup	Stores the current state of markups and placeholders	

Temporary files

Concordance Desktop creates and uses temporary files, which are automatically erased when you leave the program. However, temporary files are not erased if there is a power outage or other problem which causes an irregular program termination. Concordance Desktop 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 Concordance Desktop 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.

For more information about indexing and reindexing, see Indexing Databases.

About archiving databases

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

Another consideration for you is to think about creating a database archive using Concordance Desktop. Because the storage capacity for records is vast, an archive library may work well for your organization in researching old records and case history data.

Minimum Required Files for Archiving		
Task	**File Type**	**Use**
.dcb	Database	Primary database control block.
.ndx	Index	Fixed field and document status storage.
.tex	Text	Full-text paragraph field storage.

Archiving Guidelines:

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

Exporting Data

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

In Concordance Desktop you can export:

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

Exporting data covers two scenarios:

- Exporting data for backup files and internal case review
- Producing images and information for third parties or opposing counsel

Exporting databases

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

Security and tag history are not included in the export when you export a database. You can export a database's security settings from the Security dialog box. For more information about exporting security settings, see Setting up security.

Before exporting a database, you can store the database's tag history in one of the database's fields using TagHistoryAndStoreIt_v10.00.

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

To export a Concordance Desktop database:

1. Run a search query to locate the records you want to include in the export.

   For more information about searching, see Available search tools.

When Concordance Desktop exports a database, Concordance Desktop can export just the records in the current query or can export all the records in the database. If you want to export all the records, you can run the Zero Query.

For more information about the Zero Query, see Reviewing search queries.

2. On the **Documents** menu, point to **Export**, and click **As a Concordance Desktop database**.

   Clicking As a Concordance Desktop database opens the Export Wizard - Database dialog box.
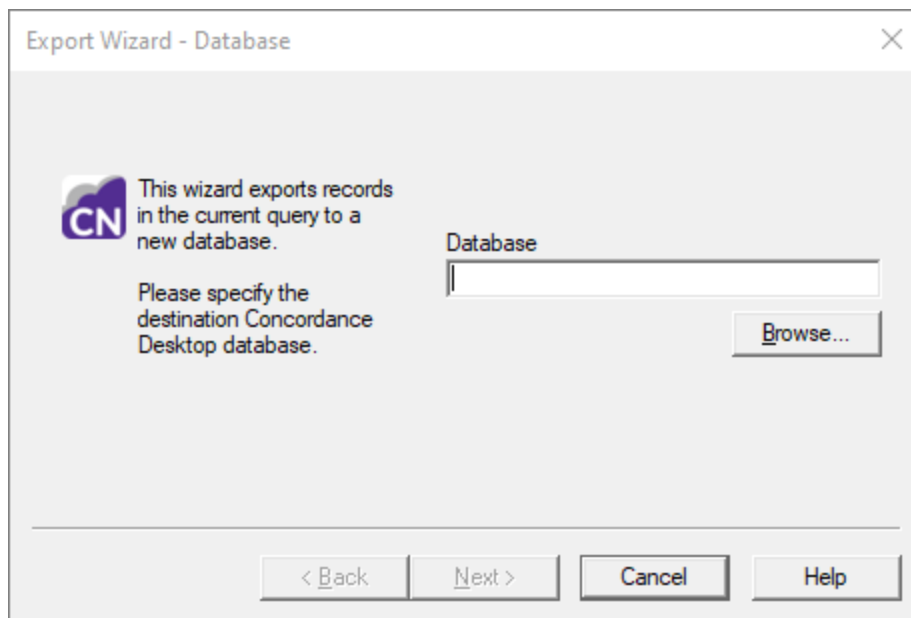
3. Click the **Browse** button to open the **Select database to merge** dialog box.

4. If you are exporting to an existing database, navigate to and open the .dcb or .fyi file for the database you are exporting to.

   If you are exporting to a new database, navigate to where you want to store the database, type the database name in the File name field, and click Open.

   Clicking Open adds the database file name and directory to the Database field in the Export Wizard - Database dialog box.

5. Click **Next** to open the **Export Wizard - Fields** dialog box.

   The database list defaults to the database currently opened and all the database's fields are selected in the field list.

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

If the database is a concatenated database, the other databases in the concatenated set are also available for selection in the database list.

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

6. To include only some of the database fields in the export, in the fields list, click the fields you want to export.

    To select multiple fields, use SHIFT+click or CTRL+click.

7. Click **Next** to open the **Append/Replace** dialog box.

    The Append/Replace dialog box allows you to control how documents are exported.

8. Choose one of the following options:

    - **Append all records -** When you select this option, if you are exporting to a new database, the export adds all records in the query to the new database. If you are exporting to an existing database, the export appends all records in the query after the last record in the existing database.
    - **Replace matching records and append new records -** When you select this option, the export searches for a matching record and replace it. If the export does not find a match, it appends the record.

    The Delete and replace existing annotations and tags check box is only available when you select the Replace matching records and append new records option. The Delete and replace existing annotations and tags check box determines how annotations are copied when an existing record is updated. By default, the check box is not selected.

9. To have the export remove all existing tags and annotations for a record in the existing database when the export finds a matching record, select the **Delete and replace existing annotations and tags** check box.

    When the check box is selected, any annotations from the matching exported record are added to the record.

    To have the export ignore any existing tags and annotations for a record in the current database when the export finds a matching record, make sure that the Delete and replace existing annotations and tags check box is cleared.

    The export uses the fields selected in the Locate matching records by comparing field to determine exact record matches between the two databases. The Locate matching records by comparing field is only available when you select the Replace matching records and append new records option. Only key fields are listed in the Locate matching records by comparing field.

    Key fields are defined in the Modify dialog box. For more information about key fields, see Creating databases.

10. In the **Locate matching records by comparing** field, select the fields you want the export to use to determine record matches.

   To select multiple fields, use SHIFT+click or CTRL+click.

   Full-text paragraph fields are considered a match if the first sixty characters or the first line, whichever is less, match, regardless of the remaining contents of the field.

11. To copy a record's attachments with notes during the export, select the **Copy attachments with notes** check box.

   When the Copy attachments with notes check box is selected, the export automatically creates sequentially numbered attachment folders in the same directory as the Concordance Desktop database, and copies attachments into the subfolders. Folders are named in the format ATTACH-000000 and increment by one if the initial folder exceeds maximum capacity.

   To exclude a record's attachments with notes from the export, clear the Copy attachments with notes check box.

12. Click **Next** to open the **Export Wizard - Export** dialog box.

   The First and Last fields default to the first and last record in the current query.

13. To modify the range of the records to be exported, in the **First** field, type the record number for the first record in the range you want to export, and in the **Last** field, type the record number for the last record in the range you want to export.

14. Click the **Export** button.

   If you are exporting to a new database clicking the Export button opens the following message:
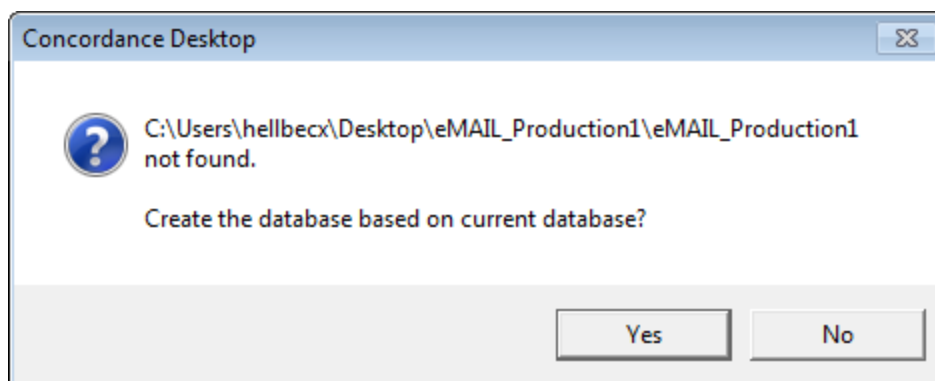
15. Click **Yes** to start the export and have the export create the new database.

   If you are exporting to an existing database, clicking the Export button starts the export.

   You can click the Cancel button at any time to cancel the process.

When the export finishes, the Export Wizard - Export dialog box automatically closes.

Exporting delimited text files

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

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

When you export database records to a delimited text file, the export includes every record in the current query, in the sort order they are listed. If you want to export the entire database, run the Zero Query. For more information about the Zero Query, see Reviewing search queries.

when you export records to a delimited text file you can export the records using the Export Wizard to guide you through the export process or you can manually export the records using the Export Delimited ASCII dialog box.

📝 When exporting records to a DAT file that will be imported into another Concordance Desktop database, do not use the "new line" (code 013) as the carriage return delimiter. Use the standard Concordance Desktop newline delimiter (code 174).

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

To export to a delimited text file using the Export Wizard:

1. Run a search query to locate the records you want to include in the export.

   For more information about searching, see Available search tools.

   When exporting from Concordance Desktop, Concordance Desktop can export just the records in the current query or can export all the records in the database. If you want to export all the records, you can run the Zero Query.

For more information about the Zero Query, see Reviewing search queries.

2. On the **Documents** menu, click **Export**, and then **To a delimited text file**.

Clicking the option To a delimited text file opens the Export dialog box.
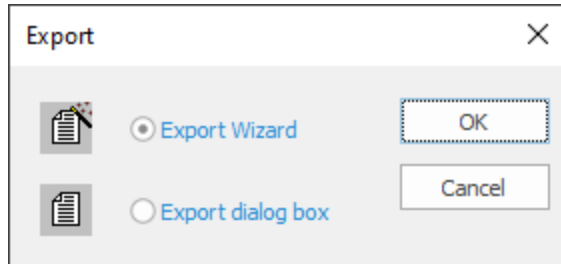
3. Click the **Export Wizard** option and click **OK**.

The Export Wizard - Documents dialog box opens.
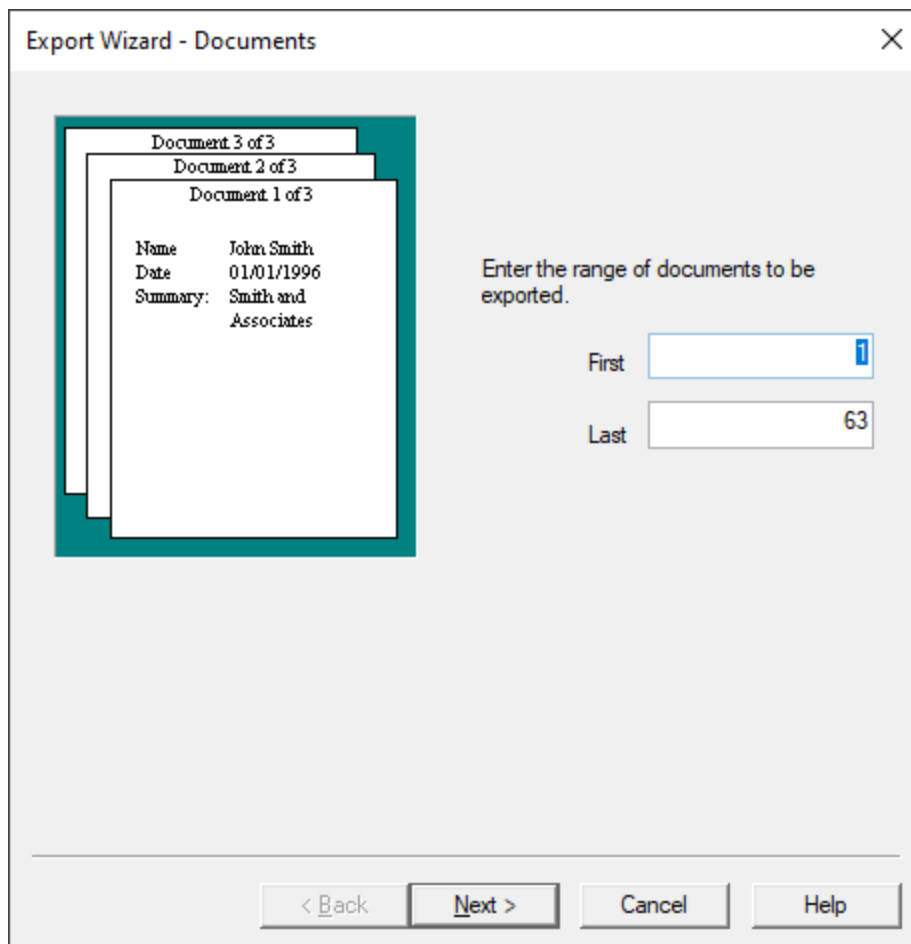
The First and Last fields default to the first and last record in the current query.

4. To modify the range of the records in the query to be exported, in the **First** field, type the record number for the first record in the range you want to export, and in the **Last** field, type the record number for the last record in the range you want to export.

5. Click the **Next** button to open the **Export Wizard - Format** dialog box.
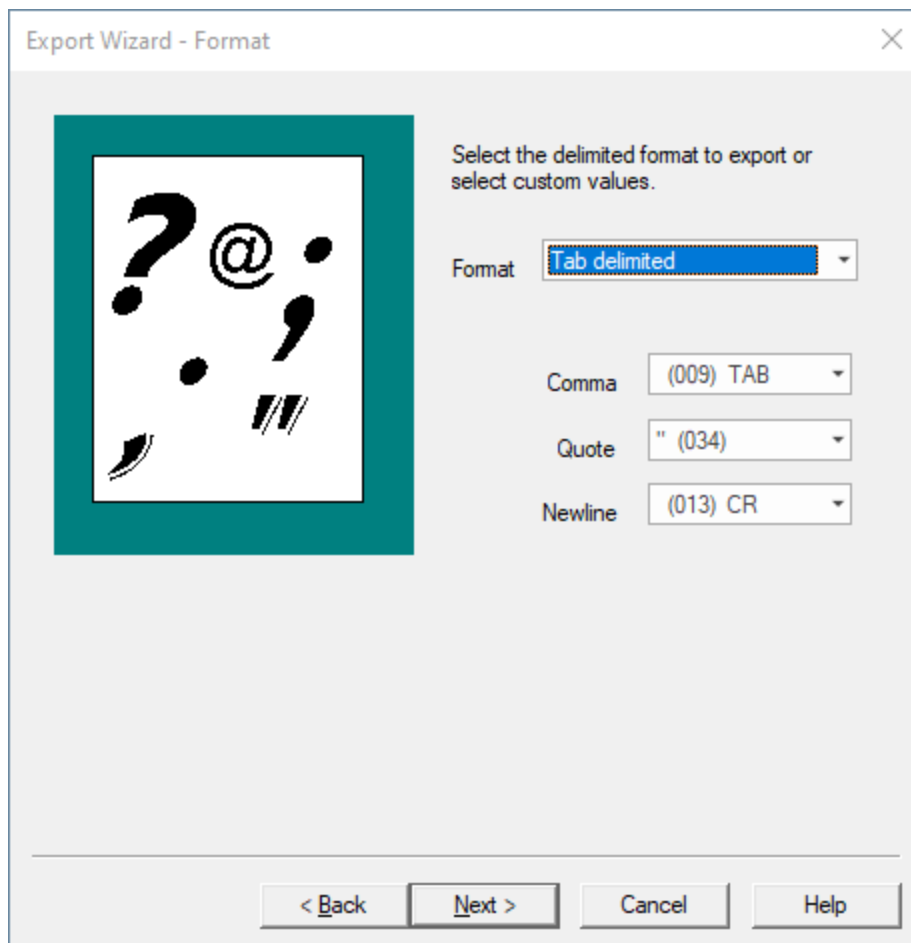
Concordance Desktop is a full-text database manager. Its documents are likely to contain text delimiters — commas, quotes, and carriage returns — that may confuse other programs, or Concordance Desktop itself, when reading the delimited text file.

To avoid this problem, Concordance Desktop allows you to specify the characters recognized as the comma, quote, and newline delimiters in delimited text files.

The Format field defaults to Concordance Desktop default.

If you are exporting and importing documents within the Concordance Desktop system, then you won't need to change these default values. Change them only if you are using these characters in the text of your documents.

⊟ **Default Delimiters for Concordance**

The default delimiter characters used by Concordance Desktop are listed below. To the right of each delimiter character is the delimiter's numeric value.

Concordance Desktop Default Delimiters		
Delimiter Character	**Function**	**Numeric Value**
Comma	The field delimiter separates one field from the other.	20
Quote	The text qualifier encloses text to differentiate it from field delimiters which may appear in the data.	254
Newline	Substitute carriage return. Some programs use this character to designate multi-level fields or fields-within-fields. Concordance Desktop replaces all carriage returns or carriage return linefeed combinations with the newline code within the data of a field. The record itself is still terminated with a real carriage return and a line feed.	174

The delimiters available from the Comma, Quote, and Newline fields may appear as square symbols or may not be displayed. How the lists are displayed depends on the computer's language environment. The delimiters listed in the About delimiter characters topic use the Tahoma font, which displays the characters regardless of the language environment. All of the characters listed in the delimiter character list can be selected as the delimiter, even if the symbols they represent do not appear in the Comma, Quote, and Newline fields.

To see the list of available delimiter characters, see About delimiter characters.

6. Click **Next** to open the **Export Wizard - Date format** dialog box.
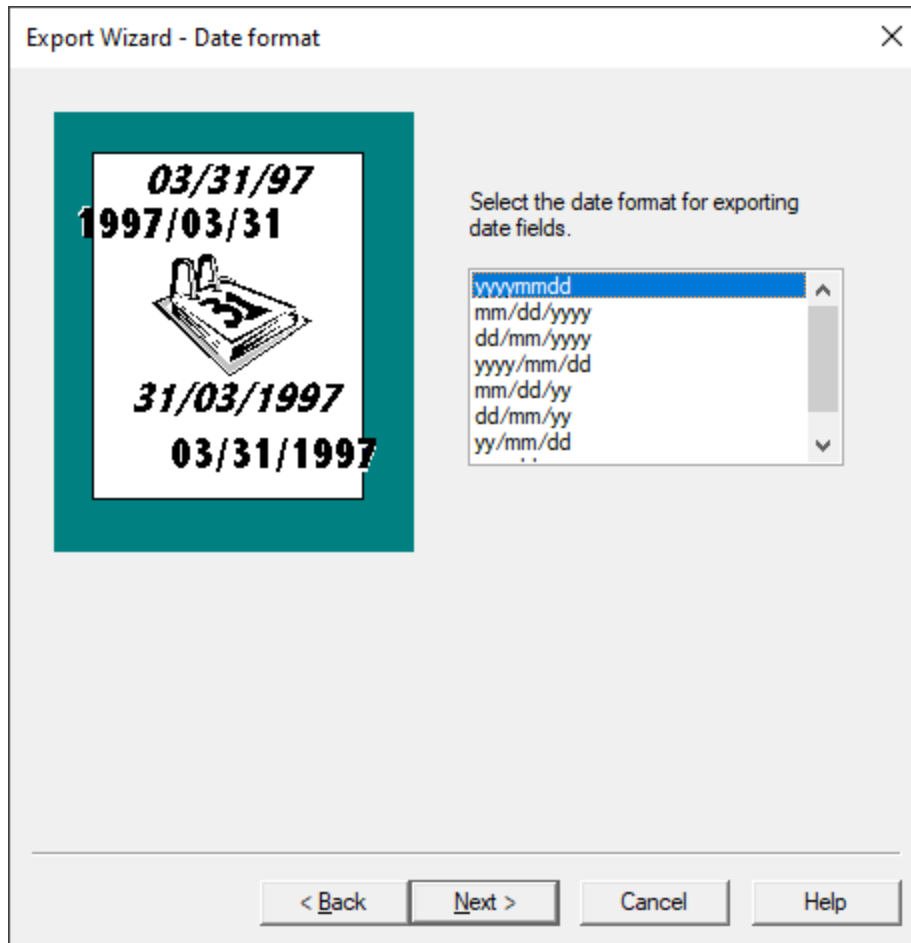
7. Click the date format you want to use in the delimited text file.

    The dates exported from the database to the delimited text file will be exported using the date format you select in the Export Wizard - Date format dialog box.

8. Click **Next** to open the **Export Wizard - Fields** dialog box.
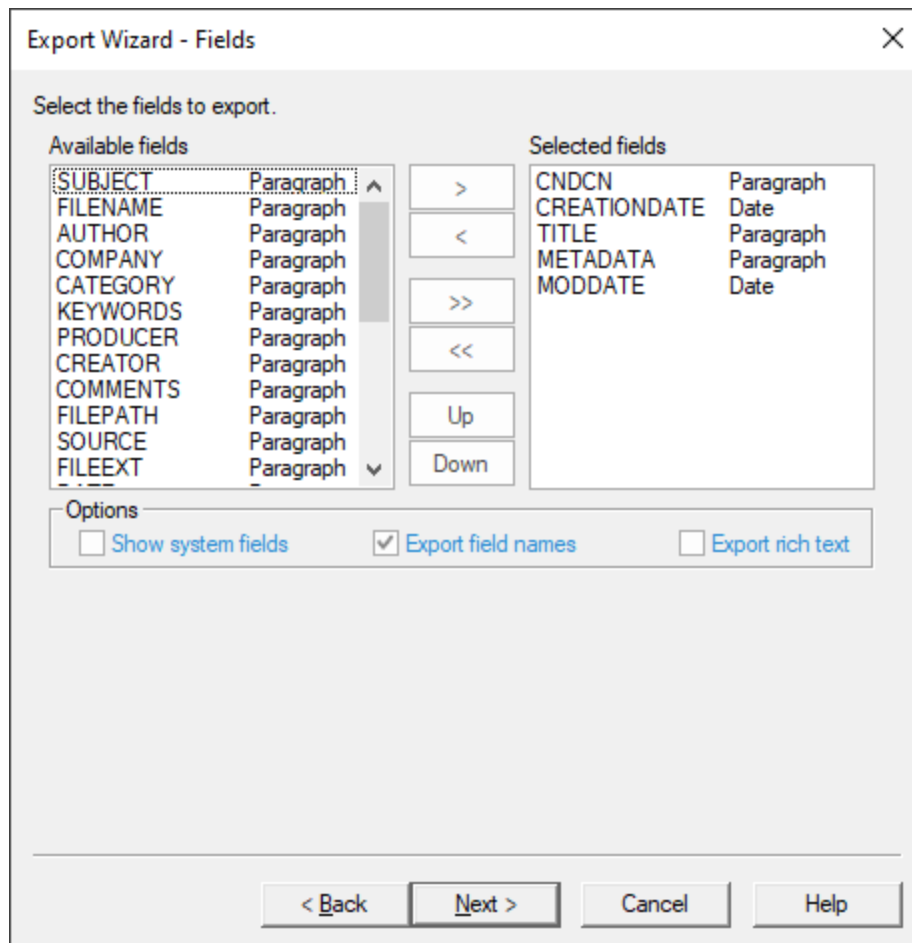
By default, all of the database fields are added to the **Selected fields** list for the export.

9. To only select some of the fields for the export, click the double arrow (**<<**) button to move all the fields to the **Available fields** list.

10. In the **Available fields** list, select the fields you want to include in the export, and click the right arrow (**>**) button to add the fields to the **Selected fields** list.

11. To change the order of the fields in the export, in the **Selected fields** list, click the field you want to move and click the **Up** or **Down** button to move the field.

    The field order in the Selected fields list will be the field order in the delimited text file.

12. To display hidden system fields in the **Export Wizard - Fields** dialog box, select the **Show system fields** check box.

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

13. To include field names in the export, select the **Export field names** check box.

    If the Export field names check box is selected, field names are exported as the first record, with each field name taking the place of its field's data for that record. Exporting field names can help manage data if the data is imported into another program.

14. To export Concordance Desktop data with rich text, select the **Export rich text** check box.

    Full text paragraph fields in Concordance Desktop can contain rich text. Rich text contains font changes, bullet lists, and other word processor commands that other database programs cannot handle. You can export with rich text if the data is destined for another Concordance Desktop database. Do not export rich text if the data is destined for another program.

    If the Export rich text check box is not selected, all text formatting is stripped from the exported data during the export.

15. Click **Next** to open the **Export Wizard - Save** dialog box.
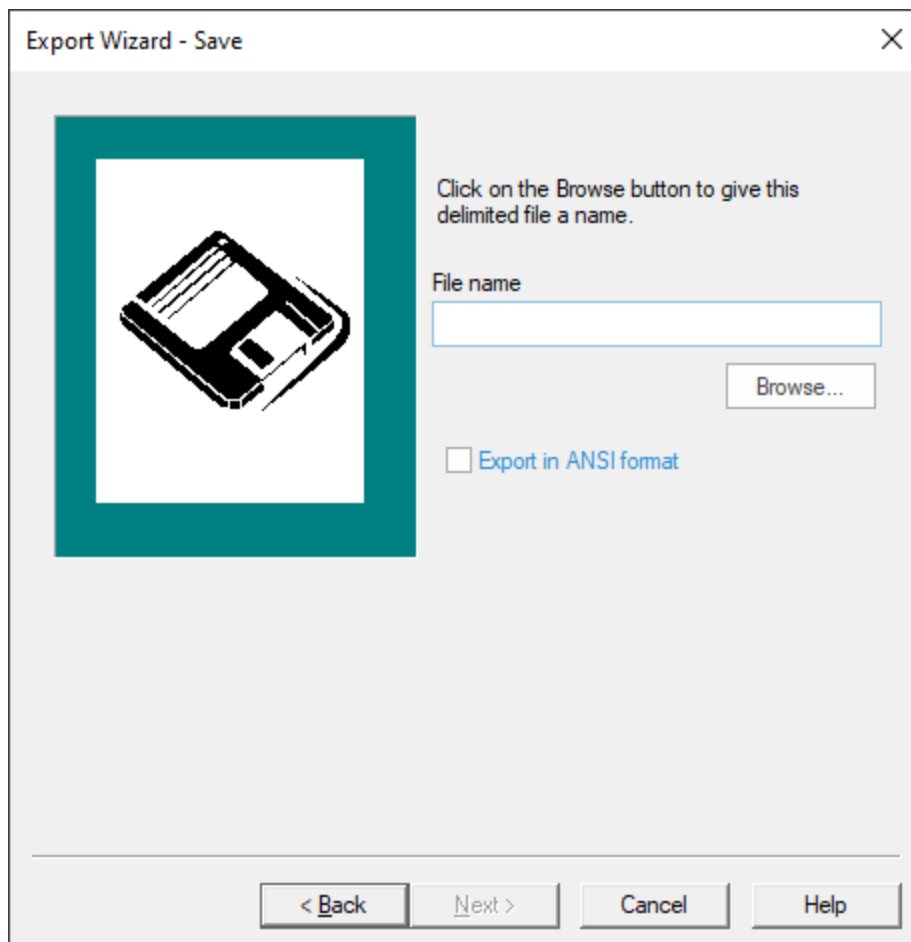
16. Click the **Browse** button to open the **Save As** dialog box.

17. Navigate to where you want to save the delimited text file, in the **File name** field, type the file name, in the **Save as type** field, select the type of text file you want to create, and click **Save**.

    Clicking Save adds the delimited text file name and directory to the Database field in the Export Wizard - Database dialog box.

18. To export the data in ANSI (American National Standards Institute) format, select the **Export in ANSI format** check box.

    You will want to select the Export in ANSI format check box if you will be importing the delimited text file into an application that does not support the Unicode Standard, such as importing into Concordance version 2007 or earlier.

    For more information about the Unicode Standard and Concordance Desktop, see About the Unicode Standard.

⚠ When exporting to ANSI or ASCII format, characters that cannot be represented as a single-byte character will be lost in the export. For an example, see the "Export Issues and Tips" section in the About the Unicode Standard topic.

19. Click **Next** to open the **Export Wizard - Finish** dialog box.

Export Wizard - Finish ✕

Click on the Finish button below to start exporting your data to a delimited file.

File

C:\temp\tempexport.TXT

Documents 0

< Back Finish Cancel Help
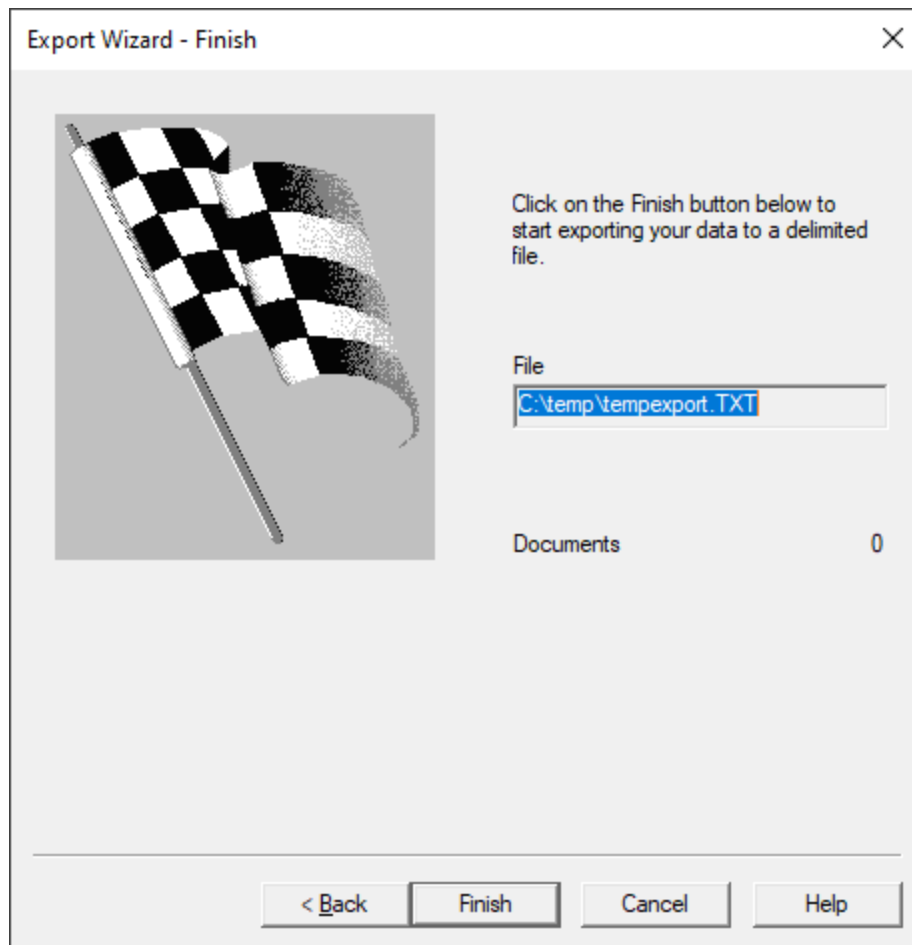
20. Click the **Finish** button to export to the delimited ASCII file.

The Export Wizard - Finish dialog box automatically closes when the export finishes.

To export to a delimited text file using the Export Delimited ASCII dialog box:

1. Run a search query to locate the records you want to include in the export.

   For more information about searching, see Available search tools.

   When Concordance Desktop exports a database, Concordance Desktop can export just the records in the current query or can export all the records in the database. If you want to export all the records, you can run the Zero Query.

   For more information about the Zero Query, see Reviewing search queries.

2. On the **File** menu, click **Export**, and then **To a delimited text file**.

Clicking To a delimited text file opens the Export dialog box.

3. Click the **Export dialog box** option and click **OK**.
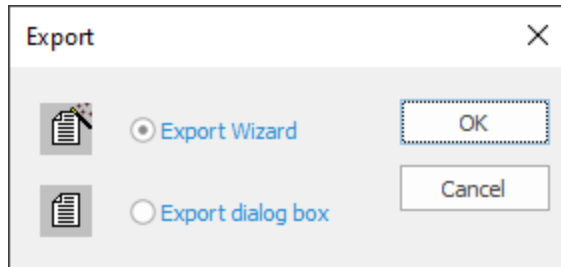
Clicking OK opens the Export Delimited ASCII dialog box.
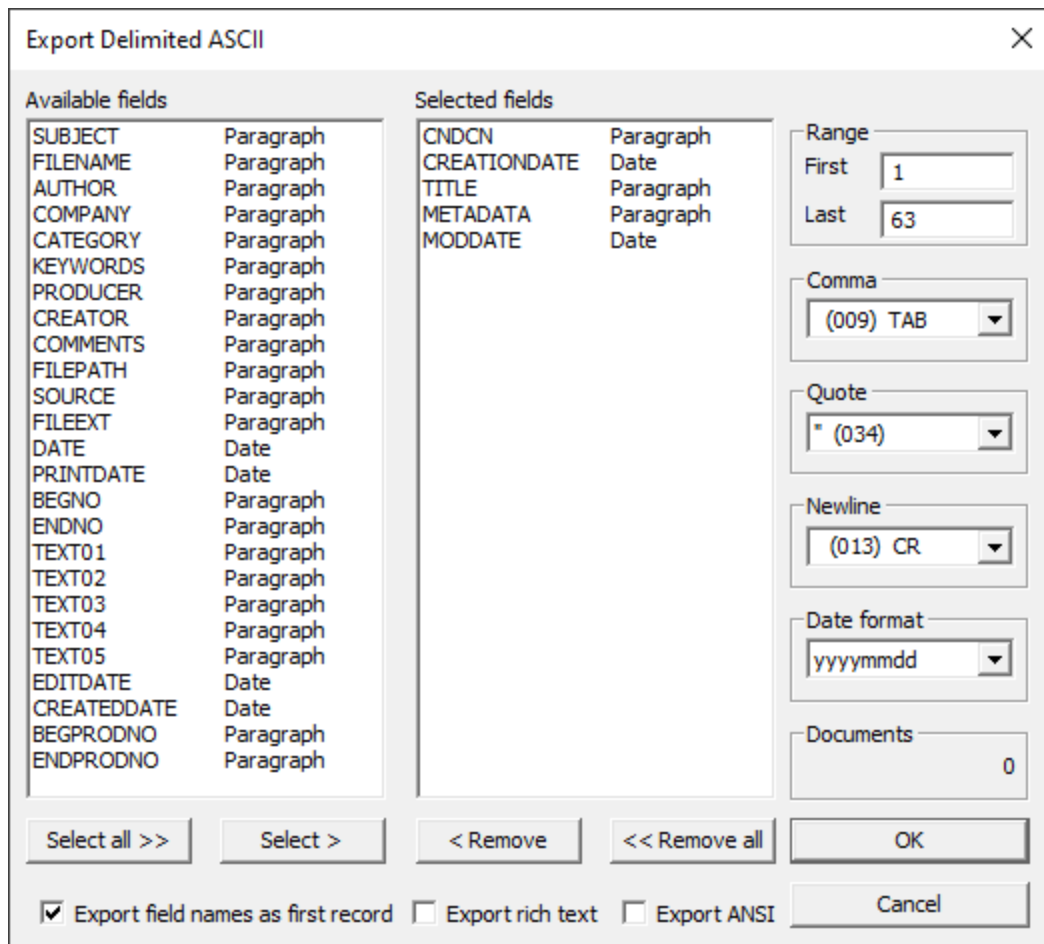
By default, all of the database fields are added to the Selected fields list for the export.

4. To only select some of the fields for the export, click the **Remove all** button to move all the fields to the **Available fields** list.

5. In the **Available fields** list, select the fields you want to include in the export, and click the **Select** button to add the fields to the **Selected fields** list.

    To change the order of the fields in the export, click the Remove all button to add all the fields to the Available fields list and then add each field to the Selected fields list in the order you want the fields to be listed. The field order in the Selected fields list will be the field order in the delimited text file.

6. To include field names in the export, select the **Export field names as first record** check box.

    If the Export field names as first record check box is selected, field names are exported as the first record, with each field name taking the place of its field's data for that record. Exporting field names can help manage data if the data is imported into another program.

7. To export Concordance Desktop data with rich text, select the **Export rich text** check box.

    Full text paragraph fields in Concordance Desktop can contain rich text. Rich text contains font changes, bullet lists, and other word processor commands that other database programs cannot handle. You can export with rich text if the data is destined for another Concordance Desktop database. Do not export rich text if the data is destined for another program.

    If the Export rich text check box is not selected, all text formatting is stripped from the exported data during the export.

8. To export the data in ANSI (American National Standards Institute) format, select the **Export ANSI** check box.

    You will want to select the Export ANSI check box if you will be importing the delimited text file into an application that does not support the Unicode Standard, such as importing into Concordance Desktop version 2007 or earlier.

    For more information see About the Unicode Standard.

    ⚠ When exporting to ANSI or ASCII format, characters that cannot be represented as a single-byte character will be lost in the export. For an example, see the "Export Issues and Tips" section in the About the Unicode Standard topic.

    The First and Last fields in the Range section default to the first and last record in the current query.

9. To modify the range of the records in the query to be exported, in the **First** field, type the record number for the first record in the range you want to export, and in the **Last** field, type the record number for the last record in the range you want to export.

    Concordance Desktop is a full-text database manager. Its documents are likely to contain text delimiters — commas, quotes, and carriage returns — that may confuse other programs, or Concordance Desktop itself, when reading the delimited text file.

To avoid this problem, Concordance Desktop allows you to specify the characters recognized as the comma, quote, and newline delimiters in delimited text files.

The Comma, Quote, and Newline fields default to the default delimiters for Concordance Desktop.

If you are exporting and importing documents within the Concordance Desktop system, then you won't need to change these default values. Change them only if you are using these characters in the text of your documents.

Default Delimiters for Concordance

The default delimiter characters used by Concordance Desktop are listed below. To the right of each delimiter character is the delimiter's numeric value.

Concordance Desktop Default Delimiters		
Delimiter Character	**Function**	**Numeric Value**
Comma	The field delimiter separates one field from the other.	20
Quote	The text qualifier encloses text to differentiate it from field delimiters which may appear in the data.	254
Newline	Substitute carriage return. Some programs use this character to designate multi-level fields or fields-within-fields. Concordance Desktop replaces all carriage returns or carriage return linefeed combinations with the newline code within the data of a field. The record itself is still terminated with a real carriage return and a line feed.	174

📝 The delimiters available from the Comma, Quote, and Newline fields may appear as square symbols or may not be displayed. How the lists are displayed depends on the computer's language environment. The delimiters listed in the About delimiter characters topic use the Tahoma font, which displays the characters regardless of the language environment. All of the characters listed in the delimiter character list can be selected as the delimiter, even if the symbols they represent do not appear in the Comma, Quote, and Newline fields.

To see the list of available delimiter characters, see About delimiter characters.

10. In the **Date format** field, click the date format you want to use in the delimited text file.

The dates exported from the database to the delimited text file will be exported using the date format you select in the Date format field.

11. Click the **OK** to open the **Unload delimited file** dialog box.

12. Navigate to where you want to save the delimited text file, in the **File name** field, type the file name, in the **File of type** field, select the type of text file you want to create, and click **Open**.

    Clicking Open initiates the export to the delimited ASCII file.

    The Export Delimited ASCII dialog box automatically closes when the export finishes.

Exporting database structures

You can export a copy of the database structure to create a duplicate database or to create a new database template based off a current database. The structure is stored in a .dcb file and contains the original field names and their types. Data exported from a database can be loaded into another database that has been exported.

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

Keep the following in mind when exporting concatenated databases:

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

To export a database structure to create a template, see Using a database template.

To populate a database with data from another database, see About importing files.

To save a database structure to a .TXT file:

1. In Concordance Desktop, open the database with the database structure you want to save.

2. On the **File** menu, click **Modify**.

    Clicking Modify opens the Modify dialog box.

3. Click the **Save to File** button to open the **Save Field Definitions** dialog box.

4. Navigate to where you want to save the file, in the **File name** field, type the file name, and click **Save**.

To export a database structure:

1. In Concordance Desktop, open the database with the database structure you want to export.

2. On the **Documents** menu, point to **Export**, and click **Structure**.

   Clicking Structure opens the Copy Structure dialog box.

3. Navigate to where you want to save the database structure .dcb file, type the name of the database file in the **File name** field, and click **Save** to export the database structure.

Exporting transcripts

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

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

Transcripts can also be exported to delimited text files. For more information about exporting to delimited text files, see Exporting delimited text files.

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

To export transcripts to a .pcf file:

1. In Concordance Desktop, open the database containing the transcripts you want to export.

2. Run a search query to locate the transcripts you want to include in the export.

For more information about searching, see Available search tools.

When exporting from Concordance Desktop, Concordance Desktop can export just the records in the current query or can export all the records in the database. If you want to export all the records, run the Zero Query.

For more information about the Zero Query, see Reviewing search queries.

3. On the **Documents** menu, click **Export**, and then **Database transcripts**.

Clicking Database transcripts opens the Export Transcripts dialog box.
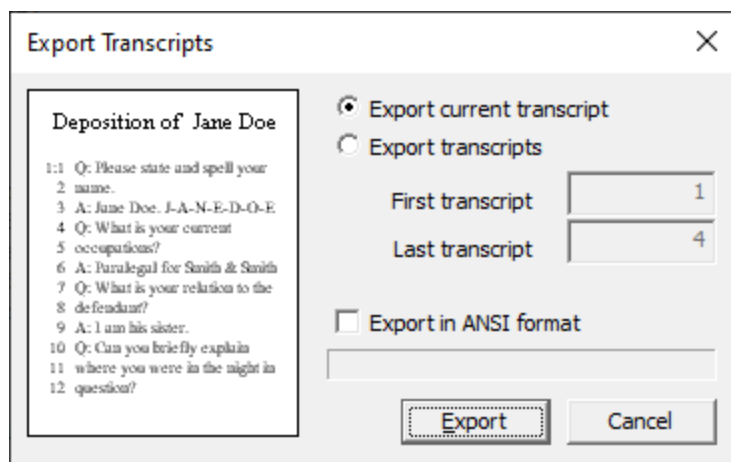
4. To export only the current transcript, select the **Export current transcript** option.

5. To export multiple transcripts, select the **Export transcripts** option.

When you select the Export transcripts option, the First transcript and Last transcript fields become available. The First transcript and Last transcript fields default to the first and last record in the current query.

To modify the range of the transcripts in the query to be exported, in the First transcript field, type the record number for the first transcript in the range you want to export, and in the Last transcript field, type the record number for the last transcript in the range you want to export.

6. To export the data in ANSI (American National Standards Institute) format, select the **Export in ANSI format** check box.

You will want to select the Export in ANSI format check box if you will be importing the delimited text file into an application that does not support the Unicode Standard, such as importing into Concordance version 2007 or earlier.

For more information see About the Unicode Standard.

⚠ When exporting to ANSI or ASCII format, characters that cannot be represented as a single-byte character will be lost in the export. For an example, see the "Export Issues and Tips" section in the About the Unicode Standard topic.

7. Click the **Export** button to open the **Save As** dialog box.

8. Navigate to where you want to save the transcript .pcf file, type the name of the transcript file in the **File name** field, and click **Save** to export the transcripts.

    Once the transcript .pcf file is created, the file can be imported in to West LiveNote. For more information about importing .pcf files into LiveNote, see the West LiveNote documentation.

Exporting to Concordance Desktop Viewer

Concordance Desktop load file formatting

A load file (.opt, .log, .txt) format is a delimited ASCII file containing all information necessary to insert links into the imagebase. The load file consists of seven delimited entries. Reference the following table and examples when formatting images.

Image Load Files	
Format	**Description**
ALIAS	Should match your media (image) key from the Concordance Desktop database. Concordance Desktop stores this key in order to reference the image.
VOLUME	Name of the volume where the documents and images reside, typically the volume name of a CD or DVD server.
PATH	Full path and file name (and extension) of the image.
DOC_BREAK	Enter a *Y* to denote whether this image marks the beginning of a document.
PAGES	Number of pages associated with the image
Character	**Description**
Y	First page of a document
Comma (,)	Indicates a page break or pages

Example: Concordance Desktop viewer format for single-page TIFF files

00010002,NROTEK001,NROTEK001\001\00010002.tif,Y,,,1

00010003,NROTEK001,NROTEK001\001\00010003.tif,Y,,,1

00010004,NROTEK001,NROTEK001\001\00010004.tif,Y,,,3

00010005,NROTEK001,NROTEK001\001\00010005.tif,,,,

00010006,NROTEK001,NROTEK001\001\00010006.tif,,,,

Example: Concordance Desktop viewer format for Multiple-Page PDF files

00010036,NROTEK001,NROTEK001\001\00010036.pdf,Y,,,29

00010065,NROTEK001,NROTEK001\001\00010065.pdf,Y,,,2

00010067,NROTEK001,NROTEK001\001\00010067.pdf,Y,,,3

00010070,NROTEK001,NROTEK001\001\00010070.pdf,Y,,,1

00010071,NROTEK001,NROTEK001\001\00010071.pdf,Y,,,1

📝 A load file does not necessarily need the volume name, but still needs the parameter for the volume name (the commas). Example format: Imagekey/Alias,Volume Name,Pathname,Doc Break,Folder Break, Box Break, Page Count - without the VOL name would look like this: 0000001,,D:\VOLO001\001\0000001.tif,Y,,,1

⚠ A document or image file path cannot contain a comma (,) when exporting to Concordance Desktop Viewer. The comma is used as a delimiter in the exported OPT file.

Unique identifier (Media Key)

Your load file format's alias (media key) should match your image key from the Concordance Desktop database. Concordance Desktop stores this key in order to reference the image.

📝 The alias in your load file matches the database field that has the Image check box selected on the Modify dialog box for the database in Concordance Desktop. For more information about the Image check box, see About fields.

⚠ The Concordance Desktop viewer will not load documents and images if the media (image) key contains over 1000 characters or a comma (,).

<u>**To export native files for use in the viewer:**</u>

1. Create the database you want to export. For information on creating a database, see Creating a new e-documents database.

2. Import the data into the database.

3. Verify that each record has a unique identifier in the field that you marked as the media (image) key field and the file path field displays the path to the native document.

4. From the **Documents** menu, click **Export**, and then **As a Concordance Desktop database**.

5. In the **Export to Concordance Desktop**, select the database field where the file path is stored.

   Note the output file path. This is where the .opt file will be exported for importing in Concordance Desktop.

   📝 Each time you perform an export, a unique OPT filename is generated with the date and time the file is created, DBNAME_YYYYMMDDhhmmssfff (i.e. NATIVE_20150517105932021.opt).

6. When finished, click the Camera button to view the documents and images in the viewer.

7. In the **Exported Load File** section of the **Imagebase Conversion Source Selection** dialog box, select the OPT file you exported, and then click **Convert**.

   The viewer opens and displays the documents and images.

Preparing Productions

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

Concordance Desktop provides two production options:

- Standard production - produces a set of TIF or PDF files, .opt and a .dat load file.
- Native production - copies original native files out to a production destination directory and the files can be renamed with the production numbers. No redactions or other production type operations happen, simply a copy and rename. for more information about Native File production, see Running a native file production.

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

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

Managing rolling productions

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

Examples of data types handled during E-Discovery

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

- Data coming from clients that needs to be processed. This could include paper documents, electronic files, e-mail files, images, metadata load files, transcripts, graphics, and audio/video files.
- Data being produced from opposing parties to be loaded into a review tool, such as Concordance Desktop, for review by attorneys, paralegals, experts or investigators.
- Data going out to vendors for processing, scanning, coding, or printing.
- Data to be processed in-house using an e-discovery processing software, such as CloudNine™ LAW.
- Data such as exhibits, graphics, and presentations being prepared for trial to be loaded into trial presentation software.
- Transcripts and audio/video files from court reporters to be loaded into a transcript database for review and analysis.
- Data being copied or produced to other parties for review such as co-counsel and experts.
- Data being produced to opposing parties.
- Data that is to be archived from the network to disk or hard drive storage.
- Data that requires special handling, such as compliance with destruction or preservation orders.

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

Tracking data

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

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

Archiving data

Production elements

⊞ Numbering documents

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

Burning annotations

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

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

For multiple or *rolling* productions, tags or sequentially numbered production fields are tracked for which production series a document was produced under. For example, fields named BEGPRODNO1/ENDPRODNO1, BEGPRODNO2, ENDPRODNO2, etc.

Production output

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

Native files

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

Generating load files and images

The output from a production is a set of images and an image load file. The output generated depends on production requirements agreed upon with opposing counsel. A best practice is to know in advance what the recipient needs for output format.

Production load files enable recipients to import images into their own viewer software. Images and load files are generated for either single or multi-page, TIFF or PDF format.

Administrators can also export specific field data to a delimited file, .dat, .csv, etc., to accompany the produced OPT and images. If new production numbers are created as part of the production, be sure to write the beginning and ending numbers back to fields in the database so they are available for export and also cross reference with any original document numbers.

Concordance Desktop export processes work well with most of the review tools on the market, or Concordance Desktop data can be converted to something that will work.

Productions and concatenated databases

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

Creating a production

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

📝 When creating productions, close any other database tabs so Concordance Desktop does not synchronize with a different database incorrectly. We recommend having no more than three tabs or databases open during this process. Do not attempt to open the Admin Console while running a production.

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

⚠ Do not open the Admin Console while running a Production.

Production process overview

1. Generate new production numbers and cross-reference them back to the Concordance Desktop database.

2. Create new files.

3. Burn in redactions and other selected annotations.

4. Create CD/DVD productions.

5. Create subsets of imagebases.

6. Create load files.

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

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

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

Selecting image file files

Reference the Supported Image File Types table when making adjustments as needed to match the images you are producing for image type, compression, and number of colors.

Supported Image Types	Compression	Colors
TIFF	None	
	1-bit	Black & White
	4-bit	16 colors
	8-bit	256 colors
	24-bit	16.7 million colors
	Pack Bits	
	1-bit	Black & White
	4-bit	16 colors
	8-bit	256 colors
	24-bit	16.7 million colors
	LZW	
	1-bit	Black & White
	4-bit	16 colors
	8-bit	256 colors
	24-bit	16.7 million colors
PDF		Black & White
		Color

Production checklist

Refer to the Pre-Production Checklist to ensure all steps are completed before running a production.

Pre-Production Checklist

File Numbering

☐ Have you determined a file numbering and naming convention for your images?

Delivery Media

☐ Do you have the proper production request file formats and media delivery types from opposing counsel or other third parties?

Tagging

☐ Have you reviewed documents categorized for production for possible tagging inconsistencies by reviewers?

☐ Did you run the Tag To Field command, Tools > Manage Tags/Issues, on production documents to capture tag activity at the time of production? Tag names can be placed into a field called PRODTAGS1.

Back-ups and File Storage

☐ Did you save a backup copy of your media files before production?

☐ Did you back up your imagebase files?

☐ Did you a create sub-directory folders for your new files?

Production training

Anyone tasked with preparing productions should receive Concordance Desktop 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 Administrator at CloudNine Training for additional information on Concordance Desktop certification courses, or email us at training@cloudnine.com to register for Concordance Desktop courses.

Executing a production run

1. Locate the documents to produce

2. Marking up documents for production

3. Capture the tag activity

4. Defining production parameters

5. Verify the produced images

6. Create a production database

Running a standard production

When using Concordance Desktop, you first need to identify and locate the documents you want to produce.

To locate documents for a production:

1. In Concordance Desktop, open the database containing the documents you want to produce.

2. Run a search query to locate the documents you want to produce.

    For more information about searching, see Available search tools.

3. Create a tag specific to this production, such as PROD1, and apply the tag to the applicable documents.

    For more information about creating and applying tags, see Creating and applying tags.

Make sure that the proper annotations have been applied to the records you want to include in a production.

Annotations to consider adding to records for productions:

- Redactions to indicate and/or cover confidential or privileged information.
- White redaction to hide internal control numbers, vendor branding, and other information you do not need to include in the production.

⚠ In Concordance Viewer, 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.

Before running a production, you need to run the Tag To Field command, Tools > Manage Tags/Issues. The Tag To Field command copies the contents in tags to a specific field in a

database. Executing this command before creating the production captures tags that were applied to each record just before the production was created.

Running the **Tag to Field** command:

1. In Concordance Desktop, create a database field, such as PRODTAGS1, to store the tag information.

2. For more information about database fields, see About fields and Creating databases.

3. On the **Tools** menu, click **Manage Tags/Issues**.

4. In the **Tag and Issue Management** dialog box, click the **Tag To Field** button.

5. From the **Select Field** list, select the field you want to copy the tag names.

6. From the **Select Delimiter** list, select the delimiter to separate the tag names in the field.

7. Click the **Start** button.

8. When prompted, do one of the following:
    - Click **Yes** to confirm that you want to write the tag names in the selected field.
    - Click **No** to append the tag names to the existing field contents.

- Click **Cancel** to abandon the changes.

9. When finished, click **Done**, and verify that the selected field displays the tag names separated by the selected delimiter.

When you run a production, you may choose to create production numbers and write the numbers back to the database. The create production number option saves the new production numbers to the new or appended .cib file and writes the beginning and ending production numbers for each document back to the Concordance Desktop database to cross-reference the information in the original record.

The Production Preferences options provide both whole number production numbers and productions numbers that include a suffix.

For example, the production has three documents (A, B, C) and document B contains four pages. The image below defines the production settings.
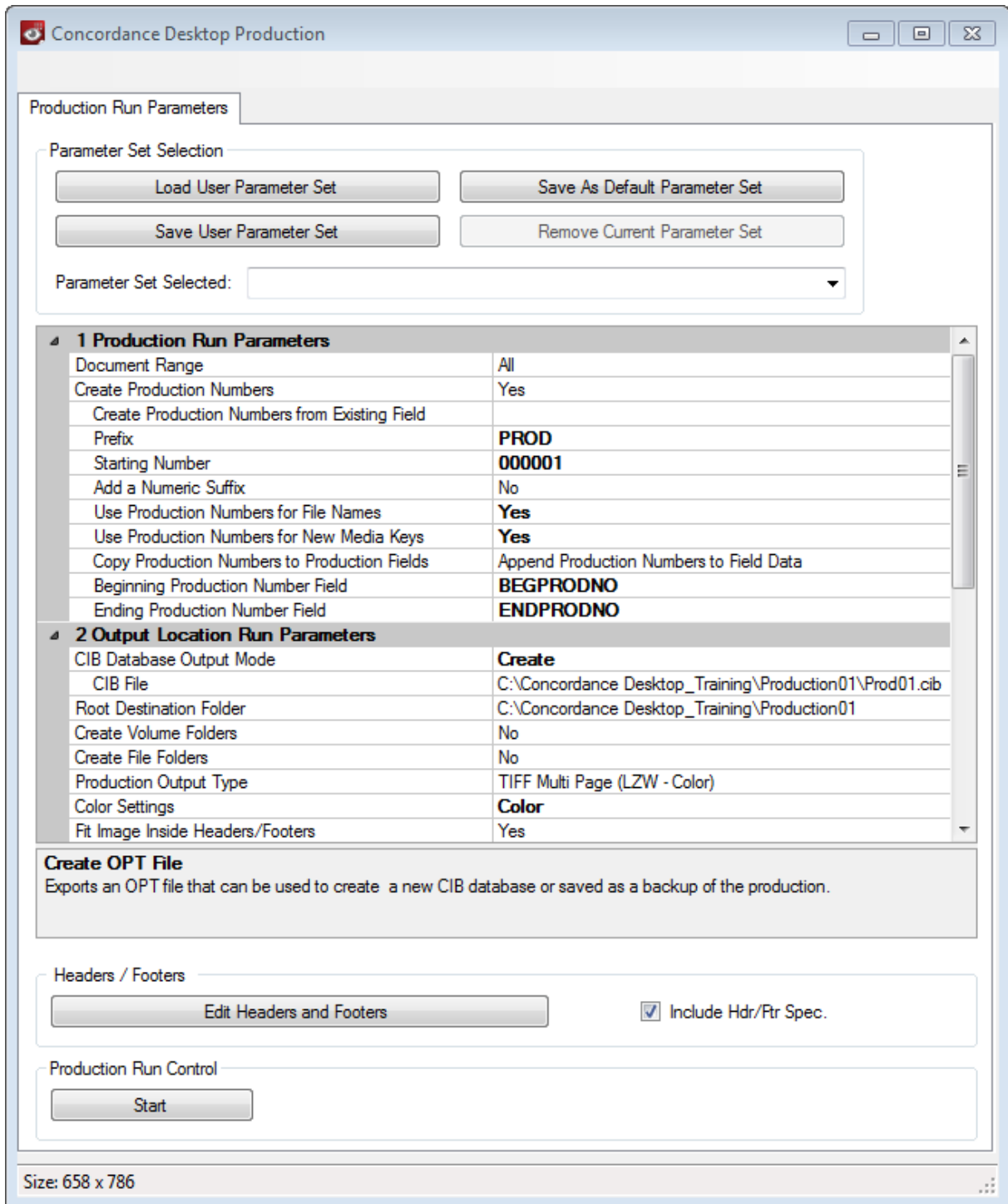
The whole number production numbers are generated and written back to Concordance Desktop as follows:

Document	Begin Production Number	End Production Number
A	DAT000001	DAT000001
B	DAT000002	DAT000005
C	DAT000006	DAT000006

Productions with the suffix added, are generated and written back to Concordance Desktop as follows:

Document	Begin Production Number	End Production Number
A	DAT000001.0001	DAT000001.0001
B	DAT000002.0001	DAT000002.0004
C	DAT000003.0001	DAT000005.0001

Each document is produced with the corresponding production and page number. Therefore, in the above example, each page of document B is produced with one of the following production numbers: DAT000002.0001, DAT000002.0002, DAT000002.0003, DAT000002.0004.

Production is the generation of a sub-set of document TIFF or PDF files, some of which have been redacted. Similar to other batch processes in Concordance Desktop, Concordance Desktop production parameter settings can be saved and used each time you create a production.

Before starting a production run, you need to run a query to locate all the documents for the production, then define the production run parameters or load a saved parameter set.

If your current database is using the Concordance Desktop Viewer, follow the information below. Otherwise if you are using the Concordance Viewer, see Production with Concordance Viewer.

⚠ Markups including redactions and header/footer/margin information may fail to be included in the produced or printed output when these processes are started from a Windows 10 workstation that is set to sleep. Windows 10 workstation used for production or print jobs should set the workstation to never sleep. The monitor may go into screensaver mode without issue but the workstation needs to maintain contact with the server in order to properly complete the production or print job.

To run a production:

1. If you have not done so already, run a search query to locate the documents you want to produce. See, Locating documents to produce.

2. Create a directory folder to store the production files.

3. From the **Tools** menu click **Production**, and then **Production**.

4. If a dialog appears stating that remote databases could run slow, click **Yes** if you want to continue. Click No only if you do not want to run the production at this time.

   The Production Run Parameters dialog opens.
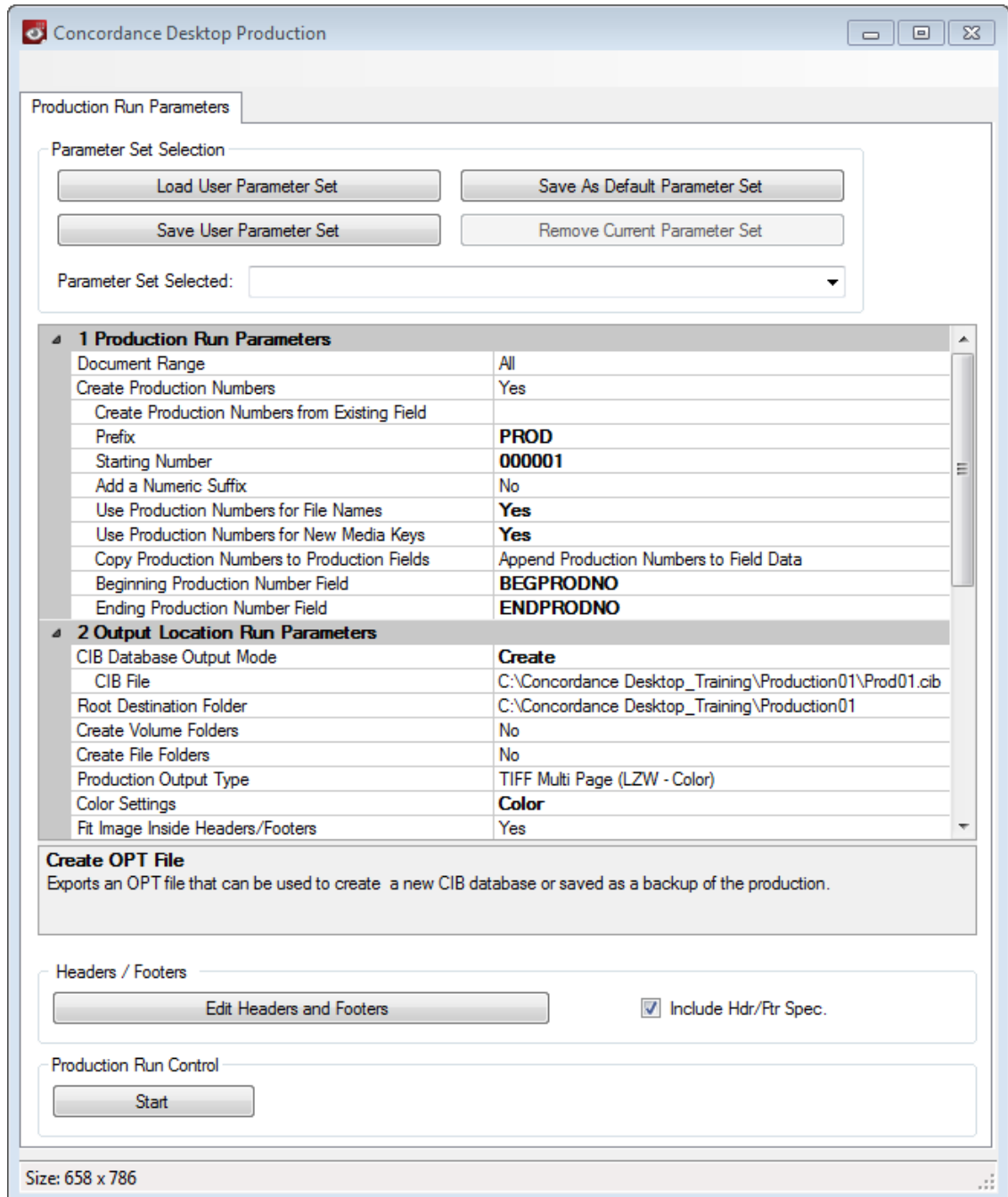
5. Specify the following production parameters:

To set production run parameters:

a. From the **Production Run Parameters** section, in the **Document Range** list, click one of the following:

- To include all the documents in the query, click **All**.
- To include a selected set of documents from the query, select **Range**, and then specify the range of documents you want to produce. The default range is the complete range of documents in the current Concordance Desktop query.

b. To create production numbers, do the following:

- In the **Create Production Numbers** field, click **Yes**.
- In the **Create Production Numbers from Existing Field,** select the Concordance Desktop database field name from which you want the Production numbers to be created.
- In the **Prefix** field, type the prefix you want to precede the production number. The prefix can be any combination of letters, numbers, or punctuation that are valid folder or file names. There is a limit of 57 characters.
- In the **Starting Number** field, type the number you want to use to start numbering the production files. Zero fill your starting number to determine the desired number width. There is a limit of 9 digits.

The Starting Number field accepts a zero-filled number up to 10 digits in length (maximum number of two billion).

- In the **Add a Numeric Suffix** field, click **Yes** or **No** to add an incrementing numeric value to a production number for each page in a document.

When adding a numeric suffix, the pages within document will be produced with a beginning .0001 suffix and incremented accordingly. Therefore, if a single document within the production set contains more than 10000 pages, page 9999 will contain the suffix .9999 and page 10000 will contain the suffix .10000. This may cause sorting issues for other applications used to view documents/images if not loaded into the application with a corresponding OPT file.

- In the **Use Production Numbers for File Names**, click **Yes** or **No** to replace the current file name with the generated production number.
- In the **Use Production Numbers for New Media Keys**, click **Yes** or **No** to replace the current media key with the generated production number in the .cib file you specified.
- In the **Copy Production Numbers to Production Fields**, select either **Append Production Numbers to Field Data** or **Overwrite Field Data with Production Numbers**.

- In the **Beginning Production Number** list, click the field you want to use to store the beginning production number in the corresponding Concordance Desktop database.

- In the **Ending Production Number** list, click the field you want to use to store the ending production number in the corresponding Concordance Desktop database.

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

The BEGPRODNO and ENDPRODNO fields are included in the standard database template as production fields to ensure that the numbers do not append to a field with existing data. If the production number appends to an existing field, the numbers may truncate if the content exceeds the field length.

c.   To create a Placeholder for unsupported or missing files, Click **Yes.**

- The produced image for the unsupported or missing file will appear as this:
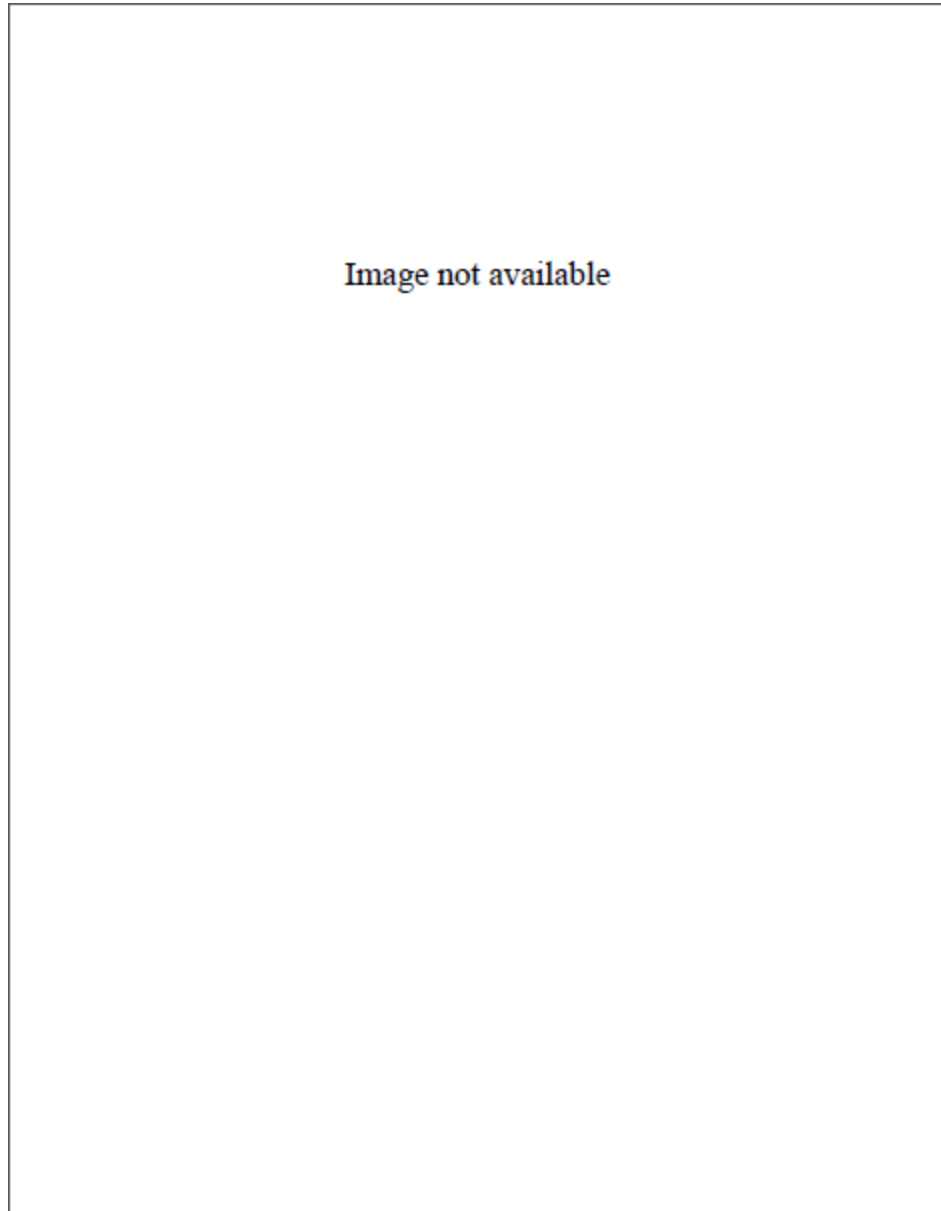
The placeholder pdf and tiff images are stored in the installation Program Data folder and can be replaced with a custom image of your choosing.

To set the output location parameters:

a. In the **Output Location Run Parameters** section, in the **CIB Database Output Mode** list, do one of the following:

- To add the documents to an existing CIB database, click **Append**.
- To create a new CIB database, click **Create**.

b. To generate the CIB database file to store references to the production files, in the **CIB File** field, do one of the following:

- To append a current CIB database, click **Browse** ⬚, and then navigate to and select the CIB file you want to append.
- To create a new CIB database, click **Browse** ⬚, navigate to where you want to store the file, and then enter a new .cib file name and click **Open**.

c. To specify location where the output files are to be stored, in the **Root Destination Folder** field, click Browse ⬚, and then navigate to and select the folder.

The Root Destination Folder path including the folder name should not exceed 250 characters as this may cause the application to close unexpectedly.

d. To create volume folders for the production files, in the **Create Volume Folders** list, click **Yes**, and then do the following:

- In the **Prefix** field, type the prefix you want to use to precede the volume number. The prefix can be any combination of letters, numbers, or punctuation; however, the characters must be valid folder and file name characters.
- In the **Starting Number** field, type the number, you want to use for the starting number for the volume folders.
- In the **Max Volume** list, click the maximum size for the folders or create a custom size.

The contents of the volume directories can be copied to a CD or DVD for distribution. If you plan to copy the production files to a CD or DVD, make sure that you know the recording capacity of the CD or DVD prior to setting the Max Volume value. This ensures that the entire contents of the volume can be copied without running out of disk space.

After a volume fills to the maximum size, a new volume folder is created and, if requested, will continue sequentially. Production files will not be split across volumes.

e. To organize the production files within the volume folder, in the **Create File folders** list, click **Yes**, and then do any of the following:

- In the **Prefix** field, type the prefix you want to use to precede the file folder number. The prefix can be any combination of letters, numbers, or punctuation.
- In the **Starting Number** field, enter the number, you want to use as the starting number for the file folders. Zero fill your starting number to determine the desired number width.
- In the **Maximum Record Count** field, type the maximum number of records to include in each folder.
- To use the first file name in each folder as the folder name, click **Yes**.

f.   To specify the output type and image compression, in the **Production Output File Type** list, do one of the following:

- Click **PDF Single Page** to convert the documents to single-page .pdf formatted files that can be loaded into a new or existing Concordance Desktop Viewer imagebase.

- Click **PDF Multi Page** to convert the documents to multi-page .pdf formatted files that can be loaded into a new or existing Concordance Desktop Viewer imagebase.

- Click **TIFF Multi Page (Color)** to convert the documents to multi-page LZW compressed .tif formatted files that can be loaded into a new or existing Concordance Desktop Viewer imagebase.

- Click **TIFF Single Page (Color)** to convert the documents to single-page LZW compressed .tif formatted files that can be loaded into a new or existing Concordance Desktop Viewer imagebase.

- Click **TIFF Multi Page (Black & White)** to convert the documents to multi-page CCITT Group-4 compressed .tif formatted files that can be loaded into a new or existing Concordance Image imagebase.

- Click **TIFF Single Page (Black & White)** to convert the documents to single-page CCITT Group-4 compressed .tif formatted files that can be loaded into a new or existing Concordance Image imagebase.

LZW compression produces a small file size image, which cannot be used with Concordance Image.

g.   To specify the output color settings, from the **Color Settings** list, select one of the following:

- To convert the documents to shades of gray, click **Grayscale**.

- To produce the files with original colors, click **Color**.

h.   From the **Fit Image Inside Headers/Footers** list, click **Yes**.

This option reduces the size of the produced document or image to accommodate the space needed for the number of lines of text and font size for the specified headers and footers.

i.   To generate a .opt file for the production files, do the following:

- In the Create OPT file, click **Yes**.

- Click the **Output path for OPT file** field, click **Browse** ⬚, and then navigate to and enter a name for the .opt file.

It is recommended that you create an OPT file when using the Numeric Suffix option to ensure the produced documents/images can be loaded properly in Concordance Desktop viewer and Concordance Image, as well as other viewer applications.

To specify markup types to include in the production:

In the **Markup Types** section, do any of the following:

- To include all markups, from the **Select All** list, click **Yes**.

- To exclude all markups, from the **Select All** list, click **No**.

- To include some of the markups, from the **Select All** list, click **No** and then for each mark up you want to include click **Yes** from the corresponding markup list.

Due to how the markups are rendered during production, if you want to include any applied crossout, strikeout, highlight, or underline markup in a production, please note that all four markups are treated as one and all four if applied will be included in the produced file. For example, if a crossout and highlight markup are applied to a document, if the crossout markup is selected in the Production parameters, both the crossout and the highlight markup are produced.

To edit a header, footer or watermark:

Headers and footers are a string of text assigned to a specific location within a document. Headers and footers contain information such as date, time, page number, user name, etc. For productions and printing, the text is not restricted to just the top and bottom of a document, you can also place them in the right and left the margins of a document. Each margin may be 10 lines deep giving you 120 individual strings of text.

A watermark is a semi-transparent string of text that appears behind the existing document content. A watermark appears across each produced file from bottom left to top right and has a transparency setting of 20%.

Similar to markups and redactions, headers, footers, and watermarks are integrated into a production file as a fixed element that cannot be moved, changed, or deleted.

1. In Concordance Desktop, from the **Tools** menu, click **Production**.

2. In the **Production Parameters** dialog box, select the **Include Hdr/Fts Spec** check box.

3. Click the **Edit Headers/Footers and Watermarks** button.

4. Click the (+) sign next to the Header/Footer folders or the watermark folder you want to edit.

5. For each header, footer, or watermark, do one of the following:

- Type the text you want to be displayed.

- Type **%** to display the available macros list, and then select the macro(s) you want to add.

<u>**Available macros**</u>

Keep the following in mind when adding macros to headers/footers, and
watermarks:

- Each line of header or footer can use multiple macros. For example,
  you can add %Date %Time to the Top Left header. This prints the
  date and time in the location you specified on each page of the
  production.

- All macro values are case insensitive, except for the %FIELD_ macro,
  this must remain all uppercase.

When producing Concordance Desktop viewer documents/images in
Concordance Desktop, do not modify the %BatePgNo() macro as this
will cause the creation of new production numbers to fail.

Macro	Description
%FIELD_	Inserts database field data up to 60 characters for a each specified field. For example, %FIELD_OCR1 %FIELD_OCR2, would produce the first 60 characters of the OCR1 field and the first 60 characters of OCR2 field. If security is enabled, only those fields with a minimum of "Read" access are displayed.
%Date	Inserts the current date
% SysDatePlusDay s(0)	Inserts a date the specified number of days after the system date. Replace the 0 a number to indicated the number of days.
%Time	Inserts the current time the production is executed based on a 12-hour clock
%MilTime	Inserts the current time the production is executed based on a 24-hour clock
%Title	Inserts the current title of the document
%Page	Inserts the page number
%TotalPages	Inserts the total number of pages
%BatesPgNo()	Indicates the starting number for each page within a document. The generated number is appended to the production number creating a unique document ID for each page of a document stored in the corresponding Concordance Desktop database. For example, a production run of three single page documents are generated as ABC00001, ABC00002, ABC00003.
%Login, %User	Inserts the user name of the person who executed the production

%Hostname	Inserts the hostname of the machine where the production was executed from
%IPAddress	Inserts the IP address of the machine where the production was executed from
%%	Inserts a single % character
©	Inserts a copyright symbol
®	Inserts a registered trademark

6. 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.

    Overlapping of text in headers and footers may occur if the specified font size is too large.

7. Click **List** to review the applied header/footer and watermark text and macros set for the production.

8. Click **Edit** to make any changes.

9. When finished, **OK**.

    Production and Printing headers/footers and watermark settings are separate entities. Parameters you set in the Production dialog box are only available for production.

6. After all production parameters have been specified, click **Start**.

7. Verify the header/footer and watermark settings, and then click **Ok**.

    The **Production Control** dialog box opens. For more information about the **Production Control** dialog box, see Monitoring the production run.

8. When the production is finished, in the **Production Control** dialog box, click **Close**.

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

☑ When creating productions, close all other database tabs and the Admin Console.

⚠ Do not open the Admin Console while running a Production.

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

If your current database is using the Concordance Viewer, follow the information below. Otherwise if you are using the Concordance Desktop Viewer, see Production with Concordance Desktop Viewer.

Locate documents for a production:

When using Concordance Desktop, you first need to identify and locate the documents you want to produce.

1. In Concordance Desktop, open the database containing the documents you want to produce.

2. Run a search query to locate the documents you want to produce.

   For more information about searching, see Available search tools.

3. Create a tag specific to this production, such as PROD1, and apply the tag to the applicable documents.

   For more information about creating and applying tags, see Creating and applying tags.

⊟ Annotating documents for production

Make sure that the proper annotations have been applied to the records you want to include in a production.

Annotations to consider adding to records for productions:

- Redactions to indicate and/or cover confidential or privileged information.
- White redaction to hide internal control numbers, vendor branding, and other information you do not need to include in the production.

See Adding markups in Concordance Viewer for additional information.

Capturing tag activity for the production

Before running a production, consider running the Tag To Field command, Tools > Manage Tags/Issues. The Tag To Field command copies the contents in tags to a specific field in a database. Executing this command before creating the production captures tags that were applied to each record just before the production was created.

Running the Tag To Field command:

1. In Concordance Desktop, create a database field, such as PRODTAGS1, to store the tag information.

2. For more information about database fields, see About fields and Creating databases.

3. On the **Tools** menu, click **Manage Tags/Issues**.

4. In the **Tag and Issue Management** dialog box, click the **Tag To Field** button.

5. From the **Select Field** list, select the field you want to copy the tag names.

6. From the **Select Delimiter** list, select the delimiter to separate the tag names in the field.

7. Click the **Start** button.

8. When prompted, do one of the following:
   - Click **Yes** to confirm that you want to write the tag names in the selected field.
   - Click **No** to append the tag names to the existing field contents.
   - Click **Cancel** to abandon the changes.

9. When finished, click **Done**, and verify that the selected field displays the tag names separated by the selected delimiter.

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⊟ **To run a production:**

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CONCORDANCE PRODUCTION

NAMING

Settings

[_____ ▼]

[Save] [Save as default] [Remove]

NUMBERING

☐ Create production numbers

OUTPUT SETTINGS

☐ Create place holders for unsupported/missing files

☐ Volume folders

☐ File folders

Concordance Imagebase

[None ▼]

Production path

[_____] [Browse...]

☐ Create OPT

IMAGE SETTINGS

File type	Page settings	Color settings
[Tiff ▼]	[Multi-page ▼]	[Black and white CCITTFAX4 cor ▼]

☐ Fit image inside header/footer

MARKUPS

☐ Select All

☐ Redaction   ☐ Text   ☐ Note

☐ Image   ☐ Stamp   ☐ Line

☐ Connected Lines ☐ Crossout   ☐ Arrow

☐ Rectangle   ☐ Ellipse   ☐ Strikethrough

☐ Highlight   ☐ Underline

HEADERS AND FOOTERS

☐ Include headers and footers

[Preview] [Start production] [Cancel]

1. From the **Tools** menu click **Production**, and then **Production**.

2. The **Concordance Production** dialog opens.

3. Specify the desired production parameters needed. See details for the various production parameters in the sections below.

4. Before you **Start production** or **Cancel**, it is recommended to review your production settings and save them to a template if desired. If you need to cancel the production it is easier to resume your production from a template of your settings.

5. If your settings are correct then click **Start production** to process your images.

After running a production, it is best practice to verify the produced images and production data, such as carefully reviewing the production log in the database logs folder; checking redacted documents; and confirming page numbers and page counts match expected output. If an OPT load file was created as part of the production, consider editing it to reflect a relative path to the images rather than a full path before sharing the file outside your organization.

⊞ **Creating Production Numbers**

1. Select the check box ☑ for **Create production numbers** to expand the numbering options.

2. Choose to create **New** production numbers or use numbers **From existing field** in the drop-down list box.

To create **New** production numbers, do the following:

- In the **Prefix** field, type the prefix you want to precede the production number. The prefix can be any combination of letters, numbers, or punctuation that are valid folder or file names. There is a limit of 57 characters.

- In the **Starting number** field, type the number you want to use to start numbering the production files. Zero fill your starting number to determine the desired number width. There is a limit of 9 digits.

   📝 The Starting Number field accepts a zero-filled number up to 10 digits in length (maximum number of two billion).

- Select the **Add a numeric suffix** check box ☑ to add an incrementing numeric value to a production number for each page in a document.

   ⚠ When adding a numeric suffix, the pages within document will be produced with a beginning .0001 suffix and incremented accordingly. Therefore, if a single document within the production set contains more than 10000 pages, page 9999 will contain the suffix .9999 and page 10000 will contain the suffix .10000. This may cause

sorting issues for other applications used to view documents/images if not loaded into the application with a corresponding OPT file.

- In the **Begin production number field**, select from the drop-down list the field you want to use to store the beginning production number in the corresponding Concordance Desktop database.

- In the **End production number field**, select from the drop-down list the field you want to use to store the ending production number in the corresponding Concordance Desktop database.

- In the **Copy production numbers to field**, select either **Append** or **Overwrite**.

  Depending on your selection, any existing field data will have the production numbers appended to the data or overwritten completely.

To create production numbers **From existing field**, do the following:

- In the **Production number field** select drop-down arrow ⬇ to choose the field in that Concordance Desktop database from which you want the Production numbers to be created.

- In the **Begin production number field**, select from the drop-down list the field you want to use to store the beginning production number in the corresponding Concordance Desktop database.

- In the **End production number field**, select from the drop-down list the field you want to use to store the ending production number in the corresponding Concordance Desktop database.

- In the **Copy production numbers to field**, select either **Append** or **Overwrite**.

  Depending on your selection, any existing field data will have the production numbers appended to the data or overwritten completely.

📝 The BEGPRODNO and ENDPRODNO fields are included in the standard database template as production fields. If the production number appends to an existing field, the numbers may truncate if the content exceeds the field length.

Output Settings

In the Output Settings section of the **Concordance Production** window, select the check box ☑ for any or all of the desired options:

- **Use production numbers for media keys**, to use the new production numbers as media (image) keys in the produced .opt file.

- **Use production numbers for file names**, to replace the current file name with the generated production number when naming the new production files.

⚠ If **Create production numbers** is not enabled in the Concordance Production settings then **Use production numbers for media keys** and **Use production numbers for file names** will not be displayed.

- If **Create place holders for unsupported/missing files** is selected, the produced image for the unsupported or missing file will appear with the text "Image not available".

- Select **Volume folders** to create volume folders for the production files. After selecting:
  o In the **Prefix** field, type the prefix you want to use to precede the volume number. The prefix can be any combination of letters, numbers, or punctuation; however, the characters must be valid folder and file name characters.
  o In the **Starting Number** field, type the number you want to use for the starting number for the volume folders.
  o In the **Max Volume Size**, enter the value for the maximum size for each volume.

    💡   The contents of the volume directories can be copied to an external storage for distribution. If you plan to copy the production files to an external storage medium, make sure that you know the available space prior to setting the Max Volume value. This ensures that the entire contents of the volume can be copied without running out of space. After a volume fills to the maximum size, a new volume folder is created and, if requested, will continue sequentially. Production files will not be split across volumes.

- Select **File folders** to organize the production files within the volume folder. After selecting:
  o In the **Prefix** field, type the prefix you want to use to precede the file folder number. The prefix can be any combination of letters, numbers, or punctuation; however, the characters must be valid folder and file name characters.
  o In the **Starting Number** field, enter the number, you want to use as the starting number for the file folders. Zero fill your starting number to determine the desired number width.
  o In the **Maximum Record Count** field, type the maximum number of records to include in each folder.

- Click **Browse** next to the **Production path** to specify the folder location where the output files are to be stored.

  ⚠ The Production path including the file name should not exceed 250 characters as this may cause the application to close unexpectedly.

- Select **Create OPT** to generate an .opt file for the production files. Click the **Browse** button, navigate to the location for the .opt file, enter a filename to use, and click **Open**.

💡 It is recommended that you create an OPT file when using the Numeric Suffix option to ensure the produced documents/images can be loaded properly in Concordance Desktop viewer and Concordance Image, as well as other viewer applications.

Image Settings

Image Settings allow you to configure output files as TIFF or PDF, single-page or multi-page, black and white (greyscale) or color in any combination of these three settings.

💡 LZW color compression produces a small file size image, which cannot be used with Concordance Image.

The available image settings are:

- **File Type** - select from the drop down list either **TIFF** or **PDF** for the image output type.

- **Page Settings** - select either **Multi-Page** or **Single-page.**

- **Color Settings** - select either **Black and white CCITTFAX4 compression** or **Color LZW compression.**

- Select the **Fit image inside header/footer** checkbox to reduce the size of the produced document or image to accommodate the space needed for the number of lines of text and font size for the specified headers and footers.

⚠ All redactions are produced as black when Black & White is selected for the production output. Color redactions will appear as selected when Color is selected for the production output.

Markups

To specify markup types to include in the production click the check box next to the desired markups to be included.

To include all markups click the check box next to **Select All**.

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

Headers and Footers

Click **Include Headers and Footers** to enable settings for Headers, Footers, Margins, and Watermarks. The headers, footers, and watermarks are integrated into a production file as a fixed element that cannot be moved, changed, or deleted.

⚠ Printing and Production headers/footers and watermark settings are separate entities. Parameters you set in the CDV Printing dialog box are only available for printing, and parameters you set in the Concordance Production dialog box are only available for production.

Font

Clicking **Font** opens a new **Select Font** window where you can change the font settings for all text in headers, footers, margins, and watermarks.

- Select the **Font Family** you want from the list box.

- Select the **Font Size** you want from the list box.

  Overlapping text in headers and footers may occur if the specified font size is too large.

- Select the **Font Style** options you want by selecting the corresponding check boxes for **Bold** and/or **Italic**.

The **Sample Text** will show an example of text using the font options as you are selecting them so you can see what it will look like.

Click **OK** to return to **Concordance Production**.

Headers and Footers

Headers and Footers are a string of text assigned to a specific location within the top and bottom margins of the produced image. Headers and footers contain information such as production page number, date, time, field content, etc.

Free text can be typed in each section or you can select from the drop-down list of variables and fields. If you specified to create new production numbers, you may select **Page ID** to endorse the image with the new production page number.

Margins

For productions the text is not restricted to just the top and bottom of a document, you can also place them in the right and left the margins of a document.

The text can be typed in to the field or selected from the drop-down list of variables and fields.

Watermark

A watermark is a semi-transparent string of text that appears behind the existing document content. A watermark appears across each produced file from bottom left to top right and has a transparency setting of 20%.

Similar to markups and redactions, headers and footers, watermarks are integrated into a production file as a fixed element that cannot be moved, changed, or deleted.

Production setting templates

In order to save time for production runs that are similar in nature, you can save your production settings to a template file for future use. If you save your settings as the default settings, the next time you run a production all the settings will be predefined accordingly when you open the Concordance Production dialog box.

To name a template

1. From the **Tools** menu click **Production**, and then **Production**.

2. The **Concordance Production** dialog opens. Any available saved settings templates will be shown in the **Settings** drop down. The first time a production is started from a station or with a new login, the Settings drop down will be blank.

3. Make sure that whatever settings you want saved as a template have been selected in the **Concordance Production** window.

4. Type the desired name of the template in the **Settings** field.

   - Click **Save** to save the template with a specific name.

   - Click **Save as default** to save the template as the default template to use whenever a Production is started.

   The templates are saved locally in C:\Users\(User name) \AppData\Local\CloudNine\CVProductionSettings.conf.

To select a saved template

1. From the **Tools** menu click **Production**, and then **Production**..

2. The **Concordance Production** dialog opens.

3. The default template will be displayed in the **Settings** field.

4. Expand the **Settings** drop down to see the full list of available templates.

5. Select the desired template and make changes as needed.

6. If the changes should be saved to the template, then be sure to select **Save** once the changes are complete.

To remove a saved template

1. From the **Tools** menu click **Production**, and then **Production**.

2. The **Concordance Production** dialog opens.

3. The default template will be displayed in the **Settings** field.

4. Expand the **Settings** drop down to see the full list of available templates.

5. Select the template you want to delete and and click **Remove**.

6. The template is removed from the **Settings** list.

7. You can now select another template or create a new one.

When a production is executed, the Production Console is displayed. The production control displays the progress of the files as they are converted, distributed to the production volumes and file folders, creation of the CIB and OPT files, and production information written back to the specified fields in Concordance Desktop.

Export to Log File:

1. If you want any error messages encountered during the production to be written to a log file, select the **Export to Log File** option.

2. Navigate to where you want to save the log, in the **File name** field, type the log name and click **Save**.

In order to save time for production runs that are similar in nature, you can save your production parameters for future use. You can also save a parameter set as the default

settings, so that the next time you want to run a production, all the parameters are already predefined when you open the Production dialog box.

<u>**To save a production's parameters:**</u>

1. Specify all production parameters you want to save. See, Setting production parameters.

2. In the **Parameter Set Selection** section, in the **Parameter Set Selected** field, enter a parameter set name.

3. Click **Save User Parameter** set.

<u>**To save defined production parameters as the default set:**</u>

1. Specify all production parameters you want to save. See, Setting production parameters.

2. When finished, click **Save As Default Parameter Set**.

<u>**To load a saved parameter set:**</u>

1. In Concordance Desktop, click **Tools**, and then click **Production**.

2. In the **Concordance Desktop Production** dialog box, from the **Parameter Set Selected** list, click the parameter set you want to use for the production.

3. Click **Load User Parameter Set**.

<u>**To remove a saved parameter set:**</u>

1. In Concordance Desktop, click **Tools**, and then click **Production**.

2. In the Concordance Desktop Production dialog box, from the **Parameter Set Selected** list, click the parameter set you want to remove.

3. Click **Remove Current Parameter Set**.

After running a production, it is best practice to verify the produced images and the production data in Concordance Desktop.

<u>**To verify produced images and production data:**</u>

1. In Windows Explorer, navigate to where you created the directory folder to store the production files.

2. Review the produced images and corresponding files.

3. If the image load file is being produced to opposing counsel, you will want to modify the directory path information before handing it over.

4. In Concordance Desktop, return to your document set and navigate to the next record to refresh the database.

5. Scroll to the bottom of the produced records to view the production numbers for the records and the tags applied to each record at the time of the production.

```
PRODTAGS1      :        PROD1 Status»Responsive
                        Witness Kits»Darling
                        Witness Kits»Goniff
BEGPRODNO      :        PROD000001
ENDPRODNO      :        PROD000003
```

Running a native file production

A native file production produces copies of the original native files to a specified production destination. The native file production does not include any markups or other production settings, Concordance Desktop simply copies the existing native files and renames them according to the parameters you specify.

Concordance Desktop renames the files using one of the following options:

- **Native File Name** - names the files based on the original native file name of each file.
- **Image Key** - names the files based on the corresponding image key
- **Field** - names the files based on the contents of a selected field
- **Custom** - names the files using a specified prefix and starting number

A native file production can be executed for all the documents in the database, for a specific set of documents from a query, or documents that have been tagged with a specific tag.

📝 Make sure that the original native file name does not contain any Unicode characters as this may result in the production of a blank text file.

To run a native production:

1. In Concordance Desktop, open the database containing the documents you want to produce.

2. Do any of the following:

⊞ <u>**To produce all the documents in the database**</u>

Click **All**   to make sure that all the documents are available. From the **Tools** menu, click **Production**, and then **Native File Production**.

⊞ <u>**To produce a specific set of documents**</u>

Run a search query to locate the documents you want to produce and from the **Tools** menu, click **Production**, and then **Native File Production**.

⊞ <u>**To produce based on tagged documents**</u>

1. Create a tag specific to this production, such as PROD1, and apply the tag to the applicable documents.

   For more information about creating and applying tags, see Creating and applying tags.

2. Right click on the tag and select **Create query from tag(s)**.

3. In the **Tags** task pane, right-click the tag, and select **Native File Production**.
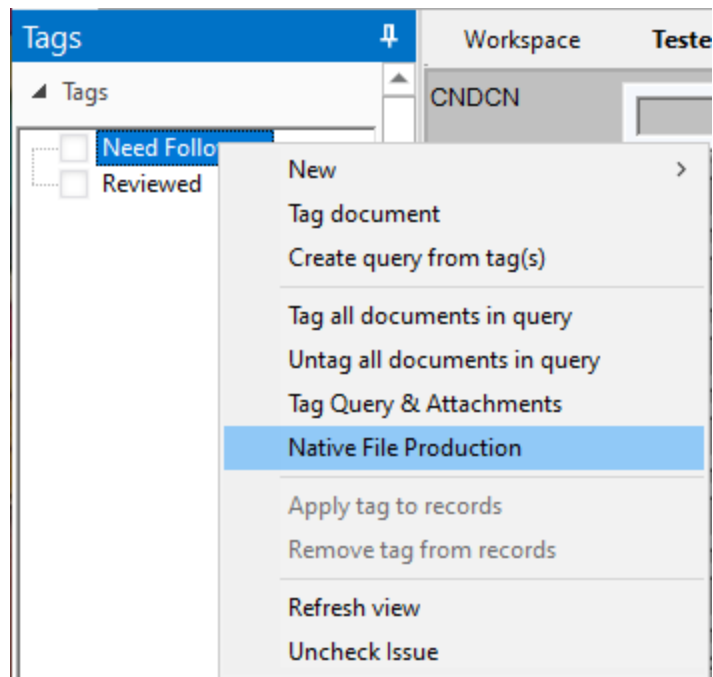
3. The Native File Production dialog opens.

Native File Production   ✕

Select Output Folder

[   ]   Browse

File Naming Scheme
  ⦿ Native File Name   Exclusion List

  ○ Image Key

  ○ Field   [<none>   ▼]

  ○ Custom   [   ] [   ]

        □ Write Production number to the database field

              [▼]

        ○ Overwrite   ○ Append

Produces the native file to the output folder renaming the file
according to the content of the selected field

Scans for duplicates for Native File Name / Field selection

Source Type
  ⦿ CIB(Imagebase)

  ○ Field   [▼]

□ Write production path back to the database field
  [▼]

Production Status: Not started
[   ]

                          [Start   ]   [Close   ]

4. In the Native File Production dialog box, click the **Browse** button to navigate to the folder location where you want to store the produced files.

⊟ **In version 1.07+**

5. Do any of the following:

- To create a new folder, select **New Folder** in the Folder field type the folder name, and click **Select Folder**.

- To use an existing folder, select the folder, and click **Select Folder**.

📝 The production folder must be empty.

⚠ Microsoft Windows imposes a limit on the number of characters that can be used for file path names. Therefore, the folder path, including the folder and production file name, should not exceed the 260 characters, as doing so may cause the application to close unexpectedly.

6. In the **File Naming Scheme** section, do one of the following:

   - To name the produced files using the original native file name, select **Native File Name**.

   - To name the produced files using the current Image Key. Select **Image Key**.

   - To name the produced files using the contents of a selected field, click **Field** and select the field from the list.

   - To name the produced files using a specific prefix and numbering scheme, click **Custom.**

   1. In the first field type the prefix you want to precede the production number.

   2. In the second field type the number to use as the starting number for the production files.

   📝 A maximum number of digits allowed for the starting number field is nine. The produced native file names are automatically incremented from the starting number.

   Selecting the box ☐ **Write Production number to the database field** writes the production number for each produced file back to the database. If the box is selected, you must select the field to update with the produced file name value. You must also select either to **Overwrite** or **Append** to any existing data in the selected field.

   - **Overwrite** will remove the current value in the field and replace it with the custom production number.

   - **Append** will add the custom production number after the current field value for example: WIN00123; ABC000001.

⚠ If creating a native file production from a concatenated set of databases, do not select 'Image Key' as the Production Type. If Image Key is selected, you may receive an "Image key duplication..." error message when the process attempts to produce native files starting with the second database in the concatenated set. Image keys must be unique across the production run however, concatenated databases may duplicate the image key across the concatenated set.

⚠ Do not open the Admin Console while running a Production.

7. (Optional) To exclude specific files from the production and insert a placeholder (empty text file), click the **Exclusion List** button, do any of the following:

To add a file, in the small field type the file type extension, and then click **Add**.

To remove a file type from the exclusion list, click the file type, and then click **Remove**.

When finished, click **OK**.

8. In the **Source Type** section, select one of the following:

- **CIB (Imagebase)** to produce files as they are currently linked in the Concordance Viewer.

- **Field** to copy files from a path and filename in a field in the data such as the FILEPATH field. Select the field from the drop-down menu.

⚠ Filetypes that are unsupported by the viewer cannot be produced using the CIB as the source type. It is recommended that a field such as FILEPATH be used for native file productions that include unsupported file types. If the CIB is selected, be sure to review the produced output for any 0-byte .txt files where the filename is the CNDCN. The presence of these .txt files indicates the native file was not produced.

9. **Write the output production path back to the database field**, select the check box ☐ and select the field to update with the produced path information.

📝 The production path is a full path with file name for the produced files. You may use the Global Edit option to modify the path to a relative path if needed prior to export.

10. To run the production, click **Start**. The production status bar will display the native file production status.

⊟ **In prior versions to 1.07**

5. Do any of the following:

- To create a new folder, click the **Make New Folder.** In the Folder field type the folder name and click **OK**.
- To use an existing folder, select the folder, and click **OK**.

📝 The production folder must be empty.

⚠ Microsoft Windows imposes a limit on the number of characters that can be used for file path names. Therefore, the folder path, including the folder and production file name, should not exceed the 260 characters, as doing so may cause the application to close unexpectedly.

6. In the **Production Type** section, do one of the following:

- To name the produced files using the original native file name, select **Native File Name**.
- To name the produced files using the current Image Key. Select **Image Key**.
- To name the produced files using the contents of a selected field, click **Field** and select the field from the list.
- To name the produced files using a specific prefix and numbering scheme, click **Custom.** In the first field type the prefix you want to precede the production number. In the second field type the number to use as the starting number for the production files.

  📝 A maximum number of digits allowed for the starting number field is nine. The produced native file names are automatically incremented from the starting number.

⚠ If creating a native file production from a concatenated set of databases, do not select 'Image Key' as the Production Type. If Image Key is selected, you may receive an "Image key duplication..." error message when the process attempts to produce native files starting with the second database in the concatenated set. Image keys must be unique across the production run however, concatenated databases may duplicate the image key across the concatenated set.

⚠ Do not open the Admin Console while running a Production.

7. (Optional) To exclude specific files from the production and insert a placeholder (empty text file), click the **Exclusion List** button, do any of the following:

To add a file, in the small field type the file type extension, and then click **Add**.

To remove a file type from the exclusion list, click the file type, and then click **Remove**.

When finished, click **OK**.

8. To run the production, click **Start**.

Generating a production attachment range

After running a production in a database that contains emails and attachments, a production attachment range can be generated to reflect the new production numbers assigned to the family of documents.

📝 An attachment field must be added to the database prior to generating the attachment range. For more information on adding fields, see About Modifying Databases.

To generate a production attachment range:

1. From the **Tools** menu, click **Production**, and then **Production Attachment Range**. The Production Attachment Range dialog opens

2. In the **Existing Attach Range Fields** section, select one of the following to specify the field(s) which contain the attachment data:

- Select the **Attach Range** option if a field in the database contains an attachment range, and then select the field that contains the attachment range data.
- Select the **Fields** option if there are beginning attachment number and ending attachment number fields in the database, and then from the Beg Attach and End Attach list select the fields that contain the attachment data for the beginning attachment number and ending attachment number.

3. In the **Existing Production Number Fields** section, select the fields that contain the beginning production number values and ending production number values in the database.

4. In the **Production Attach Range Field** section, select the field you want to use to store the production attachment range.

5. Click **Start**.

Creating a production database

After running a production and verifying the produced images, it is best practice to create a database for the production.

For more information about exporting databases, see Exporting databases.

<u>**To create a production database:**</u>

1. In Concordance Desktop, make sure that the same production query is still active in the database or rerun the same production query in the database.

2. From the **Documents** menu, click **Export**, and then **As a Concordance Desktop database**.

   Clicking As a Concordance Desktop database opens the Export Wizard - Database dialog box.
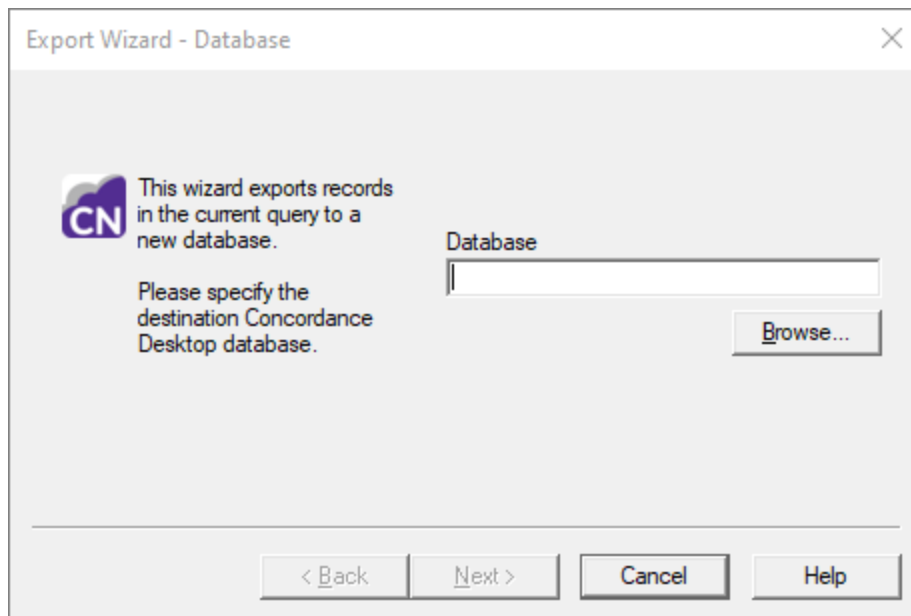
3. Click the **Browse** button to open the **Select database to merge** dialog box.

4. Navigate to the directory where the production imagebase is stored, type the database name, using the same name as the production imagebase, in the **File name** field, and click **Open**.

   When creating your production database, the database needs to be created in the same directory with the same name as the imagebase that was created in the production wizard. This will ensure that the production imagebase will link to the corresponding database.

5. Click **Next** to open the **Export Wizard - Fields** dialog box.
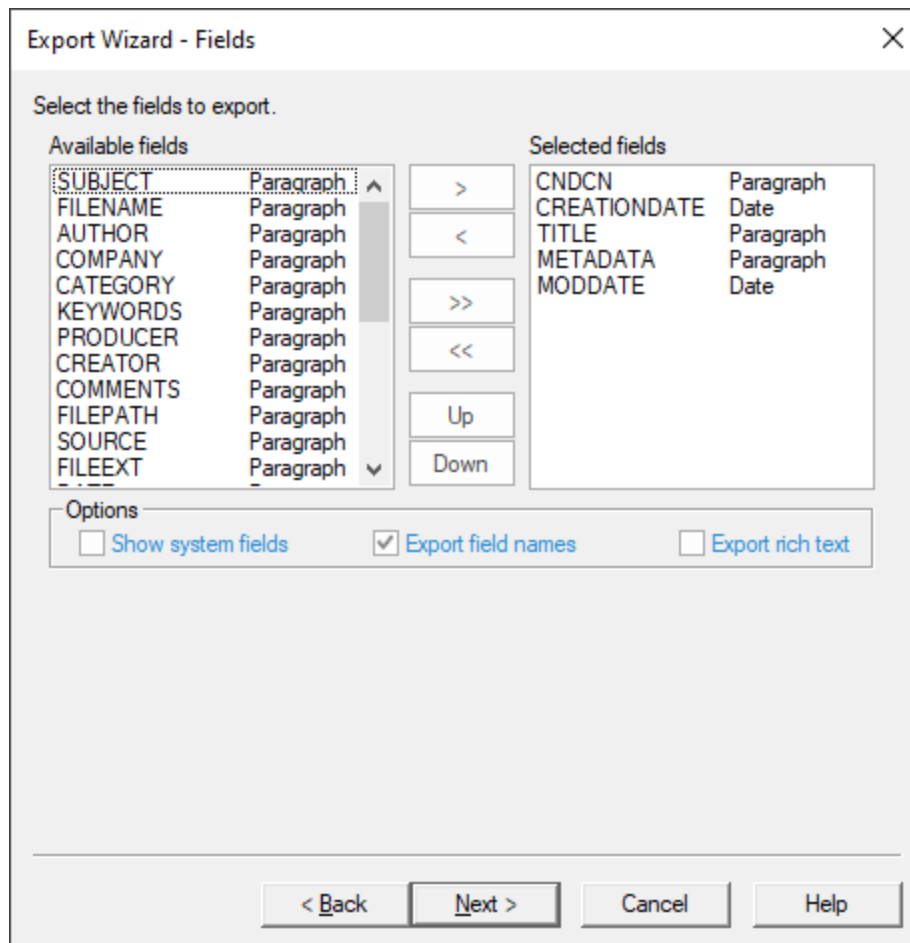
The database list defaults to the database currently opened, and all the database's fields are selected in the field list.

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

6. To only include some of the database fields in the export, in the fields list, click the fields you want to export.

    To select multiple fields, use SHIFT+click or CTRL+click.

7. Click **Next** to open the **Append/Replace** dialog box.

    The Append/Replace dialog box allows you to control how documents are exported.

8. Select the **Append all records** option.

    When you are exporting to a new database, if the Append all records option is selected, the export adds all records in the query to the database. If you are

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

9. To copy a record's attachments with notes during the export, select the **Copy attachments with notes** check box.

When the Copy attachments with notes check box is selected, the export automatically creates sequentially numbered attachment folders in the same directory as the Concordance Desktop database, and copies attachments into the subfolders. Folders are named in the format ATTACH-000000 and increment by one if the initial folder exceeds maximum capacity.

To exclude a record's attachments with notes from the export, clear the Copy attachments with notes check box.

10. Click **Next** to open the **Export Wizard - Export** dialog box.

The First and Last fields default to the first and last record in the current query.

11. To modify the range of the records to be exported, in the **First** field, type the record number for the first record in the range you want to export, and in the **Last** field, type the record number for the last record in the range you want to export.

12. Click the **Export** button.

If you are exporting to a new database clicking the Export button opens the following message:
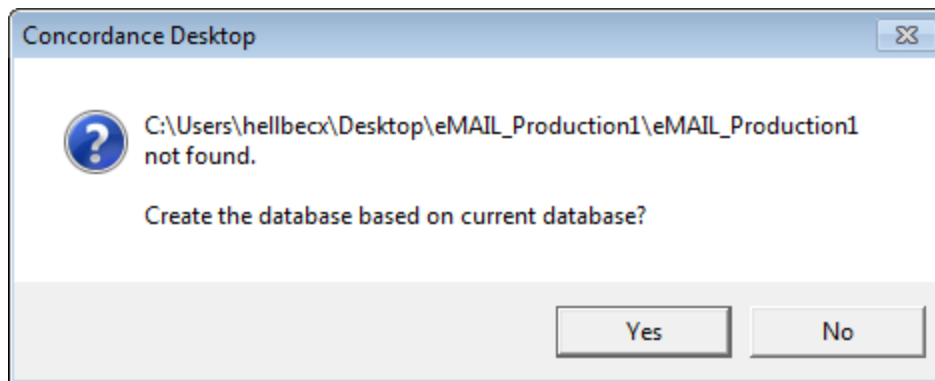
13. Click **Yes** to start the export and have the export create the new database.

If you are exporting to an existing database, clicking the Export button starts the export.

You can click the Cancel button at any time to cancel the process.

When the export finishes, the Export Wizard - Export dialog box automatically closes.

14. On the **File** menu, click **Open** to open the **Open** dialog box.

15. Navigate to and open the production database you created, to open the database in Concordance Desktop.

16. On the **File** menu, click **Reindex** to index the database.

17. On the **Dynamic** toolbar, click the **View image** (camera) button to open the Concordance Desktop viewer and the produced images linked to the production database you created.

Creating Reports

Concordance Desktop provides several tools for printing document records and transcripts, and can be used to create and print a variety of customized reports based on search results, field content, tagged document sets, and transcript annotations. Printing options are available within Concordance Desktop from either the Browse or Table view, and the output looks similar to the onscreen display, depending on which view you choose to print from. Document images can also be printed from Concordance Desktop Image, based on search results in Concordance Desktop.

While Concordance Desktop offers the basic options for printing, such as page numbers and dates, Concordance Desktop also offers selections for printing highlighted annotations, underlined hits, field labels, and more. This is especially useful for printing sets of records for full-text review or printing annotations from transcripts.

You can also print a spreadsheet report of queries displayed in Table view, with field text in the sort order selected. This option is useful when a summary listing is appropriate.

You can create reports in Concordance Desktop using the following methods:

- **Exporting Concordance Desktop Table Data**

  You can export Concordance Desktop record content to CaseMap, a case tracking tool, or export record content to spreadsheets in Microsoft Excel.

  For more information about exporting table data, see Exporting Concordance Desktop data.

- **Printing with the standard print options**

  Concordance Desktop offers many standard printing options and report tools to assist reviewers during case review.

  For more information about using the standard print options in Concordance Desktop, see Printing standard reports.

- **Printing with the Annotation Report Writer Wizard**

  Use the Annotation Report Writer Wizard to create custom reports from your transcript files. The custom reports can include transcript notes, highlights, and attachments.

  For more information about creating custom reports using the Annotation Report Writer Wizard, see Printing transcript annotations.

- **Printing with the Report Writer**

Use the Report Writer to create custom reports from the Table view, based on a sort query. You can also use the Report Writer in conjunction with a CPL (Concordance Desktop Programming Language) script to create custom exploded sort reports.

For more information about creating custom reports using the Report Writer, see Printing with Report Writer.

Exporting Concordance data

In Concordance Desktop, you can export record data from the Table view to Microsoft Excel and CaseMap. 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 or CaseMap, 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 Desktop to Microsoft Word.

Exporting to Microsoft Excel

When you export data from the Table view to Microsoft Excel, Concordance Desktop 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. If you are primarily exporting your data to Microsoft Excel 2003 , you need to be aware that this version of Excel is limited to printing a maximum of 65,000 rows, and also has limitations for the number of characters per cell.

To export table data to Microsoft Excel:

1. Run a search to locate the records you want to include in the export to Microsoft Excel.

   For more information about searching, see Available search tools.

2. In the **Table** view, adjust your table layout to include the fields and field order you want to export to Microsoft Excel.

   For more information about adjusting a table layout, see Using table layouts.

3. In the **Table** view, select the records you want to export.

    You can export multiple adjacent records and non-adjacent records.

    - Adjacent records: SHIFT + Click to select a block of consecutive records.
    - Non-adjacent records: CTRL + Click to select random records from the list.
    - All records: CTRL + A to select all records in the list.

    If you have Microsoft Excel 2013 installed, open a blank Excel spreadsheet prior to completing step 4 below.

4. Right-click in the **Table View**, point to **Send To**, and then click **Excel**.

    Microsoft Excel automatically launches and displays your exported Concordance Desktop data in the field order you selected. If the data does not display, try the export again.

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. Before exporting data to CaseMap, run a search to capture only the records you want to include in the export.

To export table data to CaseMap:

1. In Concordance Desktop, run a search to locate the records you want to include in the export to CaseMap.

    For more information about searching, see Available search tools.

2. In the **Table** view, right-click the records, point to **Send To**, point to **CaseMap**, and then click **Send all documents in query**.

Selecting Send all documents in query opens the following message: *CaseMap does not support Unicode and we will only send single-byte (Ascii) text to them. Press OK if you want to continue*.

3. Click **OK** to continue.

    Clicking OK opens the *Completed gathering the document data* message dialog box.

4. Click the **Continue** button.

    Clicking the Continue button opens the Bulk Send to CaseMap wizard in CaseMap.

    For more information about exporting Concordance Desktop data to CaseMap and using CaseMap's Bulk Send to CaseMap wizard, see the CaseMap documentation.

Exporting numerical data to Microsoft Excel

When you export numerical data from Concordance Desktop 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 Desktop 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.

Printing transcript annotations

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

To print annotations using the Annotation Report Writer wizard:

1. In Concordance Desktop, open your transcripts database.
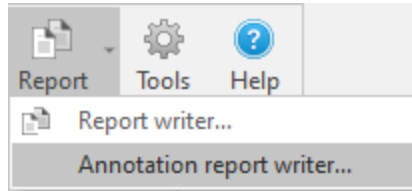
2. On the **Standard** toolbar, click the arrow next to the **Report** button and select **Annotation report writer**.
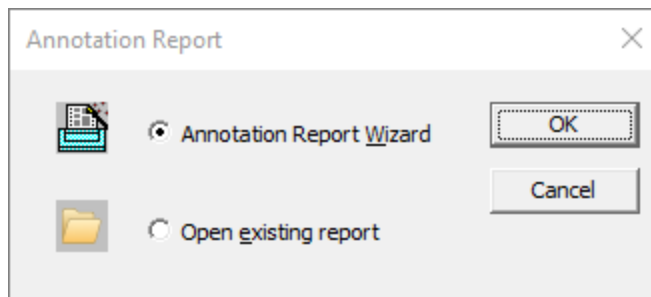
3. In the **Annotation Report** dialog box, select **Annotation Report Wizard** and click **OK**.

4. In the **Report** dialog box, select the type of annotated report you want to print and click **Next**.
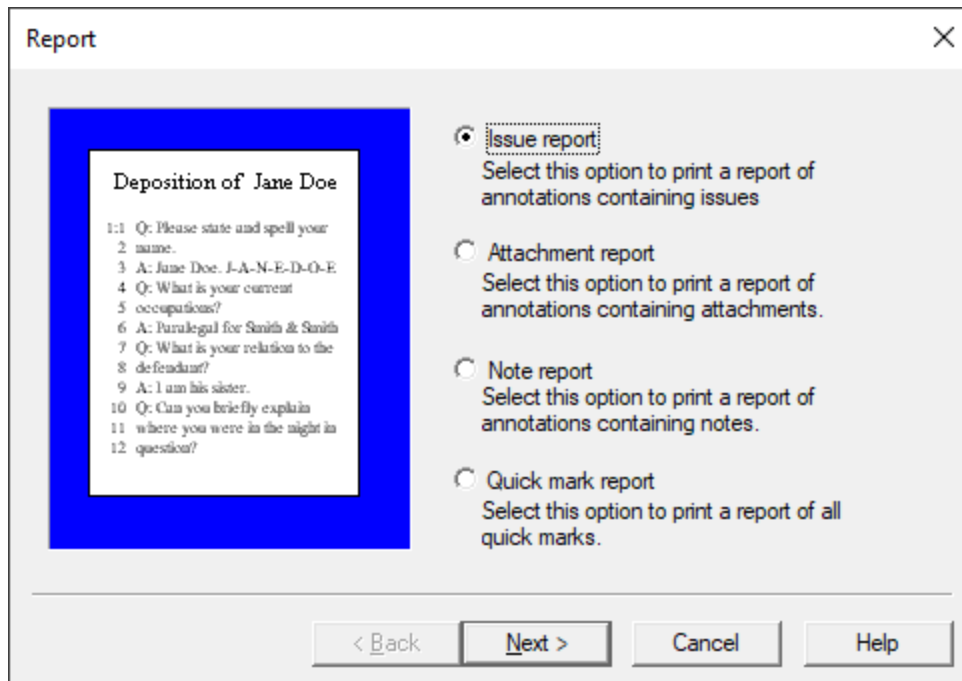
- **Issue report -** prints an issues report

- **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. If you are printing an issue report, select the **Print all issues** option or select the **Print selected issues** option and select the issues you want to include on the report, and then click **Next** on the **Issues** dialog box.

    To select individual issues in the list, use CTRL+click. To select a block of issues in the list, use SHIFT+click.

    If you are printing an attachment, note, or quick mark report, just click Next on the Issues dialog box.
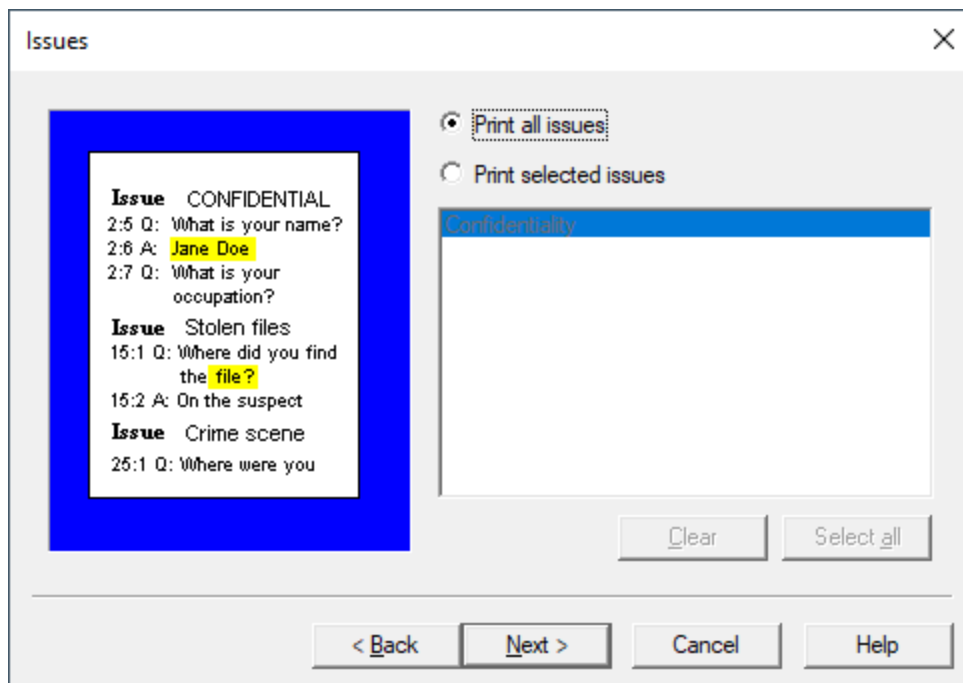
6. In the **Annotations** field, select the one of the note printing options and select whether you want to print the quick marks, attachments, and/or issue list.

7. In the **Select the user(s) to print annotations** field, select the users for which you want to print annotations and click **Next**.

    To select individual users in the list, use CTRL+click. To select a block of users in the list, use SHIFT+click.
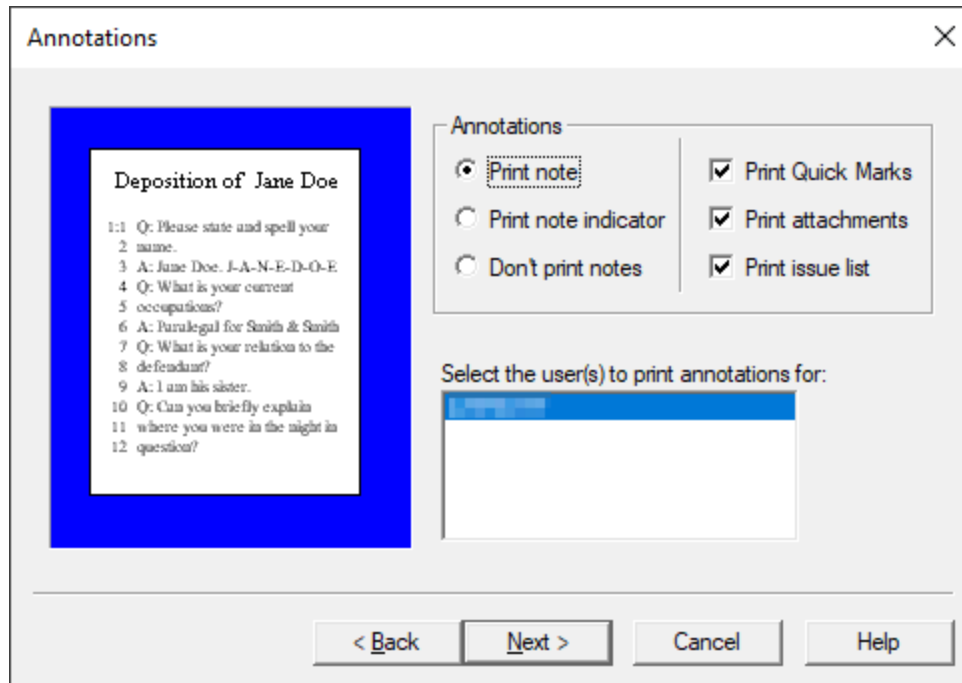
8. Select the transcript context you want to include when printing the notes and issues in the **Context** dialog box and click **Next**.
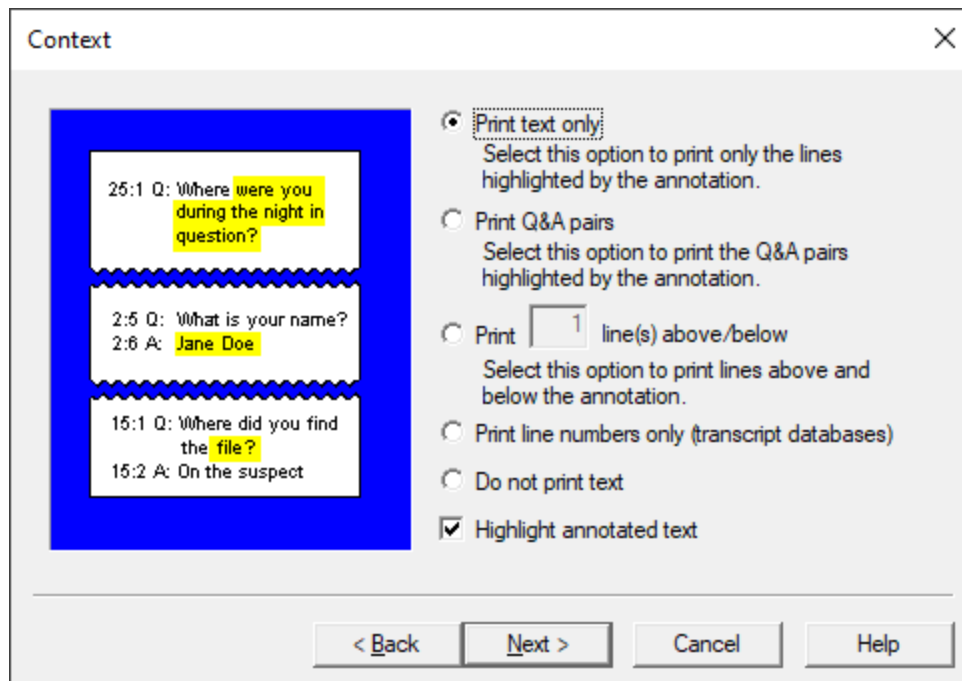
9. To add a custom header and/or footer to the report, fill out the fields in the **Formatting** dialog box and click **Next**.

You can include an annotation header, page numbers, the print date, and the print time on the report. You can also select whether to print a page border and multiple pages per sheet of paper in the Compressed print field.
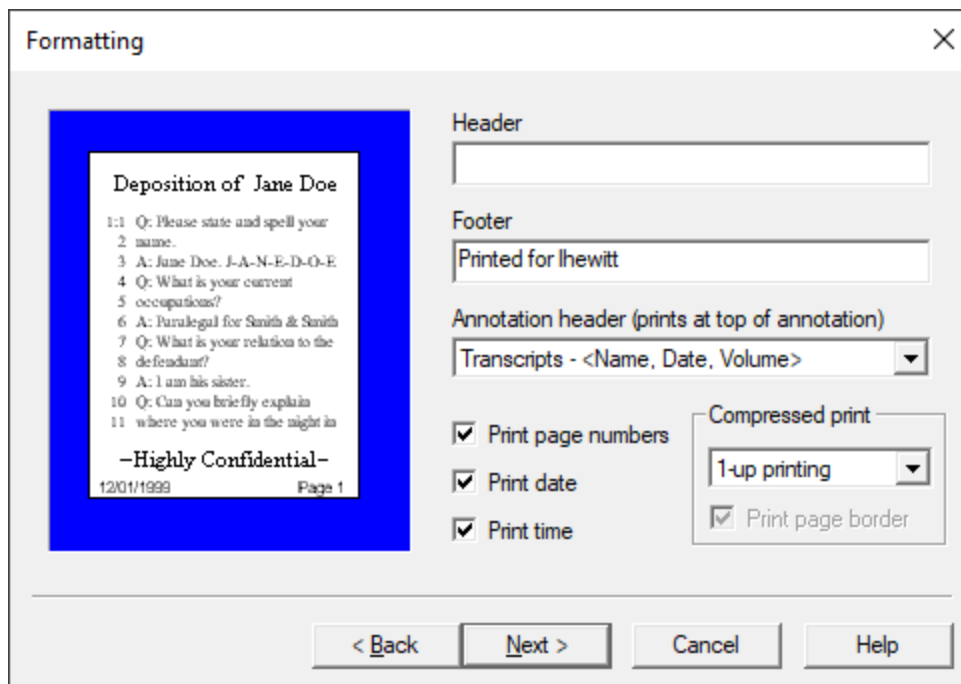
10. Define your final print options in the **Print** dialog box, like customizing the font and page layout, and whether to print a hard copy or save to a file.

    To preview or edit your report, click the Click this button to preview your report button.

💡 We recommend that you always preview the report before printing a hard copy or saving multiple files of it on your hard drive or server. This also allows you to edit the font, headers, footers, or other print options before you process the report. Click the Close button in Print Preview if you need to return to the Annotation Report dialog box to make any additional changes to the report.

11. Click the **Print** button to print the report.
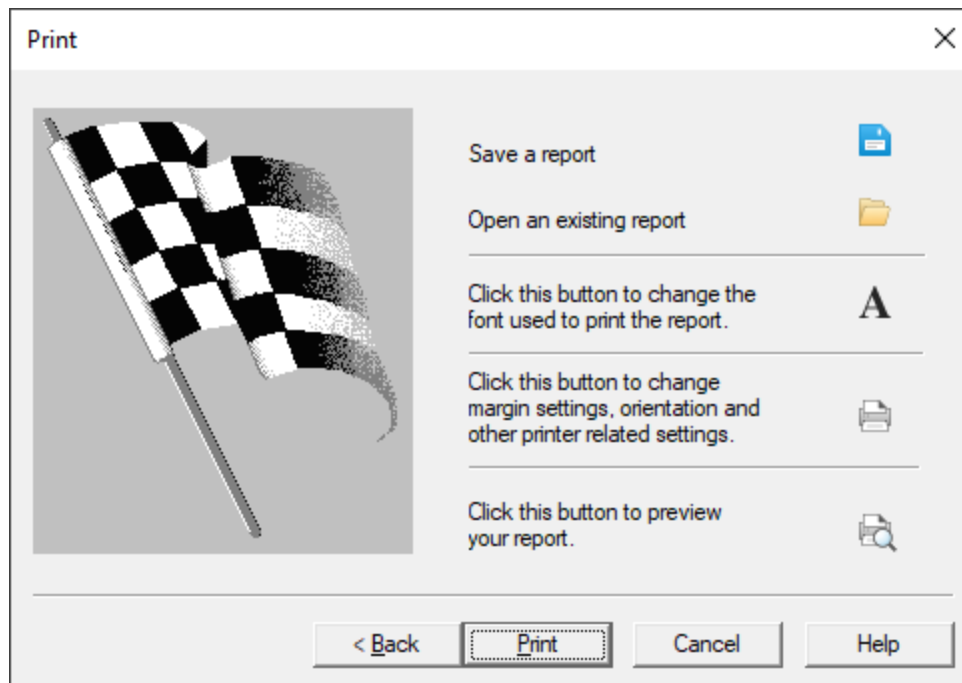
Printing with the Report Writer

With the Report Writer, you can create simple reports, exploded sort reports, complex reports from concatenated databases, or reports where you need to print tens of thousands of records. The reports are based on a sort query.

You can select the fields to use, column widths, and page and individual column formats and alignment. The report columns can contain stacked fields, truncated fields, calculated data, and combined data and quoted text with tab alignment. The Report Writer supports date and math calculations, and advanced if-then-else logic. While many of these features are powerful, the report writer was designed to be easy and flexible.

In Concordance Desktop, the Report Writer is only available in the Table view, but you can also use the Report Writer in conjunction with CPL (Concordance Desktop Programming Language) scripts.

📝 If you are primarily exporting your data to Microsoft Excel 2003, you need to be aware that this version has limitations for a maximum number of rows and characters per cell.

Understanding the Report Writer

Editable Areas

The Report Writer screen is divided into four horizontal edit areas:

- **Page Header**

The top edit box is the page header. It is printed at the top of every page. Any text can be typed into the page header. The header can be pulled down to give you more room for a large header or font. There is no limit to the number of lines in the header. If you do not want a page header, just pull it up until it disappears.

- **Column Headers**

The next row of the report contains the column headers. These are printed at the top of every page, above the data columns. As with the page header, the column headers are resized by grabbing the window borders and pulling them up or down. There is no limitation on the number of lines of text they can hold. Make them as large or small as you need. Resizing one column header will resize all column headers, they are always uniform in height.

- **Data Columns**

The next row contains the data columns. These contain the actual data printed in your reports. The data columns are interpreted; if you place a field's name--it must be in upper case--in the column, then that field's data ends up in the report. If you place something like, "Data: " + SUMMARY into the column, then the word "Data: " precedes the text from the field named SUMMARY. Any text or function or mathematic operator defined in the programming language can be used in a data column. This allows you to do things like convert data to upper or lower case, print only the first 100 characters, or calculate dates and other values in your reports.

- **Page Footer**

The bottom edit box is the page footer. The page footer is printed at the bottom of every page. Any text can be typed into the footer. The footer can be pulled up or down to give you more or less room for text or type size. Make the footer's window smaller if too much room appears between the footer and the page numbers or dates.

Adding Field Titles and Data

There are two drop-down lists on the Report Writer toolbar. The first list contains a list of every field in the database. The second list contains a list of useful CPL functions and operators. When adding fields to a report, you should always select fields from the list box. It will automatically include necessary conversions for you, such as converting dates to text so that they can be printed. For instance, selecting the date field DATE will actually place dtoc(DATE) into the report column. This uses the date-to-character function to convert a numeric date into text. To add a field,

function, or operator to a report, click on the report where you want to add a field, function, or operator and make a selection from the field or function list.

If you need to type field names manually, make sure that you use upper case letters. The report writer will not recognize field names unless they are in upper case.

Stacked Fields and Other Useful Tricks

The Report Writer is very powerful and flexible. It can use any of the CPL (Concordance Desktop Programming Language) Operators and Functions. With the Report Writer, you can create some wonderful and complex reports. There are however, just a handful of functions and operators, like the plus sign, which you will use most of the time. This section describes the most useful functions and how to use them.

The first thing you may want to do is to combine some text with a field or two. The following example does just that. It stacks two fields in one column with titles for data:

"Date "+dtoc(DATE)+newline()+

"Customer "+CUSTOMER

Enclose any static text in quotes. Combine quoted text and other data with the plus sign. The newline() function forces anything that follows it onto the next available line. Also included in the example, but not shown, are tabs. The quoted text includes a tab character to align the two data fields--there are no spaces in the line.

Always remember to use plus signs to combine everything with everything else. Leaving one out, or putting two plus signs in a row, are the two most common report errors.

Sometimes you may have a very large field which would use a lot of paper if it were printed. The next example uses the substr() function to print the first 200 characters of the summary field, it *sub-strings* it.

substr(DIGEST,1,200)

The example about uses the substr() function to grab 200 characters, starting with the first character. For this scenario, it would be really useful if we could check first to see if the brief field was actually more than 200 characters long. Then we could append ellipses (…) to show that we truncated the entry, if we need to truncate it at all.

(len(DIGEST)>200?substr(DIGEST,1,200)+"…": DIGEST)

This example uses two new features: the len() function and the conditional operator. The len() function determines the length of the text in any field. The conditional operator allows us to embed if-then-else logic into a report column. The conditional operator has the following format: *(statement?true-response:false-response)*. The Report Writer tests the statement. If it is true, the true-response is the result, otherwise the false-response is the result. In our example the Report Writer determines if the length of the digest field is greater than 200 characters. If it is, the true-response returns the first 200 characters of the field with ellipses appended to show that it was truncated. If the statement is false, the entire field is printed. The parentheses around the conditional operator are required.

Report Writer Guidelines

- Use *if-then-else* syntax is (:?) and put *literal text* within quotes

    If a date = 00/00/0000, then you can place quotes around "no date available"

- Stack fields with newline()

    "Beg Bates : "+BEGNO+newline()+"End Bates : "+ENDNO

Report Writer Toolbar

Once you have generated a report using the Report Writer, the report and the Report Writer toolbar are displayed in Concordance Desktop. You can use the Report Writer toolbar to open, save, and insert files, select print options and font settings, and more. You can also select fields and codes to customize your report options.

Button Definitions

Report Writer Toolbar Buttons		
Button	**Name**	**Description**
	Open	Opens the Open dialog box. Click the Open button to open an existing .arp report file in the Report Writer.
	Save	Saves your latest report changes to the .arp file currently opened.
	Save as	Opens the Save As dialog box.
	Insert	Inserts a column to the left of a selected column. Click a column in the report and click the Insert button to open the Report

Report Writer Toolbar Buttons

Button	Name	Description
		Columns dialog box. Type the number of columns to insert and click OK to insert the new columns.
	Delete	Deletes a selected column. Click a column in the report and click the Delete button to open the Report Columns dialog box. Type the number of columns to delete and click OK to delete the selected column, and if you entered more than one column, the remaining number of columns you entered to the right of the selected column.
	Options	Opens the Report Options dialog box. In the Report Options dialog box, you can edit the report's current settings.
	Page Setup	Opens the Page Setup dialog box. In the Page Setup dialog box, you can edit the report's page setup settings,including the paper size, source, orientation, the page margins, and printer.
	Justify	Opens the Justify dialog box. Select the check box that applies to the text you want to format, click OK to open the Text Alignment dialog box, click the alignment option you want to use, and click OK.
	Font	Opens the Font dialog box. Select the check box that applies to the text you want to format, click OK, modify the font, and click OK again.
	Print Preview	Opens the report in the print preview screen. The print preview screen allows you to browse through up to 100 pages of your report before printing the report.
	Print	Opens the Print dialog box. Select you printer settings and click OK to print the report.
	Exit	Closes the Report Writer in Concordance Desktop. You will be prompted to save the report if any changes were made.
	Field List	Contains a list of the database fields you can add to the report.
	Function List	Contains a list of available CPL functions and operators you can add to the report.

You can create reports in the Report Writer using the wizard or manually create reports in the Report Writer's Report Options dialog box. You can also edit existing reports in the Report Options dialog box.

To generate reports using the Report Writer Wizard:

1. Run a search query to locate the documents you want to include in the report.

   For more information about searching, see Available search tools.

2. In the **Table** view, use a table layout to organize the columns and column order you want to include in the report.

   For more information about custom layouts see, Using table layouts.

3. With the **Table** view still open, on the **Standard** toolbar, click the down arrow next to the **Report** button and click **Report writer**.

   Clicking Report writer opens the Report Writer dialog box.
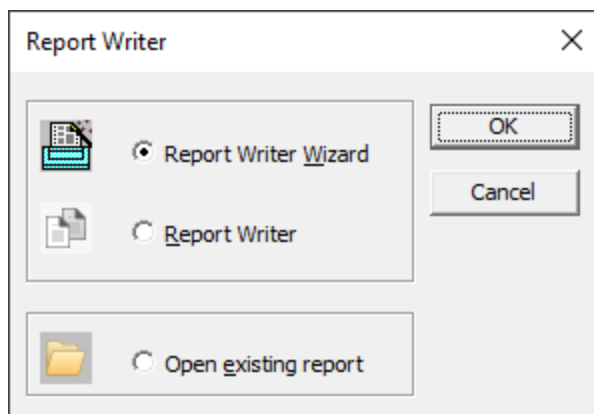
4. Select the **Report Writer Wizard** option and click **OK**.

   Clicking OK opens the Report Wizard - Documents dialog box.

5. In the **Report Wizard - Documents** dialog box, define the report's document range settings.

   To define the settings in the Report Wizard - Documents dialog box:
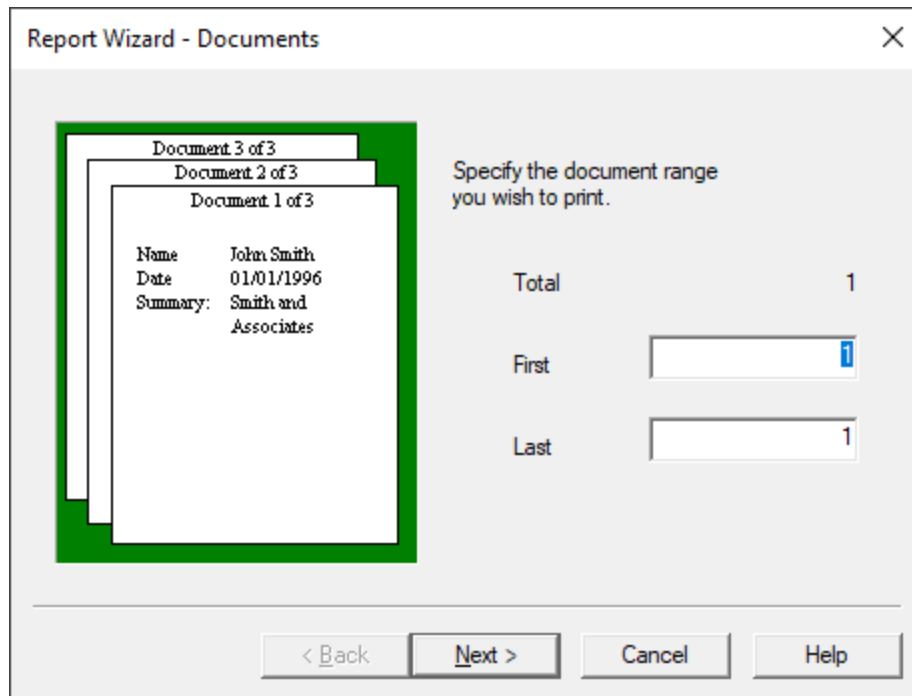
In the Report Wizard - Documents dialog box, the First and Last fields default to the first and last record in the current Concordance Desktop query.

1. To modify the range of the records to be printed, in the **First** field, type the record number for the first record in the range you want to print, and in the **Last** field, type the record number for the last record in the range you want to print.

2. Click **Next** to open the **Report Wizard - Page numbering and dates** dialog box.

6. In the **Report Wizard - Page numbering and dates** dialog box, define the report's page numbering and date stamp settings.

To define the settings in the Report Wizard - Page numbering and dates dialog box:
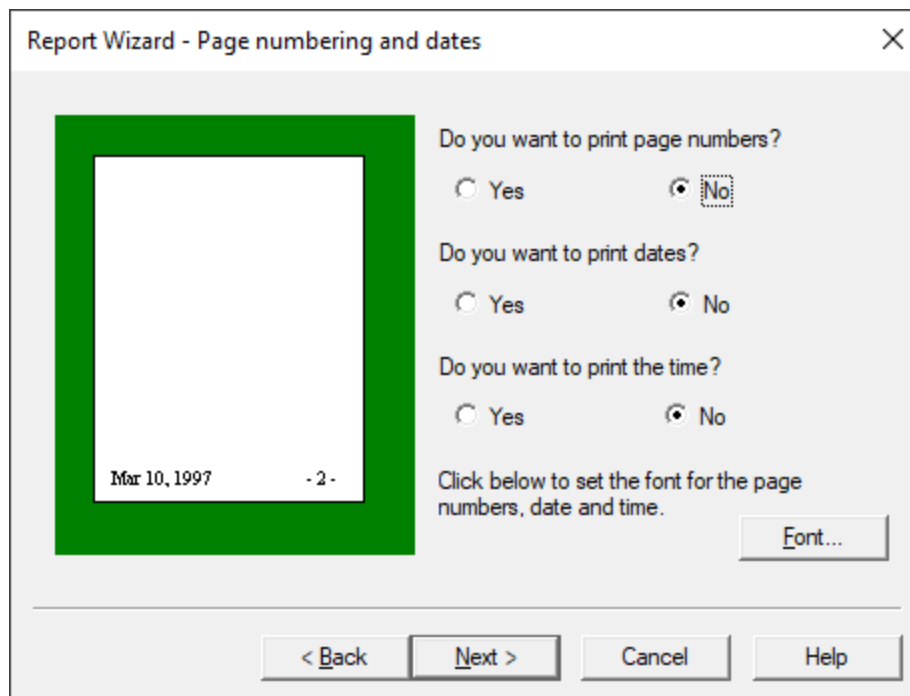
In the Report Wizard - Page numbering and dates dialog box, the page number, date, and time stamp options all default to No. If you choose to print page numbers and/or date and time stamps, they will be printed at the bottom of each page in the report footer.

1. To print page numbers, in the **Do you want to print page numbers** field, select the **Yes** option.

    Page numbers are printed in the lower-right corner of the report.

2. To print the current date, in the **Do you want to print dates** field, select the **Yes** option.

    The date is printed in the lower-left corner of the report.

3. To print the current time, in the **Do you want to print the time** field, select the **Yes** option.

    The time is printed in the lower-left corner of the report.
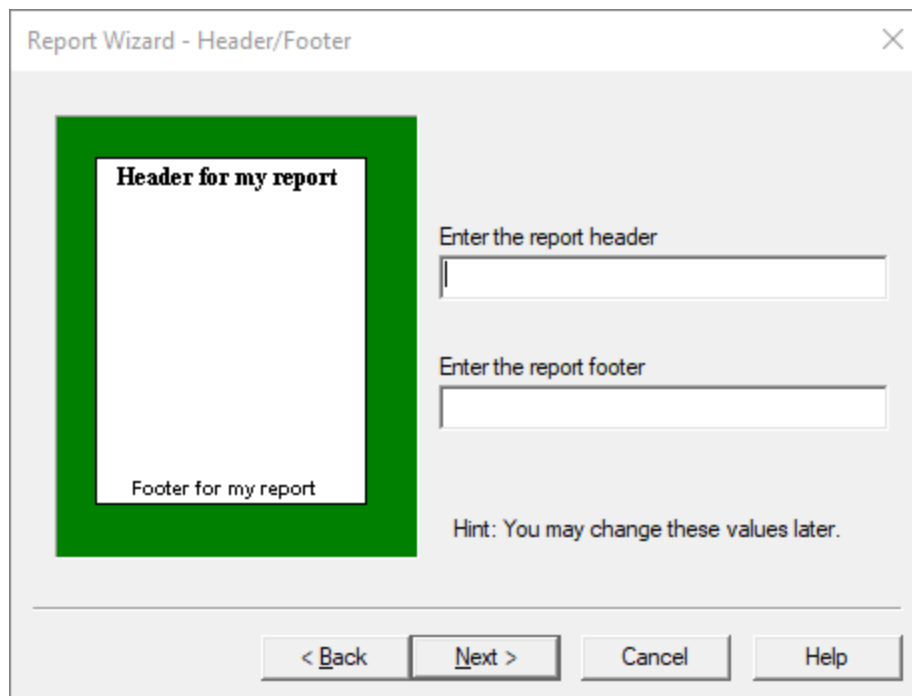
    The default font for page numbers and date and time stamps is Arial 9pt. The report uses the same font settings for page numbers and date and time stamps on the report.

4. To modify the font settings, click the **Font** button.

    Clicking the **Font** button opens the **Font** dialog box.

5. Specify the font settings and click **OK** to save your changes.

   The font changes apply to all the page numbers and date and time stamps on the report.

6. Click **Next** to open the **Report Wizard - Header/Footer** dialog box.

7. In the **Report Wizard - Header/Footer** dialog box, define the report header and footer settings .

   <u>**To define the settings in the Report Wizard - Header/Footer dialog box:**</u>

   In the Report Wizard - Header/Footer dialog box, you can preset the header and footer text for all of the fields default to No, except for the Do you want a blank line between records field.

   1. To print a report header, in the **Enter the report header** field, type the header text you want to print.

   2. To print a report footer, in the **Enter the report footer** field, type the footer text you want to print.

   3. Click **Next** to open the **Report Wizard - Options** dialog box.

8. In the **Report Wizard - Options** dialog box, define the report's record break, column border, and field printing settings.
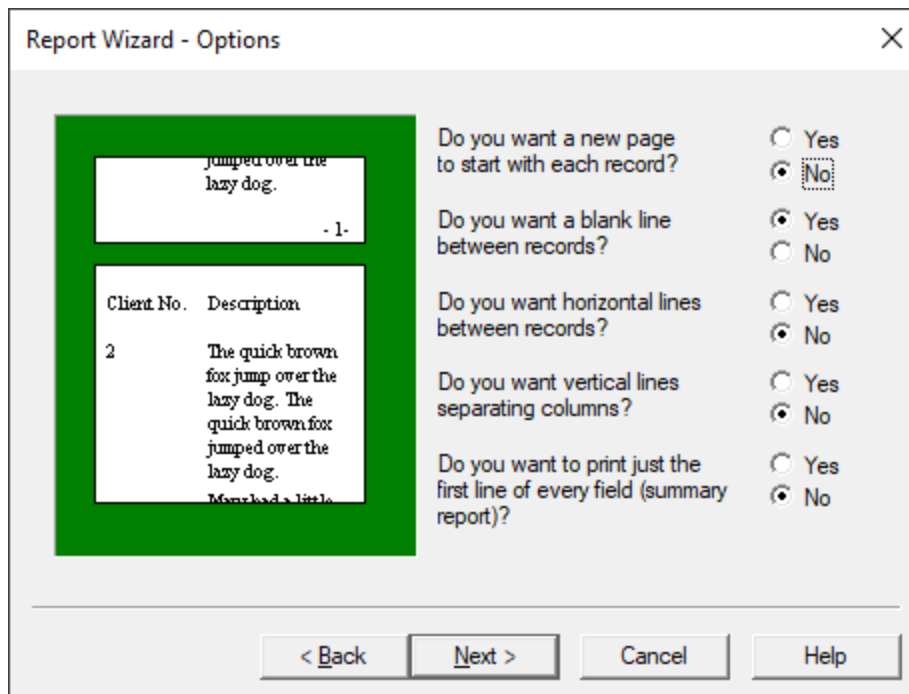
In the Report Wizard - Options dialog box, all of the fields default to No, except for the Do you want a blank line between records field.

1. To print each record on a separate page, in the **Do you want a new page to start with each record** field, select the **Yes** option.

2. To disallow a blank line between each record on the report, in the **Do you want a blank line between records** field, select the **No** option.

3. To add a horizontal line between each record on the report, in the **Do you want horizontal lines between records** field, select the **Yes** option.

   The Do you want horizontal lines between records field is only available if you are also adding blank lines between each record.

4. To add vertical lines between each report column, in the **Do you want vertical lines separating columns** field, select the **Yes** option.

5. To print only the first line from each field in the report, in the **Do you want to print just the first line of every field (summary report)** field, select the **Yes** option.

   If you choose to only print the first line of each field, Concordance Desktop prints a summary report with one line per record.

6. Click **Next** to open the **Report Wizard - Margins** dialog box.

9. In the **Report Wizard - Margins** dialog box, define the report's page margins and intercolumnar spacing setting.

    To define the settings in the Report Wizard - Margins dialog box:
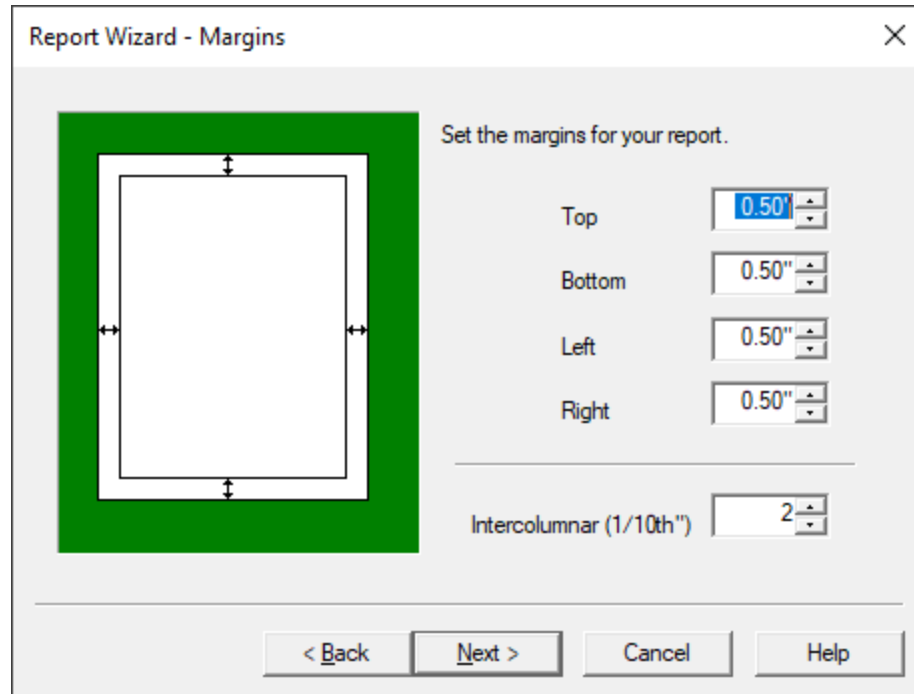
    In the Report Wizard - Margins dialog box, all page margins default to .50 inches from the edge of the page, and the Intercolumnar (1/10th") field defaults to 2 tenths.

    1. To edit the print margins, type or select the margin sizes in inches, that you want to print on the report.

        Some printers have an *unprintable* reserved area and the margins cannot be set below this limit.

    2. To edit the intercolumnar spacing, in the **Intercolumnar (1/10th")** field, type or select the spacing, in tenths of an inch, that you want to print on the report.

        The intercolumnar spacing determines the distance between columns in your report.

    3. Click **Next** to open the **Report Wizard - Printer** dialog box.

10. In the **Report Wizard - Printer** dialog box, define additional report page settings including page breaks and orientation.

    To define the settings in the Report Wizard - Printer dialog box:
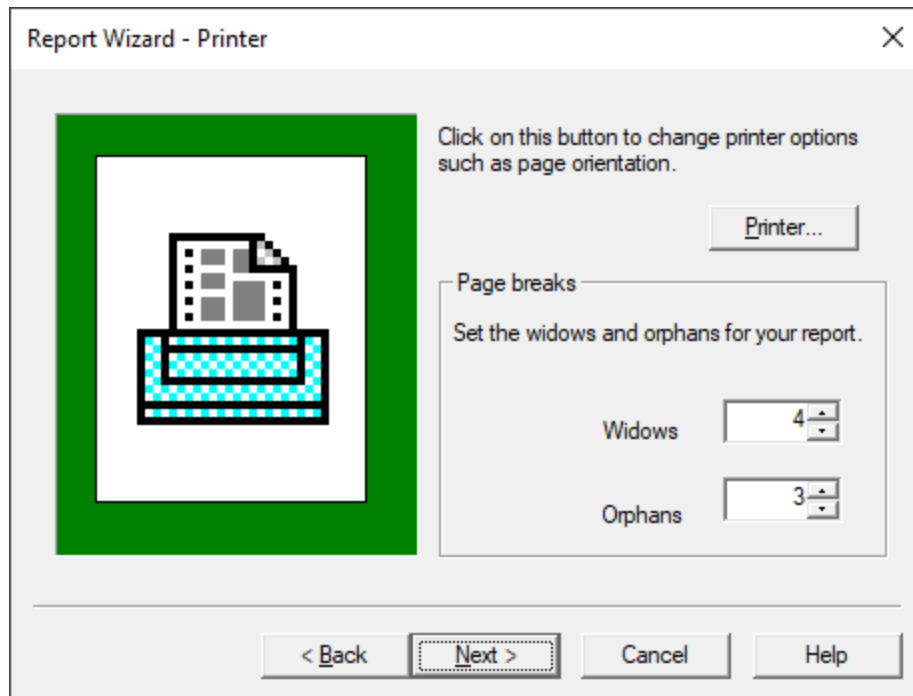
1. To change the paper size or source, page orientation or margins, or default printer, click the **Printer** button.

2. Clicking the **Printer** button opens the **Page Setup** dialog box.
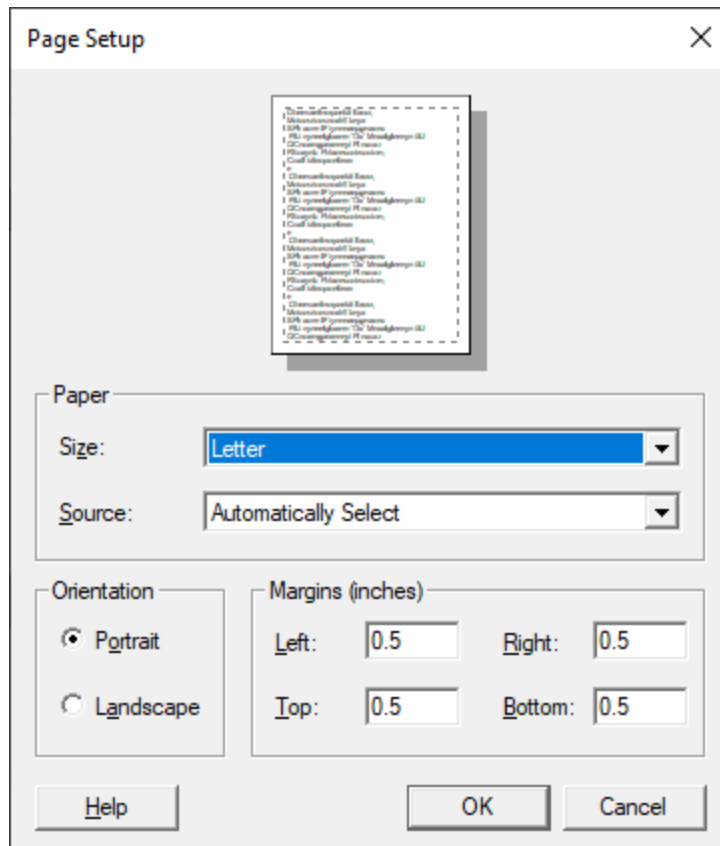
3. Make the applicable edits.

    To change the default printer for the report, click the Printer button, make the applicable edits, and click OK to save your changes.

4. In the **Page Setup** dialog box, click **OK** to save your changes and return to the **Report Wizard - Printer** dialog box.

    In the Report Wizard - Printer dialog box, the Widows field controls the minimum number of lines Concordance Desktop will allow to remain at the bottom of a page. If the number of lines to print at the bottom of the page is less than the value in the Widows field, then the document is moved to the top of the next page.

    The Orphans field controls the minimum number of lines Concordance Desktop prints at the top of a page when splitting a document between pages. If the lines left to print are less than the value in the Orphans field, then lines are borrowed from the previous page until the orphan minimum is met. This may cause the preceding page to go below the Widows threshold, causing the entire column to print at the top of the next page.

    The Widows field defaults to 4 lines and the Orphans field defaults to 3 lines.

5. To change the widows value, in the **Widows** field, type or select the number of lines you want the report to use for page widows.

6. To change the orphans value, in the **Orphans** field, type or select the number of lines you want the report to use for page orphans.

7. Click **Next** to open the **Report Wizard - Exploded Sort** dialog box.

11. In the **Report Wizard - Exploded Sort** dialog box, define the report's exploded sort settings.

To define the settings in the Report Wizard - Exploded Sort dialog box:

An exploded sort is a report where each entry in a multiple entry field is sorted in alphabetical order and given its own line in the report as if it were a separate record. Concordance Desktop determines each sub-entry in a field by grabbing the data between delimiters such as a comma. Any punctuation character can be used as the delimiter as long as it is used consistently.

Exploded Sort Example

An attorney has placed bibliographic entries for all of the documents needed in a case into Concordance Desktop. The counselor then searched for financial reports, and wanted to print a report showing each author alphabetically for an upcoming deposition. With a typical report, the attorney would get a printout sorted by the first author's name appearing in the author field. Finding

a specific author's name would require looking through each multi-author entry in the report. Using an exploded sort places each author in alphabetical order in the first column, repeating the data in the other columns for each entry. Now the attorney can find the authors quickly and easily, during the deposition.

1. To create an exploded sort report, in the **Do you want an exploded report** field, select the **Yes** option.

    If you do not want to create an exploded sort report, select the No option and click Next to open the Report Wizard - Fields dialog box.

2. In the **Select the field you want to explode sort** field, click the field you want to use for the exploded sort.

    The field selected in the Select the field you want to explode sort field will always be the first column in your exploded sort report.

    Records should be sorted by the field used in the report's second column before entering the Report Writer. That way duplicate records are sorted by the second column's contents.

    The Set a delimiter to base the exploded sort field defaults to a comma.

3. To change the delimiter used for the exploded sort, in the **Set a delimiter to base the exploded sort** field, type the delimiter you want to use.

4. Click **Next** to open the **Report Wizard - Fields** dialog box.

12. In the **Report Wizard - Fields** dialog box, define the fields that print in the report columns.

To define the settings in the Report Wizard - Fields dialog box:
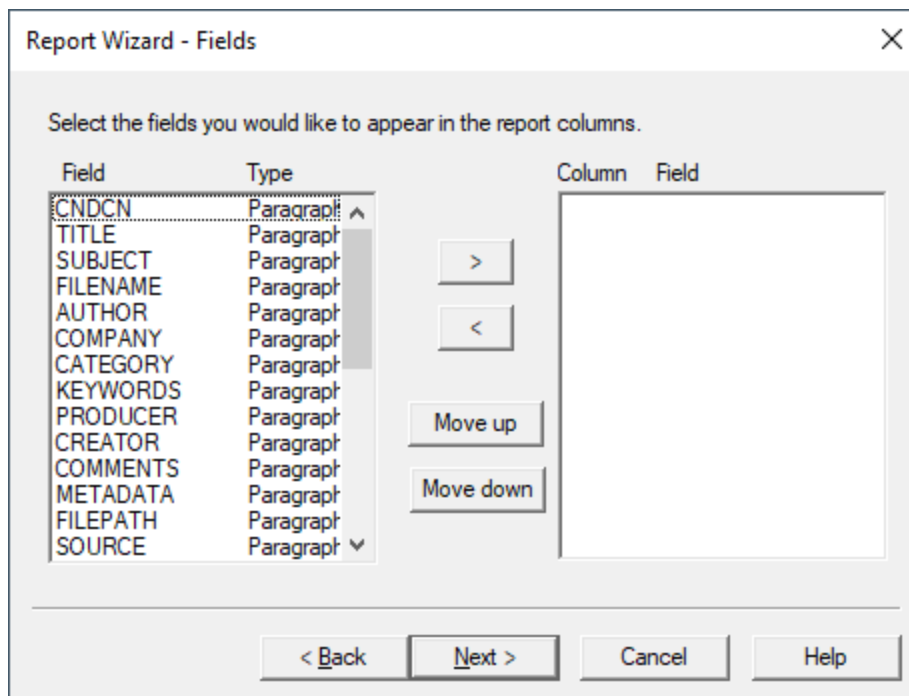
The order the fields are listed in the Column list is the order the fields will be displayed in the report columns. If you are creating an exploded sort report, the field you selected on the Report Wizard - Fields dialog box is automatically added to the first column in the report, and cannot be moved from the first column. The wizard automatically sets the number of columns in the report to the number of fields selected in the Report Wizard - Fields dialog box.

1. To add a field to the **Column** list, click the field in the **Field** list, and click the right arrow, **>**, button.

2. To remove a field from the **Column** list, click the field in the **Column** list, and click the left arrow, **<**, button.

3. To change the column order of a field, click the field in the **Column** list, and click the **Move up** or **Move down** button to move the field to the applicable column.

   When you move a field in the Column list, the wizard automatically updates the column order number for the field.

4. Click **Next** to open the **Report Wizard - Field Options** dialog box.

13. In the **Report Wizard - Field Options** dialog box, define the individual report field settings.

   To define the settings in the Report Wizard - Field Options dialog box:

In the Report Wizard - Field Options dialog box you can define settings for the individual fields in the report including totalling and defining how the Report Writer handles the data in the field, such as underlining search hits.

1. In the **Column** list, click the field you want add report settings for.

2. To print a grand total of the field data in the selected column, select the **Total** check box, in the **Width** field, type the total field size in number of characters, and in the **Decimals** field, type the number of decimal points you want to use in the grand total.

   The Width and Decimals fields are only available when the Total check box is selected. The grand total is printed at the end of the report.

3. To print subtotals, select the **Subtotal** check box and in the **Break column** field, type the number of the column to break on for the subtotals.

   A break column can be any other column in the report. The report should be sorted by the break column. For example, if the subtotal column contains the PRICE field and the break column contains the PART_NUMBER. The PRICE column prints a subtotal whenever the PART_NUMBER changes, and it will print a grand total when the report is complete.

   The Break column field is only available when the Subtotal check box is selected. Every time the column in the Break column field changes contents, Concordance Desktop will subtotal the field data.

4. To print each record on a separate page whenever the column's contents change between one record and the next, select the **New page on new entry** check box.

    The database should be sorted by the selected field in the report column.

5. To suppress all repetitive entries in the selected field on the report, select the **Suppress repetitive entries** check box.

    When the Suppress repetitive entries check box is selected, only the first instance of duplicate entries will be printed on the report. The report should be sorted by the selected field in the report column.

6. If you want all search hits in the selected field to be underlined on the report, select the **Underline hits** check box.

7. Click **Next** to open the **Report Wizard - Finish** dialog box.

14. In the **Report Wizard - Finish** dialog box, click the **Finish** button to create the report template.

    Clicking the Finish button opens the report template within the Report Writer in Concordance Desktop, and the Report Writer toolbar is now displayed in Concordance Desktop below the Standard toolbar.

15. In the Report Writer, you can further customize the report, including adjusting the column widths, adding and removing columns, adjusting report settings, and adjusting text properties.

    For more information about working in the Report Writer, see the *Concordance Desktop Report Writer User's Guide*.

16. Make the applicable edits to the report in the Report Writer.

17. Click the **Print Preview** button on the Report Writer toolbar to preview the report.

18. When you are ready to print the report, to send the report directory to the designated printer, click the **Print** button in the print preview screen.

    To make any final print adjustments before printing, click the Print button on the Report Writer toolbar to open the Print dialog box, edit the print settings, and click OK to print the report from the designated printer.

19. To save your report settings, on the **Report Writer** toolbar, click the **Save as** button.

20. To close the report, on the **Report Writer** toolbar, click the **Exit** button.

To generate a report using the Report Options dialog box:

1. Run a search query to locate the documents you want to include in the report.

For more information about searching, see Available search tools.

2. In the **Table** view, use a table layout to organize the columns and column order you want to include in the report.

    For more information about custom layouts see, Using table layouts.

3. With the **Table** view still open, on the **Standard** toolbar, click the down arrow next to the **Report** button and click **Report writer**.

    Clicking Report writer opens the Report Writer dialog box.
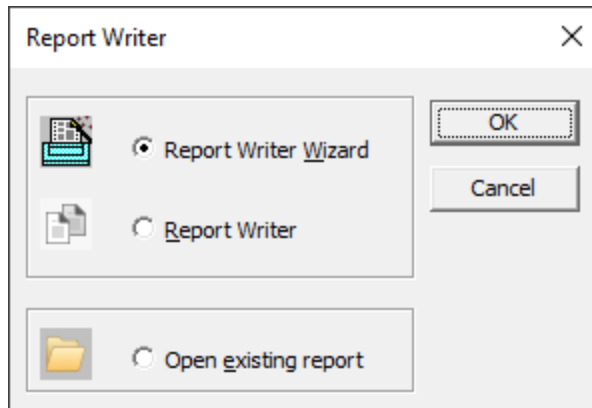
4. Select the **Report Writer** option and click **OK**.

    Clicking OK opens the Report tab in the Report Options dialog box.

5. On the **Report** tab, define the report's document range, record break, field printing, and column settings.

    To define the settings on the Report tab:

On the Report tab, the First and Last fields default to the first and last record in the current Concordance Desktop query.

1. To modify the range of the records to be printed, in the **First** field, type the record number for the first record in the range you want to print, and in the **Last** field, type the record number for the last record in the range you want to print.

   By default, only the Blank lines check box is selected in the Options section of the Report tab.

2. To print each record on a separate page, select the **New page** check box.

3. To disallow blank lines between each record on the report, clear the **Blank lines** check box.

4. To add a horizontal line between each record on the report, select the **Horizontal Lines** check box.

   The Horizontal Lines check box is only available if you are also adding blank lines between each record.

5. To add vertical lines between each report column, select the **Vertical Lines** check box.

6. To print only the first line from each field in the report, select the **Summary report** check box.

If you choose to only print the first line of each field, Concordance Desktop prints a summary report with one line per record.

7. In the **Enter the number of columns for the report** field, type the number of columns you want to create in the report.

8. In the **Enter the maximum characters in each column** field, type the maximum number of characters allowed in each column. The default is 4096 characters.

6. Click the **Printer** tab to define the report's page margin and intercolumnar spacing settings, widow and orphan settings, additional page settings, and the default printer settings.

To define the settings on the Printer tab:
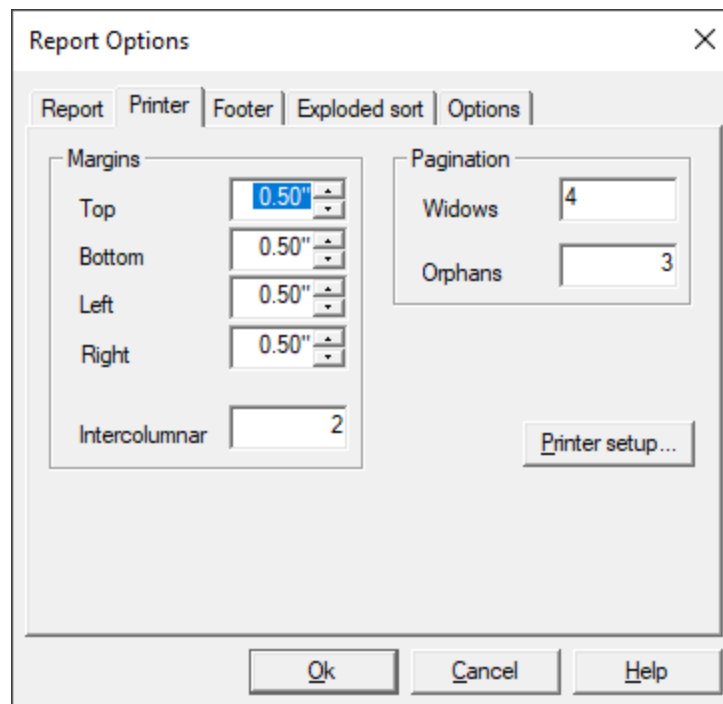
On the Printer tab, all page margins default to .50 inches from the edge of the page, and the Intercolumnar (1/10th") field defaults to 2 tenths.

1. To edit the print margins, type or select the margin sizes, in inches, that you want to print on the report.

    Some printers have an *unprintable* reserved area and the margins cannot be set below this limit.

2. To edit the intercolumnar spacing, in the **Intercolumnar (1/10th")** field, type or select the spacing, in tenths of an inch, that you want to print on the report.

   The intercolumnar spacing determines the distance between columns in your report.

   On the Printer tab, the Widows field controls the minimum number of lines Concordance Desktop will allow to remain at the bottom of a page. If the number of lines to print at the bottom of the page is less than the value in the Widows field, then the document is moved to the top of the next page.

   The Orphans field controls the minimum number of lines Concordance Desktop will print at the top of a page when splitting a document between pages. If the lines left to print are less than the value in the Orphans field, then lines are borrowed from the previous page until the orphan minimum is met. This may cause the preceding page to go below the Widows threshold, causing the entire column to print at the top of the next page.

   The Widows field defaults to 4 lines and the Orphans field defaults to 3 lines.

3. To change the widows value, in the **Widows** field, type the number of lines you want the report to use for page widows.

4. To change the orphans value, in the **Orphans** field, type the number of lines you want the report to use for page orphans.

5. To change the paper size or source, page orientation or margins, or default printer, click the **Printer setup** button.

6. Clicking the **Printer setup** button opens the **Page Setup** dialog box.

7. Make the applicable edits.

   To change the default printer for the report, click the Printer button, make the applicable edits, and click OK to save your changes.

8. In the **Page Setup** dialog box, click **OK** to save your changes and return to the **Printer** tab.

7. Click the **Footer** tab to define the report's page number, date and time stamp, and footer font settings.

   To define the settings on the Footer tab:
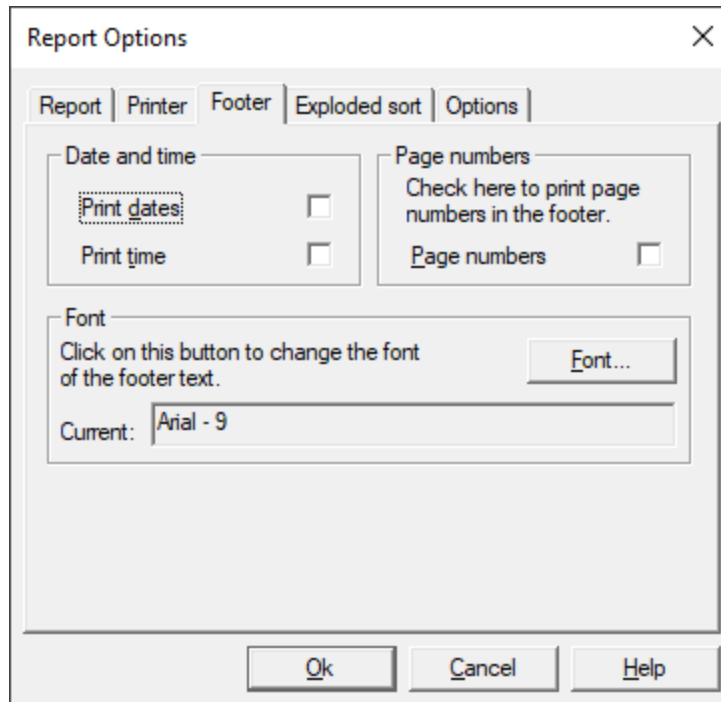
On the Footer tab, by default the Print dates, Print time, and Page numbers check boxes are not selected. If you choose to print page numbers and/or date and time stamps, they will be printed at the bottom of each page in the footer.

1. To print the current date, select the **Print dates** check box.

    The date is printed in the lower-left corner of the report.

2. To print the current time, select the **Print time** check box.

    The time is printed in the lower-left corner of the report.

3. To print page numbers, select the **Page numbers** check box.

    Page numbers are printed in the lower-right corner of the report. The default font for footer text is Arial 9pt.

4. To modify the font settings, click the **Font** button.

    Clicking the Font button opens the Font dialog box.

5. Modify the font and click **OK** to save your changes.

    The font settings apply to all text in the report footer.

8. Click the **Exploded sort** tab to define the report's exploded sort settings.

    To define the settings on the Exploded sort tab:

Report Options   ✕

| Report | Printer | Footer | Exploded sort | Options |

Explode
Check this button to activate the
exploded sort report.   Explode   ☐

Field
Select the field to perform an
exploded sort on.   [▼]

Delimiter
Select the delimiter to use for the
exploded sort.   [.   ]

            Ok   Cancel   Help

An exploded sort is a report where each entry in a multiple entry field is sorted in
alphabetical order and given its own line in the report as if it were a separate
record. Concordance Desktop determines each sub-entry in a field by grabbing
the data between delimiters such as a comma. Any punctuation character can be
used as the delimiter as long as it is used consistently.

⊟ **Exploded Sort Example:**

An attorney has placed bibliographic entries for all of the documents needed in
a case into Concordance Desktop. The counselor then searched for financial
reports, and wanted to print a report showing each author alphabetically for
an upcoming deposition. With a typical report, the attorney would get a
printout sorted by the first author's name appearing in the author field. Finding
a specific author's name would require looking through each multi-author entry
in the report. Using an exploded sort places each author in alphabetical order
in the first column, repeating the data in the other columns for each entry.
Now the attorney can find the authors quickly and easily, during the
deposition.

1. To create an exploded sort report, select the **Explode** check box.

    If you do not want to create an exploded sort report, clear the Explode check
    box.

2. In the **Select the field to perform an exploded sort on** field, click the field you want to use for the exploded sort.

    The field selected in the Select the field to perform an exploded sort on field will always be the first column in your exploded sort report.

    Records should be sorted by the field used in the report's second column before entering the Report Writer. That way duplicate records are sorted by the second column's contents.

    The Select the delimiter to use for the exploded sort field defaults to a comma.

3. To change the delimiter used for the exploded sort, in the **Select the delimiter to use for the exploded sort** field, type the delimiter you want to use.

9. Click the **Options** tab to define the report's individual column settings.

    <u>**To define the settings on the Options tab:**</u>
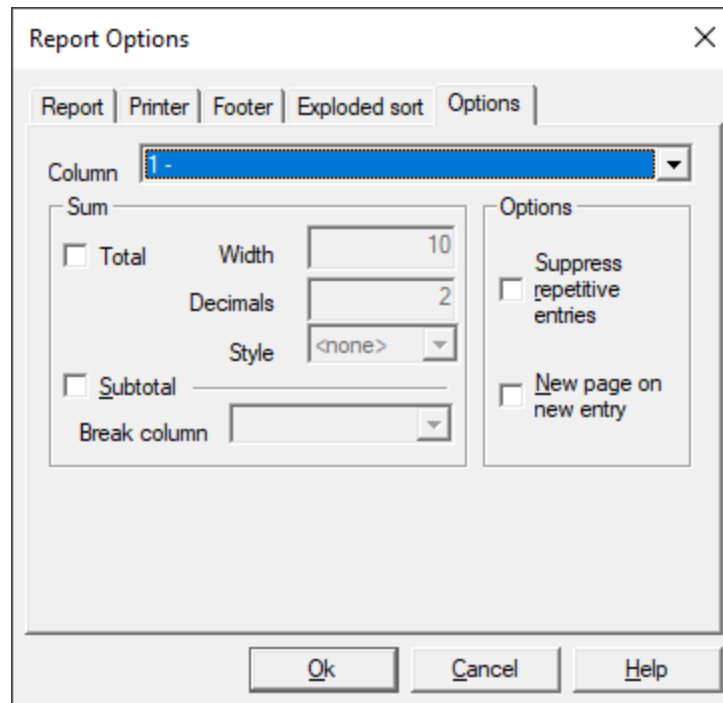
    On the Options tab, you can define settings for the individual columns in the report including totalling and defining how the Report Writer handles the field data in the column, such as underlining search hits.

    1. In the **Column** list, click the column you want add report settings for.

2. To print a grand total of the field data in the selected column, select the **Total** check box, in the **Width** field, type the total field size in number of characters, in the **Decimals** field, type the number of decimal points you want to use in the grand total, and in the **Style** field, click numbering style you want to use for the grand total.

   The Width, Decimals, and Style fields are only available when the Total or Subtotal check box is selected. The grand total is printed at the end of the report.

3. To print subtotals, select the **Subtotal** check box and then in the **Break column** field, click the number of the column to break on for the subtotals.

   A break column can be any other column in the report. The report should be sorted by the break column. For example, if the subtotal column contains the PRICE field and the break column contains the PART_NUMBER. The PRICE column prints a subtotal whenever the PART_NUMBER changes, and it will print a grand total when the report is complete.

   The Break column field is only available when the Subtotal check box is selected. Every time the column in the Break column field changes contents, Concordance Desktop will subtotal the field data.

4. To suppress all repetitive field data entries in the selected column on the report, select the **Suppress repetitive entries** check box.

   When the Suppress repetitive entries check box is selected, only the first instance of duplicate entries will be printed on the report. The report should be sorted by the selected field in the report column.

5. To have the report print each record on a separate page whenever the column's contents change between one record and the next, select the **New page on new entry** check box.

   The database should be sorted by the selected field in the report column.

10. Click **OK** to create the report template.

    Clicking OK opens the report template within the Report Writer in Concordance Desktop, and the Report Writer toolbar is now displayed in Concordance Desktop below the Standard toolbar.

11. In the Report Writer, you can further customize the report, including assigning fields to columns, adding header and footer text, adjusting the column widths, adding and removing columns, adjusting report settings, and adjusting text properties.

    For more information about working in the Report Writer, see the *Concordance Desktop Report Writer User's Guide*.

12. Make the applicable edits to the report in the Report Writer.

13. Click the **Print Preview** button on the Report Writer toolbar to preview the report.

14. When you are ready to print the report, to send the report directory to the designated printer, click the **Print** button in the print preview screen.

   To make any final print adjustments before printing, click the Print button on the Report Writer toolbar to open the Print dialog box, edit the print settings, and click OK to print the report to the designated printer.

15. To save your report settings, on the **Report Writer** toolbar, click the **Save as** button.

16. To close the report, on the **Report Writer** toolbar, click the **Exit** button.

<u>**To edit an existing report in the Report Writer:**</u>

1. In the Table view, on the **Standard** toolbar, click the arrow next to the **Report** button and click **Report writer**.

   Clicking Report writer opens the Report Writer dialog box.

2. Select the **Open existing report** option and click **OK**.

   Clicking OK opens the Open dialog box.

3. Navigate to and open the report .arp file you want to edit.

   The report opens in the Report Writer in Concordance Desktop.

4. Make the applicable edits to the report in the Report Writer.

   For more information about working in the Report Writer, see the *Concordance Desktop Report Writer User's Guide*.

5. Click the **Print Preview** button on the Report Writer toolbar to preview the report.

6. When you are ready to print the report, to send the report directory to the designated printer, click the **Print** button in the print preview screen.

   To make any final print adjustments before printing, click the Print button on the Report Writer toolbar to open the Print dialog box, edit the print settings, and click OK to print the report to the designated printer.

7. To save your report settings to the current .arp file, on the **Report Writer** toolbar, click the **Save** button.

   To save your report settings to a new .arp file, on the Report Writer toolbar, click the Save as button.

8. To close the report, on the **Report Writer** toolbar, click the **Exit** button.

For more information about using the Report Writer, including using the Report Writer with CPL scripts, see the *Concordance Desktop Report Writer User's Guide*. You can request a PDF file of the guide from Concordance Desktop Technical Support.

Troubleshooting

Isolating issues

Reference this section to review troubleshooting information and common issues that you can resolve, perhaps avoiding a call to Concordance Desktop Technical Support or isolating the issue so a support analyst can better assist you.

If you find yourself challenged with Concordance Desktop working properly, we've provided you with a checklist to help you isolate where a problem resides: computer, network, or application.

Once you've run through this checklist, you'll most likely discover where the issue lies and can determine the course of action needed to resolve an issue. If you find you still have difficulties after reviewing items on this checklist, you may want to enlist a Concordance Desktop Technical Support analyst for research feedback.

Isolating Issues Checklist:

1. **Is your problem happening to one person or all users?**

   If it's one person, there's potentially something wrong with the computer itself, such as the user's network privileges or another setting. Please check to ensure that the user is granted full privileges.

2. **Is the problem only with this computer?**

   If so, you may need to rebuild the system profile.

   Test whether the user can log into a Concordance Desktop database from another computer. If so, the problem is most likely the computer and not the application.

3. **Is the issue occurring only in one database or all databases?**

   Determining this helps isolate whether it's a database or system issue.

   Depending on the setup, try moving a database to a location other than its current placement.

   Desktop to server or server to desktop.

Resolving common database issues

Avoid time-consuming emails and calls to Concordance Desktop Technical Support by resolving issues on your own. Here is a list of the most frequent issues that clients run into while administrating Concordance Desktop and the steps you can take to fix them yourself:

Full Network rights given to users

If you find there are users having issues with accessing aspects of Concordance Desktop or there are other problems occurring, you'll want to verify that all users have full read/write privileges in the directory where each database resides.

File path problems

Whether you are trying to view images in Concordance Desktop or trying to launch a hyperlink to a native document or email attachment, there are times when you may run into the following issue:

Native files and attachments

When clicking on a native document or attachment hyperlink and nothing happens, on the Start menu, click Run and type the listed path and click OK.

Windows may open a dialog box saying it can't open the file. It will ask you what program to use to launch the file. This occurs when Windows doesn't recognize the file extension. For example, if you just downloaded Adobe® Reader®, Windows may not recognize the .PDF extension and which program to use to launch it.

Once you select the program from a list in the dialog box, ensure that the *Always use the selected program to open this kind of file* is checked. In the future, the document hyperlink in Concordance Desktop will correctly launch the native document.

If Microsoft Windows can't find the file, then there is a problem with the path listed in Concordance Desktop.

For more information about updating hyperlinks, see Updating hyperlinks.

Overflow message during import

When importing data, you may receive various overflow messages in the Data Overflow or Status box.

Here are some examples:
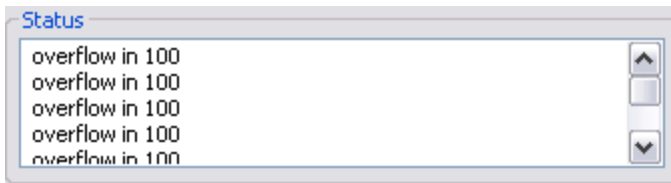
If your message looks like this, then Concordance Desktop ran into an error on line 100 within the delimited text file you selected to import.

You'll want to open up the delimited text file, navigate to line 100 and verify that the delimiters are correct and in place with the file containing a hard carriage return at the end.
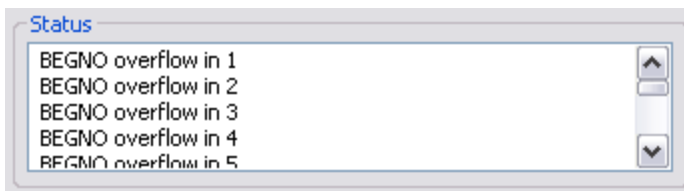
This message is listed with the first selected field (BEGNO) followed by an overflow in every document. Most likely the problem is an incorrect import dialog selection for the delimiters.

Verify what is used in the delimited text file and that your selection in the Import Wizard matches. You will also want to verify your other delimiter selections as well.
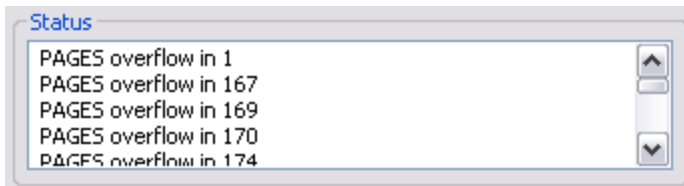
For this type of error message, there are many possible reasons that an error occurred. You will want to verify your delimiters, check your Modify dialog box to ensure that the field type matches the type of data that is being imported in, and also verify that the field order in the import selections matches the delimited text file.

Once you have modified your selections, be sure to save a new copy of your delimited text file prior to import. Next delete any records loaded incorrectly or on the File menu, point to Administration, and click Zap if it is your first import in the database.

Because mistakes can occur during an import, it is best practice to always import additional delimited text files into a duplicate empty structure of your main database to ensure that everything loads properly. Once everything looks correct, use the matching import process to bring in the new records.

For more information about the matching import process, see Loading additional data into databases.

View Image (camera) button is not highlighted

If the View Image (camera) button is unavailable and grayed out when you are ready to manage your imagebase, you most likely forgot to select a field in the database as the Image key.

You will need to open the Modify dialog box and select the Image check box for a unique field, typically your beginning Bates number. Once you have made your changes, be sure to run a full index. After indexing the database, close Concordance Desktop and re-launch your database. The View Image button should now be available.

Indexing takes too long

If your indexing speeds take too long, you'll want to check the following:

- **Indexing Cache Preferences and Recommendations**

  First, review to the Cache Preferences and Indexing Speed Recommendations sections in the Before installing Concordance Desktop topic.

  The Cache Preferences section provides a formula for allocating RAM specifically for the indexing process. For maximum speed, we recommend allocating 2 GB to your machine.

- **How many database indexes are you running?**

  Having indexes for each database run on individual machines greatly improves speed since you're able to allocate more memory to processing one database, rather than having to share it across multiple databases at the same time.

- **What is the size of your database?**

  Record sizes vary based on how many metadata fields there are and how large your OCR text fields may be. The smaller the database: the faster your index processing.

  If your databases are too large, one option is to separate them into smaller databases and concatenate them for review.

  For more information about concatenating databases, see Joining multiple databases.

Offsetting hit highlights

If you search for terms using full-text search strings and the hit highlighting is not working, here are steps to resolving the issue:

1. First, export one record that had hit highlighting issues to another Concordance Desktop database. This way, you can test the issue without impacting your reviewers.

2. In the exported database, view this record in the **Edit** view. Right-click the field where offset hit highlighting occurred, and click **Reset field formatting** on the shortcut menu.

3. Reindex the database and try searching on the same search term to see if the hit highlighting issue is resolved in the record you just formatted.

   If the problem is resolved, this was a rich text formatting issue. Sometimes, there can be problems with HTML hexadecimal color codes and .rtf files. Once these files have been imported into Concordance Desktop, the index may be offset in correctly identifying your hit terms. You can reset the field formatting on each individual record and reindex as listed above to resolve the issue.

   If the issue has impacted a large number of records, there is a CPL script that can reset the field formatting of all records in a query set.

4. If the problem persists, then there is an issue with the .ivt file. Take the entire database offline and then run a full index.

Errors on dictionary and .ivt files

If you receive a message that your dictionary or inverted text (.ivt) files had errors or were not found, then you'll want to rename the following files by adding *OLD* to the file name, and then run a full index: .dct, .ivt, .fzy, .key.

Unable to read and/or write to fields

1. If you come across a field that is read-only in the **Edit** view that you intended to have full access to, you may have applied security settings to the entire database.

   First, check the Field rights tab in the Security dialog box to verify the given access to each user. Second, check the specified field in the Data Entry Attributes dialog box as it can override a field's settings in the Security dialog box.

2. If you created a new field in the **Modify** dialog box and security is enabled, you need to ensure that the new field has read/write access in the **Security** dialog box for each individual user.

   Be careful to check these settings prior to running productions. You may have forgotten to create production fields in the database creation phase to store your new beginning and ending production numbers.

   Once you create these new fields, they are listed as options in the Production Wizard to cross-reference your new production numbers. But if you did not adjust security field rights for read/write access prior to initiating the production process, the numbers will not be written to the production fields.

Issue tags

In order to create an Issue Tag in Concordance Desktop, you must highlight the text, hold down the Shift key and then select the tag. If you attempt or accidentally highlight text and then select the tag without holding down the Shift key first, you receive a message with instructions on using this method for issue tagging. This setting can be changed back to the older method in the Issue Coding section on the Browsing tab in the Preferences dialog box.

Production issues

Empty OPT and CIB file

If after creating a Production the OPT and CIB files appear empty, use the Image Management utility to change the file path for the NearNative files. you will need to remove the backslash (\) at the end of the folder path. Use the Image base Management feature, Rename Media Paths and Folders option to remove the back slash.

Unicode Support

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 Desktop, 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 Desktop. 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.

Installation and Database Compatibility

Supporting the Unicode Standard requires the following installation and database changes:

Installing Language Packs

To display characters in Unicode within Concordance Desktop, the appropriate language packs need to be installed on the computer.

For more information, see Installing language packs.

Concordance Installation Changes

Concordance Desktop installs to a new default folder, *…\CloudNine\Concordance Desktop*, and includes a new Add or Remove Programs dialog box entry and a new registry key. This allows Concordance Desktop and prior versions of Concordance to exist on the same computer.

Database Compatibility

Due to the major database structure changes required by the Unicode Standard, all databases need to be converted to Concordance version 10.*x* and then to Concordance Desktop. Earlier database versions cannot be opened in Concordance version 10.*x* or Concordance Desktop. Only Concordance database versions 7, 8, or 9 can be converted to Concordance version 10.*x*, and only Concordance 10.x databases can be migrated to Concordance Desktop.

Since there is no backwards compatibility to older database versions in Concordance Desktop or Concordance version 10.*x*, opening a database version 7, 8, or 9 in Concordance 10.x prompts the user to convert the database to version 10. When opening a Concordance version 10.x database in Concordance Desktop, the database is automatically migrated to Concordance Desktop database format.

All Concordance version 10.x databases in a selected folder and subfolders can be converted to Concordance Desktop. For more information, see Migrating databases.

Currently, the Unicode Standard is supported when importing, searching, printing, and exporting documents in the languages listed above. However, certain issues and tips are important to know when using these features with a non-English document.

Import Issues and Tips

The Unicode Standard is supported when importing documents into Concordance Desktop.

The following issues and tips are important to know when importing 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

Native and/or text file names containing Unicode characters are supported in Concordance Desktop. However, Unicode characters are not supported for use in user IDs, user groups, matters, clients, or database file names.

Delimiters

The delimiters available from the drop-down lists in the Import Wizard, *Import Delimited Text* dialog box, and the Overlay Database dialog box may appear as square symbols or may not be displayed. How the lists are displayed depends on the computer's language environment.

The delimiters listed below use the Tahoma font, which displays the characters regardless of the language environment. All of the characters listed below can be selected as a delimiter, even if the symbols they represent do not appear in the drop-down lists.

To see the list of available delimiter characters, see About delimiter characters.

Search Issues and Tips

The Unicode Standard is supported when searching documents in Concordance Desktop. For more information about searching, see Available search tools.

The following issues and tips are important to know when searching non-English documents:

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 مصــطــــــلح.

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 Desktop administrator can remove the Kashida characters from the searchable text in the current database.

To remove Kashida characters:

1. On the **File** menu, point to **Administration**, and then click **Remove Kashida characters**.

2. Enter the administrator user name and password.

3. Click **Yes** to confirm.

   The Kashida character removal is permanent and there is no process to convert back to the earlier version. We recommend you make a backup copy of the databases before performing this action.

   Kashida characters are automatically removed from the current database. The status is displayed in the Global Replace dialog box. When finished, the dialog box closes.

4. Reindex the database after the Kashida characters have been removed to update the database with these changes.

   For more information about reindexing, see Indexing and reindexing updates.

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.

For more information about Fuzzy Search, see Using the Advanced Search panel.

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* (国語学院) you will need to click Next hit four times for each word.

Search Examples

Here are examples of searching Arabic and Japanese documents in Concordance Desktop.

Simple Search in Arabic

You can use Simple Search to find non-English words in your documents. The example below shows how Simple Search is used to find the word اللغة, which means *language* in Arabic.

> Some Adobe PDF files with Arabic text do not display the Arabic text in the proper right-to-left order in Concordance Desktop. 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.

Advanced Search in Japanese

Advanced Search can also be used to find non-English words in your documents. The
example below shows an Advance Search for the word "最も", which means *most
importantly* in Japanese.
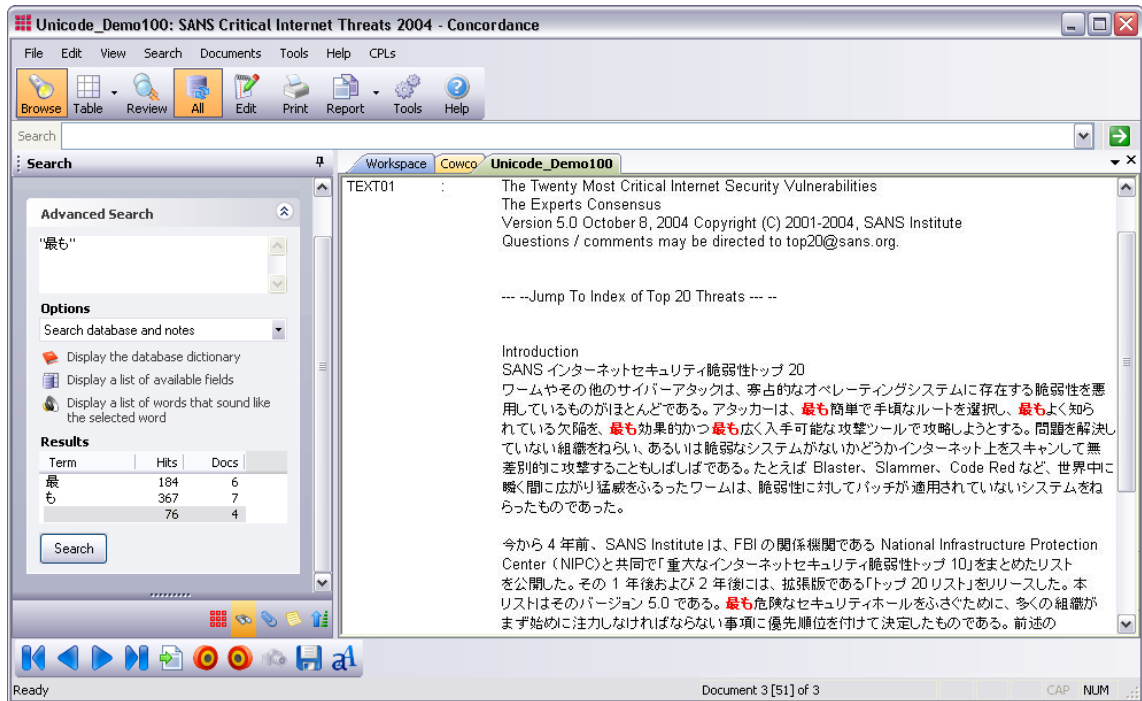
<u>Edit Issues and Tips</u>

The Unicode Standard is supported when using the Edit features in Concordance
Desktop. For more information editing in Concordance Desktop, see About editing
records.

The following issues and tips are important to know when using the Edit features with
non-English documents:

<u>Data Validation Options</u>

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

For more information about data validation, see Creating databases.

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.

Print Issues and Tips

The Unicode Standard is supported when printing documents in Concordance Desktop.

The following issues and tips are important to know when printing non-English documents:

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.

For more information about using the Formatting tab, see Printing standard reports.

Export Issues and Tips

The Unicode Standard is supported when exporting documents from Concordance Desktop. For more information about exporting documents, see About exporting data.

The following issues and tips are important to know when exporting non-English documents:

⊟ Exporting to ANSI or ASCII Format

You can export data from Concordance Desktop 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. See the example below.

Example of exporting a document with Chinese characters to ANSI

Here is a document with Chinese characters in Concordance Desktop.
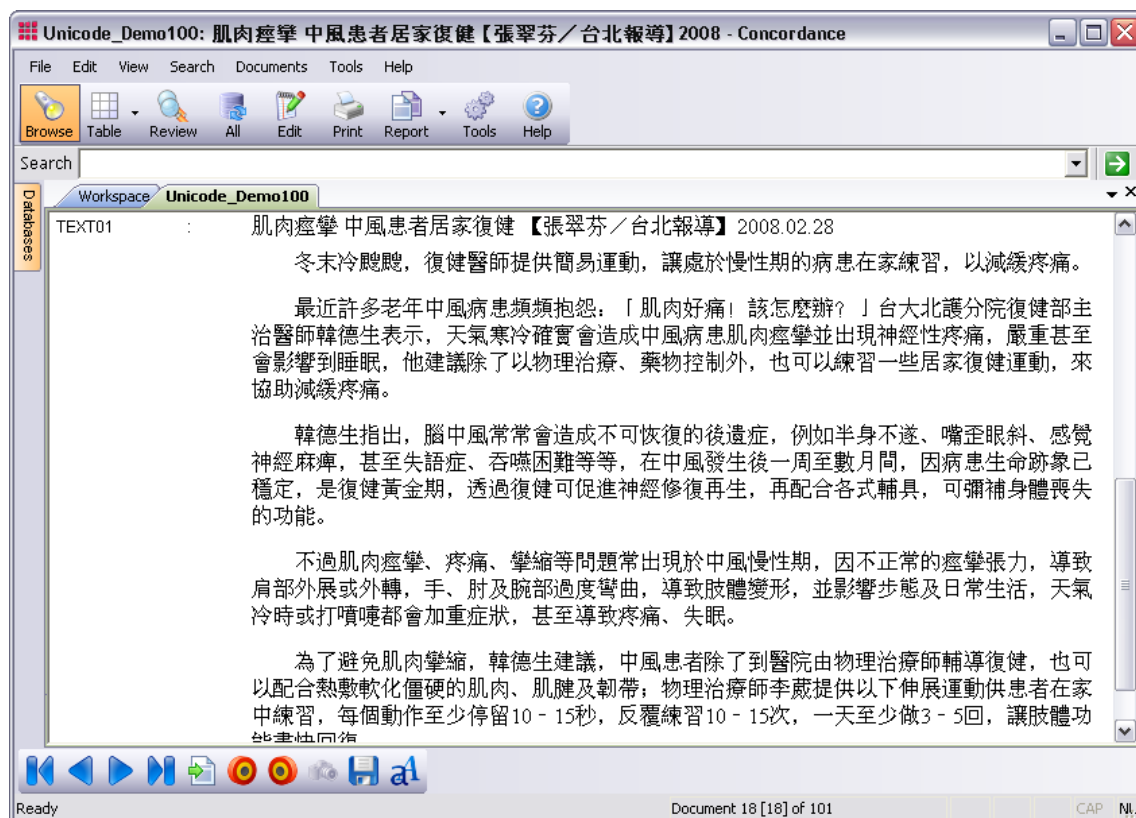
If you export this document to a delimited text file and select the Export ANSI (Export Delimited ASCII dialog box) or Export in ANSI format (Export Wizard - Save dialog box) check box, the Chinese characters will be lost. For example, when you open the exported document in WordPad, the Chinese characters are displayed as question marks (?).

Delimiters

The delimiters available from the drop-down lists in the Export Wizard and the Export Delimited ASCII dialog box may appear as square symbols or may not be displayed. How the lists are displayed depends on the computer's language environment.

The delimiters listed below use the Tahoma font, which displays the characters regardless of the language environment. All of the characters listed below can be selected as a delimiter, even if the symbols they represent do not appear in the drop-down lists.

To see the list of available delimiter characters, see About delimiter characters.

📝 When sending data to a 3rd party software program using the Send To command, only ANSI text is sent..

📝 The Concordance Desktop server does not support user names, passwords, or database names containing characters in Unicode, such as Chinese or Japanese characters. Currently, the server only support user names, passwords, or database names containing single-byte characters, such as English characters.

Ensure that you only use single-byte characters when creating user names, passwords, and database names in Concordance Desktop.

Installing language packs

To display characters in Unicode within Concordance Desktop, the appropriate language packs need to be installed on the computer. Please go to the Microsoft web site to find out how to install language packs for your version of the Windows operating system.

The Microsoft Windows Windows 7 operating system uses Language Interface Packs (LIPs). These can be downloaded from the Windows Update Web site or the installation media. Once you have installed at least one LIP, you can add or remove more LIPs from the Control Panel.

To install language packs on a Windows 7 operating system:

1. In the Control Panel, click **Change keyboards or other input methods**.

2. Click the **Keyboards and Languages** tab.

3. Under **Display Language**, click **Install/uninstall languages** and follow the prompts.

    For more information about installing LIPs, go to the Windows Help and How-to Web page at: https://support.microsoft.com/en-us/help/14236/language-packs.

Concordance Desktop

Administrator's Guide

Reference Information

Chapter

3

Reference Information

Keyboard shortcuts

Use the following keyboard shortcuts to perform Concordance Desktop functions from a specific view or task pane. The behavior of the keyboard shortcuts depends on the view or task pane selected. Ensure that the view or task pane you want to work with is selected before using the keyboard shortcuts.

Concordance Desktop

Browse and Table View

Keyboard Shortcuts: Browse and Table Views	
Shortcut Keys	**Use**
F1	Open Concordance Desktop 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.
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.

Keyboard Shortcuts: Browse and Table Views

Shortcut Keys	Use
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.
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

Keyboard Shortcuts: Tags Task Pane

Shortcut Keys	Use
SPACEBAR	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.

Keyboard Shortcuts: Tags Task Pane

Shortcut Keys	Use
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

Keyboard Shortcuts: Review View

Shortcut Keys	Use
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

Keyboard Shortcuts: Edit View

Shortcut Keys	Use
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.
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 Desktop Viewer

Keyboard Shortcuts: Concordance Desktop Viewer	
Shortcut Keys	**Use**
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
CTRL + E	Fit to Height
CTRL + W	Fit to Width
CTRL + SPACEBAR	Rotate clockwise 90 degrees
CTRL + SHIFT + SPACEBAR	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 Viewer

Keyboard Shortcuts: Concordance Viewer	
Shortcut Keys	**Use**
PAGE UP	Navigate to the previous page
PAGE DOWN	Navigate to the next page
ARROW UP	Navigate to the previous page

Keyboard Shortcuts: Concordance Viewer	
Shortcut Keys	**Use**
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 markups on the page)

Additional Resources

Sample Files

Sample Concordance Desktop databases

Two sets of sample files are included with the installation of Concordance Desktop; one is a set of documents for creating a sample e-document database and the other is a set of PST files for creating a sample e-mail database. The directory where these files reside also includes instructions for creating both types of databases in Concordance Desktop, along with an empty "Database"folder that you can use as the location for your sample e-document and e-mail databases.

The sample files folder and the instructions for creating the sample databases can be found under:

C:\ProgramData\CloudNine\Concordance Desktop\Sample Database

The e-document files can be found under:

C:\ProgramData\CloudNine\Concordance Desktop\Sample Database\Sample files\Edoc

The e-mail PST files can be found under:

 C:\ProgramData\CloudNine\Concordance Desktop\Sample Database\Sample files\Email

In addition to the sample files included with the Concordance Desktop installation, there are also some sample databases and some sample data files you can download by clicking on the links below.

⚠ When downloading the **Sample E-Documents Database**, ensure that you unzip the files to **C:\ProgramData\CloudNine\Concordance Desktop\Sample**

`Database\Database`, in order to view the documents in the Concordance Desktop viewer. Unzipping to any other folder will result in the inability to view the documents in the Concordance Desktop viewer.

- Sample E-Documents Database
- Sample E-Documents Data
- Transcript Sample Database (with Exhibits)

To 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 broken native file links in the databases.

- Unicode Sample Database (1000 records)
- Unicode Sample Database (100 records)

For more information about Concordance Desktop and the Unicode Standard, see About the Unicode Standard.

Copyright Information

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