

Concordance® Desktop

User Guide

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Concordance® Desktop User Guide

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Concordance® Desktop 1.09.00.90

Product Release Date: 05/18/2020

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Concordance Desktop

User Guide

Welcome

Chapter

1

Welcome

Concordance® Desktop is a tool that provides electronic discovery, litigation document management, and litigation support. It was designed to make it easier to identify, organize, analyze and maintain case-critical information so that you can collaborate and share across your firm, or around the world. Concordance Desktop provides the means by which a small to mid-sized law firm can control and maintain the documents that are pertinent to their cases.

- ✍ Concordance Desktop can manage up to 2048 databases. Should your database count exceed this number, we recommend archiving some of your databases that are not active, or using an enterprise tool to manage your databases.

All the functionality needed to create, maintain, store, and work with databases, as well as reviewing, marking up, and redacting, and general production functionality of your documents is available in Concordance Desktop, and can be turned on with varying licenses. There are two types of licensing; Application and User Level.

- Application licenses are used to activate your installation of Concordance Desktop as either a Server or a Mobile installation.
- User Level licenses are used to provide access to varying levels of functionality.

There are several user level licenses that affect three different types of users; Administrators, Full Reviewers, and Data Reviewers. All documents for a case can be imported into one or more databases by an Administrator. Once a database is created, it can be accessed by Data Reviewers for first level searching, record categorization, and folder, tags and issues creation. The database can also be accessed by Full Reviewers for searching and marking up documents pertinent to their cases, and for setting up documents they need to send to opposing council.

For more details about Concordance Desktop licensing and how it works, please see the About Concordance Desktop Licensing and Product Activation topic.

Basic key benefits and features

Concordance Desktop provides the most effective, cost-efficient way to manage the high volume of documents—scanned paper, email and other e-documents—generated during litigation.

Here are some of the basic key benefits and features of Concordance Desktop:

- A repository that holds documents of all types
 - A fast and efficient search engine
 - Ability to categorize records with folders, tags, and issues
 - Ability to secure confidential data at various administrative levels
 - Ability to integrate with other litigation technology
-

Here are some of the key benefits and features when installed on a network server or computer:

- A secure, centralized location for your document databases
- Local Area Network (LAN) and Wide Area Network (WAN) access from workstations on which Concordance Desktop software is installed
- Server functionality uses highly optimized data compression.
- Server functionality provides RSA encryption for efficient and secure remote access. This is the same RSA 128-bit encryption that banks use for securing online transactions.

A Server license is required to enable Concordance Desktop Server on a server, or a network computer that you want to use as a the Concordance Desktop server. When that license is activated, two Concordance Desktop Server services are started; Concordance Desktop Server and Concordance Desktop Admin Server. The Concordance Desktop Server service sends data to Data Reviewer and Full Reviewer users on the network. This is where most of the review work is done. Concordance Desktop Admin Server service works with the Concordance Desktop Admin Console to control the server, database access assignments, and user management. The Administration Console provides a user interface to manage Concordance Desktop server functionality, allowing administrators to publish databases, restrict access and change user settings, set performance parameters, and generate usage reports.

Document review key benefits and features

Concordance Desktop provides an easy to use interface and markup tools for the review process. You can view markup history as well as document and image information without having to switch back to the main Concordance Desktop window.

Document review typically involves searching for and marking up documents:

- Relevant for turning over to opposing counsel.
- Containing privileged or confidential information that you do not want turned over to opposing counsel.
- Containing evidential information to support your case.

The document review key benefits and features of Concordance Desktop are:

- An intuitive user interface for navigating and reviewing documents
- A single Concordance Desktop Image Base (CIB) SQLite database file to store both native and image information
- Advanced markup tools to review and annotate documents and images
- Track document markups added or removed during a review
- Produce color or grayscale images to PDF or TIFF

Database capacity

Database	Capacity
Number of databases	2048
Number of documents	500,000
Concatenated databases	You can join up to 128 databases
Fields	250 custom fields
Characters per field	12 million
Database .ivt file	6 gigabytes
Database .tex file	6 gigabytes

Product integrations

Concordance Desktop integrates with other leading industry technology tools and providers to assist you in maximizing the functionality you currently have in managing your case records and history, while allowing you to add on or transition data to other programs as you move through the litigation process.

Concordance Desktop also integrates with the following tools:

- Hosted Concordance Desktop servers
- CaseMap®
- CloudNine™ LAW
- Sanction® version 2.9 only
- Microsoft Excel®

Concordance Desktop

User Guide

Concordance Desktop Release Notes

Chapter

2

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

User Guide

Getting Started

Chapter

3

Getting Started

Accessing Concordance Desktop

Concordance Desktop does not require you to log onto a server until you actually attempt to open a database, or if you are an administrator, attempt to open the Admin Console. Once an attempt is made to either open a database or the Admin Console, Concordance Desktop begins the process of authenticating the user. It is at this time that a user's log on information is required.

To access Concordance Desktop, do one of the following:

- Click on the **Concordance Desktop** icon on your desktop
- Click on the Windows **Start** button and select **Concordance Desktop** from the menu.
- Double-click on a shortcut (.fyi) file that was sent to you
(If you have Concordance version 9 or lower still installed on your computer, do not use this method, as it will attempt to open the database in the older version.)
- Double-click on a database that resides on your computer
(If you have Concordance version 9 or lower still installed on your computer, do not use this method, as it will attempt to open the database in the older version.)

To open an database, see "Opening a database."

To open the Admin Console, see "Accessing the administration console."

To change your password:

Contact the administrator of the Concordance Desktop server on which you need your password reset, and ask them to reset your password.

The next time you open a database on that server, you enter your a new password in the Password field. That will be your password going forward for that server.

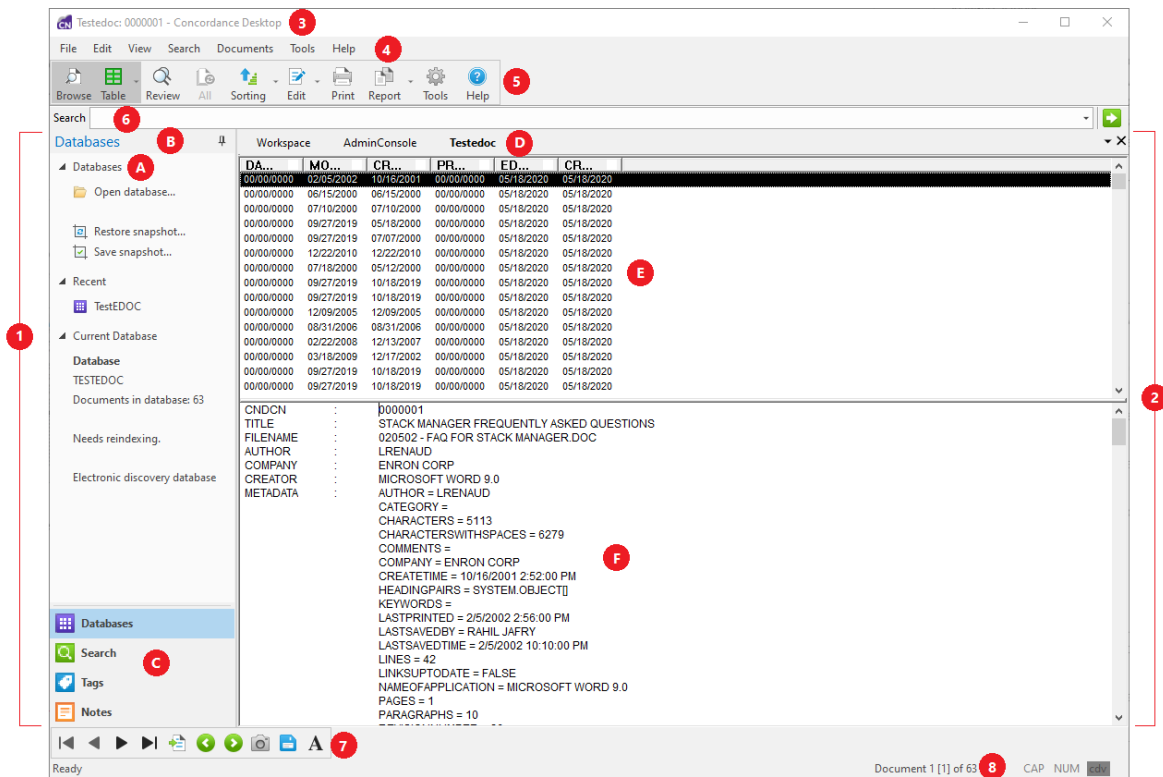
- ✎ Passwords cannot be reset from the Admin Console login window. So if you are an administrator, you will need to attempt to open a database, in order to change your password, after your account has been reset.

Navigating Concordance Desktop

The Concordance Desktop user interface is similar to Microsoft Outlook.

The left side of the window is the Navigation pane where you can navigate to Concordance Desktop tasks to search, tag, sort, and add notes to documents. The right side of the window is your Workspace pane where you can tab to multiple databases. You can view databases in the Browse, Table, Edit, or Review views.

The Dynamic toolbar at the bottom of the window changes according to the views selected.



Navigating Concordance Key

Key	Feature	Description
(1)	Navigation pane	Provides tools for performing tasks on the current database, such as searching and tagging.
(A)	Task pane	Displays database tools in work areas called <i>panels</i> .
(B)	Pin	Allows you to dock the navigation pane by pinning, or hide the navigation pane by unpinning.
(C)	Navigation buttons	Opens task panes on the Navigation pane.
(2)	Workspace pane	Displays databases in various views.

Key	Feature	Description
(D)	Tabs	Allows you to move between different open databases.
(E)	Table view	Displays a list of document records.
(F)	Browse view	Displays one document record at a time.
(3)	Title bar	Displays the current database name and information regarding the current document record.
(4)	Menu bar	Contains menus, each responsible for a set of tasks.
(5)	Standard toolbar	Contains buttons that let you access standard views and tools.
(6)	Quick Search	Allows you to quickly enter and execute simple and advanced searches while browsing document records.
(7)	Dynamic toolbar	Contains buttons for tools corresponding to the current views.
(8)	Status bar	Displays status information, such as the current document record count.

(1) The Navigation pane

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

The Navigation pane is divided into work areas called panels. The panels are resizable based on your personal preference.

The bottom of the Navigation pane contains buttons that determine which feature is displayed in the Task pane.

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

Notice the pin icon in the upper right corner of the Task pane. By clicking this icon, you can keep the Task pane visible all times (pinned) or tucked away, available when you click the Task pane tab (unpinned).

(2) The Workspace pane

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

- ✍ The Workspace pane is not the same as the Workspace tab. The Workspace tab is used to display internal or external web pages. For more information about the Workspace tab, see Customizing the start-up view.

(3) The Title bar

The Title bar displays information regarding the current database and document.

Concordance Desktop transcript databases automatically set the Title bar to the name, date and volume of the current document. For non-transcript databases, you can define the Concordance Desktop field you want to display using the Select the field to display in the title bar while browsing field in the Preferences dialog box. The selected field is displayed on the Title bar in the Browse view, Table view, and Edit view.

When reviewing standard records in the Browse, Table and Edit views, displaying the BEGNO field on the Title bar can help you keep track of record numbering.

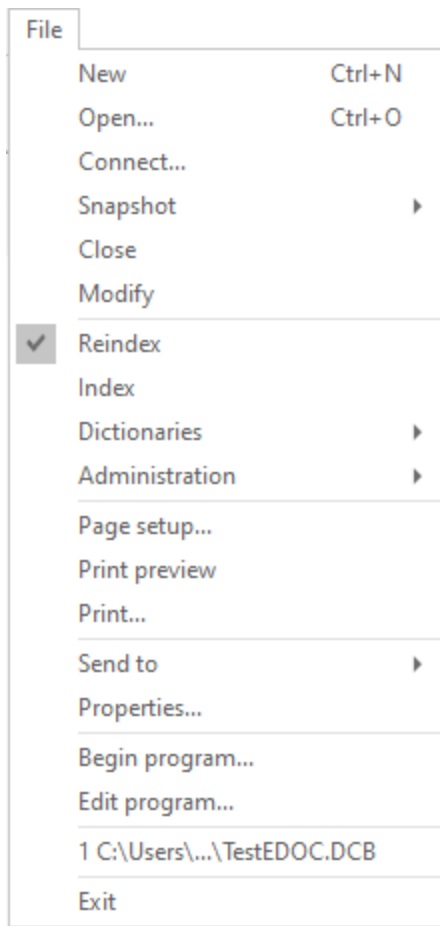
- ✍ The values in the BEGNO field represent the Bates numbering system, which is a unique serial number corresponding to each record in the database. BEGNO stands for beginning number, and ENDNO for ending number.

(4) The Menu bar

The Menu bar contains the Concordance Desktop menus that are responsible for a set of Concordance Desktop tasks. Some of the menu commands are the same as the toolbar functions.

File Menu

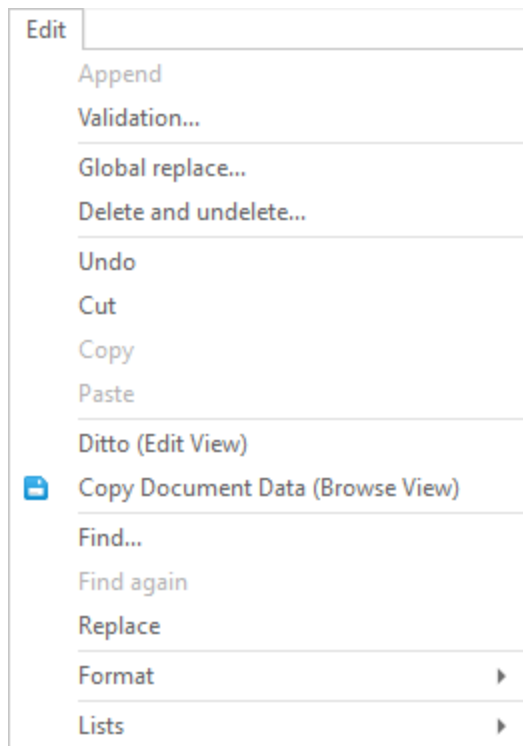
File menu commands allow you to create, maintain, and manipulate databases and the files used by the databases. From the File menu, you can also send data from Concordance Desktop to other applications, such as CaseMap and Sanction, and edit and run Concordance Desktop programs.



Edit Menu

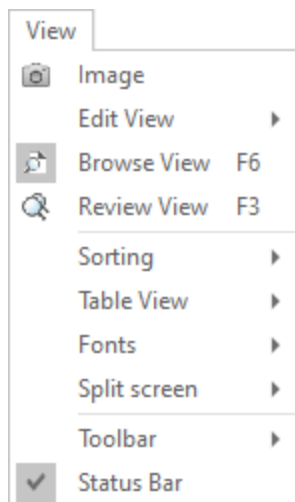
The Edit menu commands allow you to edit and set data validation options for the documents in your databases.

The Undo, Cut, Copy, Paste, Ditto, and Replace menu commands are only available when actively editing in the Edit view. You can use the Copy command to copy text in both the Edit and Browse view. The Copy Document Data command on the Edit menu is only available in the Browse view.



View Menu

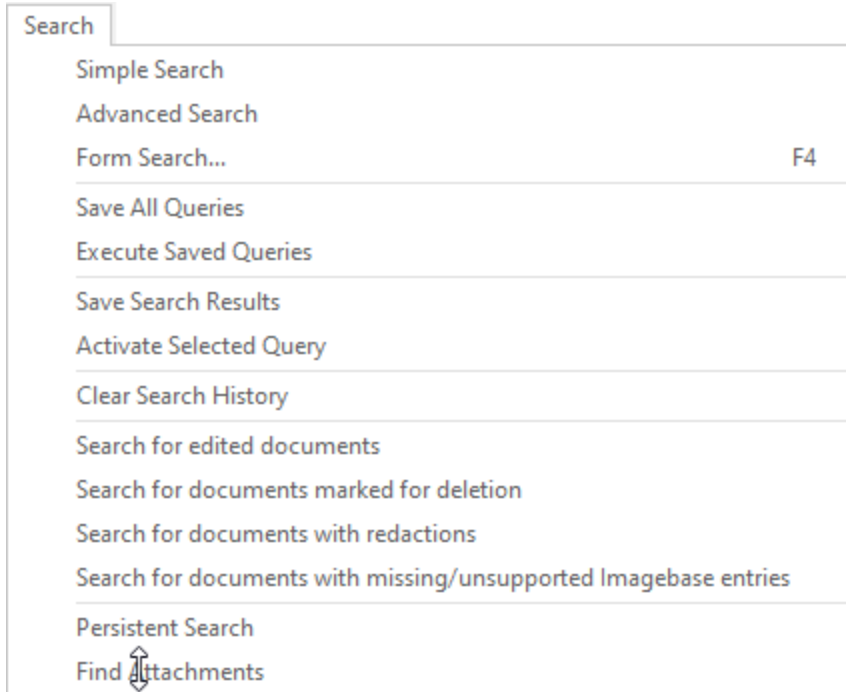
The View menu commands allow you to open images in your viewer, work with documents in the Edit, Browse, Review, or Table view, change data and field font sizes, split your screen, and select the status bar and toolbars.



Search Menu

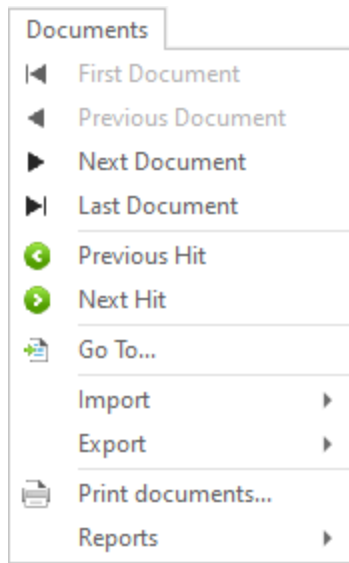
The Search menu commands provide access to the Simple Search and Advanced Search panels in the Search task pane, access to the Form Search - Query by Example dialog box, the Persistent Search and Find Attachments commands.

The Search menu commands also allow you to save your query session to a file, re-execute a saved query session, clear all searches, and search for documents that have been edited or marked for deletion. The Save Search Results and Activate Selected Query commands on the Search menu are only available in the Review view.



Documents Menu

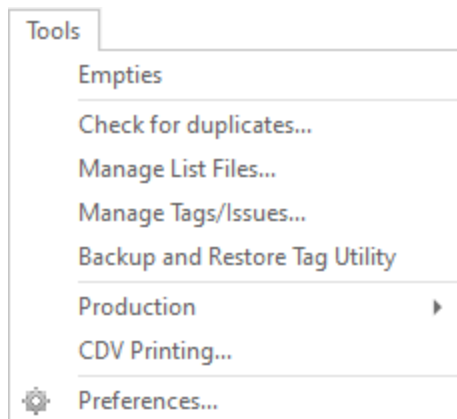
The Documents menu commands allow you to navigate documents and search results, import, export, print, and create reports in your Concordance Desktop databases. Most Documents menu commands operate on the current query. If your last search found zero documents, some the commands on the Documents menu will be unavailable.



Tools Menu

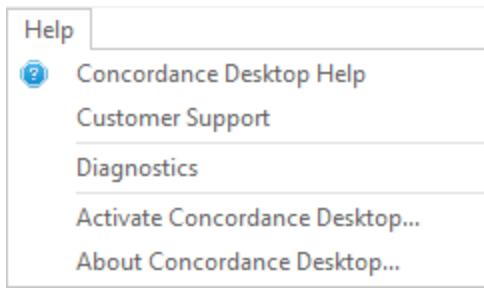
Several options are available from the Tools menu including displaying empty fields, looking for duplicate records, managing list files, managing tags and issues, and customizing your preferences.

- ✎ Do not confuse the Tools button on the Standard toolbar with the Tools menu. Clicking the Tools button on the Standard toolbar opens the Preferences dialog box. You can also open the Preferences dialog box by clicking Preferences on the Tools menu.



Help Menu

The Help menu commands allow you to access the Concordance Desktop Help system, activate Concordance Desktop, and view information about the Concordance Desktop version and contacting customer support.



(5) The Standard toolbar

The Standard toolbar contains buttons for accessing the Concordance Desktop views and related tools, including Print and Help.



Button Definitions

Standard Toolbar Buttons	
Button	Description
Browse	Opens the Browse view. The Browse view allows you to view the documents in the database. You can also add and edit tags, notes, and issues to documents in the Browse view, and send selected text to other programs. When you open the Browse view you will be viewing the first document in the current query or the first document in the database if no query has been entered.
Table	Opens the Table view. The Table view displays documents from the current search in a tabular format, similar to a spreadsheet, with one document per row. In the Table view, you can add and edit tags to documents, define which fields are displayed in the view, the field order, and modify the style and color of the font displayed in the view.
Review	Opens the Review view. The Review view displays all searches performed since the current database was opened, indexed, reindexed, or the search history was cleared. The Review view includes the search number, number of search hits, number of documents containing the search terms, and the search terms for each search.
All	Selects the entire database and returns the sort order of all records to the order in which they were added to the database. This function is sometimes referred to as <i>Zero Query</i> . The document last displayed in the Browse view remains the active record. The documents that come before and after are the documents that physically precede and follow it in the database. When you want to return to the last query, simply click the All button again. Performing a search also resets the All button.

Standard Toolbar Buttons

Button	Description
Sorting	Opens the Sorting layouts dialog box. The Sorting layout feature provides additional tools to customize and save how records are sorted in the Browse view to display the desired result.
Edit	Opens the Edit view. The Edit view allows you to edit the contents of the documents in the database. The Edit view also provides additional tools needed to create and save custom edit layouts that can be applied to display only the fields specified in the selected layout in the Edit view.
Print	Opens the Print documents dialog box. In the Print documents dialog box you can print records located from a search. You can underline search terms and produce key-word-in-context reports. Printed output can be routed to your printer or to a file. You can select a range of documents within the current query and specify the fields within the database.
Report	Opens the Report Writer dialog box. When you click the arrow next to the Report view button, you can open the Report Writer or Annotation Report dialog box. The Report Writer dialog box is used to create columnar reports for database data. The Annotation Report dialog box is used to create the Annotation Report for transcript databases.
Tools	Opens the Preferences dialog box. In the Preferences dialog box you can you to customize how you use Concordance Desktop, including customizing the Workspace tab, search hit color, title bar, issue coding, and indexing.
Help	Opens the Concordance Desktop Answer Center.

- Do not confuse the Tools button on the Standard toolbar with the Tools menu. Clicking the Tools button on the Standard toolbar opens the Preferences dialog box. You can also open the Preferences dialog box by clicking Preferences on the Tools menu.










(6) Quick Search







The Quick Search field is located below the Standard toolbar and can be used in any view. Quick Search allows you to enter basic one-word searches, as well as more complex combinations, while reviewing your documents, without having to open the Search task pane. See Running quick searches.

(7) The Dynamic toolbar

The Dynamic toolbar is located at the bottom left of the Concordance Desktop window. Each toolbar corresponds to a particular Concordance Desktop view.

Button definitions

Dynamic Toolbar Buttons		
Button	Name	Description
	First	Opens the first document in the current query in the Browse view, or opens the first document in the database if you are using zero query.
	Previous	Opens the previous document in the Browse view.
	Next	Opens the next document in the Browse view.
	Last	Opens the last document in the current query in the Browse view.
	Go to	<p>Opens the Goto dialog box where you can enter the number of the document you want to view from the current query. Concordance Desktop opens the document in the Browse view.</p> <p>For Transcripts, use the Goto dialog box, to enter the number for the document, page, or line you want to view.</p>
	Previous Hit	Moves the cursor to the previous search hit in the Browse view. If the document was edited since the last reindex, the document containing the search hits is displayed but the search terms are not highlighted.
	Next Hit	Moves the cursor to the next search hit in the Browse view. If the document was edited since the last reindex, the document containing the search hits is displayed but search terms are not highlighted. If there isn't a next search hit to display, the next document is displayed.
	View Image	Displays the image associated with the current document. Once you click the View Image button, it automatically stays selected and displays the image associated with each record in the image viewer. Click the View Image button again to release the button. This button only works when images are enabled in Concordance Desktop.
	Copy	Opens the Copy dialog box. In the Copy dialog box, you can copy document data from selected fields to the output destination you specify.

Dynamic Toolbar Buttons		
Button	Name	Description
	Font	<p>Opens the Font dialog box. When you modify the font in the Browse view, you are modifying the font for data displayed in the Browse view for the entire database.</p> <p>When you modify the font in the Table view, you are modifying the font for data displayed in the Table view for the entire database. If you are viewing a concatenated database, the font change only affects the database for the current selected record.</p>
	Edit	Adds the search terms of a selected query to the Search task pane for editing.
	Activate	Select a search in the Review view and click the Activate button to activate a previous search and make it the current search. Clicking the Activate button opens the documents in the Browse view.
	Fields	Opens the Fields dialog box. The Fields dialog box contains a list of all fields available for editing. Select a field from the list and click the Insert button to move your cursor to the selected field in the Edit view.
	Ditto	Opens the Duplicate dialog box. In the Duplicate dialog box, you can copy field data from one record to another record or to another field in the current record.
	Delete	Marks and unmarks a record for deletion. Records marked for deletion are removed from the database when the database is packed.
	Undo	Opens the Edit Options dialog box. In the Edit Options dialog box, you can undo edits, mark and unmark the record for deletion, or erase all content from the document.

(8) The Status bar

The Status bar at the bottom of the Concordance Desktop window displays the selected toolbar button's functionality, tracks the document number being edited, and the total number of documents in the current set. The number in brackets is the document's location in the physical database. Document indicators are also displayed here for documents that are tagged (TAG), marked for deletion (DEL), and/or locked (LCK) by another user.

A document locked by another user cannot be saved. A locked document is displayed for editing so that you can copy the document data to another document or program. When a record is locked, the record is grayed out.

This Status bar example indicates you are viewing document 1 out of 203 total documents, the document is the first record in the physical database, and the document has been tagged.

Opening a database

There are several ways in which you can open a database:

- From the Concordance Desktop File menu
- By double-clicking a database (.FYI) file sent by the Administrator - Note that if you have Concordance 10, 9, or 8 still installed on your desktop, this method cannot be used, as it will attempt to open the database in Concordance instead of Concordance Desktop.
- By double-clicking on a database - This method is for mobile users who are accessing a database on their own computer, or by administrators who are opening a database on a Concordance Desktop server itself.
 - ✍ If you want to open a database from Concordance 9.x, see Migrating databases for information and instructions.
- If you have recently opened a database, you can reopen that database by selecting it from the 'Recent' panel database list in the Databases task pane. Clicking a database tab activates the standard and dynamic toolbars in Concordance Desktop, as well as the task panes in the Navigation pane.

You can open as many databases as you want to review and search in any Concordance Desktop session. Each database is accessible by clicking the named database tab in the Workspace pane.

To open a database from Concordance Desktop:

A database can be opened by browsing out to the Database.DCB or selected from a list of previously opened databases on the server.

To Browse out to the database, do one of the following:

- On the **File** menu, click **Open**. Then browse out to the database.DCB and select **Open**. This option is for Mobile license users only, when they access databases on their own computer.
 - In the **Databases** task pane, click **Open database**. Then browse out to the database.DCB and select **Open**.
-

- Enter your **User name** and **Password** for the Concordance Desktop server where the database is located.
 - ✍ If you are attempting to open a Concordance version 10.21 or earlier database in Concordance Desktop, you are prompted that the imagebase is not compatible with the Concordance Desktop imagebase, and given the option to update the imagebase

To Connect to a database that has been added on the server:

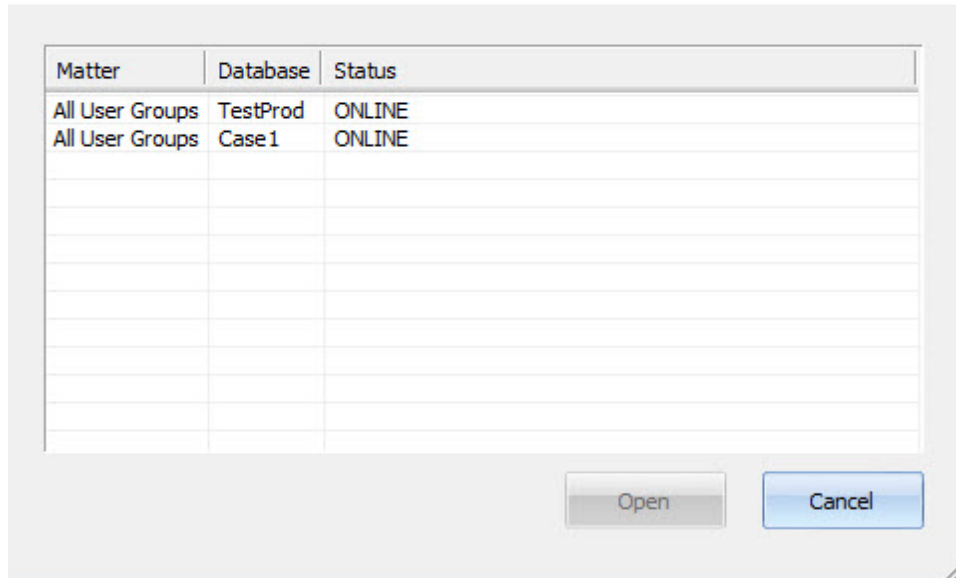
1. On the **File** menu, click **Connect**.
2. The Connect to Concordance Server opens in a new window.

Connect to Concordance Server

The screenshot shows a dialog box titled "Connect to Concordance Server". On the left side, there is a logo for "Concordance® Desktop Discovery Management Software" and the "cloudnine™" logo. On the right side, there are several input fields: "Logon" with the text "User1", "Password" with masked characters "*****", "Host name" with "Mycndserver", and "Port" with "443". Below these is a "Previous Connections" dropdown menu showing "localhost:443". At the bottom of the dialog are two buttons: "Connect" and "Cancel".

3. Enter your **Logon** (user name) and **Password** for the Concordance Desktop server where the database is located.
 - If not already populated, enter the Host name and Port of the server hosting the database that you want to open.
 - Contact your database administrator if you do not know the server's Host name or Port, or your Logon or password.
 - You may also select a Host name and Port from the drop-down menu of **Previous Connections**.
4. Select **Connect**.
5. A new window opens to **Select Database to Open**.

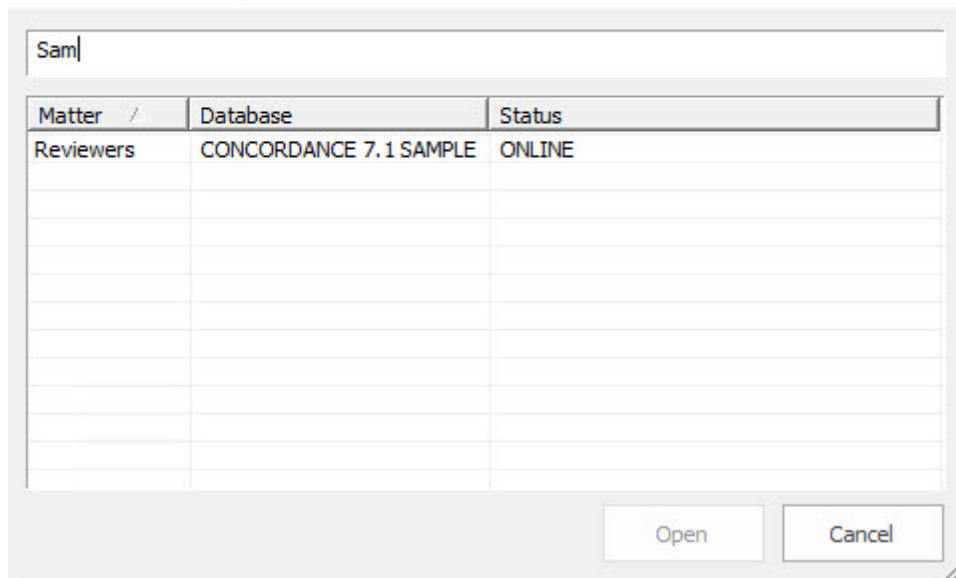
Select Database to Open



Versions prior to 1.07

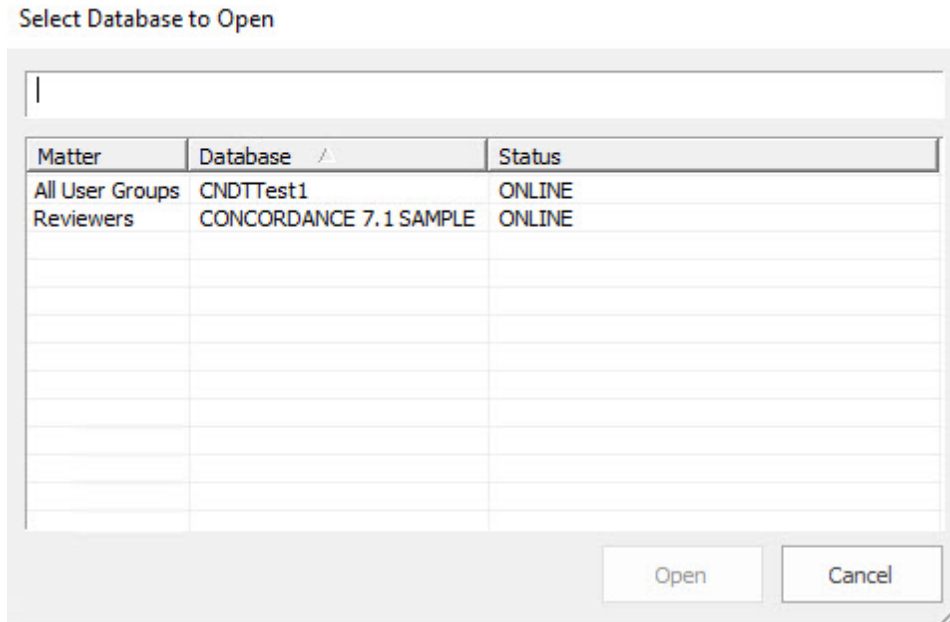
- In version 1.07+ the matter and database items in the Select Database to Open window can be filtered. To use the filter, start typing the name of the database you want to open or the name of the matter with which it is associated.

Select Database to Open



Version 1.07+

- The databases can be sorted ascending or descending by Matter, Database, or Status by clicking on the corresponding column header.
-



Sorting by Matter, Database, or Status in Version 1.07+

6. Select the desired database and click **Open**.
7. The database name is displayed on a tab next to the Workspace or other open database tab(s).

To open a database .FYI file:

1. Double-click on the .FYI file that the administrator sent to you.
2. Enter your log on **User ID** and **Password** for the Concordance Desktop server where the database is located.
 - ✎ If you receive an error message when attempting to open a .fyi database, it may be that the database you are attempting to open is not the correct Concordance Desktop version, or the .fyi file may be corrupted. Contact your administrator for a new .fyi file.

To open a database on your own computer or on the server:

Double-click on the database **.DCB** file, to open the database in Concordance Desktop.

- ✎ If you are attempting to open a Concordance version 10.21 or earlier database in Concordance Desktop, you are prompted that the imagebase is not compatible with the Concordance Desktop imagebase, and given the option to update the imagebase.

If you receive a message stating that the database is not registered, contact the Administrator and ask them to register the database. If you are opening a file on a Mobile installation, then open the Admin Console and follow the instructions for registering a database found under "Registering/unregistering a database".

To close a database

Click the **X** in the upper-right corner of the **Workspace** pane.

Viewing records

There are three ways to display records in Concordance Desktop:

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

Browse view

The Browse view is the default setting for the Concordance Desktop window and allows you to read an entire document summary.

Use the Dynamic toolbar at the lower left of the Navigation pane to navigate between records. The document number and record count display in the Status bar. The document title displays in the window's title bar and is a helpful reference when reviewing lengthy documents. See also, Navigating in Concordance Desktop.

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

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

In the Browse view, you can customize the font and color of the field and record text displayed in the view, unless the record contains rich-text format. Changing the text font and color does not affect the record's original text, which is stored as a rich text file (.rtf) that keeps the original format secure. You or your Concordance Desktop

administrator can also customize the Browse view preference settings in the Preferences dialog box. Browse view setting in the Preferences dialog box are saved in your Microsoft Windows registry settings.

For more information about customizing fonts, see [Modifying fonts in the Browse and Table views](#).

For more information about Browse view preference settings, see [Defining preferences](#).

Table view

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

You can customize which fields are displayed in the view, as well as the field order, using table layouts. You can create multiple custom table layouts for the Table view. For more information about layouts, see [Using table layouts](#).

You can also modify the font and color of the record text displayed in the Table view. Changing the text font and color does not affect the record's original text, which is stored as a rich text file (.rtf) that keeps the original format secure. For more information about modifying fonts, see [Modifying fonts in the Browse and Table views](#).

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

The Table view also offers the Tally feature. The Tally feature is a great tool for gaining an item count for a specific field to help you organize your document collection and for quality assurance checks. For more information about the Tally feature, see [Searching by tally](#).

Split screen view

The Split Screen view allows you to display two views simultaneously. You can have the two views display from top to bottom or left to right. You can use the Split Screen for the Browse, Table, Review, and Edit views.

To use the Split Screen view:

1. On the **View** menu, click **Split screen** and then **Enable**, to activate the Split Screen view.
-

A check mark next to the Enable command indicates the Split Screen view is activated.

2. On the **View** menu, click **Split screen** and then **Left - Right** or **Top - Bottom**, to set the orientation of the Split Screen.

A check mark is displayed next to the selected orientation.

When you activate the Split Screen view, the currently opened view is displayed on the top when using the Top - Bottom command, and on the left when using the Left - Right command.

3. On the **Standard** toolbar, click the view button for the second view you want to display.

For example, if you have the Browse view open when you enable the Split Screen view with the Top - Bottom orientation, and then click the Table view button, the Browse view is displayed on top and the Table view is displayed on the bottom.

4. To modify the views, click the view you want to change and click another view button on the **Standard** toolbar.

The view containing your cursor, is the view that changes when you click another view button.

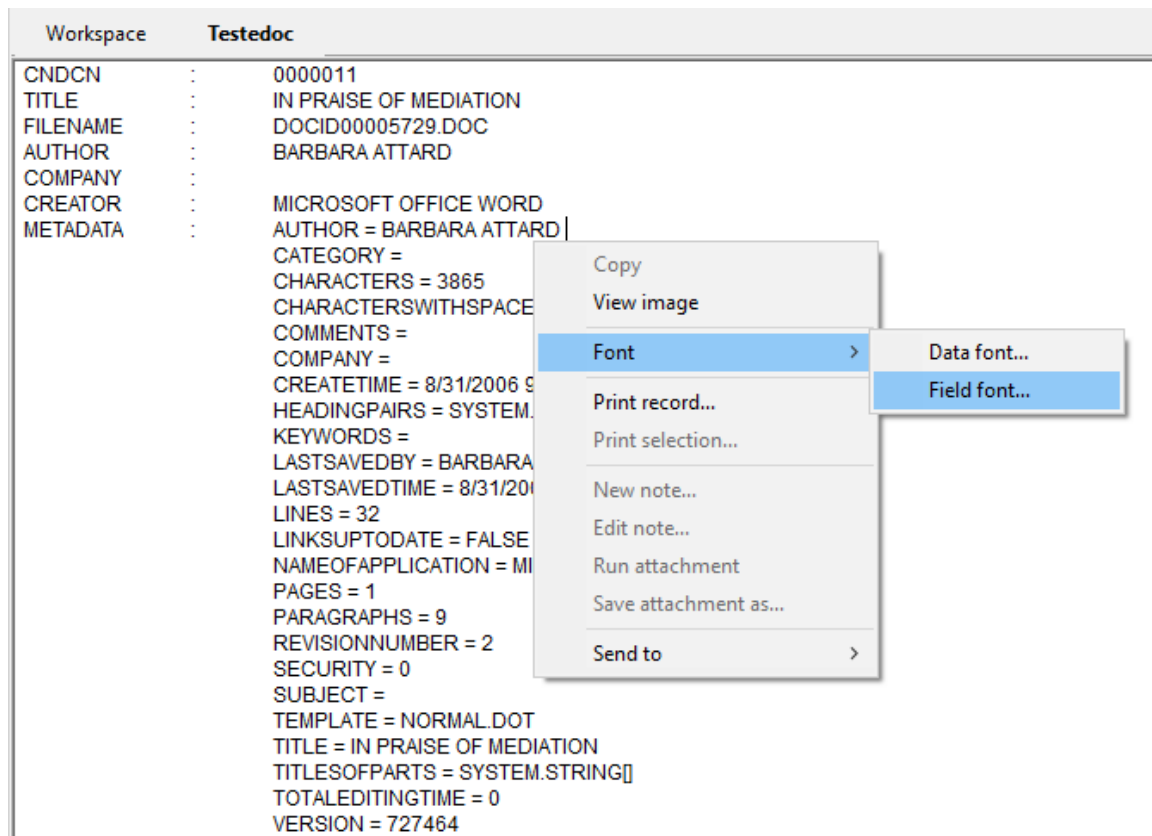
Customizing view fonts

In the Browse view, you can customize the font and color of the field and record text displayed in the view, unless the record contains rich-text format. You can also modify the font and color of the record text displayed in the Table view. Changing the text font and color does not affect the record's original text, which is stored as a rich text file (.rtf) that keeps the original format secure.

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

To change the field font in the Browse view

1. On the **Standard** toolbar, click the **Browse** view button.
 2. Right-click anywhere in the record text section of the **Browse** view.
-

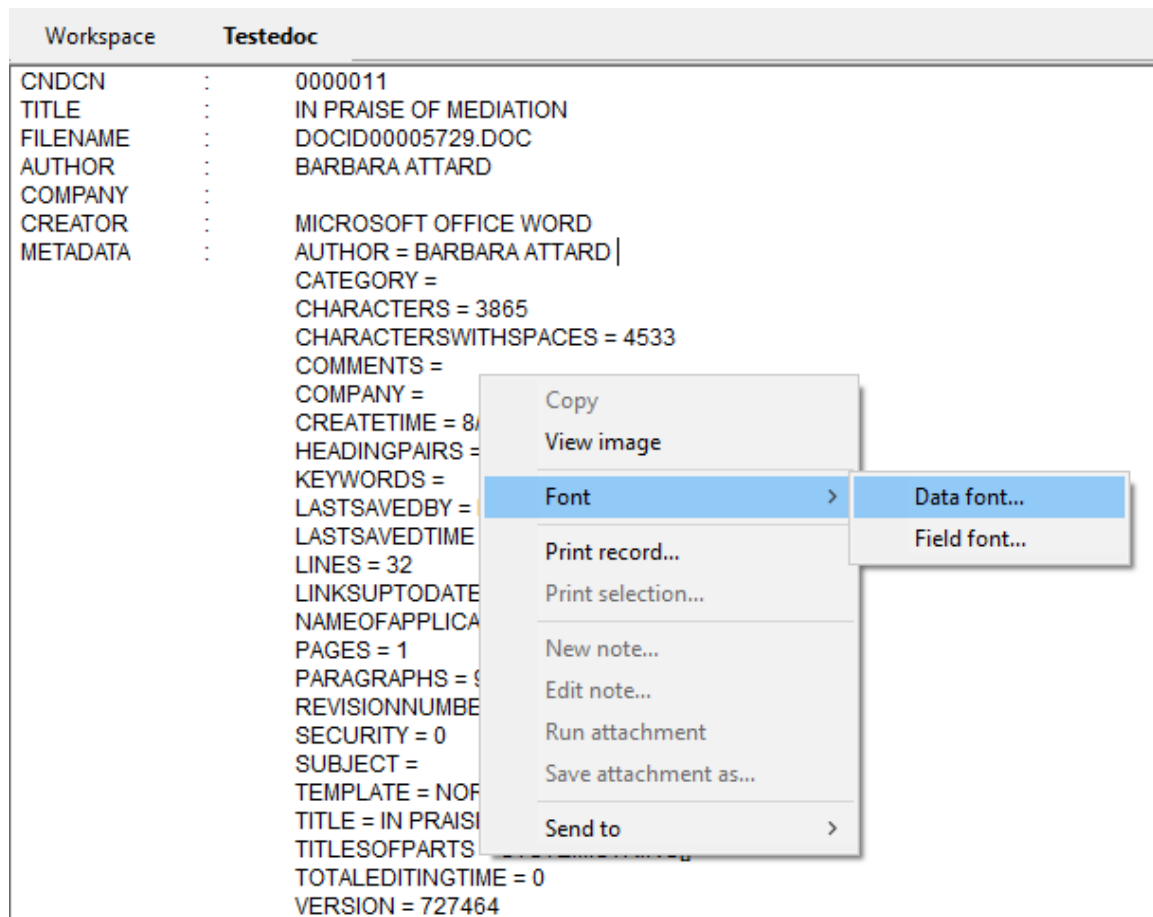


3. Point to **Font** and click **Field** font to open the **Font** dialog box.
4. Modify the font settings as desired.
5. When finished, click **OK** to save your changes.

The font changes apply to all field text displayed in the Browse view.

To change the record font in the Browse view

1. On the **Standard** toolbar, click the **Browse** view button.
2. Right-click anywhere in the record text section of the **Browse** view.



3. Point to **Font** and click **Data font** to open the **Font** dialog box.
4. Modify the font settings as desired.
5. When finished, click **OK** to save your changes.

The font changes apply to all record text displayed in the Browse view.

To change the record font in the Table view

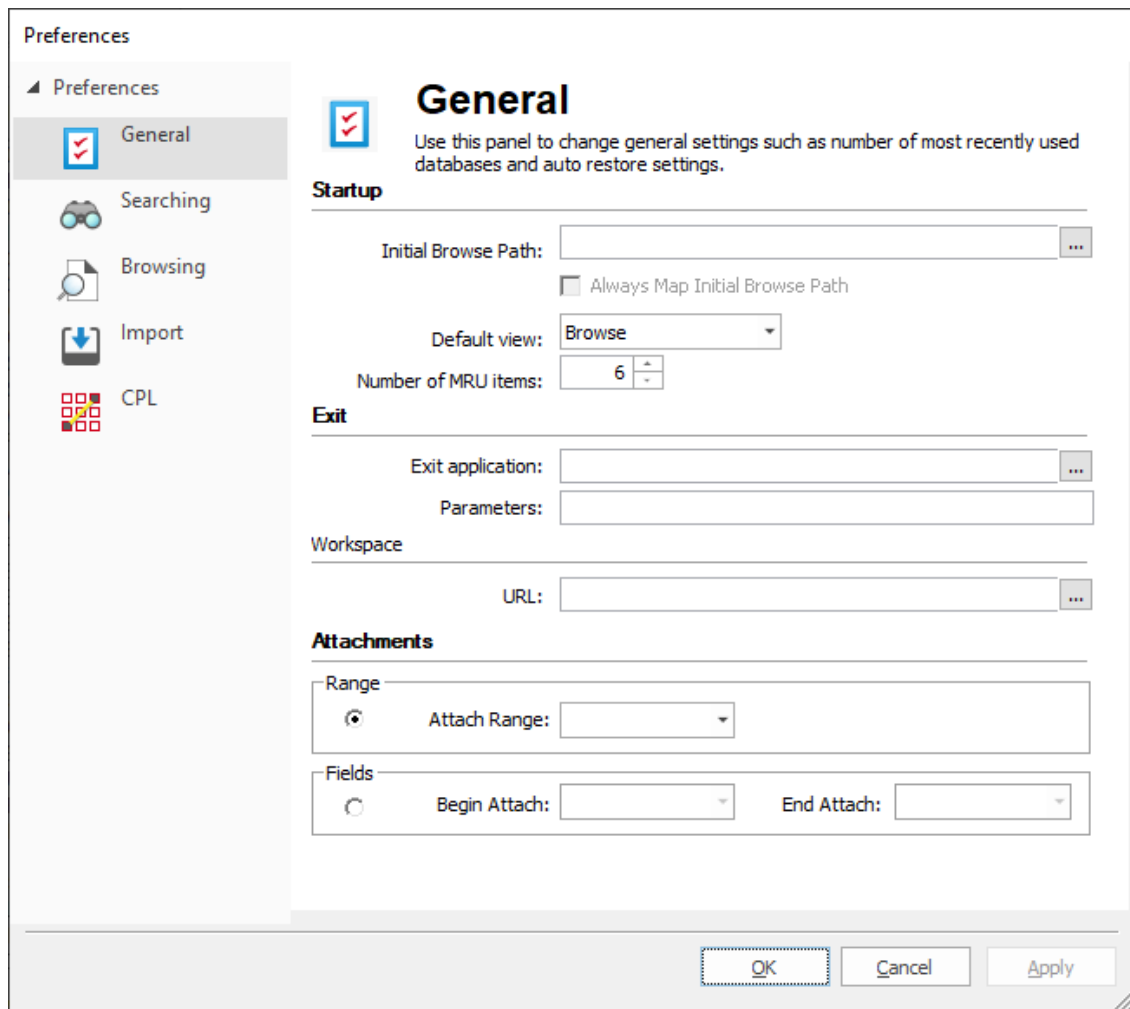
1. Click the **Table** view button on the **Standard** toolbar to open the **Table** view.
2. Right-click and click **Font** to open the **Font** dialog box.

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

- **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.

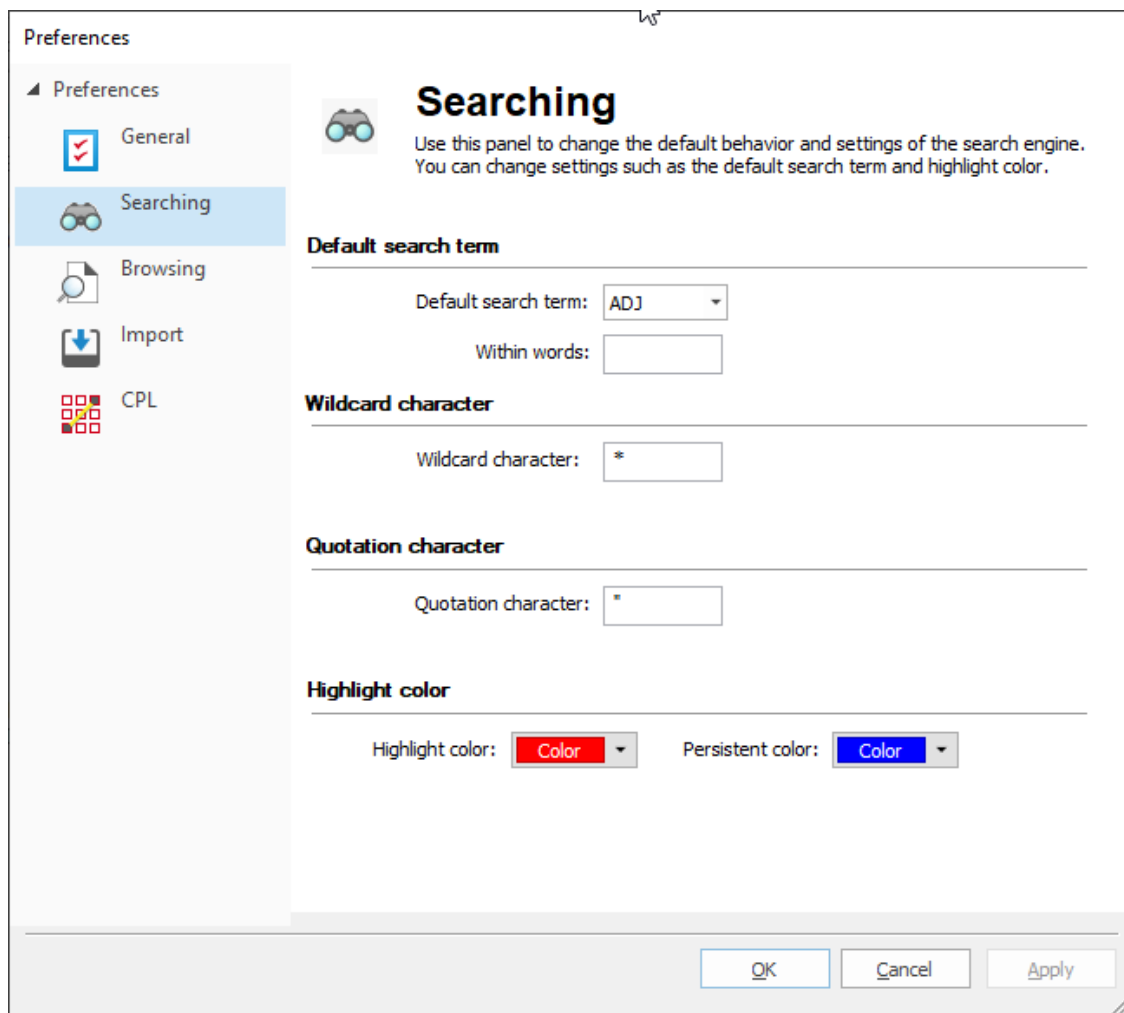
 When using the Find Attachments feature, it is best practice to setup the fields as paragraph type fields to increase the performance and make sure to index/reindex the database. For more information about the Find Attachments feature, see Finding attachments.

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 <tablename>_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.

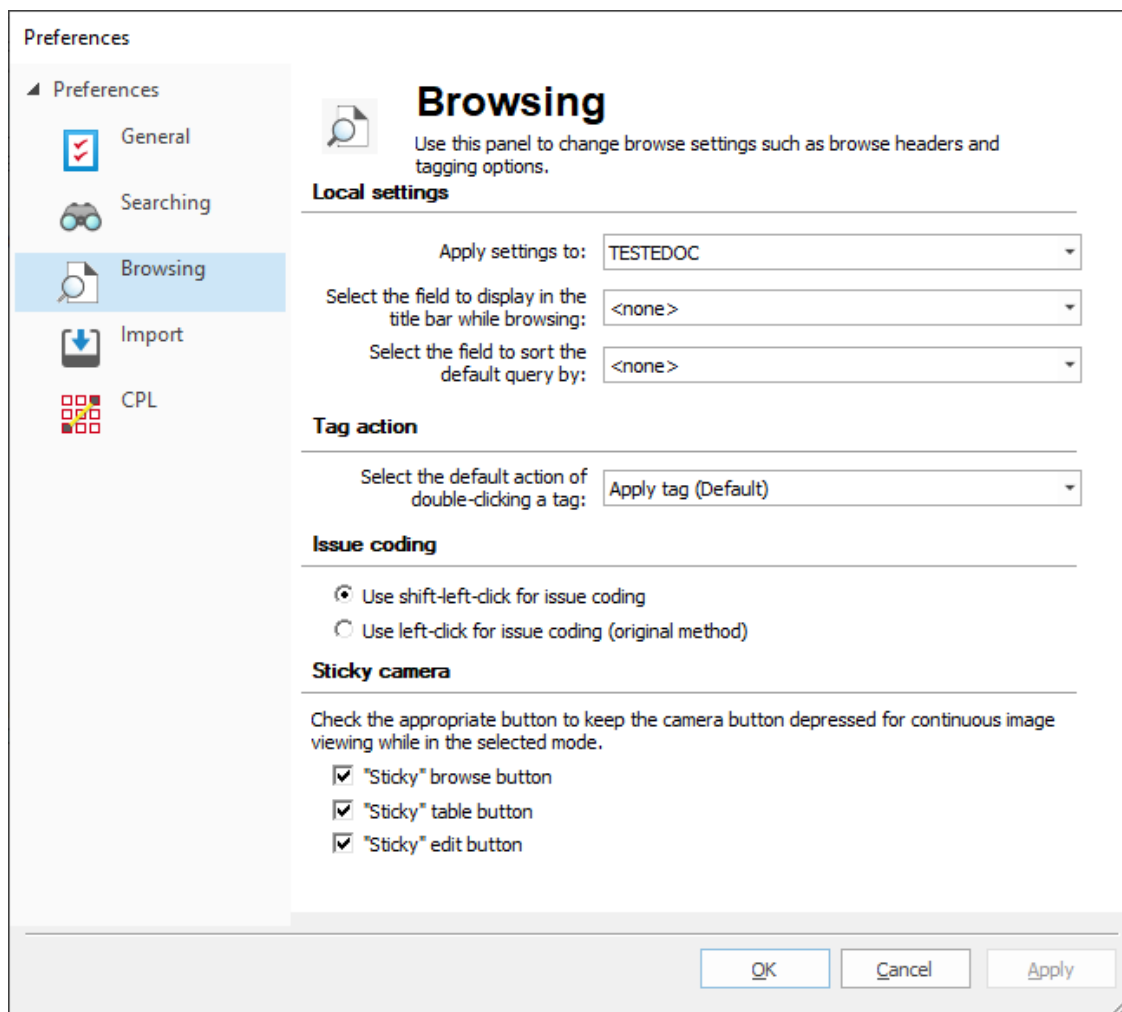
Clicking OK opens the *Changes may not be reflected until Concordance Desktop is restarted* message.

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 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.

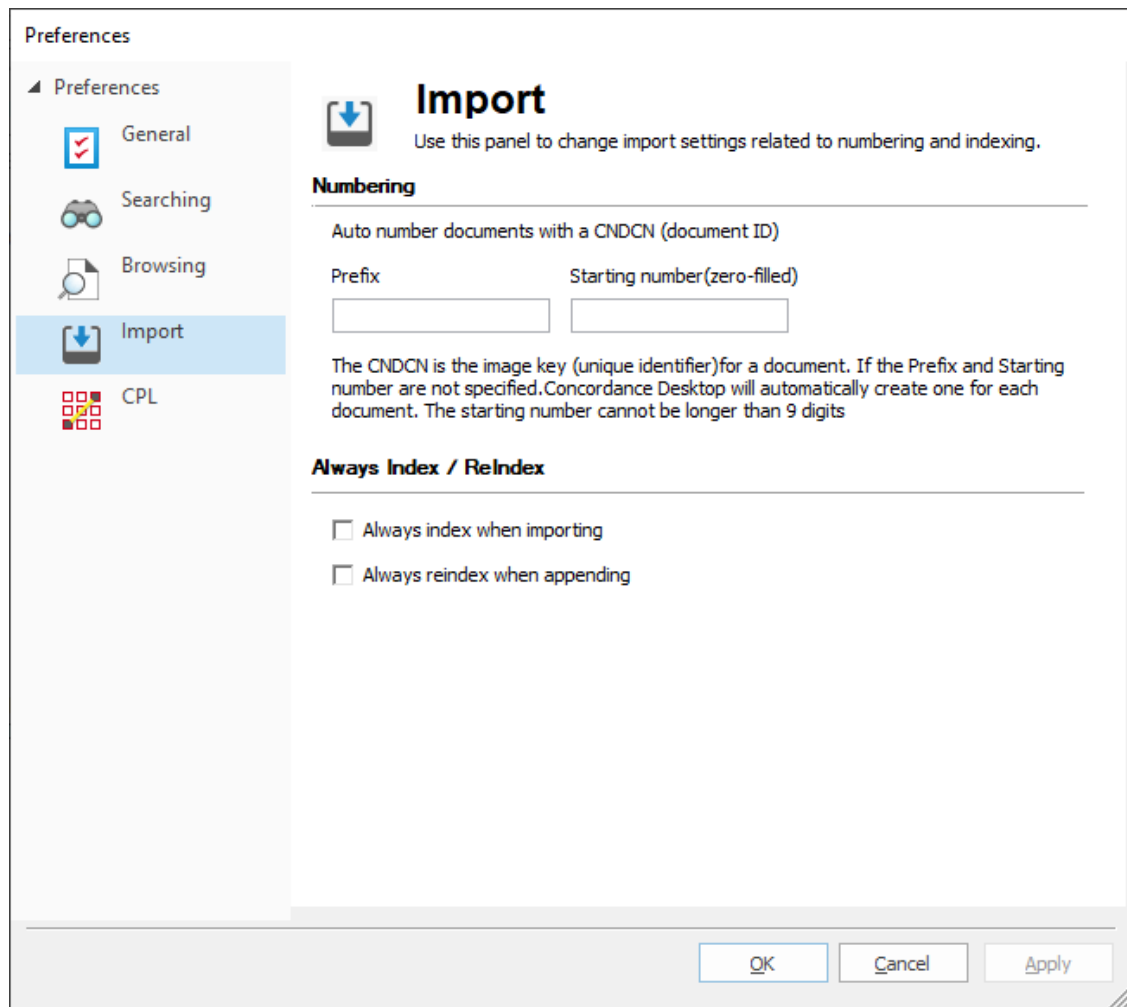
7. To turn off "**Sticky**" [view name] button function for a view, clear the check box for the view.
8. Click **OK** to save your changes.

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.

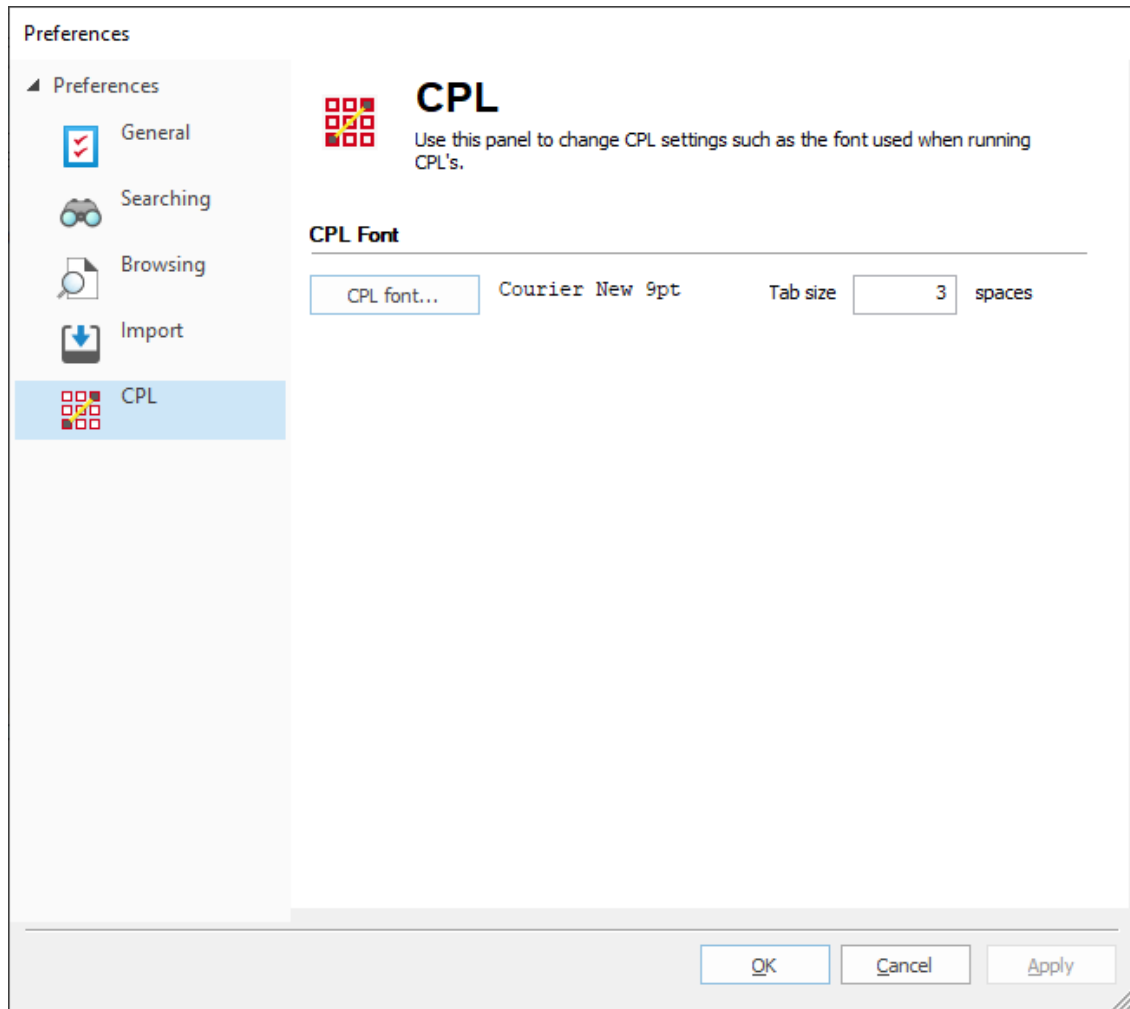
Zero fill your starting number to determine the desired number width. You can use up to 9 digits.

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**.
-

Concordance Desktop

User Guide

Document Review

Chapter

4

Document Review

Basic Searching

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

- **Full-text Searching**

Full-text searching is fast and produces results quickly because it searches for words based on index entries created when building the database. The index provides directions to words in the database dictionary and records are gathered for you to review based on search criteria. For more information, see *Running full-text searches*.

- **Relational Searches**

Relational searches scan every word of every record in a database and take longer than full-text searches, because Concordance Desktop must read every record to locate your entries and does not use an index. Relational searches are great for locating dates and numbers, whereas full-text searches are optimal for word searches. For more information, see *Running relational searches*.

When your Concordance Desktop administrator builds your record databases, the information is indexed for full-text searching capabilities. Once a record collection is indexed, a dictionary is created with additional filters that weed out unnecessary words, common English words, and even some punctuation, to improve search processing time. When reviewers make edits, redactions, or add new records to the database, the administrator must perform a reindex in Concordance Desktop to update your record collection.

All of this processing affects how up-to-date your full-text searches are on a database. However, this does not affect relational searches, because relational searches run off the entire database, not just the database index.

Administrators must perform indexing when reviewers are not working in Concordance Desktop, but a reindex process can be performed while users are working in a database.

To better understand full-text searching, it is important to understand the following functionality used in full-text searching:

Indexing and reindexing

When Concordance Desktop databases are built, the index and dictionary are generated from your document contents. The index contains directions to every word or character string in the database. The dictionary contains a list of every word or string of characters in your record collection, except words, punctuation, and/or field content your administrator specifically excludes from the dictionary.

A word is simply defined as any string of letters and/or numbers. A word does not have to be in a published dictionary to qualify as a word in a Concordance Desktop dictionary.

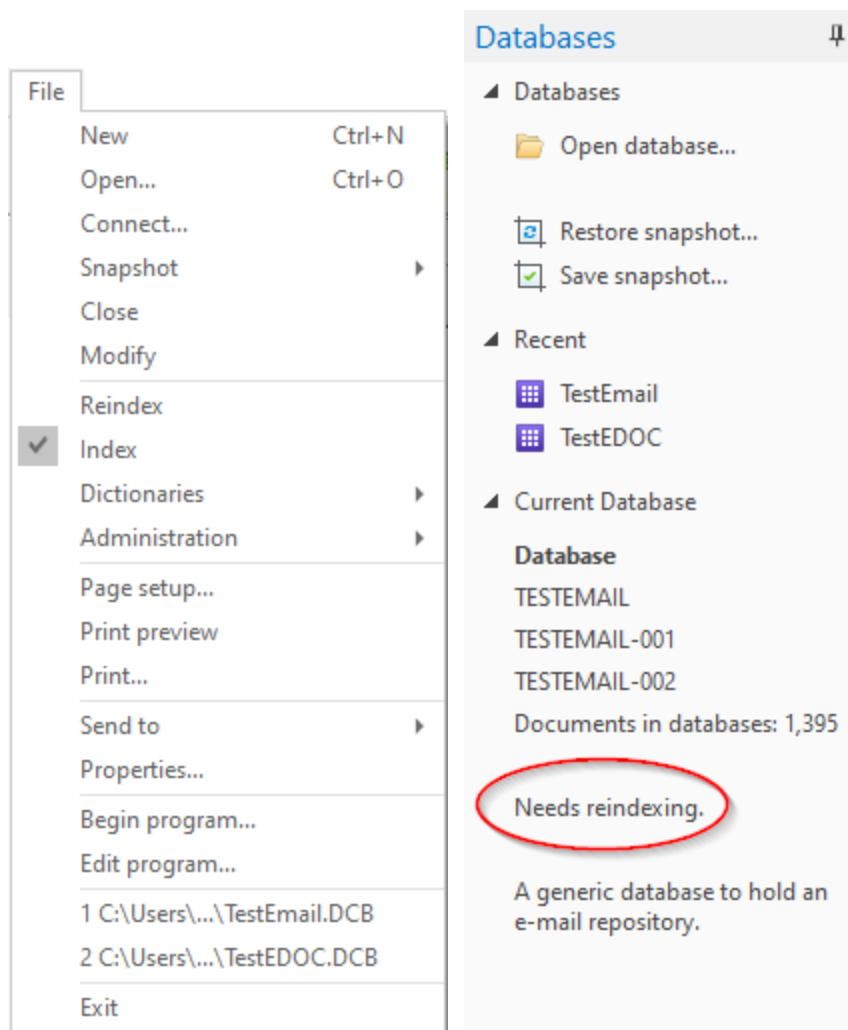
Example: *airforce1* or *ABC000001*

“Airforce1” qualifies as an index entry, including both letters and numbers. Spaces between characters disqualify it as a whole word; space between *airforce* and *1* would be read as two words. The same is true for *ABC000001*, a numbering scheme that is searchable and considered a word by Concordance Desktop.

In Concordance Desktop, we refer to an index update as a reindex. Reindexing updates the database dictionary and its corresponding index. Actively used databases need frequent reindexing to keep the index and dictionary entries current for searches.

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

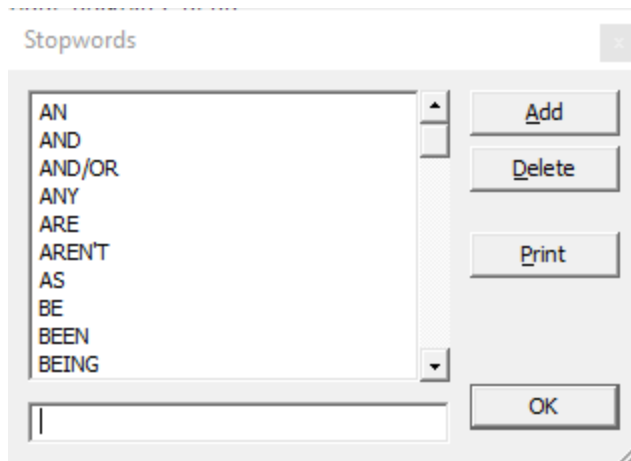
When updates have been made to a database and your database dictionary is no longer current with the latest updates, Concordance Desktop indicates that the database needs reindexing. On the file menu a check mark is displayed next to the Reindex command and *Needs Reindexing* is displayed in the Databases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



Stopwords

Concordance Desktop comes with a pre-defined list of stopwords for each database. Stopwords are words that are automatically excluded from a database's index. The stopwords list includes the most common words in the English language (for example: and, but, is, and the). Stopwords are words you would generally not search for. Eliminating these words from the index ensures that searches run faster and more efficiently. Stopwords lists can be modified by your database administrator. If you need a copy of a database's stopwords list, your administrator can print it out for you.

The stopwords list is maintained in the Stopwords dialog box. To access the Stopwords dialog box, on the File menu, point to Dictionaries and click Stopwords.



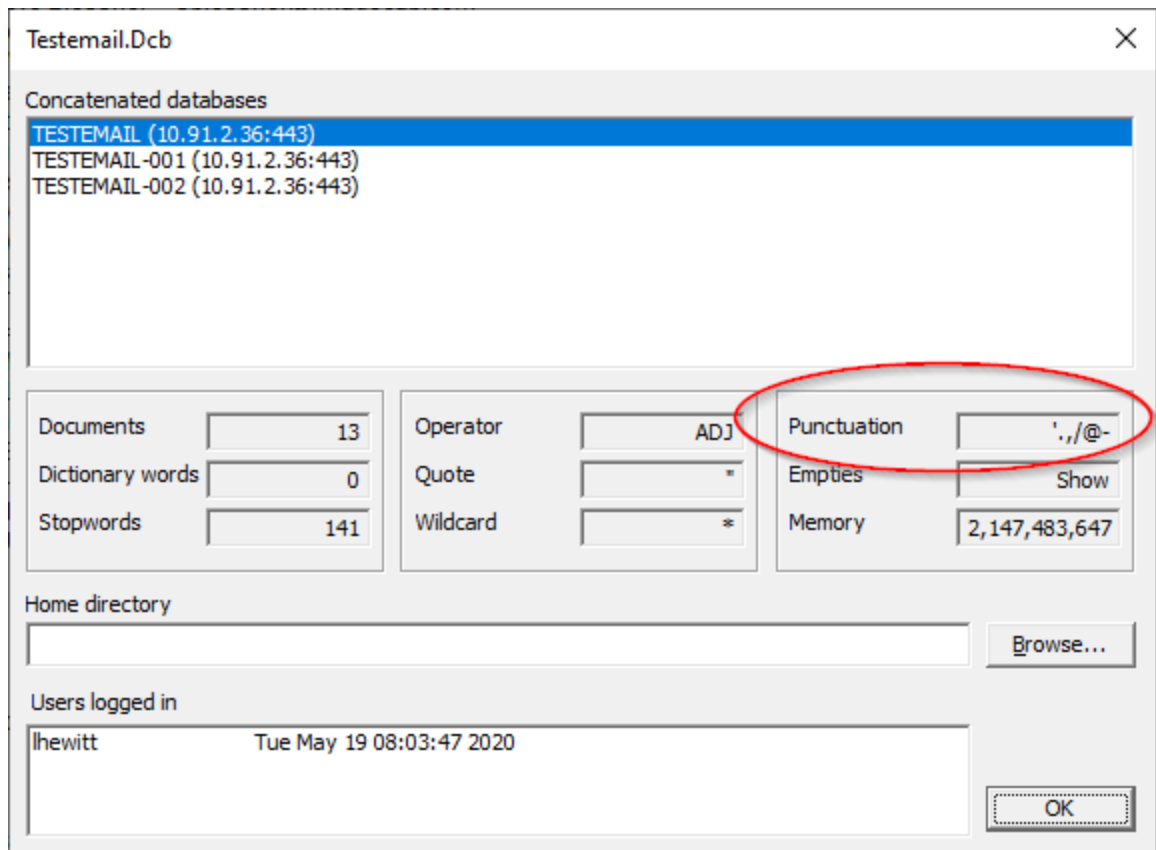
Punctuation

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

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

- Punctuation is entered in Concordance Desktop by your administrator to be indexed.
- Punctuation is embedded in a string of words.

Select File>Properties dialog to see the punctuation that is full-text searchable in a database (when it's embedded in a string of characters).



Examples of 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 often have possessive apostrophes embedded in their names and are added to the list because they are searched often.

john.smith@organization.com – The period and ampersand are both examples of embedded punctuation within an email address.

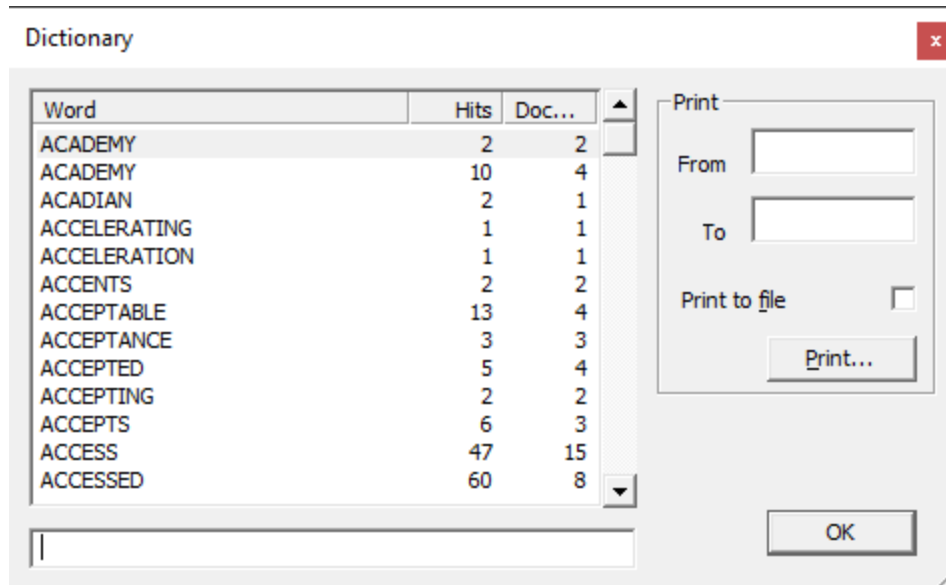
Contact your Concordance Desktop administrator if you have questions, need a listing of the punctuation used in your databases, or would like to modify the punctuation list.

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 added to help streamline your search queries.

The Properties dialog box provides a quick review of the number of words included in your dictionary, and also notes punctuation that is indexed. Punctuation is entered by your database administrator. You can only search on punctuation when listed in Properties dialog box and it's embedded in the word.

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



You can also access the Dictionary dialog box from the Search task pane by selecting Display the database dictionary under Options in the Advanced Search panel. This allows you to select words from the dictionary and add them directly into your search logic in the Advanced Search panel. You can also verify whether the word you are searching is included in the dictionary. If it isn't, then you may want to try another spelling or try a relational search.

Available search tools

Searching is a fundamental core component of Concordance Desktop, and there are a variety of tools to assist you in this process. You can use all of them, deciding which you prefer or produces faster results depending on the task and issue currently at-hand.

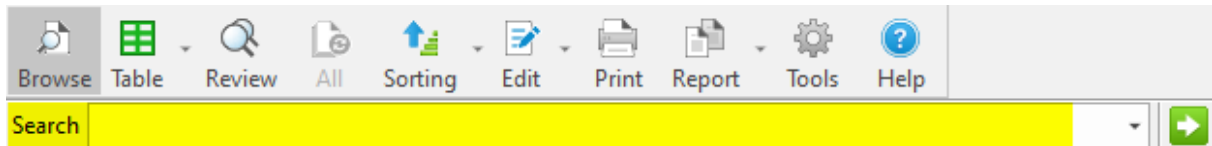
There are search tools for locating specific record content, each one specific to the type of search you are conducting:

- Quick Search (full-text and relational)
- Persistent Search (full-text)
- Find Attachments (full-text)
- Simple Search (full-text)
- Advanced Search (full-text and relational)

- Form Search (full-text and relational)
- ☑ When only searching documents, make sure that the View image (camera) button on the Dynamic toolbar is not activated, otherwise it will open images in Concordance Desktop Image.

Running quick searches

Quick Search is similar to using the Internet browser to locate information. Use Quick Search to find information quickly in the Browse or Table views without having to open the Search panel. You can use it for fast, simple searches or to copy and paste in complex search strings. Toggle the All button to switch between viewing all case records or those in your current query.



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

To run a quick search:

1. In the **Search** field, type the search value or string.

- ☑ You can enter up to 255 characters to build your query.

2. Click the **Go** button or press Enter to initiate the query.

All records containing the search value you entered are displayed in Table view, and the first record is displayed in the Browse view.

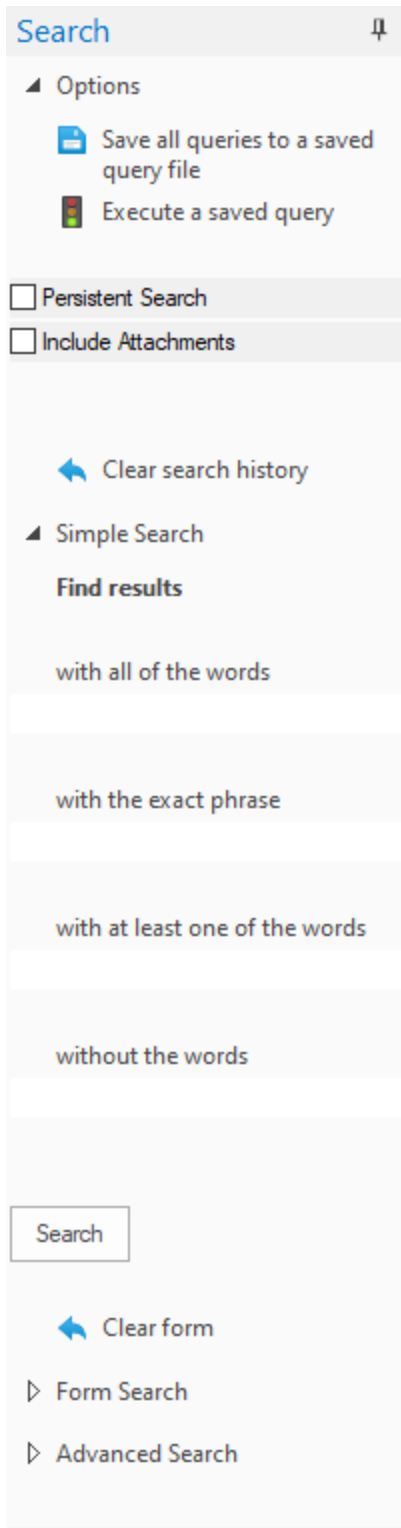
Notice that search value is highlighted in red in the Browse view. A search value highlighted in red is called a *hit* in Concordance Desktop.

3. To navigate to each hit in a document, click the **Next Hit** button.
 4. The **Search** field stores your recent quick searches. You can select, edit, and rerun any search stored in the Search field list. To access a recent quick search, click the **Search** field down arrow, and select the query. To rerun the search, click the **Go** button or press Enter.
-

Running simple searches

Simple Search is a great way for new Concordance Desktop users to jump right in and start searching records. Simple Search is designed similar to the Google Advanced Search query for familiarity. You can immediately locate information using the parameters provided in the task pane without having to use or learn about search operators.

Simple Search is available in the Search task pane in Concordance Desktop.



Simple Search is the most basic full-text search for a one-word query, reviewing the contents of all indexed fields, and finding an exact word match in seconds. You can also search for more than one word or phrases. Searching in Concordance Desktop is not case

sensitive, so you can type keywords in the manner that is most comfortable for you. You can enter up to 128 characters in a single search option field to build your query.

- 💡 Expand the width of the Search task pane, so that more text can be entered and viewing is easier. You can always resize the pane to a smaller setting once a document is open for review.

To run a simple search:

1. Open the **Search** task pane.
2. Open the **Simple Search** panel.
3. To expand your task pane for better viewing, drag the navigation pane bar to the right.
4. Enter your search criteria.

☰ Simple Search Options

Field Name	Definition
with all of the words	Conducts an <i>and</i> search to find document records containing all terms listed
with the exact phrase	Conducts an <i>adjacent</i> search to find document records containing terms found together
with at least one of the words	Conducts an <i>or</i> search to find document records containing any of the words listed
without the words	Conducts a <i>not</i> search to find document records that do not contain any of the words listed

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

5. Click the **Search** button to initiate the query.

All records containing your search criteria are displayed in the Table view.

The first record of the search results is displayed in the Browse view, and your search value is also highlighted in red in the Browse view. Use the Next hit and Previous hit buttons on the Dynamic toolbar in the Browse view to jump from one highlighted word to the next.

- ✎ When navigating search results in an ideographic language, like Chinese, one character can represent a word. Clicking the Next hit button jumps to the next character in the search results. For more information, see Navigating Search Results for Ideographic Languages.

The Status bar indicates the number of records found.

To remove Search criteria:

In the **Simple Search** panel, click the **Clear form** button.

Using persistent search

Save time during review using the new Persistent Search Hit Highlighting. Persistent Search stores a list of search terms that can be easily executed within a database to find records that contain the specified term(s) and highlights them in the Browse View. It is a search query, that when enabled, remains active even after the results are returned. The Persistent Search feature searches for the terms included in the <dbname>_Persistent.txt file and highlights term(s) in each record where they are found. To add terms to the Persistent Search text file, contact your Concordance Desktop Administrator.

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.

The color used to highlight the terms found in the record from the list of terms in the <dbname>_Persistent.txt file is set on the Searching tab in the Preferences dialog box. For more information, see Defining preferences.

- ✎ If you use a space in a persistent search term, the hit highlighting displays as red, instead of the color you have set.

The screenshot shows the Testedoc software interface. The Search pane on the left has the 'Persistent Search' checkbox checked and circled in red. The main workspace displays a document with search results for 'retention' highlighted in blue. The document content includes a date of June 15, 2000, and a subject line 'Oil Release from Unit 3 Mist Eliminator'. The body text describes an incident involving an oil sheen detected at a retention pond, with details about the investigation and actions taken.

Persistent Search terms highlighted in the Browse View

- ✍ The Persistent Search feature may be run in conjunction with the Quick, Simple, 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.

The Persistent Search text file, *<database name>_Persistent.txt*, is stored in the corresponding database folder and accessed only by the associated database. In the case of concatenated databases, the Persistent Search text file associated with the primary database is used for all the databases in the concatenated set.

The Activate button can be used with the Persistent Search option to run previous search queries. If the Persistent Search option is enabled in the Search pane and then the Activate button is selected in the Review view, Concordance Desktop returns all the records that contain both the terms in the query and the Persistent Search text file. For more information, see Running previous search queries.

- ✍ When adding words to the persistent text file that include 16 bit characters, such as Korean, Chinese, etc., save the text file as UTF16 instead of ANSI, so that the 16 bit characters are supported.

- 📍 When combining Persistent Search and other search options, make sure that the Persistent Search option is enabled before running any additional queries. However, Persistent Search is automatically disabled after executing the Find Attachments command.

- ✍ The Review view does not list the Persistent Search terms in the Search Terms(s) column; however, the Number of Hits column does count the terms in the total number of hits.

To enable/disable persistent search:

1. To enable Persistent Search, do one of the following:
 - From the Search menu, click **Persistent Search**.
 - In the Navigation pane, click the **Search** tab to open the Search task pane, and then in the Options section click the **Persistent Search** check box.
 2. To disable Persistent Search, do one of the following:
 - From the Search menu, click **Persistent Search**.
 - In the Navigation pane, click the **Search** tab to open the Search task pane, and then in the Options section clear the **Persistent Search** check box.
- 📍 If you click the 'All' button on the standard toolbar, all the records in the database are returned and Persistent Search is automatically disabled. Click the All button a second time to reactivate the Persistent Search.

To use persistent search with another query:

1. Do one of the following to enable Persistent Search:
 - From the **Search** menu, click **Persistent Search**.
 - In the **Navigation** pane, click the **Search** tab to open the **Search** task pane, and then in the **Options** section click the **Persistent Search** check box.
2. Enter the new search query using Quick, Simple, or Advanced Search features. For more information, see Running quick searches, Running simple searches, Using the Advanced Search panel.

The search results returns all records having one or both the search term and the term(s) listed in the *<databasename>_Persistent.txt* file.

3. To return to all the Persistent Search results, in the **Search** field type *0*.
4. To return to all the documents in the database, on the Standard toolbar, click the **All** button.

Finding attachments

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

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

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


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

[To locate documents and related attachments:](#)

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

To run a query and include all documents and attachments:

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

Advanced Searching


There are two ways to query a Concordance Desktop database: full-text and relational. Each method has a distinct purpose in locating information efficiently. But both methods can be combined and used in the Quick Search bar and the Advanced Search panel.

Full-text searching is the faster search method in Concordance Desktop, enabling you to examine the contents of free-text paragraph fields using words and phrases with various search operators and parameters narrowing the query results. Relational searching is used to query fixed fields, most commonly defined as numeric, date, or fixed-length text. One of Concordance’s most powerful features is its ability to combine these search methods, allowing you to search both field types at once — saving critical review process time by maximizing your query potential.

Searching Benefits: Full-text versus Relational

Searching Benefits: Full-text Versus Relational	
Full-text	Relational
Searches the dictionary, uses index to display words from dictionary search	Searches the database in real time
Very fast	Slower (depending on size of database)
Highlights hits in red	Does not highlight hits
Can only be used to search indexed fields	Can search any field, indexed or not

Searching Benefits: Full-text Versus Relational	
Full-text	Relational
Easy to search multiple fields at once	Searches one field at a time (Unless fields groups are established in the .INI file)
Used more often to find words	Used more often to find dates, numbers, ranges, comparisons
Cannot be used on date fields	Can find specific dates or a range of dates within limits or outside limits
Often used on paragraph fields	Normally used on paragraph fields only to find empty/not empty fields OCR1 EQ "" finds empty fields OCR1 NE "" finds populated fields
Cannot be used until the database has been indexed. Will not find new data until database has been reindexed.	Can be used whether or not the database has been indexed
Cannot be used to find stopwords, since they are not in the dictionary	Can be used to find stopwords
Uses the * wildcard character. Can be used before or after the word.	Uses the * wildcard character only at the end of a word. Use the ? wildcard character, to replace a single character in the middle of a word and in data searches.
Always searches the complete contents of paragraph fields	Only searches the complete contents of paragraph fields when using CO and NC operators

-  In the Browse view, you can distinguish between the different fields:
- Non-paragraph fields are preceded with an equal sign =
 - Paragraph fields are preceded with a colon :

Running full-text searches

A full-text search is designed for text and words, and is the most flexible search feature provided by Concordance Desktop. A full-text search uses the database's index to quickly sift through every word entry (of every record) entered in the database index dictionary – similar in design to the Google search engine, which is also based on indexing. Your

Concordance Desktop index is generated after your record collection is entered into the database. The dictionary is created during the indexing process and includes every word in indexed fields, except for stopwords, to improve searching speeds.

Terms entered in the search are highlighted in the record (red is the default color setting) and are referred to as a *hits*. You can quickly navigate to every hit in a given record by using the Previous Hit and Next Hit buttons on the Dynamic toolbar.

There are three sets of operators and one wildcard you can use for full-text searches:

Boolean (document level)


Boolean operators are based on the binary logic used in computers today, producing strict true or false results. In Concordance Desktop, Boolean operators search at the document level. The most common Boolean operators are: AND, OR, and NOT. The search is not case sensitive, so you do not have to enter all caps for the Boolean operators.




Table of Boolean Operators

Boolean Operators		
Operator	Query	Results
AND contains both words	milk AND coffee	All documents with both the words: milk and coffee
OR contains either word	milk OR coffee	All documents with either milk or coffee, or both
NOT contains first word, but not second	milk NOT coffee	All documents with milk, but not coffee
XOR	milk NOT/OR coffee	All documents with milk or coffee, but not both words

Boolean search operators are used in the Simple Search panel, but the operators are hard-coded for you.

 Typing spaces between words is important to separate the word you are searching from the operator word (AND, OR, NOT). For example, type spaces where you see the underscore: milk_AND_coffee.

 Using XOR saves time in locating documents by combining two separate word searches into one, pulling all documents that either have *milk* or *coffee* in them, but not *milk* and *coffee* in the same record.

Context (field level)

Context operators are great for locating authors and recipients of records, if these fields are entered in your database. Context operators search at the field level. If you are searching the AUTHOR and RECIPIENT fields for a particular name, the query results will be a list of documents to and from that person. The search is not case sensitive, so you do not have to enter all caps for the context operators.

Context operators include SAME and NOTSAME qualifiers including or excluding fields. The SAME and NOTSAME operators are not commonly used, but field limiters are used frequently to narrow a search for a particular field or to omit fields, saving valuable search processing time.

Table of Context Operators

Context Operators		
Operator	Query	Results
SAME	DOCTITLE SAME bank	Both terms exist in the same field
NOTSAME	DOCTITLE NOTSAME bank	Both terms never exist in the same field
Field Limiters .FIELD. ..FIELD.	cowco.DOCTITLE. correspondence.doctype. cowco..ocr1. memorandum..doctype.	Looks in the named fields Looks in all other fields except for the named field

Example: cowco.ocr1.

This query searches for cowco in the ocr1 field.

Example: milk SAME coffee

This query searches for documents where milk and coffee are both found in the same field. If they occur in the same document, but not in the same field, the document is ignored.

- ✍ Typing spaces between words is important to separate the word you are searching for from the operator word (SAME, NOTSAME). However, when you are using the periods/field limiters, you want to skip spaces and type the words and periods together in a tight search string, because the periods are a coding language for specifying the inclusion or omission of a field (milk..ocr1.). If you add a space between *milk* and *..ocr1*, the application will not read your search query.
- ✍ A context operator search with *word..fieldname*. locates the word with an exclusion. The word can still exist in database records, it is just not part of your specific search. For example, a search for *milk..ocr1*. locates *milk* in all fields, except for ocr1. This search is helpful for locating keywords in metadata fields, excluding a search on the record's body content.

Proximity (word level)

Proximity operators search at the word level and are useful when looking for content that appears in records either in direct succession or adjacent order, or in close succession to each other within a specified range. You can add a qualifying number from 0 to 255. This number refers to the maximum number of intervening indexed words, excluding stopwords.

Table of Proximity Operators

Proximity Operators		
Operator	Query	Results
ADJ (default operator)	milk ADJ programs	Both terms are immediately next to each other and in the order specified Produces the same results as typing <i>milk programs</i>
ADJ25	milk ADJ25 programs	Both terms appear within 25 words of each other ADJ# operator has a 255 word limit

Proximity Operators		
Operator	Query	Results
NEAR	milk NEAR programs	Both terms are within close range of each other regardless of order, i.e. <i>programs for milk</i>
NEAR255	milk NEAR255 programs	Both terms appear within 255 words of each other NEAR# operator has a 255 word limit

The default Proximity operator is ADJ. So a search for *file note* is actually searching *file ADJ note*. This selection can be customized by your Concordance Desktop administrator for your personal searches, as needed.

- ✍ Typing spaces between words is important to separate the word you are searching from the operator word (ADJ, NEAR). For example, type spaces where you see the underscore: `file_ADJ_note`.
- ✍ Proximity operators are hard-coded into the Form Search tool.

Wildcard (field and character masking)

Searching for people's names can be complicated. Names can be misspelled or include variations of punctuation. You'll want to investigate the method used at your organization for entering names into your Concordance Desktop databases. This helps you determine how to search to ensure that you do not exclude any possible variations of someone's name.

If you are searching for a name in an email database, you will notice that there are many email address formats depending on the Internet service provider's account type. You may miss a critical record in an email address search if you are not careful about how you query it. Using wildcard characters helps ensure that the recipient name is located, regardless of the email format.

Examples:

- `jsmith@organization.com`
- `J_Smith@organization.com`
- `john.smith@organization.com`
- `jsmith@gmail.com`

Names in documents are also easily misspelled and could be overlooked if apostrophes and initials are combined in records. Using a wildcard symbol as a substitute for a character or series of characters, masks the individual character fields in words creating a broader search with stronger results.

Table of Wildcard Characters - Full Text

Wildcard Characters - Full Text		
Character	Query	Results
Asterisk (*) replaces a character at the beginning or end of a search string	*count*	Finds <i>account</i> , <i>accountant</i> , <i>country</i> , <i>countries</i> , and <i>discount</i>
	milk.ocr*	Searches ocr1, ocr2, ocr3, etc.

💡 When searching for a person, think about all the fields in which this name might be printed or referenced, and also become familiar with the field titles used in your databases, as these can vary. For instance, when searching for *Weller* in one database, it may be necessary to specify the To and From fields. In another database, you may need to search in the Author and Recipient fields.

✍ Search strings that do not include white space are limited to 64 consecutive characters.

Using the Advanced Search panel


The Advanced Search panel allows you to type longer, complex search strings. You can still conduct simple, one-word searches as well. The added benefit of using Advanced Search is your query results also display the number of word hits found and how many documents it appears in. The hits and document counts are listed in the Hits and Docs columns in the Results field on the Advanced Search panel.

Reviewing your search results:



- A summary of your search results are displayed in the Results field.
 - The Results pane displays the search results for each individual term, and the search results for the entire search string. After running your query, the search results for the entire search string is displayed in the last row of the Results field and is highlighted in gray.
-

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

You can enter up to 255 characters to build your search logic in the Advanced Search panel. If a complex search string exceeds this limit, you may want to run two separate searches and later combine them in the Review screen using the search numbers.


Search 

▲ Options

-  Save all queries to a saved query file
-  Execute a saved query

Persistent Search

Include Attachments

 Clear search history




▷ Simple Search

▷ Form Search

▲ **Advanced Search**


Options

Search database and notes ▼

-  Display the database dictionary
-  Display a list of available fields
-  Display a list of words that sound like the selected word

Results

T.	H	D

Search 

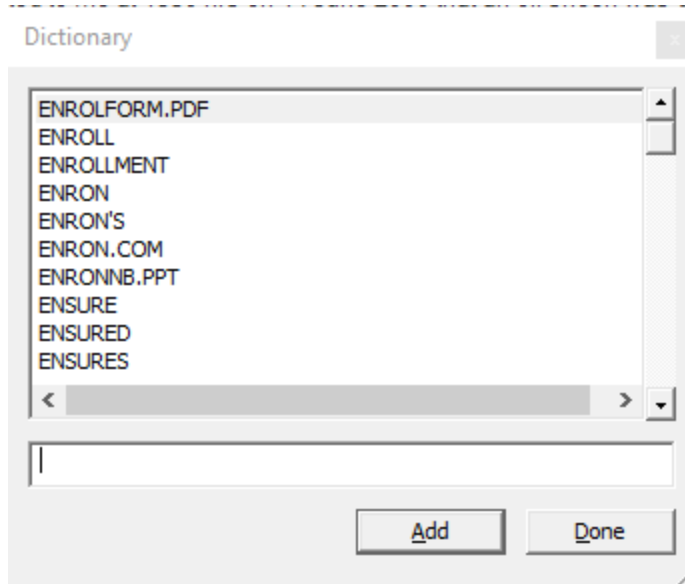
The Advanced Search panel also contains more tools to assist you with your case review:

- Display the database dictionary
- Display a list of available fields
- Display a list of words that sound like the selected word

Using the Dictionary

Use your database dictionary to search for keywords and also to add dictionary entries directly into a search string in the Advanced Search panel. You can also use your dictionary to see if a word already exists in the dictionary. If a word is not in the dictionary, use relational searching.

The dictionary contains every word, other than stopwords, in the database since the last time it was indexed or reindexed. If the database is concatenated, the dictionary feature displays only words in the primary database.



To open the Dictionary list:

1. In the **Search** task pane, do one of the following:
 - In the Advanced Search panel, click the **Display the database dictionary** link.
 - Click the **Form Search panel** to open the **Query by Example** dialog box, and click the **Dictionary** button.
2. In the Dictionary dialog box, scroll through the dictionary list or type the first letters of a word to scroll directly to that entry.
3. To add words to the search string, do one of the following:

- Select the word, and then click **Add**.
 - Double-clicking the word.
4. When finished, click the **Close** button.

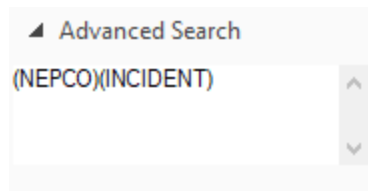
The maximum length of a dictionary word is 64 characters. Due to this limit, only the first 64 characters of a long word are included in the dictionary. Since the full word is not listed, it may not be found in the database. For example, including the file name and path in a word can create a word longer than 64 characters, and the full word will not be found in the database.

Adding Dictionary words to search queries

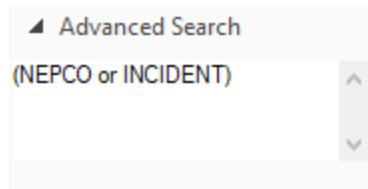
If you have a list of common words for your review, you can quickly locate the words in the dictionary and run a search query for each of the words in the Advanced Search panel to identify how many times these words appear in records, and to locate the applicable documents.

There are two ways to add a dictionary word in the Dictionary dialog box to a search query in the Advanced Search panel. You can select the word and click the Add button, or double-click the word. If you are adding multiple words at once to a search query, double-clicking the words also automatically adds the OR search operator, so pay attention to how you add dictionary words to a query, as it affects your search results.

Example: Dictionary words are added as adjacent (ADJ) words in the Advanced Search field if you add the words separately or by clicking the Add button in the Dictionary dialog box.



Example: Dictionary words are added with the OR operator to the Advanced Search field if you add multiple words at one time by double-clicking the words in the Dictionary dialog box.



To add dictionary words to a search query:

1. In the **Advanced Search** panel, click the **Display the database dictionary** link to open the **Dictionary** dialog box.
2. Scroll to and select the words you want to add to your search query.

To quickly search for a word in the dictionary, you can type all or part of the word in the field below the dictionary list to locate a word. For example, if you type *c*, the dictionary automatically scrolls to the first word in the dictionary that starts with *c*.

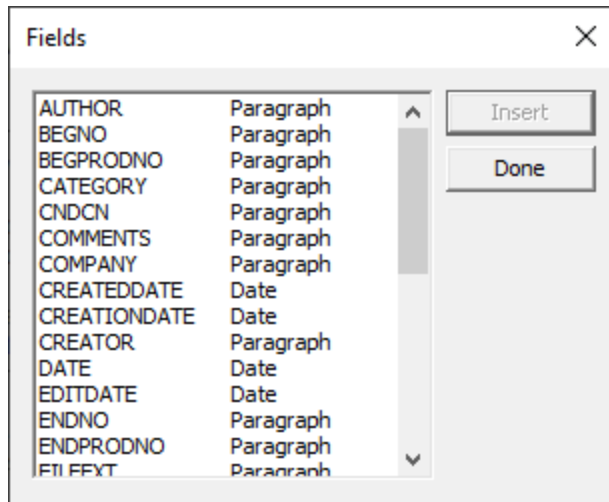
3. Double-click the dictionary word or click the **Add** button to add the word to the **Advanced Search** field.

When you double-click multiple dictionary entries at one time, rather than clicking the Add button, Concordance Desktop automatically inserts the OR search operator into the search query. When you add multiple dictionary words separately or by clicking the Add button, Concordance Desktop treats the words as adjacent (ADJ) words in the query. Pay attention to how you add dictionary words to a query, as it affects your search results.

4. Click the **Close** button to close the **Dictionary** dialog box.
5. In the **Advanced Search** panel, click the **Search** button to run a query for records containing the selected words.

Searching by fields

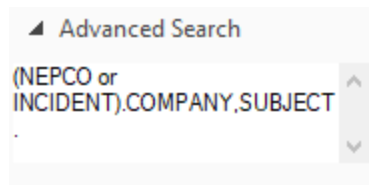
Field search narrows a query to a specified field in the active database. You can view the fields in a database and add field entries directly into a search string in the Advanced Search panel of the Fields dialog box. Referencing your Fields dialog box is a great way to verify exactly what your database field names are. For example, searching for *goniff*.TO*. when the field is actually named *RECIPIENT* will not return any search results.



To add fields to a search query:

1. In the **Advanced Search** panel, click the **Display a list of available fields** link to open the **Fields** dialog box.
2. Locate and select the fields you want to add to your search query.
3. Double-click the field or click the **Insert** button to add the field to the **Advanced Search** field.

Concordance Desktop automatically inserts the field limiters into your search string and separates the additional fields with commas.

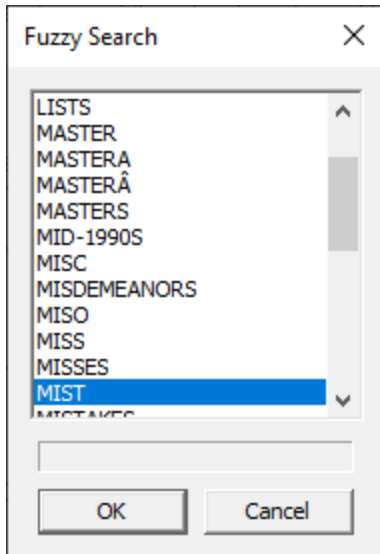


4. Click the **Cancel** button to close the **Fields** dialog box.
5. In the **Advanced Search** panel, click the **Search** button to run a query for records containing the selected fields.

Searching Fuzzy words

Fuzzy searches are great for finding misspelled words. A fuzzy search looks for homonyms in the database dictionary; finding words that *look like* and *sound like* your term. For example, *milk*, *mild*, and *mike* are homonyms. You can view the words similar to your search term and add these fuzzy word entries directly into a search string in the Advanced Search panel in the Fuzzy Search dialog box.

Fuzzy searches provide a 65 percent character match for each word, offering a list of best guesses. If you combine this search with asterisks around the *word*, you will get more fuzzy results.



To add fuzzy words to a search query:

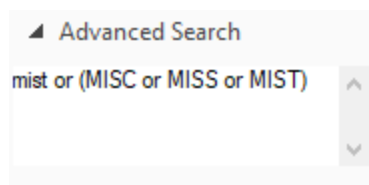
1. In the **Advanced Search** panel, type the word you want find homonyms for in database dictionary.
2. Click the **Display a list of words that sound like the selected word** link to open the **Fuzzy Search** dialog box.
3. Locate and select the words you want to add to your search query.

You can select multiple words in the Fuzzy Search dialog box. To select multiple individual words in the list, use CTRL+click. To select a block of words in the list, use SHIFT+click.

4. Click **OK**.

Clicking **OK** adds the selected words to the **Advanced Search** field and closes the **Fuzzy Search** dialog box.

When you add multiple fuzzy word entries at one time, Concordance Desktop automatically inserts the *OR* search operator into the search query.



5. In the **Advanced Search** panel, click the **Search** button to run a query for records containing the selected fields.

Running relational searches

Relational searches query the entire database in real time. This search is based on a specified field for a specified value, scanning every record in the database (usually only one field). Relational searches are primarily used to search unique value fields, Bates numbers, dates, fixed-length text fields, and other short fields.

Relational searching does not require an indexed database to search current data. Unlike full-text searching, you can search on all punctuation and stopwords in the database. Because Concordance Desktop is searching the actual database data in real time, and not a dictionary or index, relational searching can take longer than full-text searching.

Relational searches can be done on full-text fields, but it is best practice to use full-text searching for full-text fields when you can to save time.

Relational search results are not highlighted in red. Instead, you receive a list of records containing your query results in the Table view. It is best to try initial queries in a full-text search before conducting a relational search to ensure you are using the dictionary when you can.

- ❑ Field Groups are not supported in relational searching. Use full text searching for Field Groups.

Syntax

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

field name OPERATOR data value

The fixed field name to search

A relational operator

The selection criteria

Example:

ISBM = 0-477-01-482-8

The sample query searches the ISBN field in every record in the entire database for a value equal to 0-477-01482-8. Relational searches can run faster if you combine them with a full-text search:

```
wonder wheels and date <= 4/25/1994
```

In this case, the fixed fields are examined only in the documents located by the full-text portion of the query. The result line for the date query would apply only to the documents that contain wonder wheels. It is not an indication of all possible matching dates in the database.

Concordance Desktop provides ten relational operators for relational searches. Like full-text queries, relational searches are not case sensitive. You may enter your search in upper, lower, or mixed-case letters. You can search for a subset of characters in a field, for a partial match of characters, or for an exact match.

Concordance Desktop allows you to use wildcard characters in fixed fields. You can use a wildcard to mask single characters (?), or to mask the remainder of a word (*). The masking capability is not available when selecting on numeric fixed-length fields.

Searching for multiple values

Search for several values at once by separating them with commas. Spaces between the values are optional. If you are searching for a value, which itself has a comma in it, then the value must be placed in quotes.

Example: AREACODE = 213, 818, 310, 714

Relational Operators

There are ten relational operators available in Concordance Desktop. These operators compare your search criteria with the contents of the fixed field specified in your query. Some of the relational operators have a symbolic equivalent, such as *eq* and *=*, both of which mean *equal to*. These may be used interchangeably and are listed below. When performing a relational search you want to type the field first, then the data value you are searching.

Relational Search Format

field name OPERATOR data value

Relational Operators reference table

Relational Operators		
Symbol	Abbreviation	Description
=	EQ	Equals
<>	NE	Not equal to
>	GT	Greater than
<	LT	Less than
>=	GE	Greater than or equal to
<=	LE	Less than or equal to
\$	CO	Contains
!	NC	Does not contain
(no symbol)	WL	Within limits, includes stated values
(no symbol)	OL	Outside limits, excludes stated values

Typing spaces between words or symbols is important to separate the word you are searching for from the operator symbols or letters (CO, WL, GT, etc.), otherwise the search won't work. For example, type spaces where you see the underscore: milk_NC_coffee.

The CO and NC operators are only valid when searching text or paragraph fields. If used on numeric or date fields, Concordance Desktop processes the request as if you had entered EQ or NE respectively. A search for OCR CO milk locates words like un milked and milking because it includes the four characters in milk and anything before or after it.

The WL and OL operators search for ranges, within limits and outside of limits. These operators require two criteria to specify the range. The following search would locate any record with a DUEDATE field greater than or equal to January 1, 1993 and less than or equal to March 15, 1995.

Example:

DUEDATE WL 1/1/1993, 3/15/1995

- ✍ If you are searching for a value that has operators, then the value must be placed in quotes. For example: OCR1 CO "\$5,000"

Example:

doctitle = untitled

doctitle EQ untitled

Both of the relational operators produce the same search results

- 💡 If you need to find a specific record and know the Bates number, run a relational search.

But first check your dictionary to see if they are included by your administrator. If numbers are included, you can skip relational searches for them and run a full-text search instead.

Example:

docdate WL 10/01/1983,12/31/1984

This query finds all documents from October 1, 1983 through December 31, 1984.

- ✍ Use the date format that is standard for each database.

Example:

pages WL 5,10

This query finds all documents that are five to 10 pages in length. Four-page documents or 11-page documents are not included in the search results.

- ✍ Concordance Desktop searches numbers and dates in sequential order, so it's best to train yourself to enter them in that order: smaller number first, then bigger number (5,10), and earlier date, then later date (10/01/1980,12/31/1983).

Wildcard Characters - Relational

When Concordance Desktop reads a relational search, it views each individual character. The root of the search criteria can be masked (*) or individual characters can be masked (?) using the wildcard characters. For relational date searches, you must replace each digit in a date query with a wildcard character while using slashes based on the existing date format for your database.

Example:

8 and date eq 01/??/1986

All documents identified in query eight with any date in January 1986 are retrieved.

Example:

organization co wom?n*

The query selects documents that contain the words WOMAN, WOMEN, WOMANHOOD, etc., in the organization field.

Relational Wildcard Characters reference table

Wildcard Characters - Relational		
Character	Query	Results
Asterisks (*) replace a single text character at the end only	BEGNO = 0001*	Locates all Bates numbers that begin with 0001
Question mark (?) replaces a single character	DOCDATE = ??/??/1983	Locate all records in 1983
Quotation marks (") are required for searching operators	OCR1 CO "\$5,000"	Locates all records containing \$5,000 in addition to \$5,000,000 because of the CO operator

Quotes in Relational Searching

All spaces in a relational search string are automatically trimmed from the search. If you need to perform a relational search for an entry with spaces or any special characters, enclose the criteria in quotes. The text must be quoted if the criteria itself has spaces or commas in it. Below is a fixed field search with spaces and special characters.

Example:

STATUS = "PAID STATUS?"

Remember that Concordance Desktop inserts the default operator wherever it finds a space. So, without the quotes, Concordance Desktop would interpret the above query as STATUS = PAID ADJ STATUS?, and it would locate zero records.

Running complex clause searches

A complex clause search is a search string containing a combination of both full-text and relational search clauses. Stringing both full-text and relational searches together and combining complex clauses together saves query processing time, thus providing faster search results.

- 💡 Use Notepad or another text pad editor program to brainstorm your searches as the larger text box makes it easier to read onscreen. Type one clause per line and cut and paste them together, rearranging them until you find the right order. Then simply copy and paste the string into a Concordance Desktop search tool to run the query.

Type full-text clauses first, then relational, to conduct efficient queries resulting in a distinct outcome. Full-text searches are faster than relational, so by executing this search first, the secondary relational search is only running the full-text results as opposed to the entire database – saving you valuable processing time.

Example: goniff*.ocr1. AND docdate = ??/??/1983

The full-text search for *Goniff* in the OCR1 field is performed before the relational search is conducted for all records from 1983 containing *Goniff*.

In the Results box, you will find records with *Goniff* hits that appear in the DOCDATE field.

To remember whether fields come first or last in a search clause depends on the search method used:

- Full-text searches: the field is typed last
goniff.recipient. or (financial report).doctype.*
- Relational searches: the field is typed first
docdate WL 05/04/1982,05/20/1982

- 💡 Use care when querying names. Some names may be coded with the person's initials, especially in email: goniff*.recipient. vs. goniff;j.a.recipient. Use a wildcard character, like an asterisk, to mask the name in full-text searches. This will provide wider results.

- 💡 Use relational searching to search for empty or populated fields.
 - Use fieldname EQ "" to located records where the field is empty.
 - Use fieldname NE "" to locate records when the field is populated with any value.

Form Searching

The form search performs the same full-text and relational searches as manually typed searches, but a form search has the operators hard-coded for you. Clicking the Form Search panel in the Search pane or selecting Form Search from the Search menu opens

the Query by Example dialog box. Form searches are built and run from the Query by Example dialog box.

The form search can be used as a query builder if you are unfamiliar with the various searching operators. Notice each of the column headers at the top. Your first search connector will always start with *New*; then you need to tell Concordance Desktop *Where to Look*, *How to Look* and what word you want Concordance Desktop to *Look For*. To build complex queries, use the search connector fields to join various query strings that you determine for each line.

- ✍ You can enter up to 85 characters per field with a maximum of 255 characters total for all fields to build your search logic.

Concordance Desktop determines whether to run a relational or full-text search for you. If you understand searching concepts and want to use the form search to run all your complex queries, remember to place your all your full-text searches before the relational searches in the Query by Example dialog box.

- 💡 The Query by Example dialog box is limited to ensure it remains simple to use. For more complex searches, you can use the Advanced Search panel to enter longer queries, add parentheses more precisely, review the results of each word when using wildcards, and use a larger range of query operators.

Query by Example

Connector	Where to look	How to look	Look for
New	*Any Full Text*	CO Contains	<input style="width: 100%;" type="text"/>
adj	*Any Full Text*	CO Contains	<input style="width: 100%;" type="text"/>
adj	*Any Full Text*	CO Contains	<input style="width: 100%;" type="text"/>
adj	*Any Full Text*	CO Contains	<input style="width: 100%;" type="text"/>
adj	*Any Full Text*	CO Contains	<input style="width: 100%;" type="text"/>
adj	*Any Full Text*	CO Contains	<input style="width: 100%;" type="text"/>

Dictionary
 Notes
Search then Browse
Search then Table
Search
Done

To build and run a form search:

1. To open the Query by Example dialog box, do one of the following:

- In the **Search task** pane, click the **Form Search** panel.
- From the **Search** menu, click **Form Search**.

The Connector field in the first row always defaults to New.

2. If you are creating a new search query, leave the default value, **New**, in the first row.

If you are filling out more than one row for your search query, select the appropriate connector from the Connector field in the additional rows.

You can also change the first search connector, *New*, to another operator. The new query will be added to the previous query. For example, if you search for *milk* in the Quick Search bar it will now be search #1 (or the next sequential number). You can then open the Query by Example dialog box, change the first connector to adj and search for *Corp*. The new search query will be 1 adj Corp and will find where *milk* is adjacent to *Corp*.

3. From the **Where to look** field, select the field you want to search.

4. From the **How to look** field, select the operator you want to use.

In the How to look field CO Contains is equivalent to *EQ Equals*, and NC Does not contain is equivalent to *NE Does not equal*.

5. In the **Look for** field, type the specific value you want to search for.

6. When finished, click the **Search** button.

After clicking the Search button, your search query is displayed in the text field and the number of hits and documents found for your search are displayed at the bottom of the Query by Example dialog box.

To view your query results:

Do one of the following:

- Click the **Search then Browse** button to display the search results in the **Browse** view.
- Click the **Search then Table** button to display the search results in the **Table** view.
- Click the **Done** button to display the search results in the current view.

You can edit your search in the text box and run it again to receive different results. You can insert words from the dictionary into your search string using the Dictionary

button. When you add a word from the dictionary, the word is inserted wherever your cursor is in the text field.

Combining Search Strings

Using Boolean search operators, join search clauses together.

Example:

milk OR calcium NEAR25 coffee

This query locates all documents with either milk or calcium within 25 words of coffee. The search results omit instances where milk or calcium are in a document, but not within 25 words of each of coffee because the NEAR operator carries a higher precedence than the OR operator.

- ✍ Use of spaces when typing search strings becomes very important and is dependent on the type of search operators you are using.
 - Use spaces when using word operators (AND, OR, NOT, SAME, NOTSAME, ADJ, and NEAR). For example, type spaces where you see the underscore:
milk_AND_coffee
 - Omit spaces when using field limiters (. or ..). For example, do not type spaces before or after the field limiter: cowco.doctitle.
 - If you combine operators and limiters, you still need spaces before and after the operator: Goniff*.AUTHOR._AND_Weller*.RECIPIENT.

Using Parentheses for search precedence

Like mathematics, Concordance Desktop uses a hierarchy to evaluate search expressions. Use parentheses liberally in complex search strings to clarify query logic and enforce operator precedence. Searches within parentheses are evaluated before they are combined with other search operators. Parentheses have the highest precedence and can be nested up to 50 levels deep.

The following table includes Boolean, context, and proximity operators and the order of precedence they carry in a Concordance Desktop search. Refer to this table when you are combining one or more clauses together to know which operator clause to place first, and which is secondary. Use the parentheses to combine two or more clauses when additional clauses are included in the search logic, but are secondary in emphasis.

Operator Order of precedence reference table

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

Example: milk OR (calcium NEAR25 coffee)

In this example, the NEAR operator carries a higher precedence than OR, and Concordance Desktop searches clauses within parentheses first. The results of the calcium NEAR25 coffee search would then be processed as milk OR results.

Examples:

financial ADJ statement OR report

This query locates financial statement or report.

financial ADJ (statement OR report)

This query is focused on finding statements or reports containing the words financial statement or financial report.

Example: (Correspondence.doctype. AND Goniff*.Recipient.) NOT date = ??/??/1982

This query forces Concordance Desktop to run a full-text search first for all correspondence records to Mr. Goniff, with a secondary emphasis that eliminates anything from the year 1982.


Searching by tally


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


▲ Tally MODDATE


Item	Count
01/30/2002	1
02/04/2002	1
02/05/2002	2
02/22/2008	1
03/14/2007	1
03/18/2009	1
06/15/2000	1
07/07/2000	1
07/10/2000	1
07/13/2006	1
07/18/2000	1
08/01/2000	1
08/18/2000	1
08/31/2000	1
08/31/2006	1
09/13/2006	2
09/27/2019	40
10/22/2001	1
11/02/2005	1
12/08/2000	1
12/09/2005	1
12/22/2010	1


Tallied 22 items


 Reset


 Print...


 Save...


 Close

 Databases

 Search

 Tags

 Notes

 Tally

In the Tally task pane, you can:

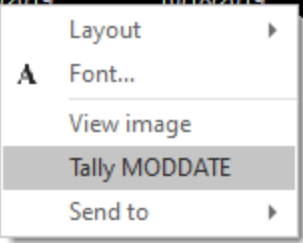
- Reset the tally list for a new search
- Print a tally list for quality assurance reference
- Save the tally list to a text file for tracking purposes

For more information about using Tally for printing needs, see Tallying records for reports.

To run a field tally in the Table view:

1. In the **Table** view, right-click in a field column.
2. Select **Tally [field name]** to tally the field.

DATE	MODDATE	CREATIONDATE
00/00/0000	02/05/2002	10/16/2001
00/00/0000	06/15/2000	06/15/2000
00/00/0000	07/10/2000	07/10/2000
00/00/0000	09/27/2019	05/18/2000
00/00/0000	09/27/2019	07/07/2000
00/00/0000	12/22/2010	12/22/2010
00/00/0000	07/18/2000	05/12/2000
00/00/0000	09/27/2019	10/18/2019
00/00/0000	09/27	
00/00/0000	12/09	
00/00/0000	08/31	
00/00/0000	02/22	
00/00/0000	03/18	
00/00/0000	09/27	
00/00/0000	09/27	
00/00/0000	09/27/2019	10/18/2019



3. The tally results are displayed in the **Tally** task pane.
4. Double-click an item in the tally list to display the records in the **Table** view and the first corresponding record in the **Browse** view.

Each time you double-click a tally list item, you are narrowing your search results based on your initial query.

- To sort the tally results, click the tally column headers to sort by item or count.
- To return to the original document listing, click the Reset link.
- To print your tally results, click the Print link.
- To save your tally results to a text (.txt) file, click the Save link.
- To close the Tally task pane, click the Close link. To hide the Tally task pane, click another task pane icon.

Searching by tags and issues

You can also search by tags and issues in the Tags task pane. Searching by tags or issues allows you to locate documents tagged in a specific category and marked with internal issues. You can also search your record collection by tags, using the Review screen or conducting a query on applied tags.

For more information about searching by tags or issues, see [Creating queries from tags and Querying tags and folders](#).

Creating a synonyms list

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

Synonyms can be based on words already entered in your database dictionary, creating a permanent link between them, or other search terms in Concordance 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.

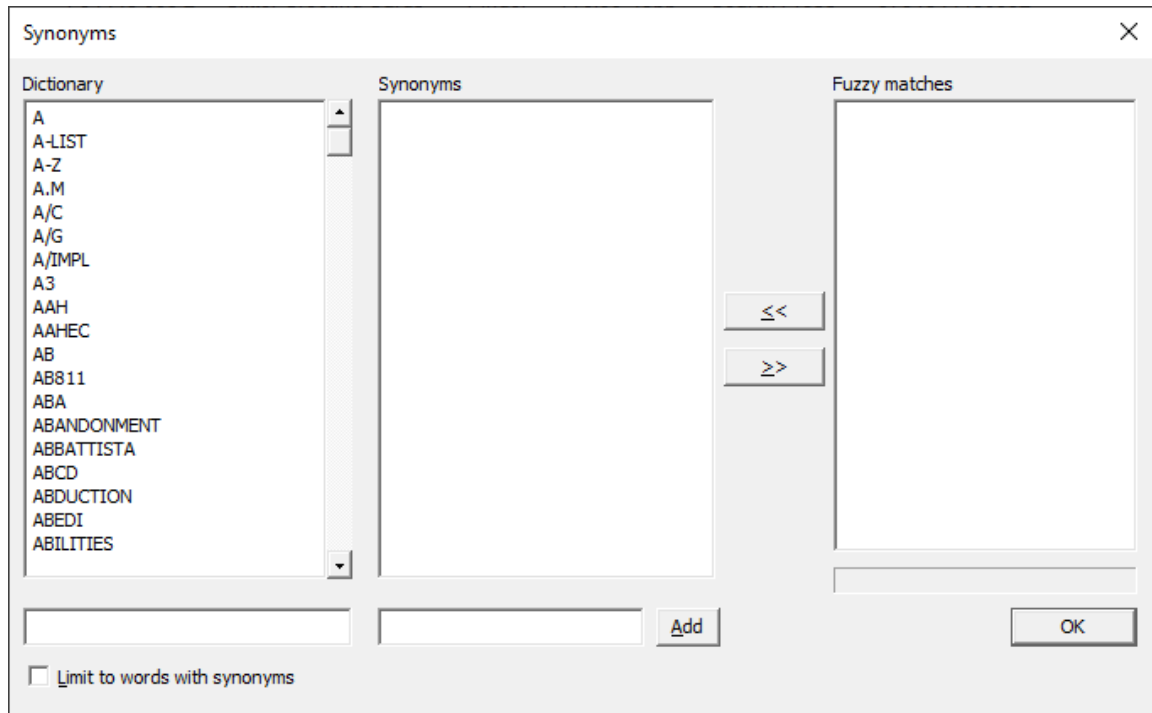
Here are some examples of synonyms you can create:

- Common American English and UK English spellings, such as color and colour
- OCR errors and misspellings
- For acronyms
- For complex query expansions (Automatic synonym expansion is suppressed when you place a search term in quotes.)
- Associating generic drug names with brand name medications
- Associating e-mail messages to a person’s name
- Capturing misspellings of a person’s name

For more information about fuzzy searches, see [Using the Advanced Search panel](#).

To create a synonyms list:

1. On the **File** menu, point to **Dictionaries**, and click **Synonyms**. Clicking Synonyms opens the Synonyms dialog box.
-



- In the **Dictionary** list, click the word you want to link to synonyms.

To search for a word in the Dictionary list, type or select part or all the word you are looking for in the Dictionary field below the Dictionary list.

If you only want the Dictionary list to display words already associated with synonyms, select the Limit the words to Synonyms check box. If you want the Dictionary list to display each word in the dictionary, clear the Limit the words to Synonyms check box.

You can manually add words to the synonym list or add words to the synonym list from the Fuzzy matches list. You can associate multiple synonyms with a dictionary word.

- To manually add a word, in the **Synonyms** field at the bottom of the **Synonym** list, type in the corresponding synonym and click the **Add** button.

Clicking the Add button adds the word to the Synonyms list. Repeat this step for each of the synonyms you want to associate with the selected dictionary word.

- To add a word from the **Fuzzy matches** list, in the Fuzzy **matches** list, click the word and click the double arrows, **<<**, button.
- When finished, click **OK**.

To check the synonyms associated with a dictionary, you can run a search for the word in the Advanced Search panel in the Search task pane. You should see the synonyms listed as hits in the Results list in the Advanced Search panel since they are linked to the word in the dictionary.

Saving Searches

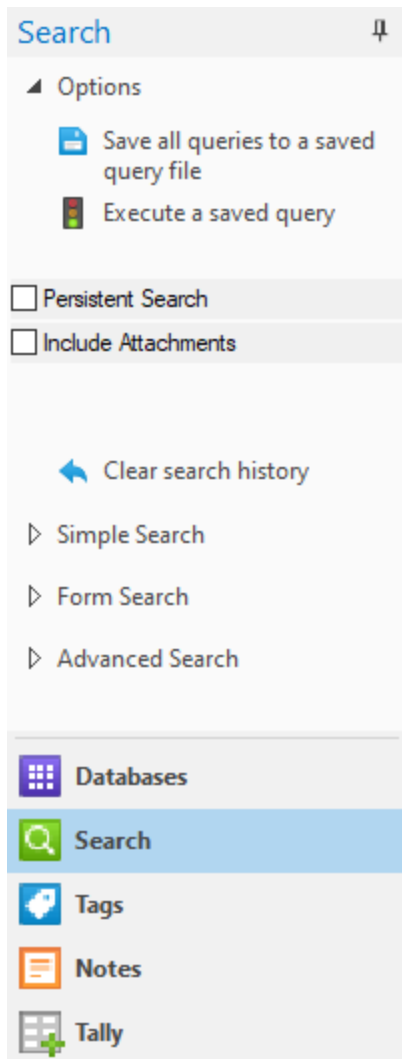
Reviewing and saving your work history is essential for tracking purposes, especially during complex and lengthy reviews. After conducting a series of searches, you'll want to review your search history to combine previous searches into a new search to narrow your results and rerun prior queries to capture updates in the record recollection. You will also want to save previous queries to a file for tracking purposes or to rerun them at a later time.

Saving search queries

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

You may want to save your searches if:

- You are interrupted during a complicated set of searches that you want to resume later.
 - You need to perform some searches on a regular basis for production reports or privilege-status logs.
 - Other reviewers need to retrieve your search results from another computer at a later time.
 - You want to run the searches on another database.
-



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

- ✍ Each reviewer needs to save their query file with a unique file name on a shared network. Your network will not allow multiple files of the same name to be created in the same folder. We recommend each user adds their initials to the end of the file name to differentiate it from others and make it easily identifiable to each person. This rule does not apply to personal or local folders. This example has initials at the end of the file name: F:\DATA\CONCORDANCE\TUTORIAL\SEARCHES\LAM.QRY
-

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

To save search queries:

1. To open the Review view, do one of the following:
 - Click the **Review** button on the standard toolbar.
 - From the **View** menu, click **Review** view.
 - Press **F3** on your keyboard.
2. To open the Keep Queries dialog box, do one of the following:
 - In the **Search** task pane, click the **Save all queries to a saved query file**.
 - From the **Search** menu, click **Save All Queries**.
3. Browse to where you want to save the file.
4. Type the name of the .QRY file in the **File name** field.
5. Click **Save**.

To clear the queries from the Review view:

Once you have saved your queries, to clear the queries from the Review view, do one of the following:

- In the **Search** task pane, click **Clear search history**.
- On the **Search** menu, click **Clear Search History**.

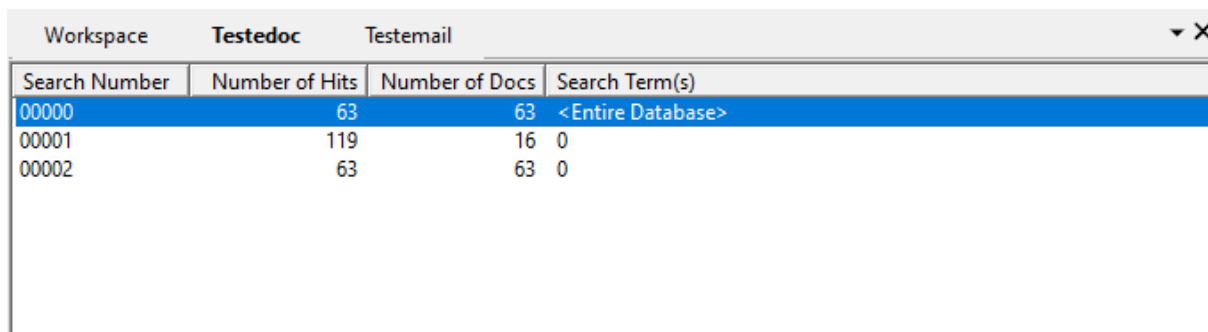
To rerun saved queries:

1. Do one of the following:
 - In the **Search** task pane, click **Execute a saved query**.
 - On the **Search** menu, click **Execute Saved Queries**.
2. Locate and open the .qry query file.

Concordance Desktop reads the file and reruns all the searches in the query file. If any records were updated before you restored the query, your search results are automatically updated. The search results display in the Review view as soon as they are executed.

Reviewing search queries

The Review view provides a complete, numerical listing of all searches conducted since you opened Concordance Desktop or it was last reindexed. Use the Review view for tracking purposes or simply to save your queries at the end of your Concordance Desktop session. The Review screen references all search scenarios already conducted on a record collection. The listing is also a foundation for building advanced searches to narrow results for key criteria.



Search Number	Number of Hits	Number of Docs	Search Term(s)
00000	63	63	<Entire Database>
00001	119	16	0
00002	63	63	0

Because each search query is numbered sequentially, you can select one or more to combine two previous queries into a new one. The Review screen conducts searches based on Boolean operators, so you can also exclude previous queries from a new search using the OR or XOR operators when combining multiple search numbers in a complex query. Concordance Desktop references a query by number faster than if you re-type the query words.

Example: 2 AND 3

Using the queries listed in the Review view image above, the 2 AND 3 query searches for all documents from 1980 with Goniff in the RECIPIENT, AUTHOR, OR CC fields.

Reviewing recent queries is easy. You can click the drop-down arrow in the Search field to view your recent queries, and rerun and edit previous searches from the Search field. You can also copy an advanced search string into the Search field to save it and rerun at a later time. Queries in the Search field list are stored for one Concordance Desktop session.

- ☑ The Review view does not list the Persistent Search terms in the Search Terms(s) column; however, the Number of Hits column does count the terms in the total number of hits.

Zero Query

To search the entire database or resort it after running several queries, run a Zero Query by typing a zero, 0, in the Search field. The zero is predefined in Concordance Desktop to locate all records in a database and resort them in their original load order

and is always the first search run when opening a database. You can combine the zero with operators to narrow query results.

Example: 0 NOT milk

This search first locates all records in the database, then narrows the results to exclude all documents that contain the word milk.

Example: 0 NOT 9

This search locates all database records, then narrows the results to exclude the query results found for search number 9 in the Review view.

Using the Search field is the fastest way to search the entire database or conduct a Zero Query, and is a useful tool when rerunning or excluding results in previous searches tracked in the Review view.

Running previous search queries

When you click the Review button in the Standard toolbar, two additional Dynamic toolbar buttons become active: Edit and Activate. The Edit button adds queries from the Review view to the Advanced Search panel. The Activate button initiates a previous search query and the search results are displayed in the Table view.

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

- ✍ The Review view does not list the Persistent Search terms in the Search Terms(s) column; however, the Number of Hits column does count the terms in the total number of hits.

To review a previous search query:

On the **Standard** toolbar, click the **Review** button.

All searches conducted since you opened the Concordance Desktop session are saved and displayed in the Review view.

To rerun a previous search query:

In the Review view, do one of the following:

- Double-click the search query.
- Select the search query, and then on the **Dynamic** toolbar, click **Activate**.
- Right-click the search query, and then click **Activate**.

The first record of the search results displays in the Browse view. You can also view the query results in the Table view.

To copy a previous search query:

In the Review view, do one of the following:

- Right-click the search query, click **Copy Query**, and then right-click in a search field and click **Paste**.
- Select the search query, and then on the **Dynamic** toolbar, click **Edit**.
- Right-click the search query, and then click **Edit**.

The query displays in the Advanced Search panel, where you can add or edit the search logic for a new query.

To combine and run search queries using query numbers:

1. In the **Search Number** column in the **Review** view, locate the query numbers for two previous searches.
2. In the **Advanced Search** box, type in the numbers for those two search queries.

For example: 3 AND 9.

It isn't necessary to type in the preceding zeros displayed in the Search Number column.

3. Click the **Search** button.

Combining both search queries narrows your search results. Remember that the number of keyword hits and documents found display in the Results field of the Advanced Search panel.

Basic Tagging

A new case has started and boxes of printed documents, CDs, DVDs, and other discovery documents have arrived and need to be reviewed and categorized. In a traditional setting, someone would have to manually sort and flag each document, hoping that the privileged flags don't fall off in the process.

With Concordance Desktop, you no longer need to worry about lost flags and managing boxes of papers and electronic media files. If your case documents have already been entered into Concordance Desktop, you can step into the review process with the bulk of the headache-inducing tasks already completed, and start reviewing and categorizing documents.

Tagging records is a critical step in the discovery process. It is your organization's way of essentially putting color-coded flags on your documents to categorize them by privilege, review status, or other criteria during document review.

- 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. See [Concatenating Databases](#) for more information about joined datasets.

The screenshot shows the Concordance Desktop interface. The main window displays an email document with the following content:

CREATIONDATE = 10/18/2019
 TEXT01 Progress with police oversight
 From: Rosenthal, Richard - OIM
 Sent: Monday, April 30, 2007 8:20 AM
 To: Castellano, Gerylann - OIM <Gerylann.Castellano@ci.denver.co.us>; Clemmons, Ajenal - OIM <Ajenal.Clemmons@ci.denver.co.us>; Crittenden, Gregg - OIM <Greg.Crittenden@ci.denver.co.us>; Esquibel, Daniel - OIM <Daniel.Esquibel@ci.denver.co.us>; Proctor, Jon - OIM <Jon.Proctor@ci.denver.co.us>
 Cc: Anthony Navarro (ajnavarro@hollandhart.com), Cathy Reynolds (RickRitids@aol.com), David Montez (DaveM@gillfoundation.org), Henry Hank Knoche (hknoc@comcast.net), Paul Burleson (pastorpaub@aol.com), Samuel Freeman (jocess@aol.com), Steven Foster (foster@congregationmanuel.com)
 Subject: FW: The Denver Post: Progress with police oversight

A nice editorial in the Denver Post today. Unfortunately, it does overstate our involvement and ignores the good work of the Manager of Safety.

From: r.rosenthal@comcast.net [mailto:r.rosenthal@comcast.net]
 Sent: Monday, April 30, 2007 8:18 AM
 To: Rosenthal, Richard - OIM
 Subject: The Denver Post: Progress with police oversight

This article link was mailed to you by: r.rosenthal@comcast.net

CNDN	CREATIONDATE	TITLE	METADATA
0000001	10/18/2001	STACK MANAGER FREQUENTLY ASKED QUESTIONS	AUTHOR = LRENAUD
0000002	05/15/2000		AUTHOR = MARK S DOBLER
0000003	07/10/2000	CRAIG BRESLAU	AUTHOR = CBRESLA
0000004	05/18/2000		AUTHOR = ACOPELA
0000005	07/07/2000		AUTHOR = MGUEVARA
0000006	12/22/2010		
0000007	05/12/2000	ORION POWER HOLDINGS, INC. ENRON NORTH AMERICA CORP	
0000008	10/18/2019	MEDIATION	AUTHOR =
0000009	10/18/2019		
0000010	12/09/2005	S:PPRSILAYOUTS/OCTOBER-NOVEMBERSPRR.PMD	
0000011	08/31/2006	IN PRAISE OF MEDIATION	AUTHOR = BARBARAATTARD
0000012	12/13/2007	EMPLOYEE MORALE	
0000013	12/17/2002		AUTHOR = SEARCH PRESS
0000014	10/18/2019	MESSAGE	AUTHOR =
0000015	10/18/2019		
0000016	10/18/2019		AUTHOR =
0000017	10/18/2019		
0000018	10/18/2019		
0000019	10/18/2019		
0000020	10/18/2019		AUTHOR =
0000021	10/18/2019		
0000022	10/18/2019	ANNUAL REPORT	AUTHOR =
0000023	10/18/2019		
0000024	10/18/2019		AUTHOR =
0000025	10/18/2019		
0000026	10/18/2019	PROGRESS WITH POLICE OVERSIGHT	AUTHOR =
0000027	10/18/2019		

Preliminary planning for tagging

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

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

Typical tag uses

The following tag list provides examples of the types of tags organizations use to categorize documents during the document review process. You should consider in advance what tags will be required for both high-level review and specific research angles for your case. Collaborate with your Concordance Desktop administrator so these tags can be set up in advance.

- **Responsive vs Non-responsive** - identify responsive documents that must be produced as part of the discovery process
- **Privileged** - identify documents containing information that should not be produced
- **Witnesses** - identify documents for witness kits or binders used in depositions or trials
- **Reviewer Assignments** - delegate documents to be reviewed by individual reviewers
- **Exhibits** - identify documents that will used as exhibits
- **Issues** - identify documents related to key legal issues in the case
- **Keywords** - identify documents containing important terms in the case
- Other

Tagging strategies

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

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

Tagging records

New tags are easily added to a list of persistent ones that are custom designed for a particular case. Any new tag created is immediately accessible to all users in Concordance

Desktop. This provides a standard format, easy access, and a faster, more efficient review for all users.

Often tags are placed in folders or grouped by type or purpose so all reviewers have an immediate understanding of the case tag organization.

Tag names always display and sort alphabetically. If you intentionally want a tag to appear in a specific location, use the tag name to accomplish that.

Tagging individual records

Before you begin tagging records, it is best practice to run a search to limit the number of documents you have to review.

- ⚠ Tags can be applied and removed by any user, at any time. Contact your Concordance Desktop administrator or supervisor if you have concerns regarding the permanence of applied tags.

To apply a tag to a document:

1. Open the **Tags** task pane.
2. Run the appropriate search to limit the documents you have to review.
3. Review your search results and identify the documents you want to tag.
4. In the **Table** view, select the document.

You can also tag documents from the Browse view. Tags can be applied to the document currently displayed in the Browse view.

5. In the **Tags** task pane, do any of the following:
 - Click the tag's check box.
 - Right-click the tag and click **Tag document**.
 - Double-click the tag's name.

When you double-click a tag Concordance Desktop can either apply the tag or open the tagging options menu. The double-clicking option is set on the Browsing panel in the Preferences dialog box. Double-clicking a tag to apply the tag is the default setting.

A red check mark appears in the tag's check box and the tag is now applied to the document.

To remove a tag from a document:

1. Select the document in the **Table** view.

You can also remove tags from documents in the Browse view. Tags can be removed from the document currently displayed in the Browse view.

2. To remove the tag from the document, in the **Tags** task pane do one of the following:
 - Clear the tag's check box.
 - Double-click the tag's name.


When you double-click a tag Concordance Desktop can either apply the tag or open the tagging options menu. The double-clicking option is set on the Browsing panel in the Preferences dialog box. Double-clicking a tag to apply the tag is the default setting.


The tag's check box is now cleared and the tag is removed from the document.

Tagging multiple records

In some review projects, you may want to conduct searches first and tag all documents for review later. This method is often referred to as *bulk tagging*.

For example, if you want to review all documents containing references to Mr. Goniff, you can search for these documents and tag all the documents in the search results for a later review.

 Tags can be applied and removed by any user, at any time. Contact your Concordance Desktop administrator or supervisor if you have concerns regarding the permanence of applied tags.

 When bulk tagging, do not drag and drop (move) tags from one folder to another, as it can produce duplicate tags, as opposed to just moving the tags.

To apply a tag to multiple documents simultaneously:

1. Open the **Tags** task pane.
 2. Run the appropriate search to limit the documents you have to review.
 3. Open the **Table** view to view the search results.
 4. In the **Table** view, select all the documents you want to apply tags.
 5. In the **Tags** task pane, do one of the following:
-

- Click the tag's check box, right-click the tag, and then select **Tag all documents in query**.
- In the **Table** view, drag the documents selected to the tag in the **Tags** panel.
- Double-click the tag's name.

When you double-click a tag Concordance Desktop can either apply the tag or open the tagging options menu. The double-clicking option is set on the Browsing panel in the Preferences dialog box. Double-clicking a tag to apply the tag is the default setting.

A red check mark appears in the tag's check box, and the tag is now added to each of the selected documents.

To apply a tag to all documents and attachments in a query simultaneously:

1. Open the **Tags** task pane.
2. Run the appropriate search to limit the documents you have to review.
3. Open the **Table** view to view the search results.
4. In the **Tags** panel, right-click the tag, and then select **Tag Query & Attachments**.

If no attachments are found for a document, the selected tag is applied to all the documents in the current query.

5. When prompted, confirm the number of documents to tag.

A red check mark appears in the tag's check box, and the tag is now added to each of the selected documents and associated attachments.

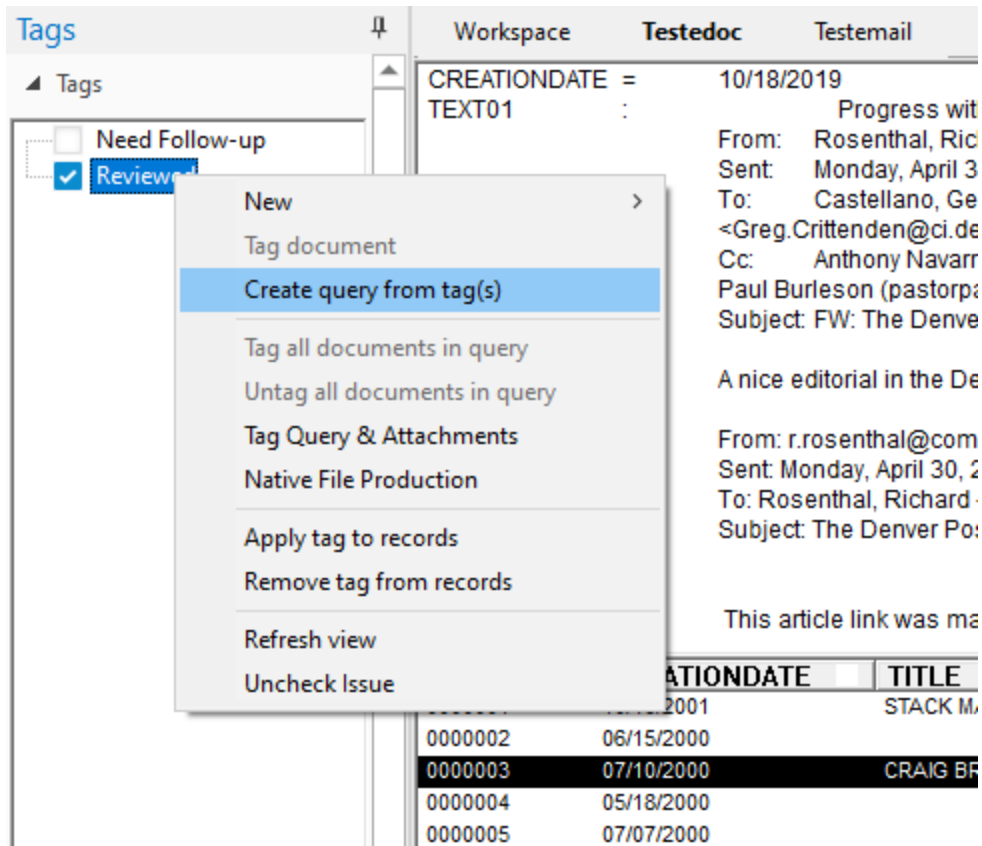
To remove a tag from multiple documents simultaneously:

1. Open the **Tags** task pane.
 2. Run the appropriate search to limit the documents you want to remove a tag.
 3. Open the **Table** view to view the search results.
 4. In the **Table** view, select all the documents you want to remove tags.
 5. In the **Tags** task pane, click the tag's check box, right-click the tag, and then select **Untag all documents in query**.
-

The tag's check box is now empty and the tag is removed from each of the selected documents.

Creating a query from tags

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



To create a query from tags:

1. Open the **Tags** task pane.
2. In the **Tags** task pane, select the tags you want to query.

You can select multiple tags by pressing the SHIFT or CTRL key while selecting multiple tags.

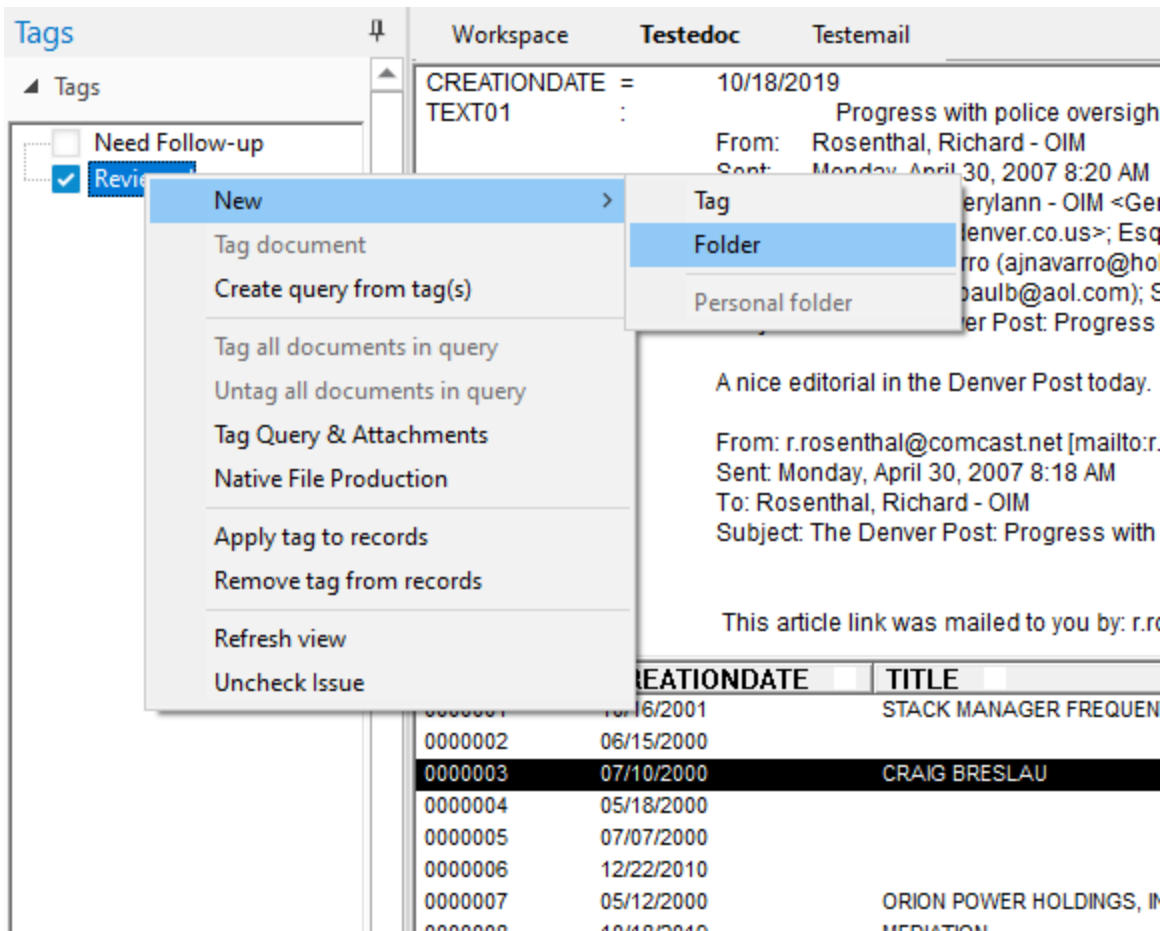
3. Right-click the selected tags and select **Create query from tag(s)**.

All documents that are tagged with the selected tags display in Table view.

Advanced Tagging

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.

Creating queries from tags

As your team reviews documents and categorizes them using various tags, you may want to search on multiple tags to find documents that have more than one tag applied. For example, you may want to run a search to find all documents that your team has tagged as both *Responsive* and *Privileged* so you can redact content prior to production. You can search on multiple tags individually or by folder.

Query results are displayed within the Tags task pane and the Review screen, where they are stored and can be rerun later. A query created from a tag becomes the current query and it can be used just like any group of retrieved records. Concordance Desktop stores the tagging information in the .TRK file, so it remembers the tagged documents and tag descriptions between query sessions.

Querying tags by a tag

There are two ways you can query multiple tags. You can query multiple tags together in one query or you can query the tags individually and then combine the individual queries into one complex search query.

For more information about complex search queries, see [Running complex clause searches](#).

To query multiple tags combining individual queries:

1. Open the **Tags** task pane.
-

2. In the **Tags** task pane , select the tag you want to query.
3. Right-click the selected tag and select **Create query from tag(s)**.
All documents that are tagged with the selected tags display in Table view.
4. In the **Tags** task pane, select another tag to query.
5. Right-click the selected tag and select **Create query from tag(s)**.
All documents that are tagged with the selected tags display in Table view.
6. Click the **Review** button on the **Standard** toolbar to review your queries in the **Review** view.
7. In the **Review** view, identify the search numbers for both of the tag queries you created.
8. In the Search field, type the numbers with the **AND** operator between them and press Enter.

For example, if the searches were numbered 12 and 13, then type *12 AND 13* to combine the two searches.

The Table view displays only those documents that have both tags applied.

This new search combines the initial queries into a new complex query, locating documents that contain both tags.

Querying tags by folder

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

To create a query from folders:

1. Open the **Tags** task pane.
2. In the **Tags** task pane, select the folders you want to query.
You can select multiple folders by pressing the SHIFT or CTRL key while selecting multiple folders.
3. Right-click the selected folders and select **Create query from tag(s)**.

This selection says *tag(s)* instead of folders, but the query process applies to both tags and folders.

The Table view displays all the documents tagged with any of the tags in the selected folders.

Searching by tags and issues

You can also search by tags and issues in the Tags task pane. Searching by tags or issues allows you to locate documents tagged in a specific category and marked with internal issues. You can also search your record collection by tags, using the Review screen or conducting a query on applied tags.

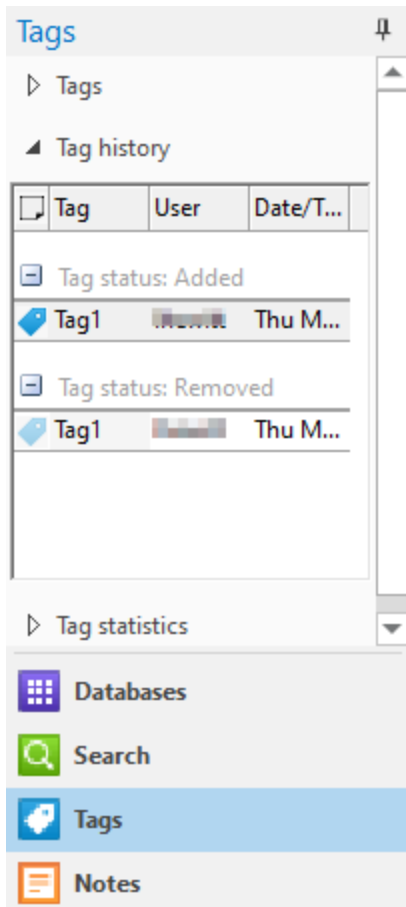
For more information about searching by tags or issues, see [Creating queries from tags and Querying tags and folders](#).

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.

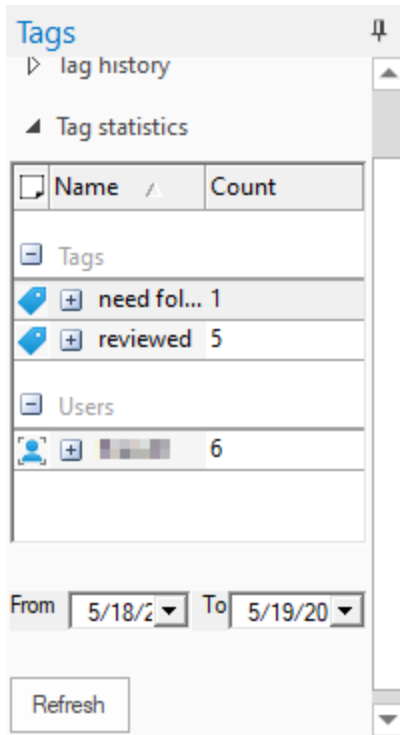


To review tag history:

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.

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.



To review tag statistics:

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.

Sorting Records

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

The Sorting layout feature provides additional tools to customize and save how records are sorted in the Browse view to display the desired result. For more information, see [Using sorting layouts](#). The Table layout feature provides the tools to create customized public and a private layouts for viewing data in the Table view. For more information, see [Using table layouts](#).

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

Additional methods for sorting records:

Returning all records

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



Quick sort

After running any search, you may want to sort your documents to view them chronologically, by author, by document type, or by any other field you have in your database.

In order to sort your documents by a field, click a column heading in the Table view. Documents are sorted in ascending order by the selected field. To sort in descending order, click the column heading a second time. The arrow in the column header indicates the current sort order. For more information, see [Using table layouts](#).

CNDCN	CREATIONDATE	TITLE
0000001	10/16/2001	STACK MANAGER FREQUENTLY ASKED QUESTIONS
0000055	10/22/2001	
0000058	01/28/2002	ENA NATGAS FIRM GTC
0000060	02/05/2002	
0000013	12/17/2002	
0000044	11/03/2005	SEPTEMBER05PPR.PMD
0000010	12/09/2005	S:\PPRS\LAYOITS\OCTOBER-NOVEMBER05PPR.PMD
0000040	01/31/2006	
0000051	07/13/2006	JULY 2006.PMD
0000011	08/31/2006	IN PRAISE OF MEDIATION
0000034	09/13/2006	
0000036	09/13/2006	WHY THE URBAN SPECTRUM
0000012	12/13/2007	EMPLOYEE MORALE
0000006	12/22/2010	

Sorting by selected fields

In the Table view you can sort documents by a single field. With Sorting layouts, you can go a step further and perform multi-level sorting of records using up to four fields at once. For more information, see Using sorting layouts

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.

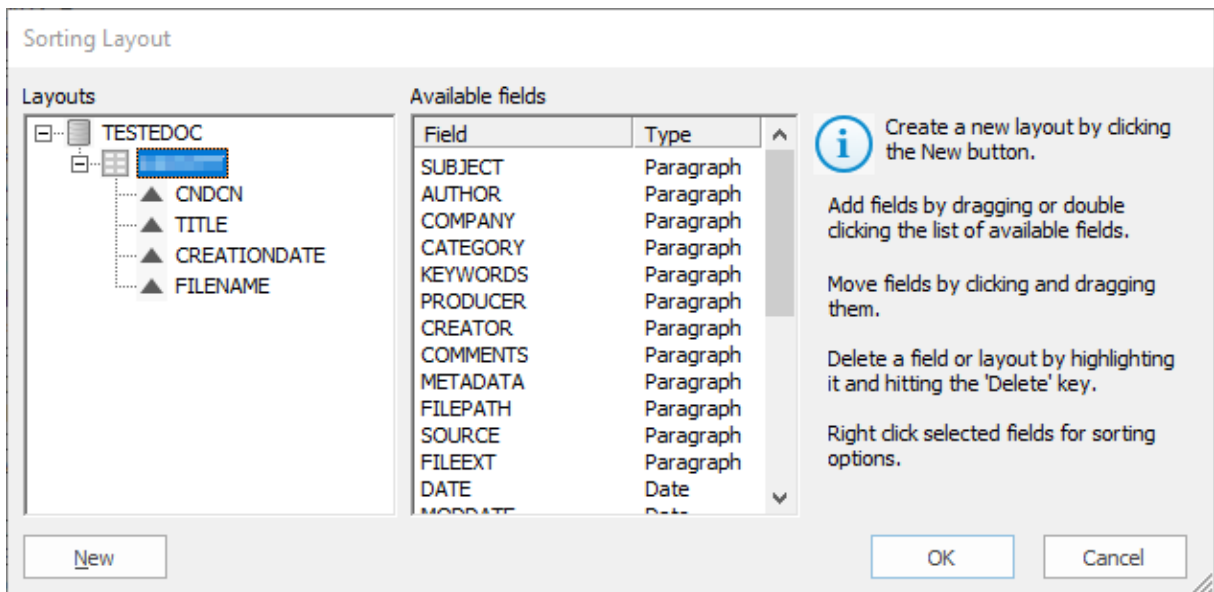
Sorting layouts are created and maintained in the Sorting Layout dialog box and saved as a .Sortlayout file on your local machine in the same directory as the database. There are no limits to the number of sort layouts that can be created and saved; however, sort layouts are specific to the database 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**.

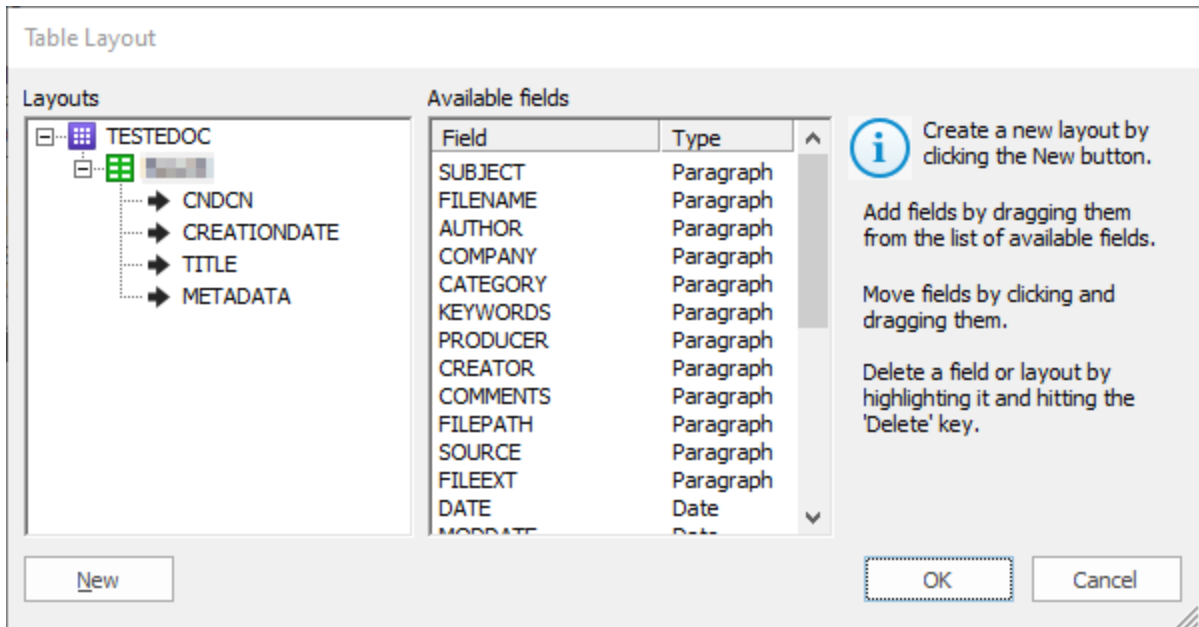
To rename a sort layout:

1. On the **Standard** toolbar, click the **Sorting** button arrow, and click **Sort layout** to open the Sorting Layout dialog box.
 2. 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.

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.

To create a table layout:

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**.

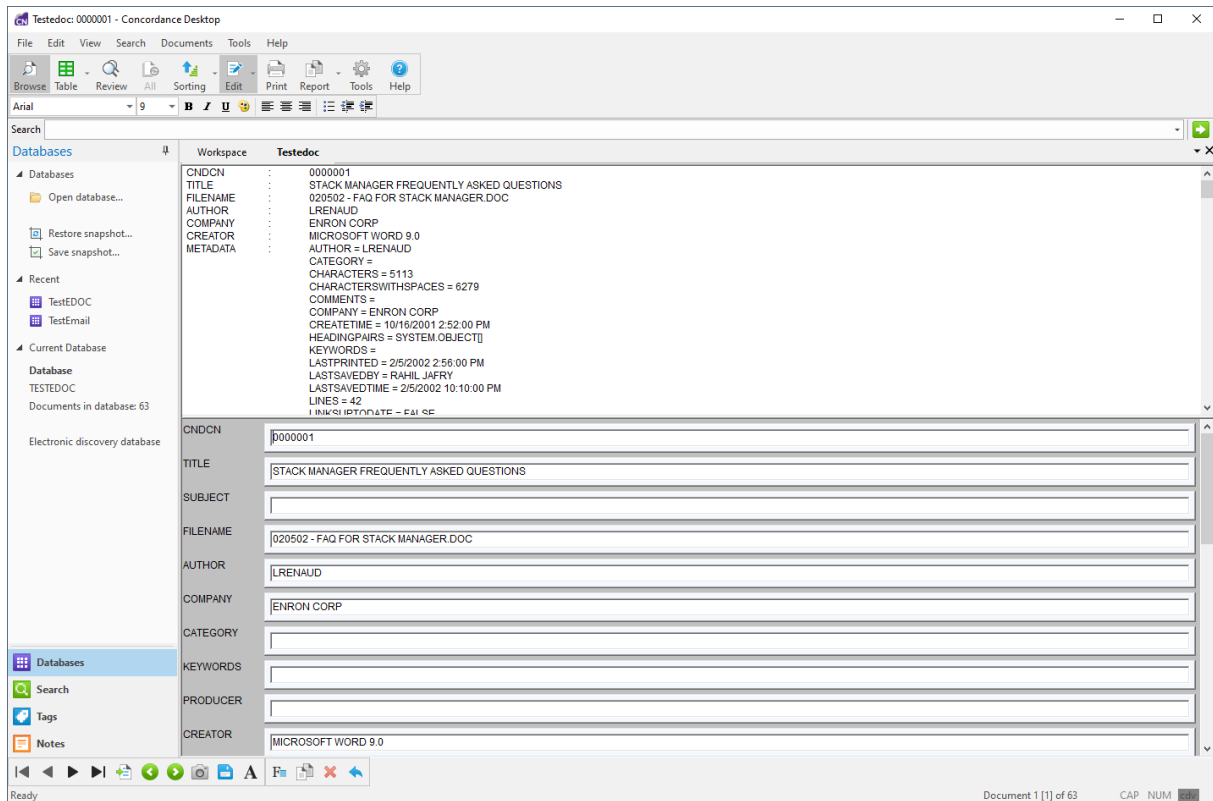
Editing Records

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 the Edit pane appears on the left and the Edit toolbar at the bottom of the workspace. By default the Edit view is blank, providing the ability to customize the view to display only those fields you want to edit for each record in the database. The Edit pane lists all the available fields that can be added to the view. Only those fields you have full rights can be edited.

-  The customization of the Edit view is not available for the Append and Ditto features.
-



Edit tools

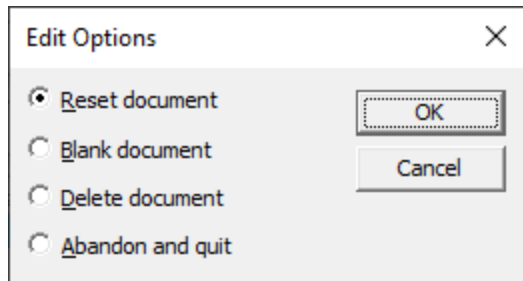
When you click the Edit button on the Standard toolbar, the four Edit view tools on Dynamic toolbar are displayed:



- **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** - allows you to mark or unmark a document for deletion
- **Undo** - displays the Edit Options dialog to allow you to undo or abandon edits

Edit Options dialog box

Clicking the Undo button on the Dynamic toolbar opens the Edit Options dialog box.



The Edit Options box offers the following options:

- **Reset document** - removes applied edits and restores the record to its original state
- **Blank document** - erases all field content in a record
- **Delete document** - marks the record status for deletion
- **Undelete document** - removes the Delete status for a record
- **Abandon and quit** - exits the current record and exit Edit mode, any applied edits are not saved

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.

Workspace	Testedoc
CNDCN	: 0000003
TITLE	: CRAIG BRESLAU
FILENAME	: ACCOMPLISHMENTS.DOC
AUTHOR	: CBRESLA
COMPANY	: ECT
CREATOR	: MICROSOFT WORD 8.0
METADATA	: AUTHOR = CBRESLA
	: CATEGORY =
	: CHARACTERS = 5985
	: CHARACTERSWITHSPACES = 7350
	: COMMENTS =
	: COMPANY = ECT
	: CREATETIME = 7/10/2000 4:12:00 AM
	: HEADINGPAIRS = SYSTEM.OBJECT[]
	: KEYWORDS =
	: LASTPRINTED = 7/10/2000 3:38:00 AM
	: LASTSAVEDBY = CBRESLA
	: LASTSAVEDTIME = 7/10/2000 4:12:00 AM
	: LINES = 49
	: LINKSIPTODATE = FALSE

CREATOR	MICROSOFT WORD 8.0
COMMENTS	
METADATA	AUTH
FILEPATH	CAUS CONCORDANCE DESKTOP\NATIVES\VOL0000
SOURCE	CATE
FILEEXT	DOC
DATE	00/00/0
MODDATE	07/10/2
CREATIONDATE	07/10/2
PRINTDATE	00/00/0
BEGNO	

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.

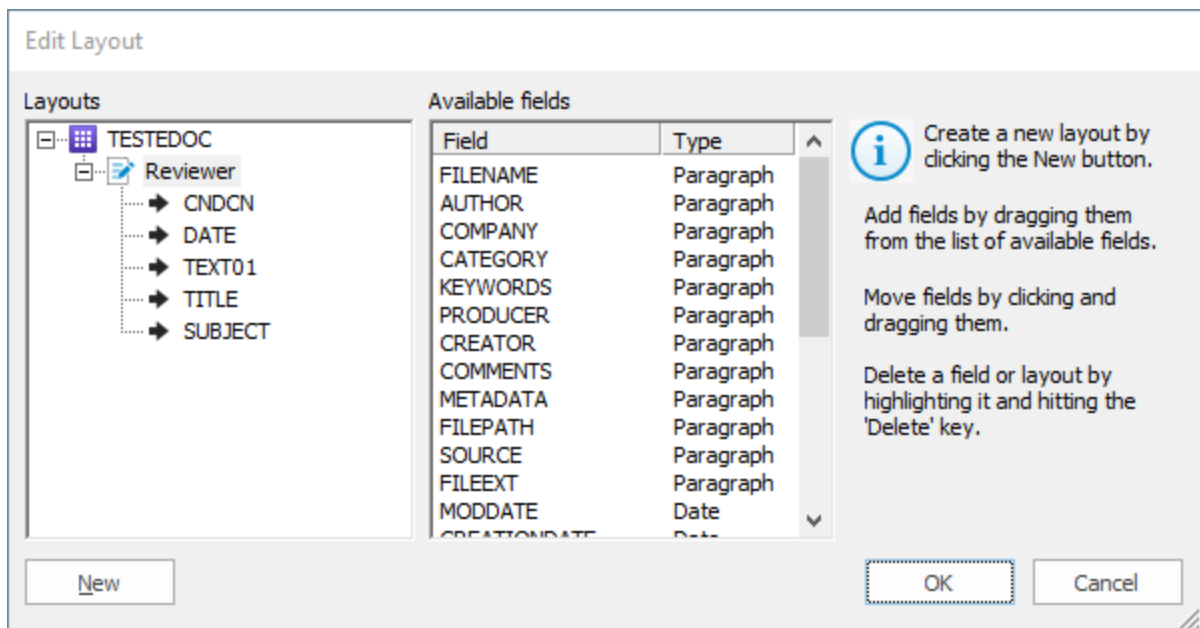
2. Right-click the text and click the applicable formatting option.

Your changes are saved when you navigate to another record or view in Concordance Desktop.

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 <datasenname>.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.



- ✍ 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.

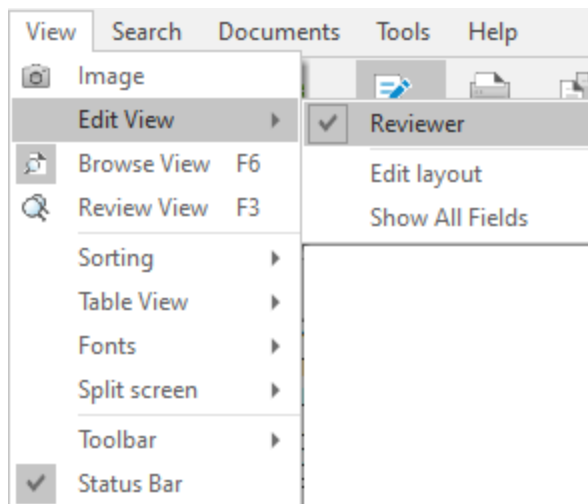
To view saved edit layouts:

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.



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.

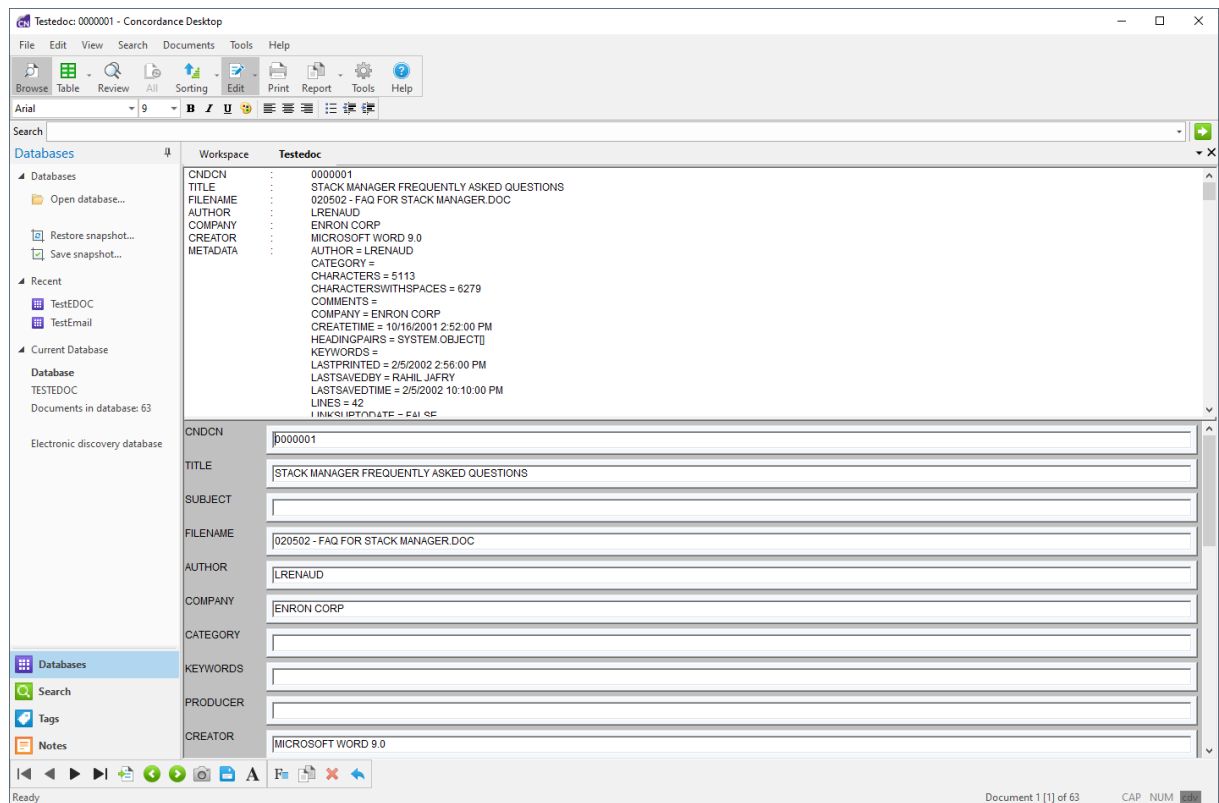
If you are an attorney entering summary notes or a paralegal adding missing data to records, you are only able to access fields that you have permission to edit. Fields that can't be edited display in gray. Other data entry restrictions may be placed on fields by your Concordance Desktop administrator.

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 spoliage 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.

Formatting field text

In the Edit view you can format individual field text. You can change the text's case and add or remove rich text formatting. When you modify text formatting in a field in the Edit view, the formatting only applies to the field text in the current record.

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. For more information about the Bulk Field Format Reset feature, see Removing rich text from multiple records.

To change text case in the Edit view:

1. In the **Edit** view, open the record containing the text you want to modify.
2. Select the text.
3. Right-click the selected text and click one of the following:
 - **Upper** - changes each letter in the selected text to upper case.
 - **Lower** - changes each letter in the selected text to lower case.
 - **Capitalize** - changes the first letter of the selected text to upper case. If you selected multiple words, the first letter of each word will be capitalized.

The Upper, Lower, Capitalize functions are also available using the Format option under the Edit menu.

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.

4. To reindex the database, on the **File** menu, click **Reindex**.

To add rich text formatting to text in the Edit view:

Rich text can be imported into Concordance Desktop or added to text from the Format toolbar in the Edit view.



Use the Format toolbar to change the font type, size, bold, italic, underline, and color. You can also change the alignment of a paragraph, indent the paragraph, or, make it a bullet list.

1. In the **Edit** view, open the record containing the text you want to modify.
2. Select the text.
3. On the **Format** toolbar, apply the rich text formatting you want for the text.

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.

4. To reindex the database, on the **File** menu, click **Reindex**.

To reset a field's rich text formatting to plain text:

1. In the **Edit** view, open the record containing the text you want to modify.
2. Right-click in the field containing the text you want to modify and click **Reset Field Formatting**.

Clicking Reset Field Formatting removes the rich text formatting from all text in the field and changes the text to plain text. Clicking Reset Field Formatting does not change the field's case sensitivity.

The Reset Field Formatting function is also available using the Format option under the Edit menu.

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.

3. To reindex the database, on the **File** menu, click **Reindex**.

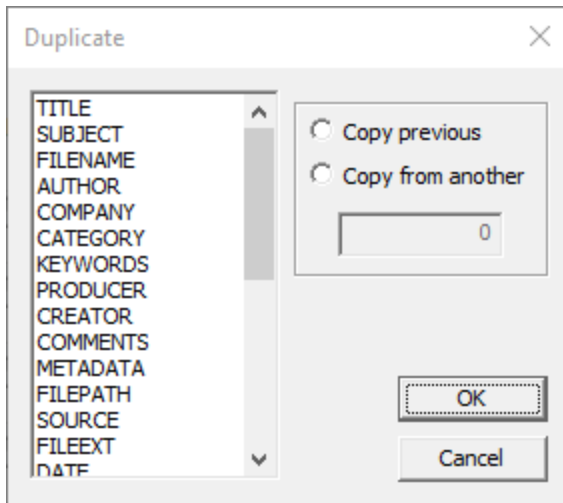
Copy field data from record to record

- 🚩 **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.

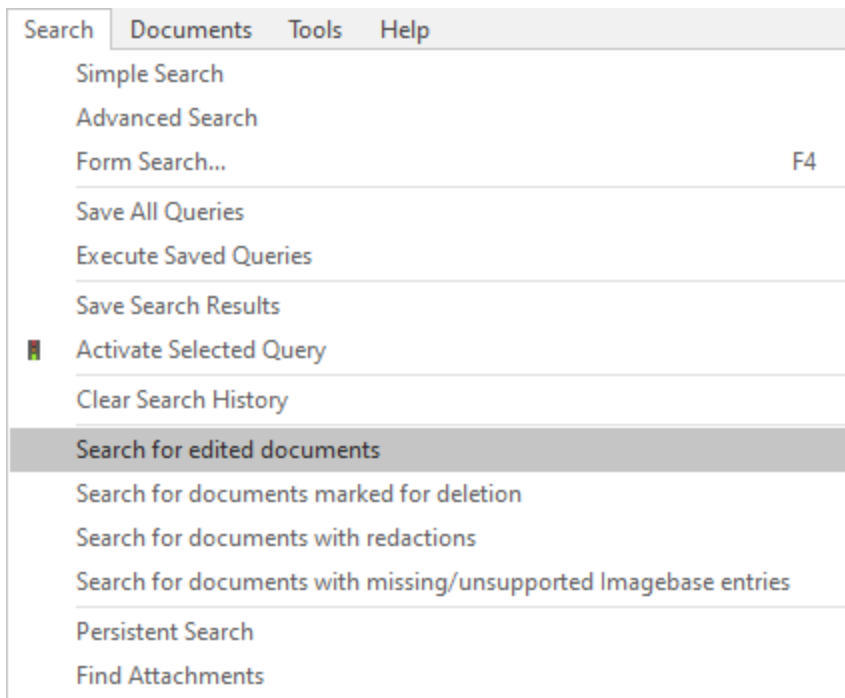
Concordance Desktop automatically saves the new record as soon as you close the Edit view or navigate to another record.

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**.

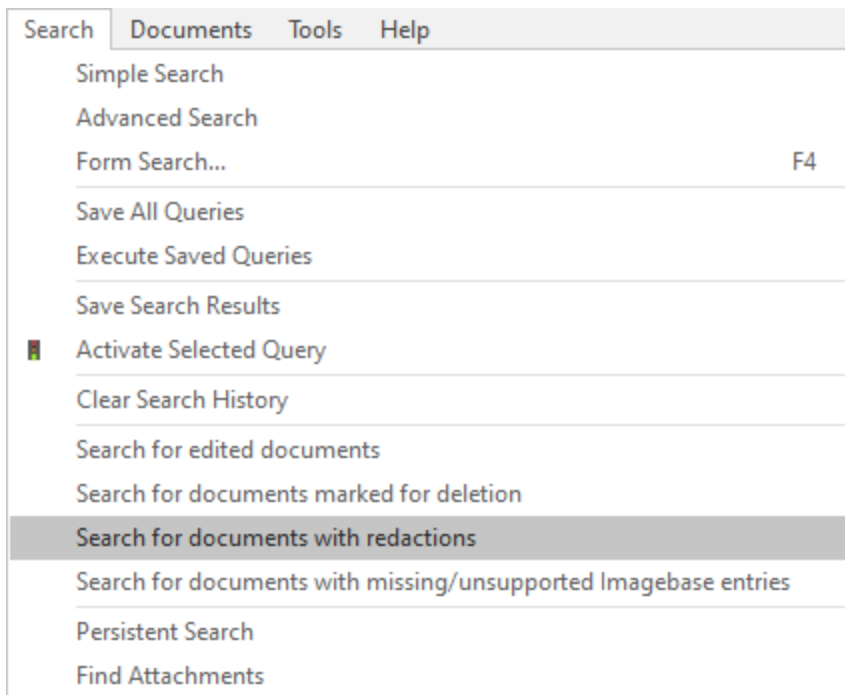
Searching for edited records

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.



Searching for documents with redactions

To query the database for any documents that have been redacted, use the Search for documents with redactions command. When you select Search for documents with redactions, all documents that have been redacted are displayed in Browse or Table view.




Deleting records

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

You can also mark multiple records for deletion at one time. By querying for these records, you can mark all of them for deletion at once.

Records are not permanently removed from the database until your Concordance Desktop administrator removes them, so retrieval of documents marked for deletion is available.


To mark individual records for deletion:

1. In the **Browse** or **Table** view, select the record you want to mark for deletion.
 2. On the **Standard** toolbar, click the **Edit** button to open the **Edit** view.
 3. Do one of the following:
 - On the **Dynamic** toolbar, click the **Delete** button.
 - On the **Dynamic** toolbar, click the **Undo** button , click the **Delete document** option in the **Edit Options** box, and then click **OK**.
-

Clicking the Delete button or clicking Undelete Document in the Edit Options box marks an individual record for deletion. DEL is now displayed in the status bar for the record.

Before a record is permanently deleted by your Concordance Desktop administrator, you can unmark a record for deletion.

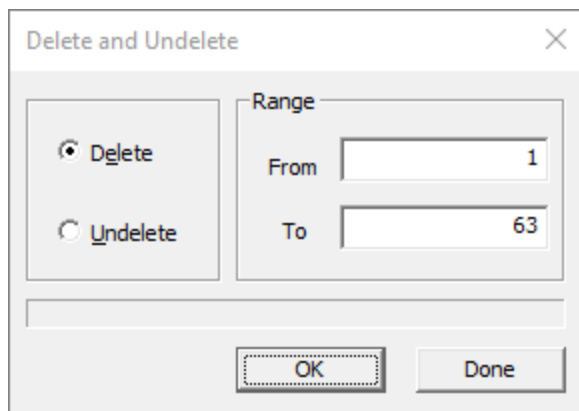
To unmark individual records for deletion:

1. In the **Browse** or **Table** view, select the record you want to unmark for deletion.
2. Click the **Edit** button on the **Standard** toolbar to open the **Edit** view.
3. Do one of the following:
 - On the **Dynamic** toolbar, click the **Delete** button.
 - On the **Dynamic** toolbar, click the **Undo** button , select the **Undelete document** option in the **Edit Options** box, and then click **OK**.

When a record is marked for deletion, clicking the Delete button or clicking Undelete Document in the Edit Options box removes the mark for deletion from the record and DEL is removed from the status bar for the record.

To mark multiple records for deletion:

1. Run a search for a batch of records that you want to mark for deletion.
2. Verify that the desired records appear in **Table** view.
3. On the **Edit** menu, click **Delete and Undelete**.



4. In the **Range** field, confirm the range of records to mark for deletion, and then click **OK**.

Selected records are marked for deletion and a DEL is shown in the status bar for each of the records.

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

Working with Transcripts

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

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

For more information about joining a transcripts and records database together, see [Concatenating Databases](#).

Viewing Transcripts

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

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

Right-click menu options for transcript databases:

- Change the font size and color while reviewing the transcript on the screen, especially useful if more than one database is open.
- Print the transcript.
- Print selected content of the transcript.
- Add or edit a note or attachment.
- Export the transcript to other litigation software, like CaseMap and Sanction.

You can easily navigate to a transcript you want to review by using the Go to button on the Dynamic toolbar, and entering the document page and line numbers in the Go to box. The transcript document is identified in the Concordance Desktop title bar by name, date, and volume.

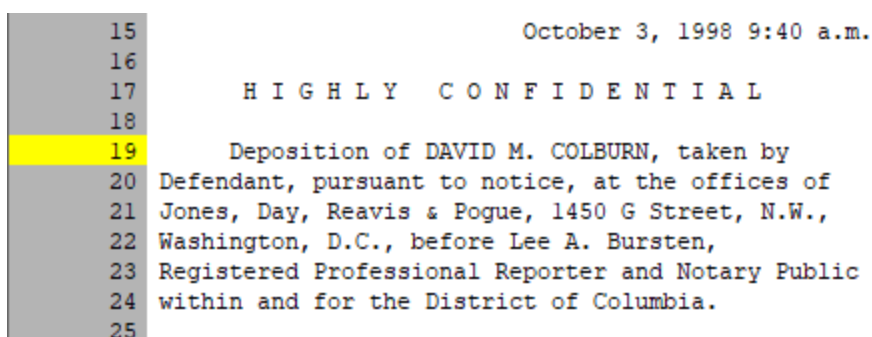
There are four ways to annotate a transcript:

- Apply a Quick Mark
- Create a Note

- Apply an Issue tag
- Add an Attachment

Adding Quick Marks to transcripts

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

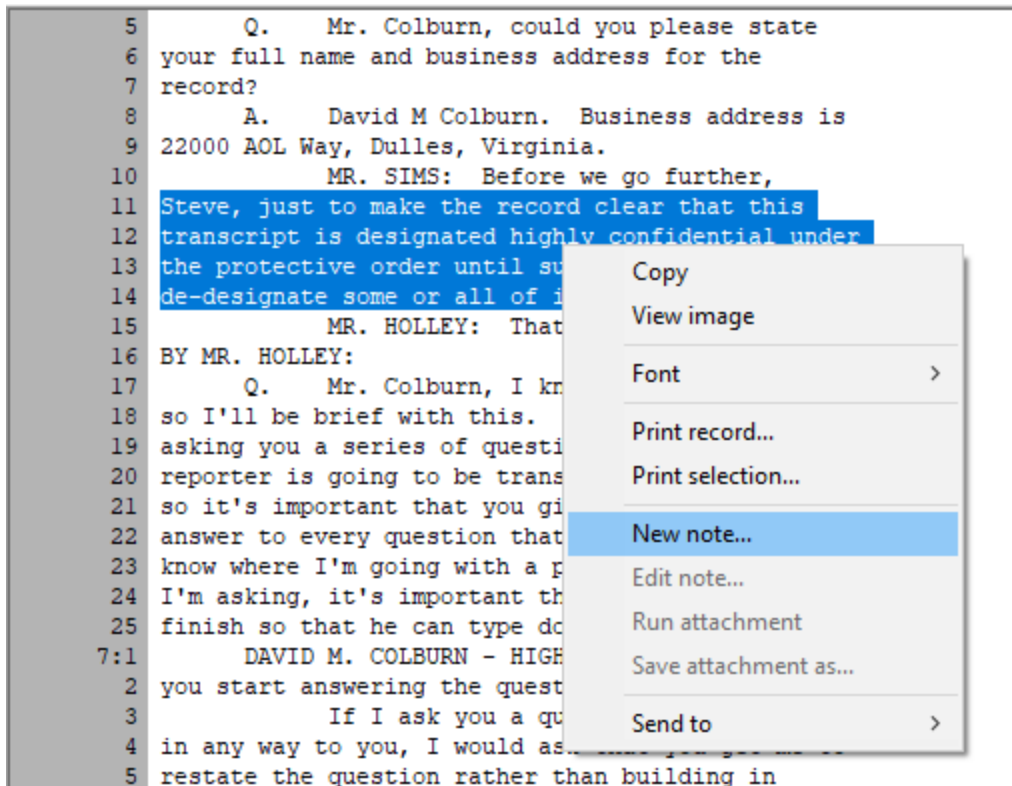


- ✍ Quick Marks made in West® LiveNote® are retained if the transcript is imported from that application into Concordance Desktop.

Adding notes to transcripts

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

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



To add transcript notes:

1. In the **Browse** view, select the transcript text or region where you want to apply a note.
2. Right-click the selected text and select **New note** to open the **Notes** dialog box.
3. On the **Note** tab, type the applicable comments.

To apply issues to a transcript, see Applying issue tags to transcripts.

To add attachments to a transcript, see Adding attachments to transcripts.

4. Click **OK** to save the note and close the **Notes** dialog box.

Once a note is applied, the area you selected is highlighted and underlined. To view the note text, float your cursor over the highlighted text.

5. If you need to edit a note, right-click a note and then click **Edit note**.
6. Modify the note text as needed and click **OK**.

Changes are immediately viewable. However, in order to run full-text searches on new or modified notes in the record, the database needs to be reindexed. Once this action is performed all reviewers can search the notes.

7. To reindex the database, on the **File** menu, click **Reindex**.

To delete a note:

1. In the **Browse** view, click the note or right-click the note and select **Edit note** to open the **Notes** dialog box.
2. Click the **Delete** button, and then when prompted click **Yes** to verify that you want to delete the note.

The note is removed from the database and the next note in the database displays in the Notes box.

3. Click **OK** to close the **Notes** box.


Notes disappear the instant you delete them, but are not physically removed from the database until your Concordance Desktop administrator removes them.

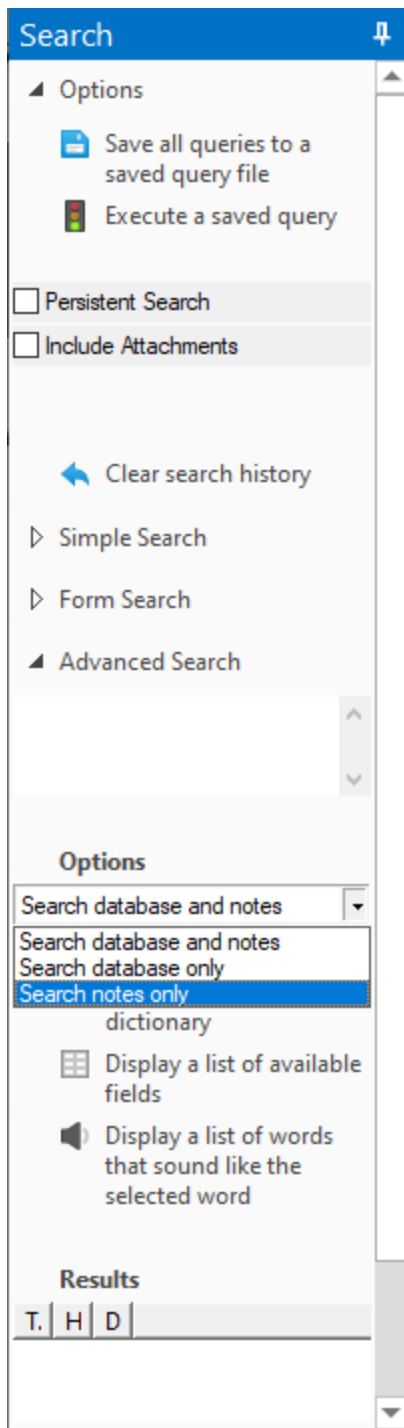
Searching Transcript Notes

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

You can search transcripts notes using:

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

 The database must be reindexed before any new notes you entered are searchable.



To search transcript notes using the Advanced Search panel:

1. In the **Search** task pane, open the **Advanced Search** panel.
2. From the **Options** list, select **Search notes only**.

3. Type the type the search value or string in the **Advanced Search** panel.
4. Click the **Search** button or press Enter to initiate the query.

Your search results display at the bottom of the Search pane and include those transcripts with notes containing the search value or string.

If multiple transcripts display in your search results, use the Notes panel to review each transcript to find other notes containing the search value or string.

To search transcript notes using the Notes task pane:

1. Open the **Notes** task pane, in the **Note** panel, select **View by notes**.

When you select View by notes, the transcript's notes are displayed in the Notes panel.

2. To view a specific note in the transcript, double-click on the note in the note list to jump directly to that note in the transcript.

- ✍ In the Notes panel, lines with <empty> are simply transcript notes that do not contain any note text in the note.

Quick marks are also displayed in the Notes panel. The text of a transcript line marked by a quick mark is what is displayed for each quick mark in the Notes panel.

Applying issue tags to transcripts

Tags work well for categorizing documents, because tags mark or categorize an entire document. Transcripts are handled differently from documents in Concordance Desktop. Instead of marking the entire transcript, you are marking a section of text within a transcript. An issue is a type of tag applied to a section of transcript text. When you're adding issues to transcripts, you also have the option of entering comments along with the issue tag for further distinction.

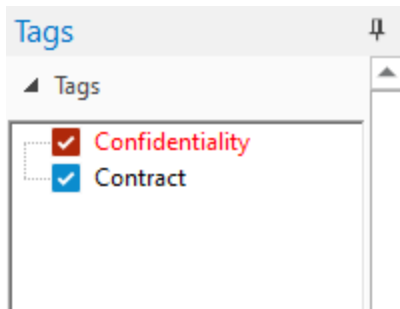
Applying tags to transcripts is not the same method as applying tags to documents records. Tagging is done during review to categorize an entire document. Tagging transcripts with issues is done to digest a transcript based upon a review category.

You can apply issue tags to transcripts from both the Tags task pane and the Notes dialog box.

Document Tags Versus Issue Tags

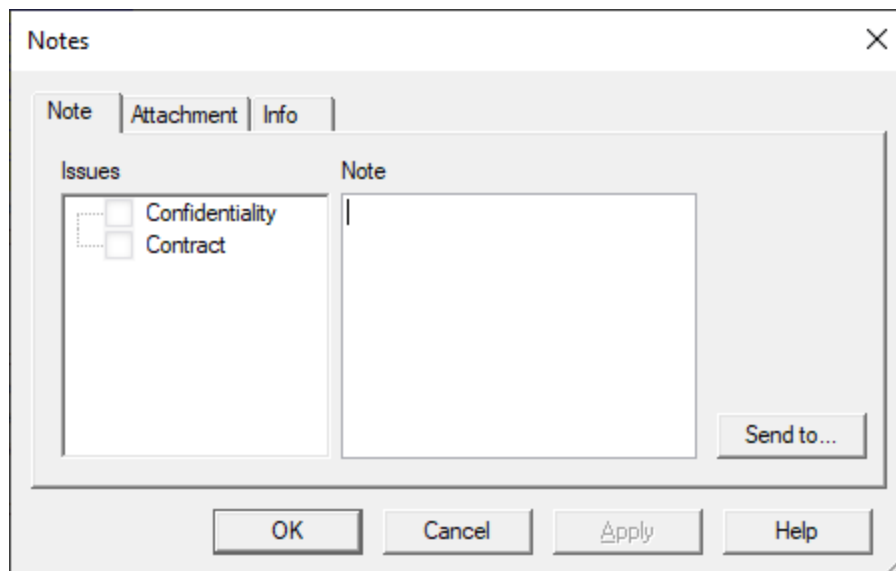
The difference between a document tag and an issue tag:

- A document tag is applied at the document level. When a document tag is applied to a document, the tag name displays in black text with a blue check box in the Tags task pane
- An issue tag is applied at the text level, within the document. When an issue tag is applied to a document, the tag name displays in red text with a dark red check box in the Tags task pane



To add issue tags from the Notes dialog box:

1. In the **Browse** view, select the transcript text or region where you want to apply an issue tag.
2. Right-click the highlighted text and select **New note** to open the **Notes** dialog box.



3. In the **Issues** field on the **Note** tab, select the check box next to the tags you want to apply.

A red check mark next to a tag in the Issues field indicates the issue tag has been applied to the selected text.

To apply notes to a transcript, see Adding notes to transcripts.

To add attachments to a transcript, see Adding attachments to transcripts.

4. Click **Apply** and then **OK** to save the issue tag and close the **Notes** dialog box.

Once an issue tag is applied, the area you selected is highlighted and the tags you applied are selected. The tag name is displayed in red in the Tags panel.

5. If you need to edit the issue tags, right-click the highlighted text and select **Edit note**.

To remove an issue from a document in the Notes dialog box, in the Issues field on the Notes tab, clear the issue tag check box.

You can also remove an issue from a document in the Tags task pane by right-clicking the issue in the Tags task pane and clicking the Uncheck issue command. Removing the tag in the Notes dialog box or clicking the Uncheck issue command in the Tags task pane does not delete the issue code from the database. Issue codes can be deleted from the Add/Delete panel in the Tag and Issue Management dialog box.

6. Modify the tags as needed and click **OK** to save your changes.

To view the issues applied to highlighted text, you can double-click the highlighted text or open the Notes task pane, select View by Issues or View by Notes, and double-click the applicable issue or note to open the Notes dialog box.

To add issue tags from the Tags task pane:

1. In the **Browse** view, select the transcript text or region where you want to apply an issue tag.
2. Open the **Tags** task pane.
3. In the **Notes** panel, press **SHIFT** and select the check box next to the tags you want to apply.

The default setting for adding issue tags using the Tags task pane is SHIFT+Left Click. If your Concordance Desktop administrator changed the issue tagging setting to only use a single left click, just select the check box next to the tags to want to apply.

A red check mark next to a tag indicates the issue tag has been applied to the selected text.

To remove an issue from a document in the Tags task pane, right-click the issue in the Tags task pane and click the Uncheck issue command.

You can also remove an issue from a document in the Notes dialog box, by clearing the issue tag check box in the Issues field on the Notes tab. Removing the tag in

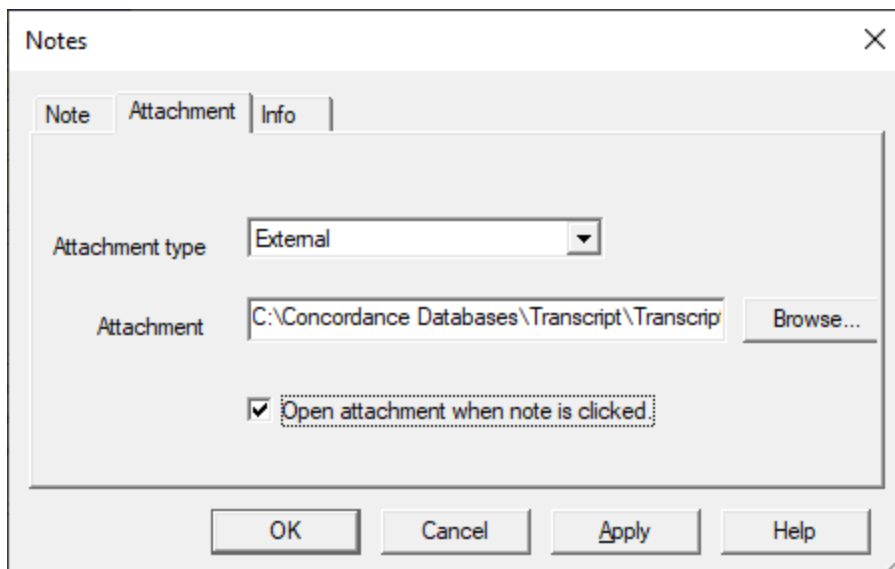
the Notes dialog box or clicking the Uncheck issue command in the Tags task pane does not delete the issue code from the database. Issue codes can be deleted from the Add/Delete panel in the Tag and Issue Management dialog box.

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

Adding attachments to transcripts

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

Concordance Desktop allows you to browse to your hard drive, network, or the Internet to attach a file, creating a direct hyperlink to a file or Web site so that it can easily be referenced later.



To add attachments to transcripts:

1. In the **Browse** view, select the transcript text or region where you want to add an attachment.
2. Right-click the highlighted text and select **New note**.
3. Click the **Attachment** tab.
4. Select the file type's destination or location from the **Attachment type** list:
 - **<none>** - field defaults to **<none>** until an attachment is added
 - **External** - to attach an external file or link to a Web site
 - **Viewer** - to attach a document image from a Concordance Desktop database
 - **Clipboard** - to copy the highlighted text to the Microsoft Windows clipboard
 - **Internal** - used by the system only
5. Click the **Browse** button next to the **Attachment** field and locate the applicable files or Web site.
6. Click the **Open** button on the **Open** dialog box to add the path to the files or Web site address to the **Attachment** field.
7. To automatically launch the file or Web site with one click, select the **Open attachment when note is clicked** check box.

If the Open attachment when note is clicked check box is not selected, users have to right-click the note and select Run attachment to open the attachment.

To apply notes to a transcript, see Adding notes to transcripts.

To apply issues to a transcript, see Applying issue tags to transcripts.

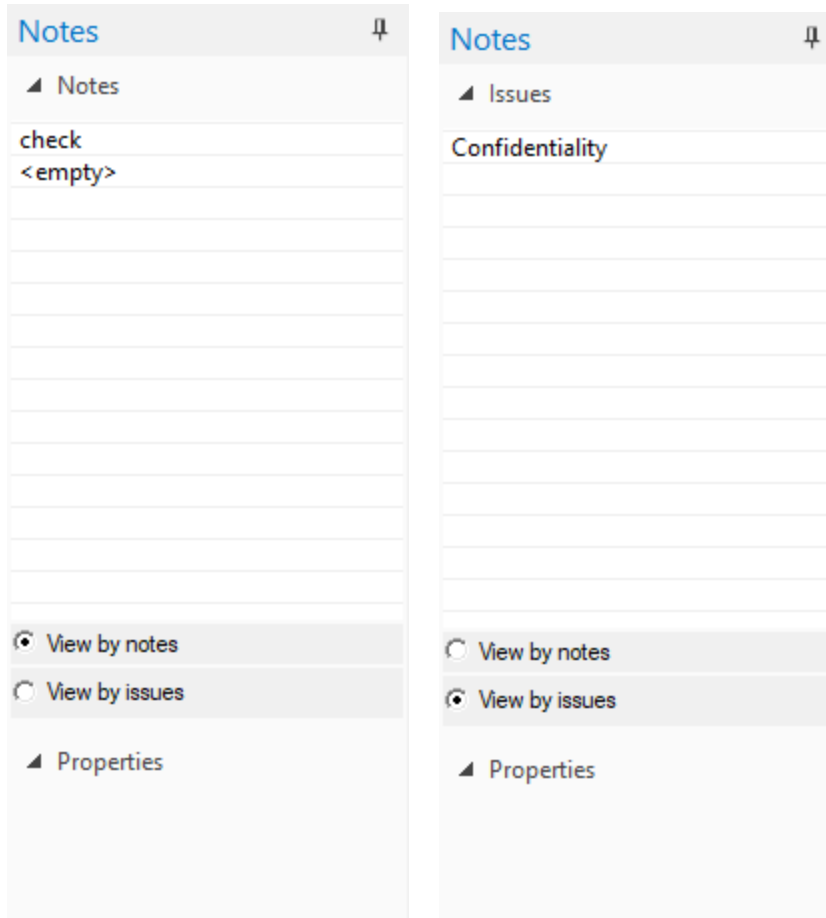
8. Click **OK** to save the attachment.
9. If you need to edit the attachment, right-click the highlighted text and select **Edit note**. Modify the attachment information as needed and click **OK** to save your changes.

If you select <none> from the Attachment type field but do not delete the file path or Web site address from the Attachment field, Concordance Desktop does not permanently remove the path or address. Concordance Desktop only blocks the attachment from launching when someone is reviewing the highlighted text.

10. To save a copy of the attachment, right-click the highlighted text and select **Save attachment as** to save it to your hard drive or network.
-

Reviewing transcript notes

A quick review of a transcript notes and issues can be done in the Notes task pane. The notes, issue tags, and attachments associated with the current transcript are listed in the Notes and Issues panels. Click a listed item to quickly jump through all the annotations in a transcript.



To review notes and issues in a transcript:

1. Open the transcript in the **Browse** view.
2. Open the **Notes** task pane.
3. In the **Notes** panel, do one of the following:
 - To view by notes, select **View by notes**.
 - To view by issues, select **View by issues**.

Selecting View by notes displays a list of the notes applied to the transcript in the Notes panel.

Selecting View by issues displays a list of the issues applied to the transcript in the Issues panel.

4. Click a note in the **Notes** panel to instantly jump to the highlighted region of the transcript.
5. Click an issue in the **Issues** panel to instantly jump to the tagged region of the transcript.

You can also double-click a note or issue to jump to the transcript note and open the Notes dialog box and edit the note, issue, and/or attachment.

Notes and issues in the Notes task pane display in the order they appear in the transcript, not in the order applied.

The properties for the selected note or issue are displayed in the Properties panel below the Notes and Issues panels. The Properties panel displays the location of the note or issue in the transcript, any added note text, and the path to any attached file or Web site address.

Printing

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

Concordance Desktop provides several printing options for document records and transcripts, and can be used to create and print a variety of customized reports based on search results, field content, tagged document sets, and transcript annotations. Printing options are available in the Browse and Table views. The view you print from determines the format of the print output. The print output format looks similar to the view you print from.

You can print single pages using the viewer or a set of media or image files from Concordance Desktop using the Print CNV command on the Tools menu.

In Concordance Desktop you can print:

- Records directly from the Browse view
 - Record batches based on queries
 - Transcript annotation reports (Annotation Report Writer)
 - Tagged record lists
-

- Summary reports from the Table view (Report Writer or Send to Excel)
- Selected field data
- Multiple annotated media files from CNV as a batch

Using the viewer you can print:

- Redacted media (documents/images)
- Single documents (a single document may contain multiple pages)

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

While you have basic options for printing page numbers and dates, Concordance Desktop also offers selections for printing highlighted annotations, underlined hits, field labels, and more. These print options are useful for printing sets of records for full-text review or to print annotations from transcripts.

You can also print a spreadsheet report of queries displayed in Table view with field text in the sort order selected. This option is useful when a summary listing is appropriate.

With lengthy documents like depositions, transcripts, and research reports, print a Keywords in Context (KWIC) report to capture pertinent information in context, like the deponent's name or article title.

- ✍ If you need to print from the Table view, try exporting the content to Excel and printing it from there. For more information about exporting table data and exporting numerical data, see [Exporting Concordance Desktop data](#).
- ✍ Your Concordance Desktop administrator or Litigation Support Manager is typically in charge of printing productions because of the sensitivity involved in running a production. We highly recommend that any staff tasked with printing productions receives proper Concordance Desktop administration training before attempting to do so with live databases.

For more information about producing new image files using the Production Wizard, see [Creating a production](#).

Printing individual records and transcripts

You can print an individual record, transcript, or selected text from the Browse view. When you print from the Browse view, Concordance Desktop only prints the record or transcript file currently displayed in the Browse view.

Before you print a record or transcript, you can preview how the document will print by clicking Print Preview on the File menu.

- ✍ If you have another view, such as the Table view, open with the Browse view, the Print and Print Preview menu selections may be disabled on the File menu. Click on the record or transcript file in the Browse view to activate the Print Preview and Print menu selections.

For additional print options, you can click the Print button on the Standard toolbar. For more information about printing from the Standard toolbar, see Printing standard reports.

To print an individual record or transcript:

1. In the **Browse** view, open the record or transcript you want to print.
2. On the **File** menu, click **Print** or right-click in the **Browse** view and click **Print record**.
3. Click **OK** to print the record or transcript file.

To print selected text in the Browse view:

1. In the **Browse** view, select the text you want to print.
2. Right-click the selected text and click **Print selection**.
3. Click **OK** to print the selected text.

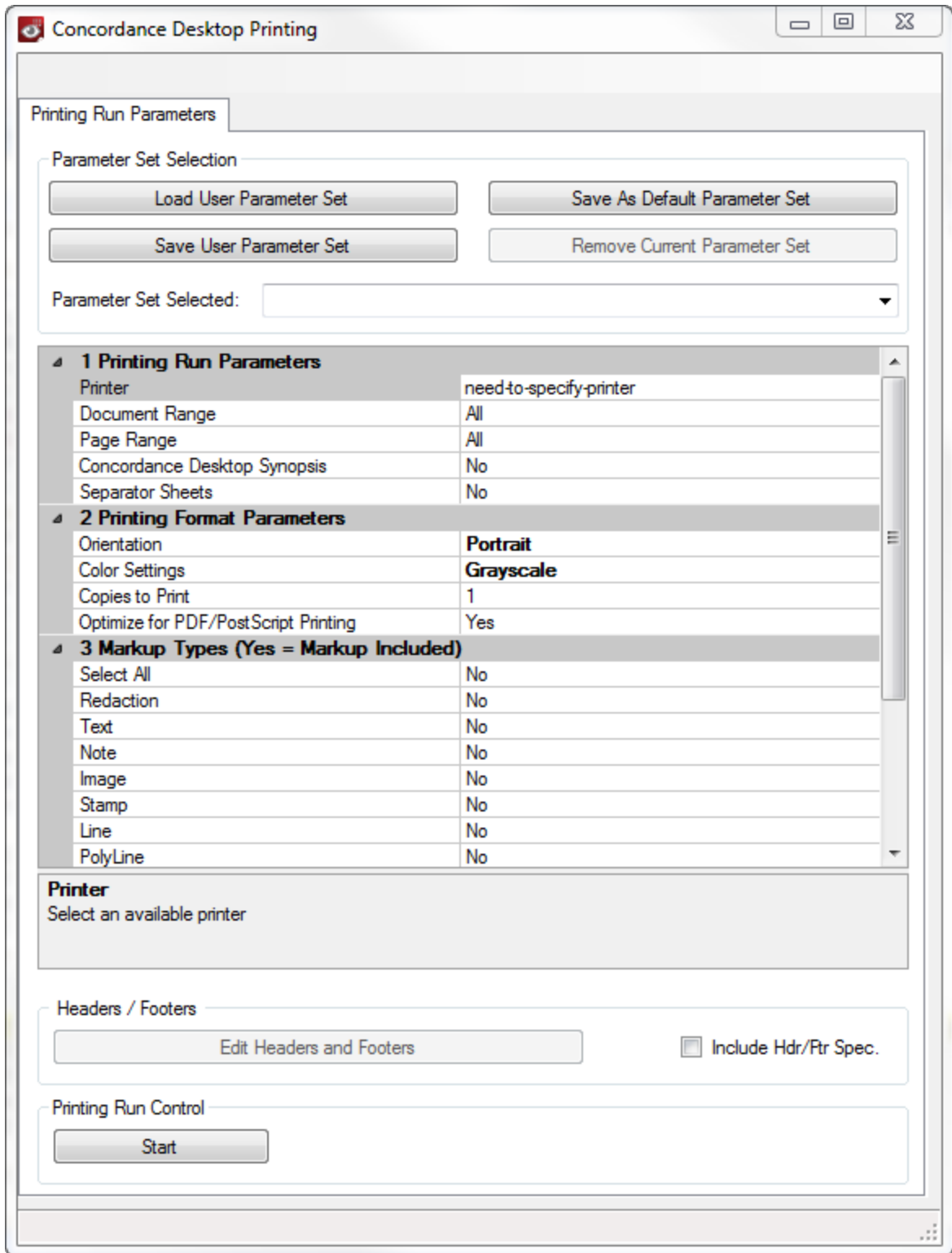
Batch Printing with Concordance Desktop Viewer

Batch printing allows you to print what is seen in the viewer for multiple documents. In Concordance Desktop, batch printing is known as CDV Printing. The CDV Printing feature allows you to print markups (annotations), add synopsis and separator sheets, and add headers/footers and watermarks.

If you want to print documents or images from concatenated databases, each database must be similar in structure, contain media keys, a current .CIB file, and you must have a minimum of ReadOnly access.

When printing documents, be aware of the following:

- If you are printing documents that have been reviewed and redacted in the viewer, be aware that any redaction placed on the document will print transparent revealing the text underneath. If you want to print redactions as opaque, you must run the documents through the Production process in Concordance Desktop, then print the produced document.
 - Printing documents that contain markups to Adobe PDF using the File > Print option, does not permanently burn the markups in the document. If you want markups burned in, you must run the documents through the Production process in Concordance Desktop, then print the produced document.
 - ☑ The CDV Printing bulk printing feature is only available in Concordance Desktop when you are using the viewer for reviewing and annotating documents.
 - ⚠ When including Synopsis and Separator Sheets in a bulk print job, you may experience delayed print times. This is due to how Concordance Desktop processes the synopsis and separator sheets at print time.
-



Before scheduling a batch print run, you first need to identify and locate the documents you want to print using one of the Search tools available in Concordance Desktop. See, Available search tools.



Identifying documents for printing

1. In Concordance Desktop, open the database containing the documents you want to print.
2. Run a search query to locate the documents you want to print.

Using CDV Printing

1. In Concordance Desktop, from the **Tools** menu, click **CDV Printing**.
2. Specify the printing parameters:



Setting print run parameters:

1. Select the **Printer** you want to use for printing the documents/images.
 2. Select the appropriate **Document Range**:
 - To include all the documents in the query, click **All**.
 - To include a selected set of documents from the query, click **Range**, and then specify the range of documents you want to print. The default range is the complete range of documents in the current Concordance Desktop query.
 3. Select the appropriate **Page Range**:
 - To include all the pages of a document in the query, click **All**.
 - To include a selected set of pages of a document in the query, click **Range**, and then specify the range of pages for a document.
 4. To include data from Concordance Desktop fields that you have *Read* access (minimum):
 - Select **Yes** for **Concordance Desktop Synopsis**.
 - In the **DBC B Field Names** field, click the field, and then click the Browse button .
 - In the **DBC B Fields** dialog box, select your desired database fields:
 - To select all the fields, click **Select All**.
 - Select specific fields by clicking the check box for each desired database field you want to include on the Synopsis sheet.
 - To change the order of database fields on the Synopsis sheet, select the field and click the **Move UP** or **Move DOWN** buttons.
 - Click **Save** in the DBC B Fields dialog box.
 - In the Synopsis **Font** field, click the field, and then click the **Browse** button .
 - In the **Font** dialog box, do the following:
 - In the **Font** list, click the font.
-

- In the **Font Style** list, click the font style.
- In the **Size** list, click or type the font size.

The Synopsis Separator sheets may, together, contain up to 32 unique database fields. Both sheets may contain the same database fields, which counts as a single unique field. For example, if you add three fields, BegNo, Admin1, and Filepath field to the Synopsis sheet, and two fields, BegNo, and Date Sent to the Separator sheet. You have added four unique fields. The BegNo field counts as one unique field.

The synopsis page prints the first 60 characters of data within the specified Concordance Desktop database fields. If security is enabled, only those fields with a minimum of "Read" access are displayed.

5. To add separator sheets at the beginning of each document:
 - Select **Yes** for **Separator Sheets**.
 - In the Separator Sheets **Text** field, click the field, and then click the Browse Button .
 - In the **Separator Sheet Editor** dialog, select your separator sheet options:
 - Type the text you want to appear on the separator sheets.
 - To insert a Concordance Desktop macro, right-click on the edit box and then select any the Concordance Desktop Macros (Date, DateTime, DocNo, Time) from the list that displays.
 - To insert a Concordance Desktop database field to display, right-click on the edit box and then select the field from the list that displays. The fields are displayed in the order they appear in the corresponding database. If security is enabled, only those fields with a minimum of "Read" access are displayed.
 - In the Separator Sheets **Font** field, click the field, and then click the Browse Button .
 - In the **Font** dialog box, do the following:
 - In the **Font** list, click the font.
 - In the **Font Style** list, click the font style.
 - In the **Size** list, click or type the font size.

When you add print macros or select database fields, they appear in the text between angled brackets <>. When the print job is executed, the information associated with the macro or database field appears within the text where the macros or database fields were placed. There is no limit to the number of macros or database fields you can add.

Setting print format parameters:

1. From the **Printing Format Parameters** section, in the **Orientation** list, do one of the following:
 - Click **Portrait**.
 - Click **Landscape**.
 - Click **Rotate to Fit** — allows more of the image to fit within the margins of the printed page.

Some document types, such as .xls, the landscape option will split the page by columns and orientated as portrait.

2. In the **Color Setting** list, do one of the following:
 - To print the documents using the document's original colors, click **Color** (default).
 - To print the documents to shades of gray, click **Grayscale**.

To ensure the print job prints the documents as expected, make sure that the printer's color properties are set appropriately.

3. In the **Copies to Print** field, type the number of copies you want to print. The maximum number of copies is 100 and the copies are automatically collated.
4. When printing a PDF document, in the **Optimize for PDF/Postscript Printing** field, click **Yes**.

The Optimize for PDF/PostScript Printing option resolves the issue where some older printers and the PDF Distiller and Writer may not properly invert printouts resulting in reversed prints (black background and white foreground). When selected, this produces a bitmap of the current document/image that is sent to the printer giving accurate printouts for the problematic printer or print driver. However, selecting this option results in slower print time and a larger print spool file.

Specifying markups to include in printing:

From the **Markup Types** section, do any of the following:

- To include all markups, in the **Select All** list, click **Yes**.
- To exclude all markups, in the **Select All** list, click **No**.
- To include some of the markups, for each mark up you want to include click **Yes** from the corresponding markup list.

When printing viewer documents, any documents that contain redaction markups are printed with transparent redactions. If you want the redactions

to print opaque, you need to use the Production tool in Concordance Desktop to produce the document(s) and then print the produced document.

Due to how the markups are rendered during printing, if you want to include any applied crossout, strikeout, highlight, or underline markup in a print job, please note that all four markups are treated as one and all four if applied will be included in the printed file. For example, if a crossout and highlight markup are applied to a document, if the crossout markup is selected in the CDV Printing parameters, both the crossout and the highlight markup are printed.

Adding headers/footers and watermarks:

Headers and footers are a string of text assigned to a specific location within a document. For productions and printing, the text is not restricted to just the top and bottom margins of a document, you can also place them in the right and left margins of a document.

A watermark is a semi-transparent string of text that appears behind the existing document content. A watermark appears across each printed document from bottom left to top right and has a transparency setting of 20%.

1. In the **Printing Run Parameters** dialog box, select the **Include Hdr/Fts Spec** check box.
2. Click the **Edit Headers/Footers and Watermarks** button.
3. Click the (+) sign next to the Header/Footer or the watermark you want to edit.
4. 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.

Available macros

Keep the following in mind when adding macros to headers/footers, and watermarks:

- Each line of a 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 print.
 - All macro values are case insensitive, except for the %FIELD_ macro.
 - All settings in the Header and Footers dialog box are saved for all documents and images in the Wind
-

Macro	Description
%FIELD_	Inserts database field data up to 60 characters for a each specified field. For example, %FIELD_OCR1 %FIELD_OCR2, would print 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
%SysDatePlusDays(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 print is executed based on a 12-hour clock
%MilTime	Inserts the current time the print is executed based on a 24-hour clock
%Title	Inserts the current title of the document
%Page	Inserts the page number of the document
%TotalPages	Inserts the total number of pages of the document
%BatesPgNo()	Inserts a page number (x) to include for each printed document. The number entered is the beginning page number for each document. Multi-page documents are numbered incrementally. For example, %BatesPgNo(0001) would print 0001 on each single-page document. However, if a document had more than one page, the first page would appear as 0001, the second as 0002, and so on.
%Login, %User	Inserts the user name of the person who executed the print
%Hostname	Inserts the hostname of the machine where the print was executed from
%IPAddress	Inserts the IP address of the machine where the print was executed from
%%	Inserts a single % character
©	Inserts a copyright symbol
®	Inserts a registered trademark
%AUTO_	Inserts database field data AND increments field content ending with a numeric value by 1 for each page. Field must be specified. Do not use with fields where special characters such as % are present. Does not account for gaps or suffixed numbers within a document.

- 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.

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**.

Printing and Production header/footer and watermark settings are separate entities. Parameters you set in the Printing dialog box are only available for printing.

3. When finished, click **Start**.

Saving print parameters:

1. Set the printing parameters.
2. Do one of the following:
 - To save the parameters as a named parameter set, in the **Parameter Set Selected** field, enter a name, and then click **Save Parameter Set**.
 - To save the parameters as the default set, click **Save as Default Parameter Set**. The default parameter set is loaded each time the CDV Printing command is executed.

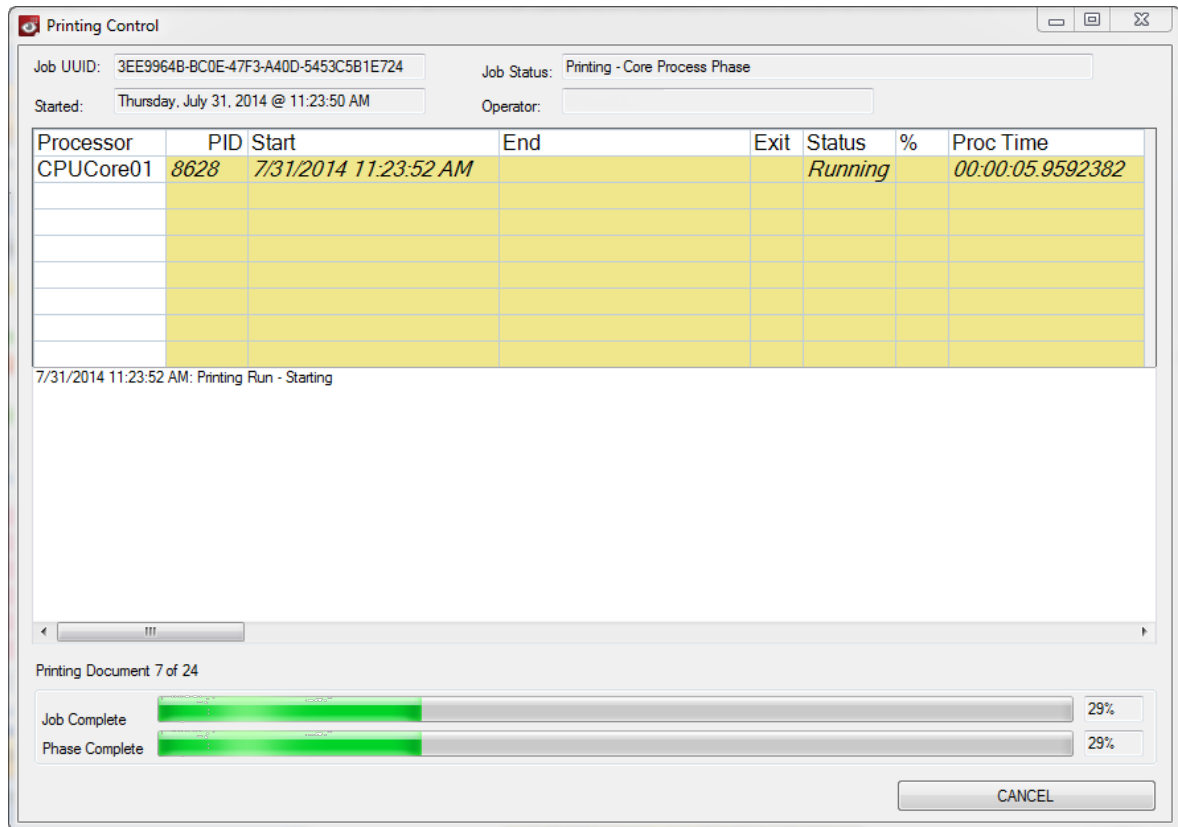
All the parameters are saved, with the exception of document range as this always defaults to 1-*n*, where *n* is the total number of documents in the current Concordance Desktop query.

Using saved print parameters:

1. In the **Parameter Set Selected** list, click the parameter set you want to load.
2. Click **Load User Parameter Set**.

Monitoring print jobs:

When a print job is executed, the Print Console is displayed. The Print Console displays the progress of the files as they are processed and sent to the selected default printer.



Batch Printing with Concordance Viewer

Batch printing allows you to print what is seen in the viewer for multiple documents. In Concordance Desktop, batch printing is known as CDV Printing. The CDV Printing feature allows you to print markups (annotations), add synopsis and separator sheets, and add headers/footers and watermarks.

If you want to print documents or images from concatenated databases, each database must be similar in structure, contain media keys, a current .CIB file, and you must have a minimum of ReadOnly access.

When printing documents, be aware of the following:

- If you are printing documents that have been reviewed and redacted in the viewer, be aware that any redaction placed on the document will print transparent revealing the text underneath. If you want to print redactions as opaque, you should select the **Opaque** option in the **Print Redactions as** drop down.
- Printing documents that contain markups to Adobe PDF using the File > Print option, does not permanently burn the markups in the document. If you want markups burned

in, you must run the documents through the Production process in Concordance Desktop, then print the produced document.

- ✍ The CDV Printing bulk printing feature is only available in Concordance Desktop when you are using the viewer for reviewing and annotating documents.

- ⚠ When including Synopsis and Separator Sheets in a bulk print job, you may experience delayed print times. This is due to how Concordance Desktop processes the synopsis and separator sheets at print time.

CONCORDANCE PRINTING [Close]

SETTINGS

Settings

[Dropdown]

Save Save as default Remove

PRINTER

Send To OneNote 2016 [Dropdown]

DOCUMENT SELECTION

Document Range: Current Document [Dropdown]

Page Range: All [Dropdown]

Include document separator sheet

Include document synopsis

OUTPUT SETTINGS

Orientation: Portrait [Dropdown]

Color Settings: Color [Dropdown]

Resize for best fit

Copies to print: 1 [Text]

MARKUPS

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

Print redactions as: Opaque [Dropdown]

HEADERS AND FOOTERS

Include headers and footers

Preview Start printing Cancel

Before scheduling a batch print run, you first need to identify and locate the documents you want to print using one of the Search tools available in Concordance Desktop. See, Available search tools.

To locate documents for printing

1. In Concordance Desktop, open the database containing the documents you want to print.
2. Run a search query to locate the documents you want to print.

To print viewer documents or images

1. In Concordance Desktop, from the **Tools** menu, click **CDV Printing**.
2. Specify the printing parameters:

To set the printing run parameters:

1. Select the **Printer** you want to use for printing the documents/images.
 2. Select the appropriate **Document Range**:
 - To include the current document, click **Current Document**.
 - To include all the documents in the query, click **All**.
 - To include a selected set of documents from the query, click **Range**, and then specify the range of documents you want to print. The default range is the complete range of documents in the current Concordance Desktop query.
 3. Select the appropriate **Page Range**:
 - To include all the pages of each document in the query, click **All**.
 - To include a selected set of pages of each document in the query, click **Range**, and then specify the range of pages for each document.
 4. To include data from Concordance Desktop fields to which you have Read or Read/Write access:
 - Select **Include document synopsis**.
 - Click the **Configure synopsis sheet** button.
 - In the **Document Synopsis Configuration** dialog box:
 - Select the desired database fields from the **Available Fields** list and add them to the **Selected Fields** list on the right.
 - To change the order of database fields, select a field in the **Selected Fields** list and drag/drop it in the desired order.
-

- Click the **FONT** button, and select your font options in the **Select Font** dialog:
 - Select your font in the **Font Family** list.
 - Select your font size in the **Font Size** list.
 - Select **Bold** or **Italic** under **Font Style** if desired.
 - Click **OK** to close the **Select Font** dialog with your selections.

The Synopsis Separator sheets may, together, contain up to 32 unique database fields. Both sheets may contain the same database fields, which counts as a single unique field. For example, if you add three fields, BegNo, Admin1, and Filepath field to the Synopsis sheet, and two fields, BegNo, and Date Sent to the Separator sheet. You have added four unique fields. The BegNo field counts as one unique field.

The synopsis page prints the first 60 characters of data within the specified Concordance Desktop database fields. If security is enabled, only those fields with a minimum of "Read" access are displayed.

5. To add separator sheets at the beginning of each document:
 - Select **Include document separator sheet**.
 - Click the **Configure separator sheet** button.
 - In the **Document Separator Page Configuration** dialog box:
 - In the text box, type the text you want to appear on the separator sheets.
 - To insert a Concordance Desktop macro (Date, Time, DateTime) or Concordance Desktop database field, click the **Fields** dropdown and select the macro or field from the list that displays.
 - Click the **FONT** button, and select your font options in the **Select Font** dialog:
 - Select your font in the **Font Family** list.
 - Select your font size in the **Font Size** list.
 - Select **Bold** or **Italic** under **Font Style** if desired.
 - Click **OK** to close the Select Font dialog with your selections.

When you add print macros or select database fields, they appear in the text between angled brackets <>. When the print job is executed, the information associated with the macro or database field appears within the text where the macros or database fields were placed. There is no limit to the number of macros or database fields you can add.

To set the printing format parameters:

1. From the **Output Settings** section, in the **Orientation** dropdown, select **Portrait** or **Landscape**
-

Some document types, such as .xls, the landscape option will split the page by columns and orientated as portrait.

2. In the Color Settings dropdown, select:
 - **Color** (default) to print the documents using the document's original colors.
 - **Greyscale** to print the documents in shades of gray.

To ensure the print job prints the documents as expected, make sure that the printer's color properties are set appropriately.

3. Select the **Resize for best fit** check box to have the documents adjusted to best fit based on your output settings.
4. Type the number of copies you want to print in the **Copies to print** text box. The maximum number of copies is 100 and the copies are automatically collated.

To specify markup types to include in the print job:

From the **Markups** section, do any of the following:

- To include all markups, select the **Select All** check box.
- Select each individual markup that you want included.

In the **Print redactions as** drop down box:

- Select **Opaque** to have redaction markups printed opaque, or blocking out the underlying section of document fully.
- Select **Transparent** to have redaction markups printed where the underlying section of document will still show through.

Due to how the markups are rendered during printing, if you want to include any applied crossout, strikethrough, highlight, or underline markup in a print job, please note that all four markups are treated as one and all four if applied will be included in the printed file. For example, if a crossout and highlight markup are applied to a document, if the crossout markup is selected in the CDV Printing parameters, both the crossout and the highlight markup are printed.

To add headers/footers and watermarks:

1. Select the **Include headers and footers** check box. The **Concordance Printing** dialog window displays additional parameters to configure.
-

HEADERS AND FOOTERS

Include headers and footers Font

HEADERS AND FOOTERS

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

MARGINS

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

WATERMARK

Watermark
None

- For each header, footer, margin, or watermark, choose an item from the corresponding drop down that you want to print in that location or leave the selection **None** if you want that area to be left blank. You can select from several different macro and Concordance Desktop database fields.
- To edit the font for the headers and footers, click the **Font** button and select your font options in the **Select Font** dialog:
 - Select your font in the **Font Family** list.
 - Select your font size in the **Font Size** list.
 - Select **Bold** or **Italic** under **Font Style** if desired.
 - Click **OK** to close the **Select Font** dialog with your selections.

Printing and Production header/footer and watermark settings are separate entities. Parameters you set in the Printing dialog box are only available for printing.

- When finished, click **Start printing**.

Using parameter sets:

To save print parameters:

1. Select the printing parameters you want.
2. In the **Settings** drop down field, enter a name for the parameter set and then:
 - Click **Save as default** to save the named parameter set as the default set. The default set is loaded each time the CDV Printing command is executed.
 - Click **Save** to save this set of parameters with the name specified (not as default).

To use saved print parameters select the parameter set name in the **Settings** drop down list. The print parameters will be updated to reflect the selected parameter set.

To remove a saved print parameter set, select the parameter set name in the **Settings** drop down list and click **Remove**.

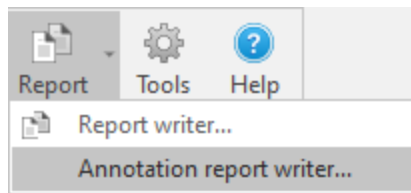
Printing transcript annotations

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.

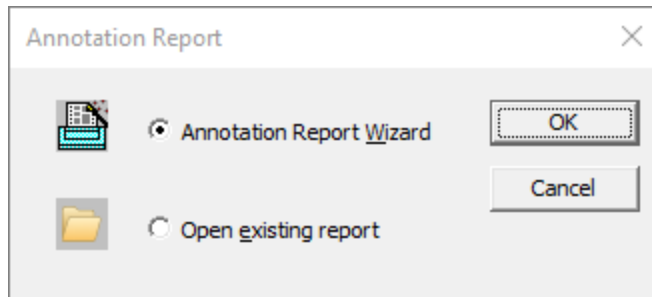
Depending on your needs, each annotated report created in the wizard may include several types of annotations and the text included in the annotations.

To print annotations using the Annotation Report Writer wizard:

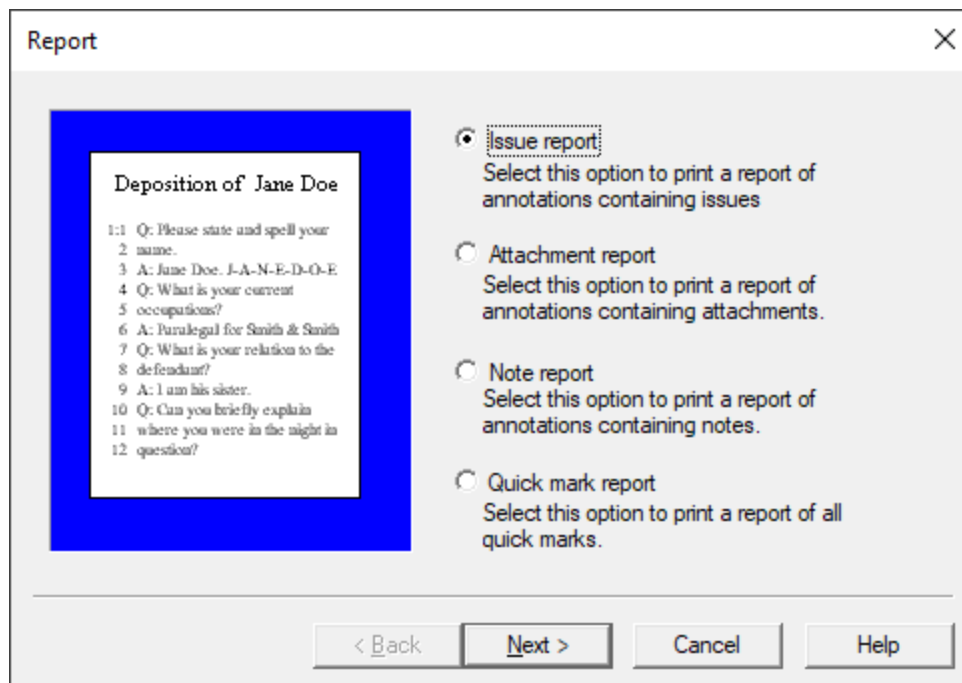
1. In Concordance Desktop, open your transcripts database.



2. On the **Standard** toolbar, click the arrow next to the **Report** button and select **Annotation report writer**.
-



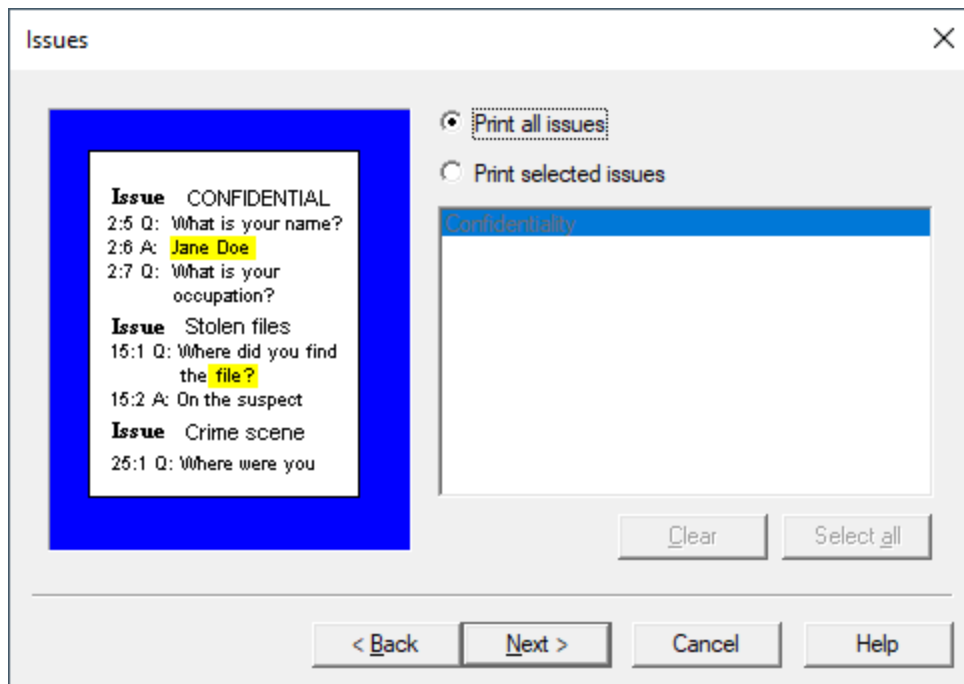
3. In the **Annotation Report** dialog box, select **Annotation Report Wizard** and click **OK**.
4. In the **Report** dialog box, select the type of annotated report you want to print and click **Next**.



- **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.

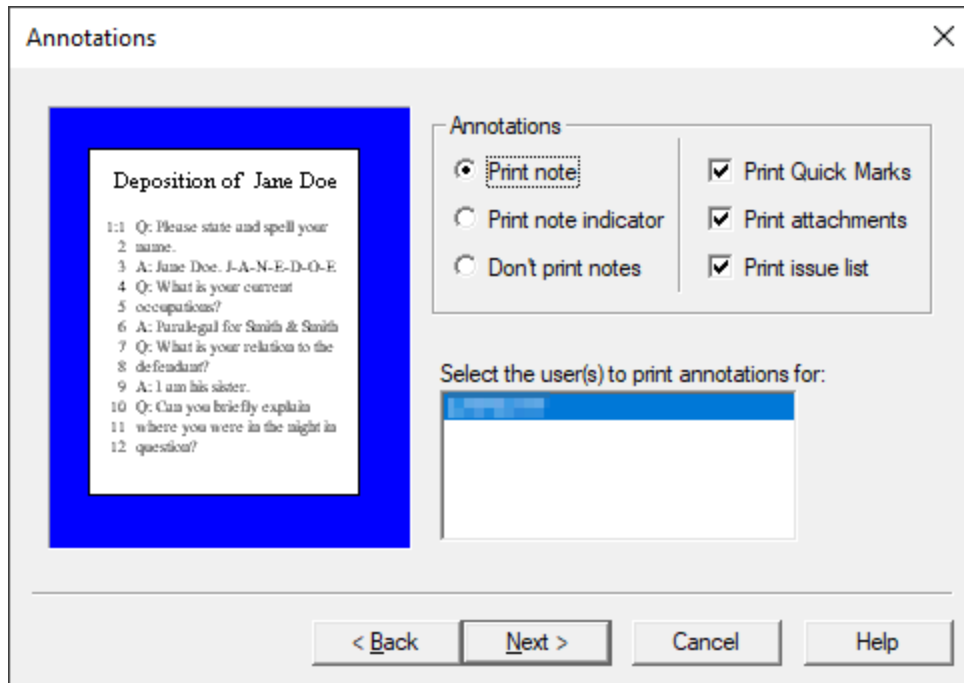
To select individual issues in the list, use CTRL+click. To select a block of issues in the list, use SHIFT+click.

If you are printing an attachment, note, or quick mark report, just click Next on the Issues dialog box.

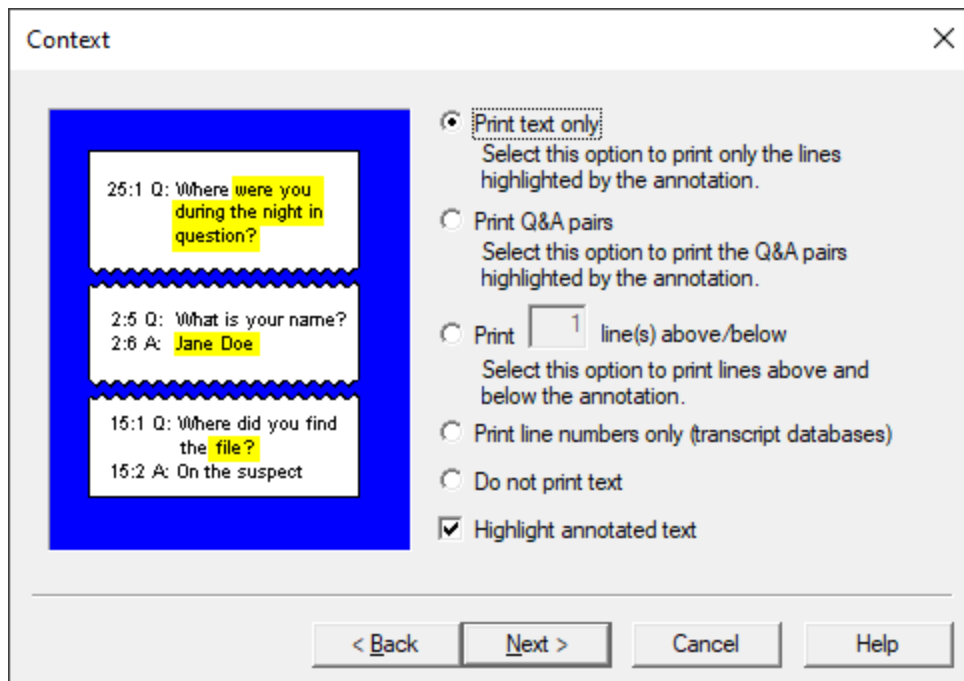


6. In the **Annotations** field, select the one of the note printing options and select whether you want to print the quick marks, attachments, and/or issue list.
7. In the **Select the user(s) to print annotations** field, select the users for which you want to print annotations and click **Next**.

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.

Formatting [X]

Header

Footer

Annotation header (prints at top of annotation)

Print page numbers

Print date

Print time

Compressed print

Print page border

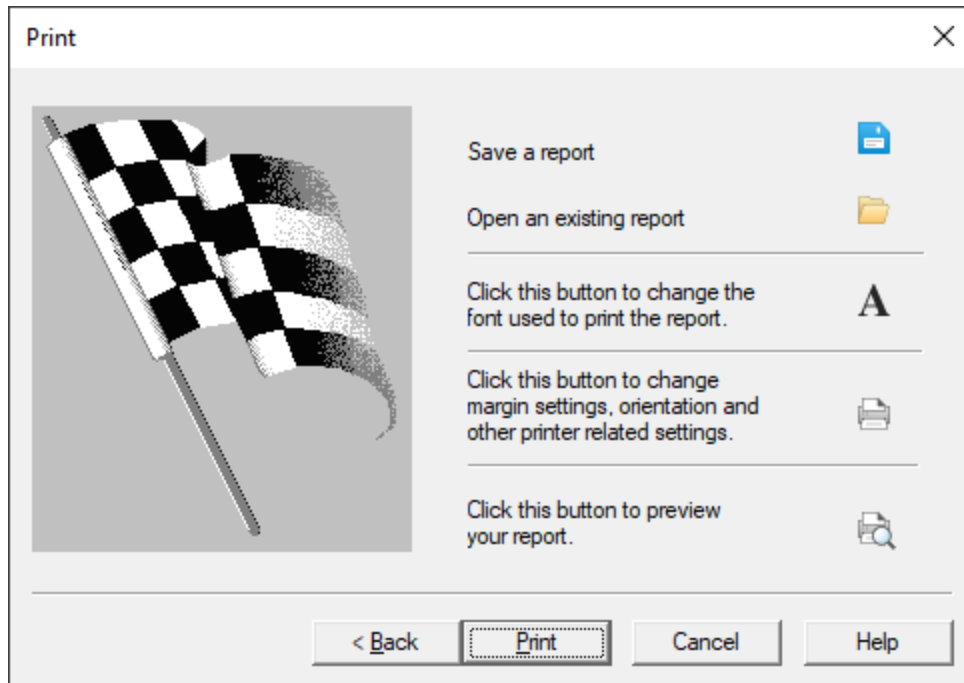
< Back Next > Cancel Help

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 standard reports

If you want to print multiple records or transcripts, you can generate a standard report. Your current search query determines which records or transcripts are available to print on a standard report. For example, if your current search query contains 47 records, you can include some or all of the 47 records in the query on the standard report.

Standard reports have a number of customizable features such as headers, footers, date and time stamps, page numbering. When you print a standard report in Concordance Desktop, by default the printed font format for records is determined by your personal Concordance Desktop display settings. For example, if your display font setting is: Sea Green, 14 point, Monotype Corsiva, your document will be printed with the larger italic green font (for color printers) or gray font (for black and white printers). If you do not want to use the default format, you can define your preferred print settings on the Print documents dialog box before printing. You can also save your preferred print settings for future printing, or use previously saved print settings for printing.

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

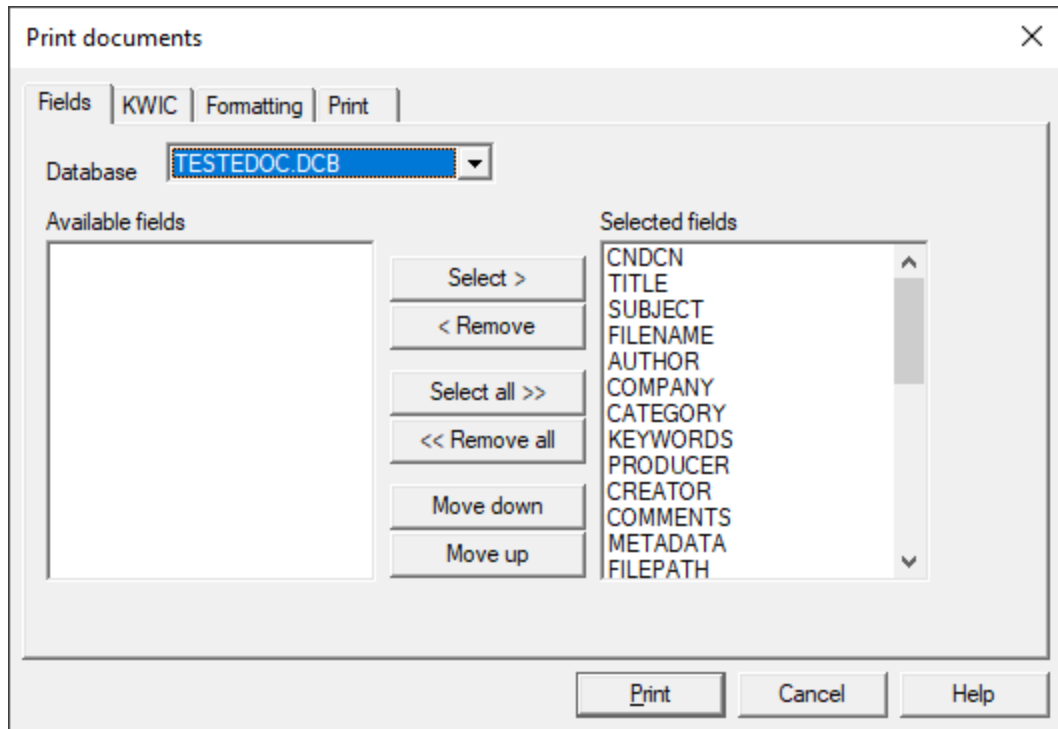
- ✍ When you print in Concordance Desktop, you are printing from database records. When you print in Concordance Desktop Image, you are printing from .tif files in the

imagebase. For more information about printing in Concordance Desktop Image, see [Printing in Concordance Desktop Image](#).

To print standard reports in Concordance Desktop:

1. On the **Standard** toolbar, click the **Print** button.
2. Click the **Fields** tab.

The Fields tab is used to define the fields and their order to include on the report for the selected database. The fields are listed alphabetically in the Available fields field.



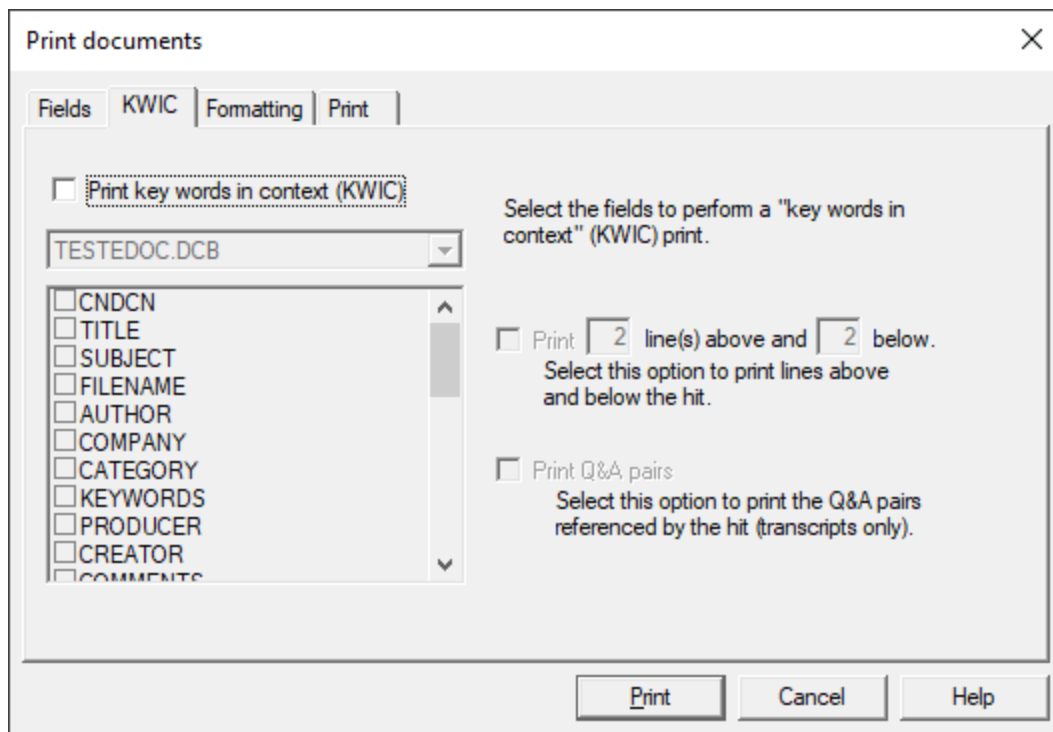
3. In the **Database** list, select the database containing the records you want to print.
The Database field defaults to the current Concordance Desktop database.
4. In the **Available fields** list, choose the fields you want to include on your report.
For example, to print the record's body text, click the OCR1 field.
You can choose multiple fields by pressing the SHIFT or CTRL key while clicking multiple fields.
5. Click the **Select** button to add the fields to the **Selected fields** list.

The standard report includes data from each of the fields in the Selected fields list, and displays the field data in the order the fields are displayed in the Selected fields list.

To add all of the fields to the Selected fields list, click the Select all button. To change the order of the fields in the Selected fields list, click a field and click the Move down or Move up button.

To remove a field from the Selected fields list, click the field you want to remove and click the Remove button. To remove all the fields from the Selected fields list, click the Remove all button.

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



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

This check box only applies to transcripts. Leave the Print Q&A pairs check box blank if you are not printing from a transcript.

10. To add header and footer text, determine widows and orphans on page breaks, and define other printing controls, click the **Formatting** tab.

11. In the **Header** field, type the report header.

The header displays at the top of each printed page and is left justified on the page.

12. In the **Footer** field, type the report footer.

The footer displays at the bottom of each printed page and is left justified on the page.

13. In the **Widows and Orphans** field, type the number of widows and orphans to allow on each page.

Widows are the lines of text left at the bottom of a page when a record is split in two. Orphans are the lines of text at the top of the next page.

The number entered in the Widows field controls the minimum number of lines Concordance Desktop allows to remain at the bottom of a page. If the number of lines to print at the bottom of the page is less than the number in Widows field, then the document is moved to the top of the next page.

The number entered in the Orphans field controls the minimum number of lines Concordance Desktop prints at the top of a page when splitting a document

between pages. If the lines left to print are less than the number in the Orphans field, then lines will be borrowed from the previous page until the orphan minimum is met. This may cause the preceding page to go below the widows threshold, causing the entire document to print at the top of the new page.

14. In the **Options** section, select the print options you want to apply to your report.

Formatting options field names and definitions

Field Name	Field Definition
Print date	Prints the current date on each page below the footer.
Print time	Prints the current time on each page below the footer.
Print field labels	Prints the field name before each field.
Print page numbers	Prints the page number at the bottom of each page on the right side of the page.
Print document numbers	Numbers each document in the report and prints the document number before each document in the report. For example, Document 1 of 100.
New page for each record	Prints each document on a separate page.
Highlight annotations	Highlights the notes and annotations in the report.
Compressed printing	Prints the selected number of pages on one single page. You can print up to nine pages per sheet of paper. Printing multiple pages on one single page is sometimes referred to as N-up printing. The N represents the number of pages you are printing on one single page.
Print page borders	Prints a border around each page when you are printing multiple pages on one single page. This field is only available if you are printing 2 or more pages on one single page.
Underline hits	Underlines search hits in full-text paragraph fields.
Bold hits	Bolds search hits in full-text paragraph fields.
Italicize hits	Italicizes search hits in full-text paragraph fields.
Hit Color	Adds the selected color to search hits in full-text paragraph fields. To change the hit color, click the Hit Color button and select the hit color.

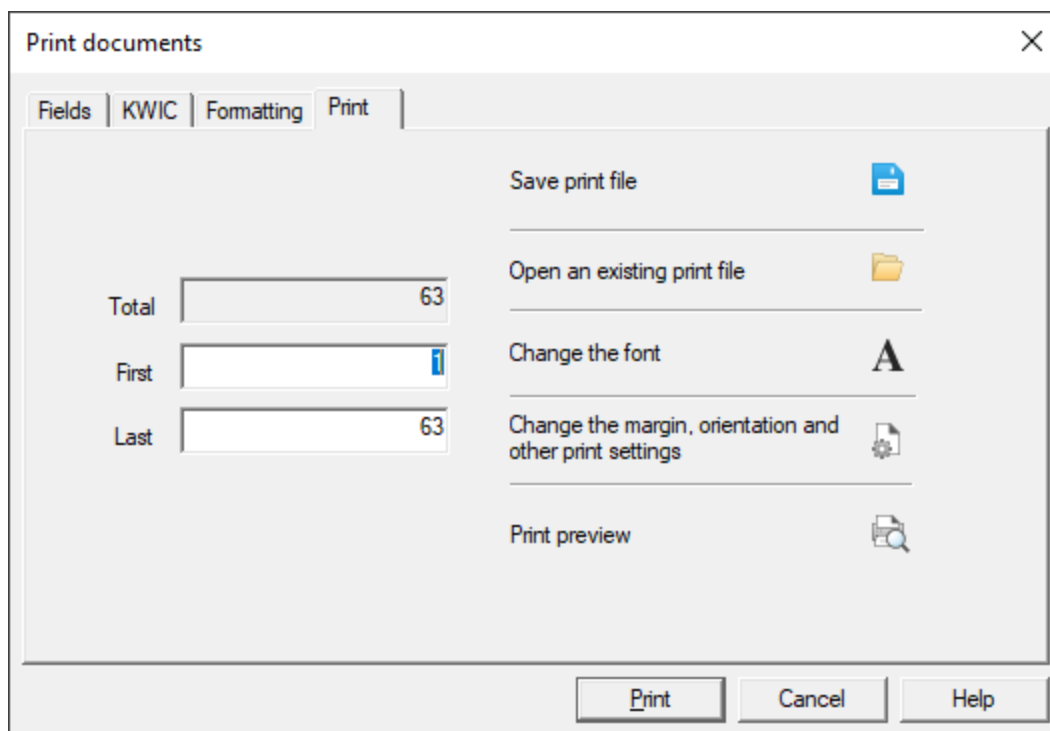
Search hits are only highlighted in the full-text paragraph fields, not in fixed-length text, date or numeric fields.

If a record is edited after the search, the record's search hit will not be highlighted in the report. To include the edited record's search hit, index or reindex the database and re-run the search.

- 💡 When printing documents with ideographic text, like Chinese, a character underlined for hit highlighting can easily be confused with other characters. Select bold, italicize, or color to highlight search hits in these languages.

15. To define the document print range, change the font, margin, orientation and printer settings, and preview and save your print settings, click the **Print** tab.

The Total field is a read-only field, and displays the total number of documents in the current query. The First and Last fields determine the document print range for the report. The First field defaults to the first document in the current query, and the Last field defaults to the last document in current query.



16. In the **First** field, type the number of the first document you want to include on the report.
17. In the **Last** field, type the number of the last document you want to include on the report.

Concordance Desktop prints all documents between and including the first and last documents defined in the First and Last fields.

18. Click one or more of the following buttons:

Print button names and definitions

Button Name	Definition
Save to Print file	Click to open the Print Format dialog box and save your settings to a print format file (.fmt). For more information see To save your print settings.
Open an existing print file	Click to open the Print Format dialog box and select an existing print format file (.fmt) to use for printing the report. For more information, see To print a standard report from an existing print file.
Change the font	Click to open the font menu. Click the font type you want to modify to open the Font dialog box and modify the font. You can modify the font for the fields, data, transcripts, and header and footer in the report.
Change the margin, orientation, and other print settings	Click to open the Page Setup dialog box and define the paper size and source, and the page orientation and margin settings. By default, reports print to your computer's default printer. You can click the Printer button in the Page Setup dialog box to select a different printer for the report.
Print preview	Click to preview the report. To print directly from the preview screen, click the Print button. To return to the Print documents dialog box, click the Close button.

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

To save your print settings:

1. On the **Standard** toolbar, click the **Print** button.
2. In the **Print documents** dialog box, define your print settings on the tabs.
3. On the **Print** tab, click the **Save print file** button to open the **Print Format** dialog box.
4. Browse to where you want to save the file, type the file name in the **File name** field, and click the **Save** button.

All of the print settings are saved including selected fields, fonts, page orientation, paper size, headers and footers. The file is saved in plain text format and can be edited with any text editor or word processor that uses plain text. The print format file's file extension is .fmt.

To print a standard report from an existing print file:

1. On the **Standard** toolbar, click the **Print** button.
2. On the **Print** tab, click the **Open an existing print file** button to open the **Print Format** dialog box.
3. Browse to and select the print format file you want to use.
4. Click the **Open** button to load the print settings into the **Print documents** dialog box.
5. Click the **Print preview** button to preview the report, and make any necessary changes to the print settings.
6. Click the **Print** button to generate and print the report.

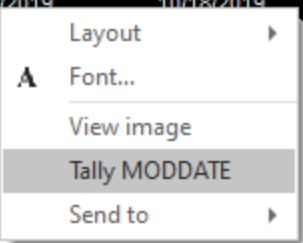
Tallying records for reports

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

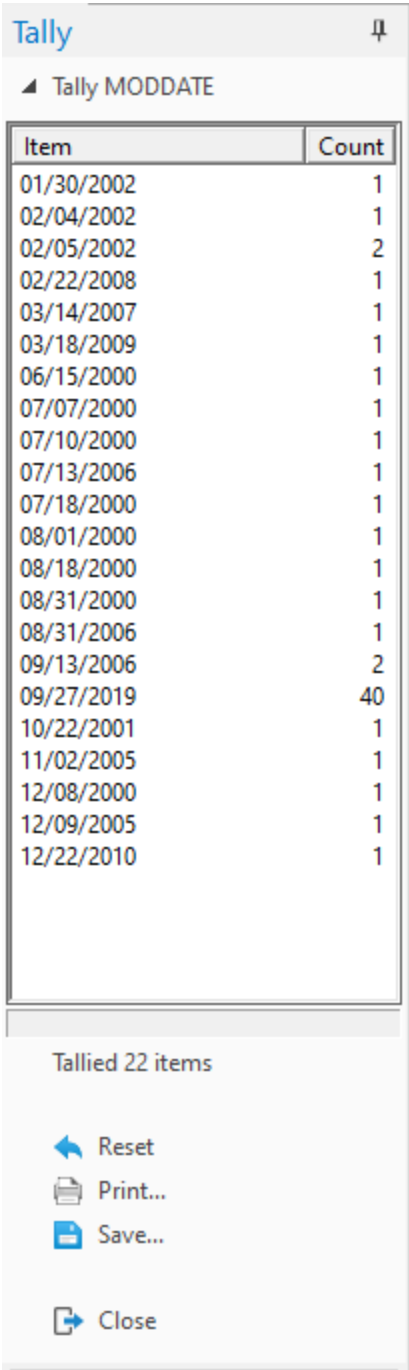
To tally records for reports:

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

DATE	MODDATE	CREATIONDATE
00/00/0000	02/05/2002	10/16/2001
00/00/0000	06/15/2000	06/15/2000
00/00/0000	07/10/2000	07/10/2000
00/00/0000	09/27/2019	05/18/2000
00/00/0000	09/27/2019	07/07/2000
00/00/0000	12/22/2010	12/22/2010
00/00/0000	07/18/2000	05/12/2000
00/00/0000	09/27/2019	10/18/2019
00/00/0000	09/27	
00/00/0000	12/09	
00/00/0000	08/31	
00/00/0000	02/22	
00/00/0000	03/18	
00/00/0000	09/27	
00/00/0000	09/27	
00/00/0000	09/27/2019	10/18/2019



Clicking Tally [field name] displays the tally results in the Tally task pane.



- 2. In the **Tally** task pane, double-click an item in the **Tally** list.

Double-clicking an item in the tally list displays only those records in the Table view. For example, if you ran a tally on the DOCTYPE field, and double-clicked Financial Report in the Tally task pane, only financial reports are displayed in the Table view.

3. Print the applicable records.

To print an individual record listed in the Table view, open the record in the Browse view and see Printing standard reports and for more information.

To print multiple records listed in the Table view, see Printing standard reports for more information.

To export the data in the Table view to Microsoft Excel, see Exporting Concordance Desktop data for more information.

Exporting database table view 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.

- 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.

- 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.

CNDCN	CREATIONDATE	TITLE
0000009	10/18/2019	
0000010	12/09/2005	S:\PPRS\LAYOOTS\OCTOBER-NOVEMBER05PPR.PM
0000011	08/31/2006	
0000012	12/13/2007	
0000013	12/17/2002	
0000014	10/18/2019	
0000015	10/18/2019	
0000016	10/18/2019	
0000017	10/18/2019	
0000018	10/18/2019	
0000019	10/18/2019	
0000020	10/18/2019	

If you have Microsoft Excel 2013 installed, open a blank Excel spreadsheet prior to completing step 4 below.

- 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:

- 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.

Productions

Once a document collection review is completed, documents typically need to be produced to opposing parties. Database administrators prepare the electronic production using Concordance Desktop and the viewer or Concordance Desktop Image based on

queries or tagged sets of documents that are identified for production during the review phase.

Numbering documents

As part of the production process, a new set of images 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.

Markups

Redactions or other markups 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 an electronic production in Concordance Desktop is a set of images or PDF files and an image load file. Both the production image 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 file production

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

For Concordance Desktop databases, the Native File Production produces a copy of the original native file. The produced document does not include any annotations or markups.

Generating Load files and images

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

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

Learning more about productions

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 email our Client Training Administrator at training@cloudnine.com to register for the Concordance Desktop courses.

Additional course information is available on CloudNine Training.

Protecting Data

Protecting discovery document collections is a sensitive and demanding job. Your Concordance Desktop administrator or Litigation Support Manager must perform a variety of maintenance processes and manage various files to preserve the integrity of your document collection. Stringent litigation guidelines must be adhered to and maintenance schedules followed to protect the information and ensure your databases are up-to-date and running efficiently for the review team.


Many of the processes involved in protecting your Concordance Desktop databases include:

- Taking Snapshots
-

- Backing Up Databases
- Zapping Databases
- Packing Databases
- Deleting Tags
- Performing Global Replacements

Consult with your Concordance Desktop administrator or Litigation Support Manager to gain a deeper understanding of your organization's maintenance process schedule. If you are responsible for maintaining the database at an administrative level, it is recommended that you attend our Concordance Desktop Administration Fundamentals and Concordance Desktop Certified System Administrator classes.

If you or anyone on your IT or Litigation Support Team are interested in learning more about Concordance Desktop classes, please email our Client Training Program Administrator at Training@cloudnine.com.

 Avoid using administrative features in Concordance Desktop that you are unfamiliar with, because using these features without fully understanding the feature may cause data loss or corruption. These features may also require a backup of the database before proceeding.

Whenever possible, consult with your database administrator before attempting to use any administrative features so they can either backup the database before you proceed or take care of administrative tasks for you.

Saving and restoring snapshots

Snapshots are a point-in-time picture of your work history. Using snapshots is one way reviewers can help track and preserve both search history and search results.

Saved snapshots can easily be restored to see what the contents of a database were on a particular day, and what search results were found at that moment in time. During a lengthy review, tracking your work for the day is also important, not only to manage tasks and schedules, but to provide a placeholder for searches so you can jump right back into your project without duplicating previous efforts.

Unlike a query file, a snapshot saves the search results for documents retrieved, not which words were searched. This means that a snapshot will not locate new or updated documents in a database; a snapshot only displays those documents captured at the time the picture was taken.

Because snapshots provide a picture-in-time reference, all your search queries and customized sort settings are preserved and can be displayed again or restored at a later time. If your database is actively being edited, changes will not be reflected in a snapshot saved last week. For instance, a document deleted from the database since the snapshot was taken will display as blank when you open the snapshot in Concordance Desktop. To capture updates after edits have been made, rerun your snapshot queries.

Snapshots are saved as .snp files and can only be restored on the original databases. When you restore a snapshot file, Concordance Desktop automatically opens the databases associated with the file, with all queries and sorts preserved.

- ✍ If you regularly save snapshots at the end of every work session, we recommend that you periodically review and delete outdated or unnecessary files due to their large file size on your hard drive or network.

There are two ways to save snapshots in Concordance Desktop. You can manually save snapshots or you can use the Auto restore command to have Concordance Desktop automatically save snapshots for you.

To manually save a snapshot:

- ✍ Ensure that the snapshot path along with the file name does not exceed 256 characters. Windows limits file paths to a maximum of 256 characters.

1. To open the **Save Snapshot** dialog box, do one of the following:
 - In the **Databases** task pane, click **Save snapshot**.
 - On the **File** menu, click **Snapshot**, and then **Save snapshot**.
2. Browse to where you want to save the snapshot file, type the file name in the **File name** field, and then click the **Save** button.

All search queries and customized sort settings for the current Concordance Desktop session are saved in a .snp file.

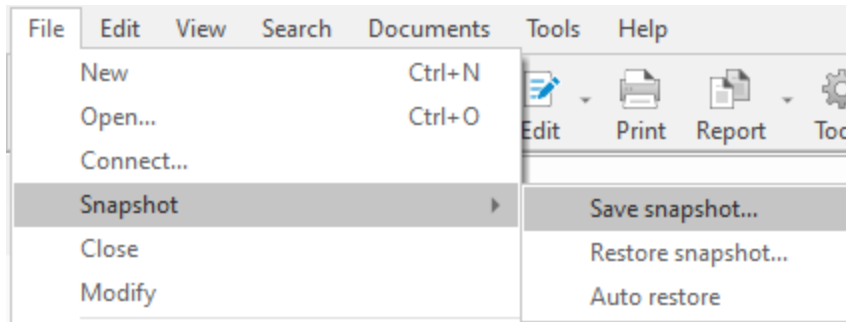
Auto-restoring snapshots

With the Auto-restore feature, Concordance Desktop can automatically create and save a snapshot each time you close the Concordance Desktop application. The next time you open a Concordance Desktop session, the application automatically displays the exact record and view settings you had when you closed the application, including displaying your last search in the Review view.

The Auto-restore feature functions differently than manually saving separate snapshots of work your sessions. When the Auto-restore feature is enabled, Concordance Desktop creates the autosave.snp file and automatically saves the snapshot created by the Auto-restore feature to this file at the end of each session, overwriting the previous work session's autosave.snp file. The autosave.snp is automatically saved to the ... \Documents and Settings\UserID\My Documents\Concordance Desktop [version#] (Windows XP) or ...Users\UserID\My Documents\Concordance Desktop [version#] (Windows 7) directory on your machine.

By default, the Auto-restore feature is enabled. The Auto-restore feature is enabled and disabled by clicking the Auto restore option in the Snapshot menu. When a check

mark is displayed next to the Auto restore menu selection, the Auto-restore feature is enabled. When the check mark is not displayed, the Auto-restore feature is disabled.



To restore a snapshot:

1. To open the **Restore Snapshot** dialog box, do one of the following.
 - In the **Databases** task pane, click **Restore snapshot**.
 - On the **File** menu, click **Snapshot**, and then **Restore snapshot**.
2. Browse to and select the snapshot file (.snp) you want to open, and then click **Open**.

When you restore a snapshot file, Concordance Desktop remembers what databases and documents were accessed during the search session captured by the snapshot and launches them. The search results are displayed in the Review view, and the restored snapshot file is listed in the Recent panel in the Databases task pane.

About backing up databases

Database administrators take stringent precautions against data loss. Data loss can occur for many reasons, including hardware failures, file corruption, human error, and natural disasters such as fire, floods, electrical surges that can cause damage to equipment containing data. It is important that precautions are in place to deter any data loss by backing up data on a regular basis and having disaster recovery plans in place.

Most organizations have backup programs that run automatically at scheduled times to backup data on their network servers. We recommend becoming familiar with your company's backup policies and disaster recovery plans in case you need to recover data that has been lost or damaged.

Every organization handles backups differently, so it is important to know how often backups occur on your network or off-site hosted network. Sometimes backups are stored off-site or may be difficult to recover on short notice, so it is helpful to know what to expect.

Concordance Desktop databases on a network should be backed up on a regular basis to protect work product. Concordance Desktop databases that are stored on local hard drives or hosted on off-network computers should have an alternative means of backing up the data, such as an external hard drive or other backup device that can be easily attached to the computer. Many of these devices come with software programs that are designed to run backups automatically at a scheduled time, or files can be backed up by copying them manually to a storage device attached to the computer.

Consult with your Concordance Desktop administrator or Litigation Support Manager if you need more information regarding your organization's backups and disaster recovery plans.

About other maintenance tasks

In addition to backing up and preserving databases, your Concordance Desktop administrator performs several processes that keep your document collection streamlined and running efficiently.

Reviewers should understand how these processes affect their document collections, but should not attempt to use any of these tools without consulting their Concordance Desktop administrator or having received proper database administration training for Concordance Desktop.

The following administrative functions do not have an undo feature to retrieve data once the process is performed:

- **Zap** - deletes every record in the database
- **Pack** - if not done properly, can delete all of the records in the database
- **Delete Tags** - deletes all tags in the database
- **Global Replace** - if not done properly, can change data throughout the entire database unintentionally

We highly recommend that security is applied to every Concordance Desktop database to preserve document collections and protect staff from inadvertently deleting or altering critical information.

Zap

This is an administration-only function. The Zap feature is used to remove all documents from a database, freeing space in Concordance Desktop. Once all documents are purged, only the stopwords file and field definitions are retained in the database. When zapping a database, there is no undo feature for document retrieval so administrators must back up databases before running this process.

Pack

This is an administration-only function. The Pack feature is used for both the document database and dictionary file. Packing a database removes all documents that are marked for deletion. Packing a dictionary optimizes its file structure to increase search speed and reindex processing time. Once performed, there is no undo button for data retrieval, unless your Concordance Desktop administrator has made a backup file of all deleted records.

Delete Tags

The Delete Tags feature is used either to remove a tags from all documents, or remove all tags from a database. There is no undo feature once this process is performed.

Global Replace

Global editing is basically running a Find and Replace process for words or phrases in a database. The Global Replace function can perform replacements on specific fields, full or empty fields, with or without case sensitivity, and with or without confirmation before replacement. Caution must be used when replacing data, otherwise information in your document collection may be unintentionally and permanently altered. There is no undo feature once this process is performed.

Concordance Desktop Viewer

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

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

- ⚠ Due to changes within Brava, our third party vendor, if you are currently working on a review with Concordance Desktop Viewer (any version), it is recommended that you complete the review and produce the files before migrating the database to Concordance Desktop. For more information, contact Concordance Desktop Technical Support.
-

Supported file types

The Concordance Desktop viewer works with the following file types:













File Type	Description
*.tif, *.tiff	Tagged Image File
*.jpg, *.jpeg	Joint Photographic Experts Group
*.gif	Graphic Image File
*.bmp	Bitmap
*.asc	ASCII text
*.pcx	PC Paintbrush Bitmap
*.csv	Comma-Separated Values
*.cal, *.cals	Facsimile
*.pdf	Adobe Portable Document Format
*.doc, *.dot, *.docx	Microsoft Word
*.ppt, *.pps, *.pptx, *.pptm	Microsoft PowerPoint®
*.xls, *.xlsx	Microsoft Excel
*.msg	Microsoft Outlook 2010 or later Message File
*.eml	Microsoft Outlook Express®
*.txt	ASCII text
*.rtf	Rich Text Format
*.html, *.htm	Web/HTML
*.wps	Microsoft Works®

Concordance Desktop Viewer basics

Navigating the document viewer

The viewer in Concordance Desktop opens a separate window that displays the document associated to the record you currently have open in the Concordance Desktop database. Using the tools in the viewer, you can review documents, navigate between records, apply markups (annotations), and adjust the display of the documents.

The Thumbnails pane in the viewer displays small images of the pages of the current document. The Document Information pane displays additional information about the current document, such as corresponding media information, image information (images only), and markup history.


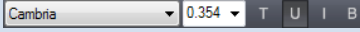
Tool	Name	Description
	Image	Places an external raster image (JPG, BMP, or PNG) on the page
	Stamp	Places a predefined stamp on the page
	Straight Line	Draws a straight line in any direction on the page
	Polyline	Draws a jointed line on the page
	Crossout	Draws an X on the page
	Arrow	Draws a line with an end arrowhead on the page
	Rectangle	Draws a rectangle around the selected area on the page
	Ellipse	Draws an ellipse around a selected area on the page
	Redaction	Blocks out areas on the page that are considered confidential or sensitive from being viewed or copied after production
	Strikeout	Draws a strikeout line over the selected text
	Underline	Draws an underline under the selected text
	Highlight	Highlights the selected text


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

The Markup properties toolbar

The Markup properties toolbar displays properties you can set for the selected markup tool when adding or editing a markup.










Property	Name	Description
	Fill	Defines color for a markup tool
	Text format	Defines font name, style, size, and effect: (T) - Transparent, match background, or custom color (U) - Underline

Property	Name	Description
		(I) - Italic (B) - Bold
	Line Style	Defines style and width for lines and shapes

The Navigation toolbar

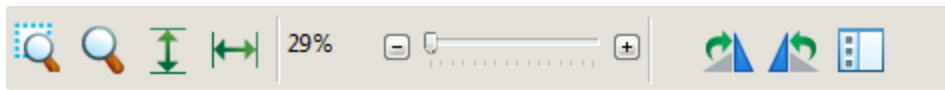
The Navigation toolbar allows you to move between documents and records. See, Displaying documents and records in the viewer.





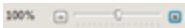





Tool	Name	Description
	First Document	Navigates to the first document in a single or concatenated set of Concordance Desktop databases
	Previous Document	Navigates to the previous document in a single or concatenated set of Concordance Desktop databases
	Next Document	Navigates to the next document in a single or concatenated set of Concordance Desktop databases
	Last Document	Navigates to the last document in a single or concatenated set of Concordance Desktop databases
	GoTo Document	Navigates to a specified document or page within a single or concatenated set of Concordance Desktop databases
	Previous Page	Navigates to the previous page in a multi-page document shown in the viewer
	Next Page	Navigates to the next page in a multi-page document shown in the viewer

The View toolbar

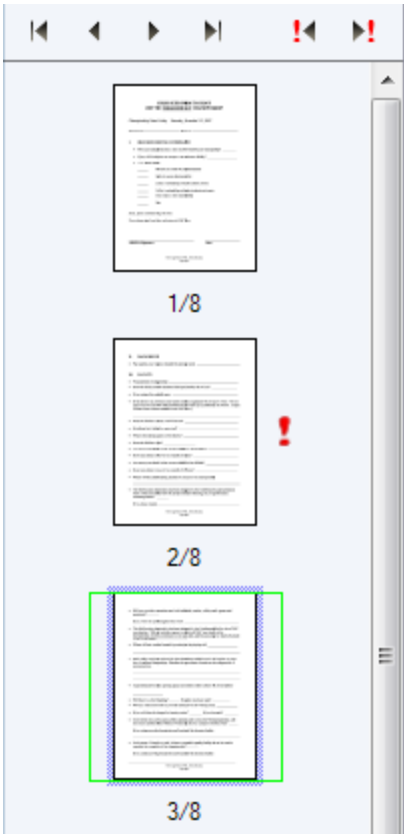
The View toolbar adjusts the magnification, size, and orientation of the current document.



Tool	Name	Description
	Zoom on Selection	Enlarges a selected region
	Magnifier	Displays a magnifier window for viewing sections of the current document
	Fit to Height	Adjusts the zoom height so that the entire height of the document appears in the workspace
	Fit to Width	Adjusts the zoom width so that the entire width of the document appears in the workspace
	Zoom slider	Controls the magnification of the document being displayed
	Rotate Clockwise	Rotates the document in 90 degree clockwise increments
	Rotate Counter Clockwise	Rotates the current document in 90 degree counter clockwise increments
	Toggle Thumbnails	Opens the Thumbnails pane

The Thumbnails pane

The Thumbnails pane displays small images of the pages within the current document. The green rectangle indicated the currently displayed page. The red exclamation point (!) next to the thumbnail image indicates the page contains markups. See, Displaying documents and records in the viewer.

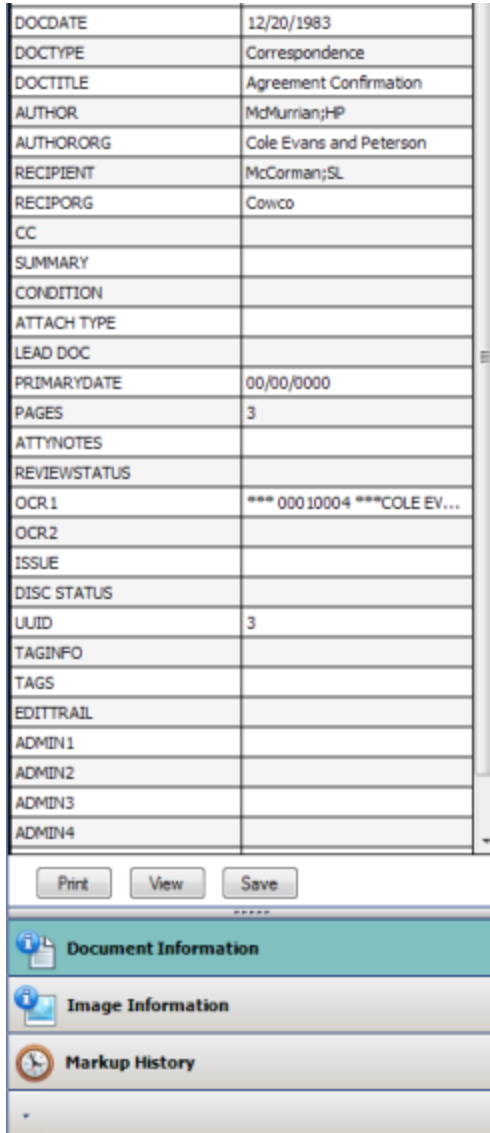


Use the navigation tools in the Thumbnails pane to navigate the pages of the current document.

Tool	Name	Description
	First Page	Navigates to the first page of the document or image
	Previous Page	Navigates to the previous page of the document or image
	Next Page	Navigates to the next page of the document or image
	Last Page	Navigates to the last page of the document or image
	Previous Markup Page	Navigates to the previous page that contains markups
	Next Markup Page	Navigates to the next page that contains markups

The Media Information pane

The Media Information pane contains detailed information about each document within a record. Each media button can be configured to display the information most important to you. See, Using the Document Information pane.



Media Tab	Description
Document Information	Displays numeric, date, text and paragraph data, up to 60 characters, from the document's corresponding Concordance Desktop field in the order you specify.
Image Information	Displays metadata for the current image-type object displayed in the viewer. TIFF image types display full information. Other image types such as GIF and BMP display only minimal information as these image types do not allow for the storing of descriptive information within the image.

Media Tab	Description
Markup History	Displays a complete history, in descending chronological order, of all markup additions, modifications, and deletions that have taken place for the current document.

Displaying documents and records in the viewer


Using the media key (image key) field in Concordance Desktop, the viewer can synchronize with the current database and display the associated documents. Using the viewer you can also view native documents, removing the need to purchase and open the document in its native application. The viewer opens a PDF copy of the supported document types, allowing you to review and annotate them.

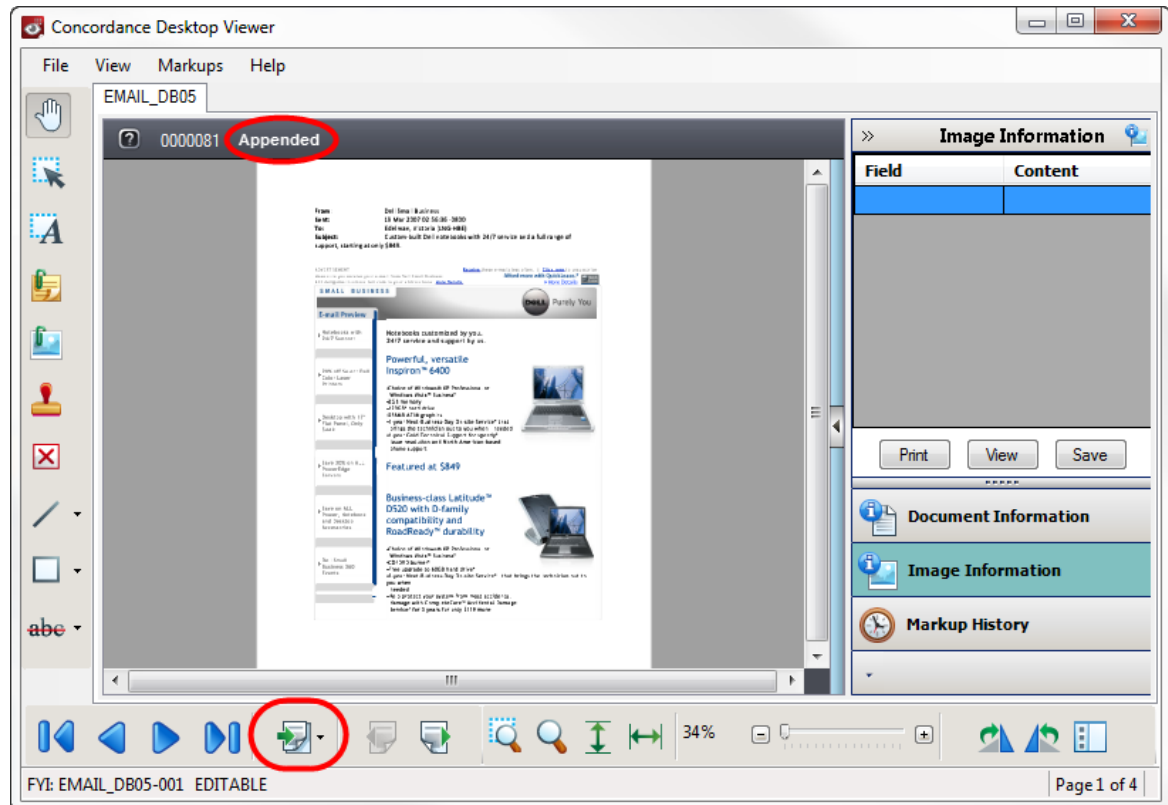
With the Concordance Desktop viewer open alongside the Concordance Desktop application, you can view a record in the Browse and Table views while viewing the same record in the viewer.

To open documents in the viewer:

1. In Concordance Desktop, open the database you want to view.
2. On the Dynamic toolbar, click the **View Image** (camera) button.

Documents may consists of multiple pages. There are two way to determine if a document contains multiple pages:

- Appended is displayed next to the media key near the top of the view workspace.
- The Next Page button  is activated.



Concordance Desktop viewer


To navigate between documents and pages:

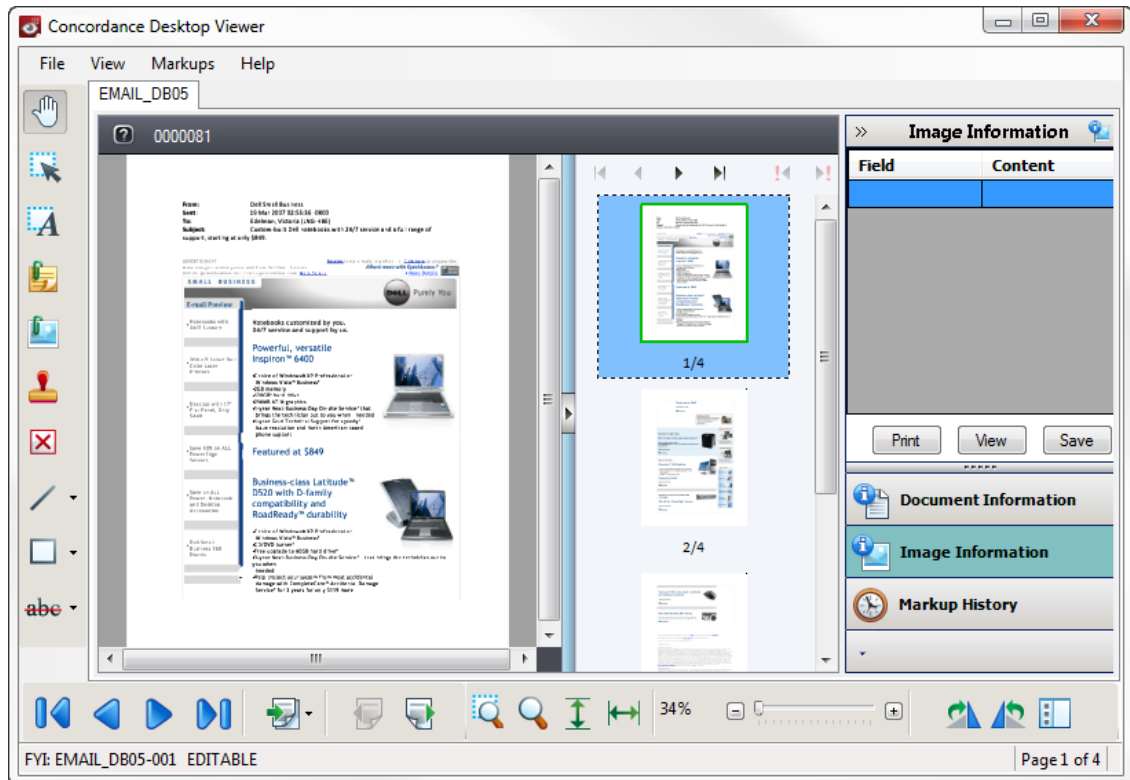
On the Navigation toolbar, do any of the following:

- To move to the next document, click the **Next document** button.
- To move to the previous document, click the **Previous document** button.
- To move to the next page in the document, click the **Next page** button.
- To move to the previous page in the document, click the **Previous page** button.
- To move to a specific document, click the **Go To Document or Image page** button, in the Go To dialog box select the document number you want to view, and then click **GoTo**.
- To move to a specific page in the document, click the **GoTo Document or Image page** button, in the Go To dialog box, select the page number you want to view, and then click **GoTo**.

To display a page within the current document using the Thumbnails page:

1. To open the Thumbnails pane, do one of the following:

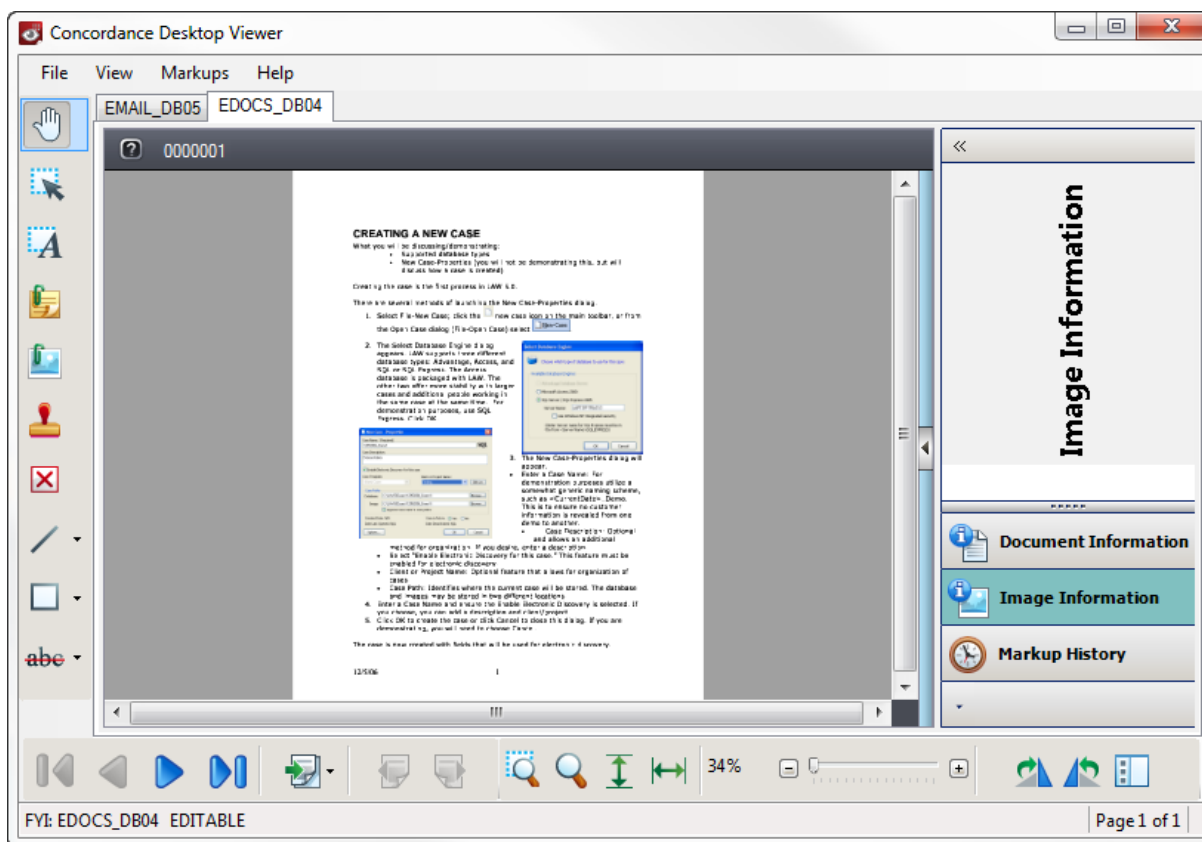
- On the Navigation toolbar, click the **Toggle Thumbnails** button.
 - On the right side of the workspace, click the arrow  button.
2. In the Thumbnails pane, click the page you want to view.



Concordance Desktop viewer Thumbnail pane navigation

Opening views

When synchronized with Concordance Desktop, each tab in Concordance Desktop has an associated tab in the viewer, displaying the associated document view. You can have up to 16 views open at the same time. Each view is accessible using the named tabs at the top of the workspace.



- ✍ If the Concordance Desktop Image Base (.cib) file does not exist for the corresponding Concordance Desktop database, then you are prompted to convert the existing imagebase or select the load file exported from CloudNine™ LAW (OPT) or Concordance Desktop Image (LOG) file.

To view media files in the viewer:

1. In Concordance Desktop, select the database tab you want to view.
2. On the Dynamic toolbar, click the **View Image** (camera) button.

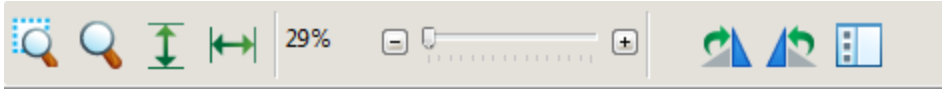
The viewer opens the view for the document associated with the current record in Concordance Desktop.





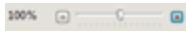



To close the current view:

From the **File** menu, click **Close**.

Magnifying records in the viewer

In the Concordance Desktop viewer, you can zoom, magnify, pan and rotate documents depending on the record type and particular content. For instance, handwritten documents are harder to read online and perhaps illegible in some instances too. Special magnifying tools allow you to read with ease and inspect signature details.



Tool	Name	Description
	Zoom on Selection	Enlarges a selected region
	Magnifier	Displays a magnifier window for viewing sections of the current document
	Fit to Height	Adjusts the zoom height so that the entire height of the document appears in the workspace
	Fit to Width	Adjusts the zoom width so that the entire width of the document appears in the workspace
	Zoom slider	Controls the magnification of the document being displayed
	Rotate Clockwise	Rotates the document in 90 degree clockwise increments
	Rotate Counter Clockwise	Rotates the current document in 90 degree counter clockwise increments
	Toggle Thumbnails	Opens the Thumbnails pane



To adjust the magnification of the document view:


On the **Navigation** toolbar, do any of the following:


- To enlarge a selected area, click the **Zoom on Selection** tool and drag the tool across the area you want to enlarge.
- To open a magnifier window, click the **Magnifier** tool and drag the tool over the area you want to magnify.
- To fit the entire height of a document in the workspace, click the **Fit to Height** button.
- To fit the entire width of a document in the workspace, click the **Fit to Width** button.
- To zoom in or out on a document, using the **Zoom** slider drag the slider to the right to increase the magnification or to the left to decrease the magnification.
- To rotate a document in 90 degree increments, click the **Rotate Clockwise** or **Rotate Counter Clockwise** button.

- 💡 If your mouse has a scroll wheel, you can use the wheel to quickly zoom in or out on a document. Click in the workspace, and then turn the mouse wheel to zoom in or out of the document.

To toggle the options of the Magnifier window:

1. On the **Navigation** toolbar, click the **Magnifier** tool.
2. Toggle the icon in the upper left corner for different viewing preferences.
 - When the **Eyeglass** icon  displays, click on any area of the document and the window will snap to that area and display the selected section.
 - When the **Bird's Eye** icon  displays, a small rectangle displays with the cursor when it is moved off the magnifier window.

As you move your cursor over the document, the area contained in small rectangle displays in the magnifier window.
 - When the **Dock** icon  displays, you can click on an area of the document and that area stays docked in the magnifier window.

You can scroll on the document and the view that is currently in the magnifier remains the same until another area selection is made.
3. Click or drag the corner or edge of the magnifier window to expand its size.
4. Click on the **Adjustment Handle**  x 3.6 to decrease or increase the font size within the magnifier window.
5. Click the **Close** button to exit the magnifier window.

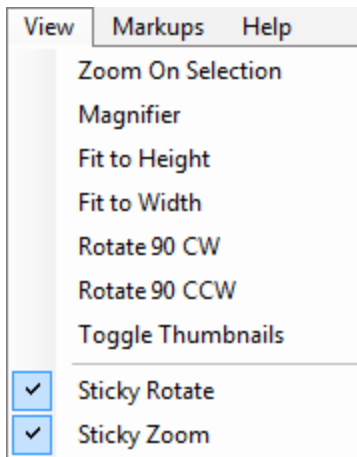
Using sticky zoom and sticky rotate:

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

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

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

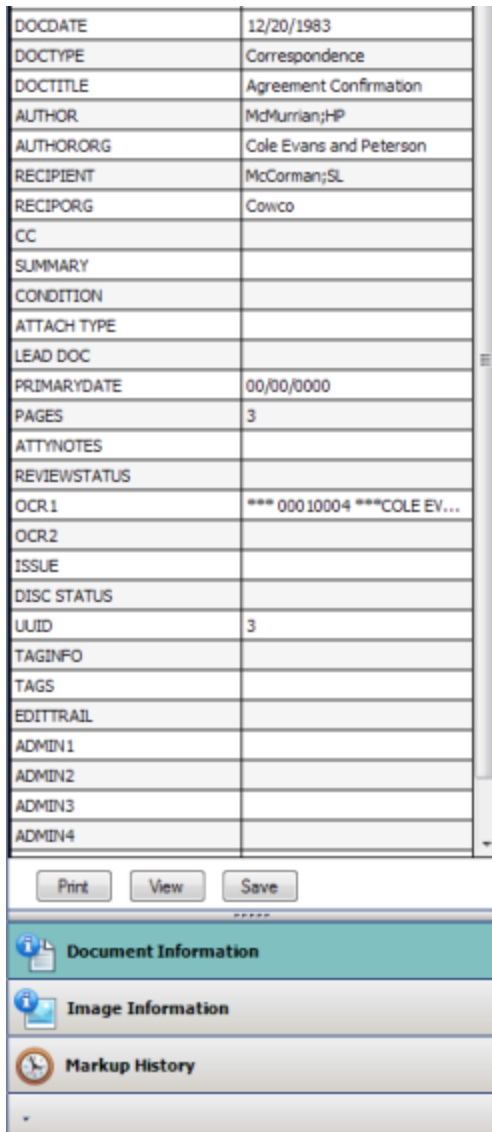
A check mark next to each option on the Tools menu indicates that this setting is selected. The selections are maintained for the current database when Concordance Desktop Viewer is closed and reopened.



Concordance Desktop viewer View menu

Using the media information pane

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




The Media Information pane organizes the information into three views.


Media Button	Description
Document Information	Displays numeric, date, and text up to 60 characters and paragraph data truncated to 60 characters from the document's corresponding Concordance Desktop data in the order you specify.
Image Information	Displays metadata for the current image-type object displayed in the viewer. TIFF image types display full information. Other image types such as GIF and BMP display only minimal information as these image types do not allow for the storing of descriptive information within the image.
Markup History	Displays a complete history, in descending chronological order, of all markup additions, modifications, and

Media Button**Description**

deletions that have taken place for the current document.

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

Document Information 	
Field	Content
STARTPAGE	00010002
ENDPAGE	00010002
DATE	00/00/0000
DOCTYPE	File Note
TITLE	Untitled
AUTHOR	
AUTHORORG	MMC
RECIPIENT	
RECIPIORG	
CC	
SUMMARY	
CONDITION	
ATTACH TYPE	
LEAD DOC	
ATTACHMENTS	
PRIMARYDATE	00/00/0000
PAGES	1
CCORG	
ATT	
ATTORG	
OCR1	*** 00010002 ***MAf C Fil...
OCR2	
OCR3	
OCR4	
OCR5	
RENUMBER	00054
ISSUE	
DISC STATUS	
TITLE	Untitled
PAGES	1
<input type="button" value="Print"/> <input type="button" value="View"/> <input type="button" value="Save"/>	

To show and hide the media information pane:

In the upper left corner of the media information pane, click the **Expand/Collapse** (<<) button.

The Document Information and Image Information views are customizable so that you can display only the information you want.

To configure the Documentation Information view:

1. In the **Media Information** pane, click the **Document Information** view button.
2. To designate the Concordance Desktop database fields to display in the view, click the **View** button.

The **Grid View Options** dialog box lists all the corresponding Concordance Desktop imagebase fields available to display.

3. To select fields, in the **Imagebase fields** section, do any of the following:
 - To select individual fields, select the field name check box.
 - To select all the fields, click the **Select All** button.
 - To cancel all the selections, click the **Clear All** button.
4. To reset the order the fields appear in the view, select the field you want to move, and then click the **Move Up** or **Move Down** button.
5. When finished, click **Save**.

To configure the Image Information view:

1. In the **Media Information** pane, click the **Image Information** view button.
2. To designate the Concordance Desktop database fields to display in the view, click the **View** button.

The **Grid View Options** dialog box lists all the metadata information available to display.

3. To select metadata, in the **Imagebase fields** section, do any of the following:
 - To select individual metadata, select the metadata check box.
 - To select all the metadata, click the **Select All** button.
 - To cancel all the selections, click the **Clear All** button.
 4. To reset the order the metadata information appears in the view, select the field you want to move, and then click the **Move Up** or **Move Down** button.
 5. When finished, click **Save**.
-

You can also print or save any of the information in the Media Information views.

To print a media view:

1. In the **Media Information** pane, open the view you want to print.
2. Click the **Print** button.
3. In the Print preview dialog box, review the information, and then click the **Print** button.

Annotating documents

Applying markups

During the discovery process, marking up record detail is the phase when deeper content investigation and case record preparation begins.

CONCORDANCE VIEWER Version 1.8.5.14

SAMPLEEDOCNV x

Select Document 62 of 63 Page 1 of 5 Document Options

0000062

Requires Further Review

US/CANADA GOVERNMENT AFFAIRS
UPDATE: June 1-July 7, 2000

California
ISO Sets Lower Price Caps
The Board of the California ISO voted to lower price caps for ancillary services and imbalance energy from \$750 to \$500. A vote to further lower the caps to \$250 was rejected by a 12 to 12 tie. The Board also added provisions that reduced the price cap on replacement reserves from \$750 to \$100 and required suppliers to bid all available generation into the market in California when the California load reaches 38GWh.

At a subsequent meeting on July 6, the Board again rejected a proposal to further reduce the price cap to \$250.

CPUC Issues Post-Transition Order
The California Public Utilities Commission ("CPUC") issued an order addressing "end of transition" issues. The major issues include the following:

- Prohibits the utilities from capping monthly PX prices OR offering new alternative pricing products in order that the market will provide these products.
- Rejected SDG&E's proposal for a procurement PBR as premature.
- Maintained a mandatory buy requirement for the three UDCs until all three have recovered their transition costs, but expanded the buy requirement to include other "qualified" exchanges. This portion of the decision was short-circuited by the legislature which maintained the mandatory buy requirement exclusively for the California PX unless or until the Commission performs a study and submits the results to the legislature. In any event, the Commission cannot act prior to June 2001 on this issue.

The CPUC adopted a new allocation method for Competition Transition Charges ("CTCs") related to QF contracts. The new allocation method is based on the top 100 hours of demand on the utility system, which will have the effect of shifting some costs from small consumers to large consumers. This result, while moderately worse than the existing methodology, is significantly better than the initial proposal of an equal-cent-per-kWh allocation in the proposed decision. Enron, along with the large consumer groups, actively lobbied against the proposed decision on this issue.

- The decision provides for a lump-sum refund of San Diego Gas & Electric's excess bond proceeds rather than amortizing the excess proceeds over time. From our book perspective, this is positive as the refund will occur during the term of our contracts. Prospectively, however, this refund mechanism may increase rates for residential and small commercial customers as the repayment of the bonds will continue for several years after the end of the transition period and the mandated 10% rate reduction will have ceased.

Research these rules

FIELD	CONTENT
CNDCN	0000062
TITLE	US/CANADA G...
SUBJECT	
FILENAME	US-CANADAU...
AUTHOR	EES
COMPANY	ENRON
CATEGORY	
KEYWORDS	
PRODUCER	
CREATOR	MICROSOFT W...
COMMENTS	
METADATA	AUTHOR = EES CATEGORY = CHARACTERS... CHARACTERS...
FILEPATH	C:\USERS\LHE...
SOURCE	C:\PROGRAMD...
FILEEXT	DOC
DATE	00/00/0000
MODDATE	07/07/2000
CREATIONDATE	07/07/2000
PRINTDATE	00/00/0000
BEGNO	
ENDNO	
TEXT01	US/CANADA G... UPDATE: June...
TEXT02	
TEXT03	
TEXT04	
TEXT05	

Connected FYI: SAMPLEEDOCNV LOCKED for edit by YOU on 3/5/2020 1:15:06 PM

The Markup toolbar includes a variety of tools you can use to mark up (annotate) a document or image during review. Applying markups includes redacting information and adding notes. You can also apply color markings to highlight or underline text and add a circle or box to emphasize a block or region of key content. All of these elements can easily be edited, moved, or resized.

There is no limit to the number of markups you can add to a document.



Markups for the current document/record are displayed in the history tab of the Document information pane. The markup history displays markup type, author, date, and time. Markup history is also saved in the .cib file. See, Viewing document information.

- ⚠ The current state for the markups on a document are stored in an XML formatted (.xml) file in the same directory as the corresponding media file. DO NOT edit this file.

Doing so may corrupt all your markups and redactions, as well as, possibly cause Concordance Desktop Viewer to crash.




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

To add text:





1. On the **Markup** toolbar, click the **Text** tool .
2. Using the **Text** tool, select the area where you want to add the text.
3. In the **Text** dialog box, type the text you want to add.
4. On the **Markup properties** toolbar, specify any of the following:
 - To change the color, click the **Color** button , and then select a color from the color picker.
 - To change the font, in the **Font** list, select a font.
 - To change the font size, in the **Font size** list, select a font size.
5. To change the background color of the text box, click the **Text Background** button (**T**), and then select one of the following:
 - **Transparent** sets the background as transparent and all text is visible.
 - **Match Display Background** sets the background color to match the color of the current document background.
 - **Select Background Color** opens the color picker dialog box, and sets the background to the color selected. The outline color of the text box is set to be the same as the current font color.
6. Set the font style, do any of the following:
 - To underline the text, click the **Underline** button.
 - To italicize the text, click the **Italics** button.
 - To make the text bold, click the **Bold** button.
7. Navigate to another document to save the markup.


To add a note:

1. On the **Markup** toolbar, click the **Note** tool.
-




- Using the **Note** tool, click in the area of the document where you want to place the note.
 - In the **Changemarks** dialog box, do the following:
 - In the top field, type a title for the note.
 - In the bottom field, type the text you want to include in the note.
 - When finished, click **OK**.
 - To change the note color, on the **Markup properties** toolbar, click the **Color** button , and select a new color from the color picker.
 - Navigate to another document to save the markup.
-  You cannot use Rich Text Formatting (RTF) in notes, including copying RTF content from another application and then pasting into a note. Doing so may corrupt all the markups and redactions, as well as, possibly cause Concordance Desktop Viewer to crash. If this happens, you need to contact Customer Support.
-  After applying a note, you can move the pointer over the note to display the first 40 characters of the contents of the note. To view the contents of the note (maximum of 520 characters), double-click the note you want the view to open the Markup History Details dialog box.

To add lines:

- On the **Markup** toolbar, click one of the following:
 - To draw a straight line, click the **Line** tool .
 - To draw a jointed line, click the arrow next to the **Line** tool, and then click the **Polyline** tool .
 - To place an X over an area on the document, click the arrow next to the **Line** tool, and then click the **Crossout** tool .
 - To draw an arrow, click the arrow next to the **Line** tool, and then click the **Arrow Line** tool .
 - Draw on the document:
 - To draw a line, crossout, or arrow, drag the tool across the document where you want the markup to appear.
 - To draw a polyline, click to create the starting point, move the tool, and then click to create each segment.
 - To draw a line, polyline, or arrow that is horizontal or vertical, press Shift while you draw.
-




3. To change the line properties, on the **Markup properties** toolbar, do any of the following:
 - To change the color, click the **Color** button , and then select a color from the color picker.
 - To change the line width, select the value from the drop-down list.
 - To change the line style, select the style from the drop-down list.
4. Navigate to another document to save the markup.


To add shapes:

1. On the **Markup** toolbar, click one of the following:
 - To draw a rectangle or square, click the **Rectangle** tool .
 - To draw an ellipse or circle, click the arrow next to the **Rectangle** tool, and then click the **Ellipse** tool .
2. Draw in the document:
 - To draw a rectangle or ellipse, drag the tool across the document where you want the markup to appear.
 - To draw a square or circle, press Shift while you draw.
3. To change the shape properties, on the **Markup properties** toolbar, do any of the following:
 - To change the color, click the **Color** button , and then select a color from the color picker.
 - To change the shape style, select the style from the shape style list.
4. Navigate to another document to save the markup.

To add text edit markups:

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

1. On the **Markup** toolbar, click one of the following:
 - To draw a strikeout, click the **Strikeout** tool .
 - To draw an underline, click the arrow next to the **Strikeout** tool, and then click the **Underline** tool .
 - To draw a highlight, click the arrow next to the **Strikeout** tool, and then click the **Highlight** tool .
 2. Draw in the document:
-

- To draw a strikethrough, drag the tool across the text where you want the strikethrough to appear.
 - To draw an underline, drag the tool across the text where you want the underline to appear.
 - To draw a highlight, drag the tool across the text where you want the highlight to appear.
3. To change the text edit color, on the **Markup properties** toolbar, click the **Color** button , and then select a color from the color picker.

ASCII

The ~~American Standard Code for Information Interchange~~ is a standard seven-bit code that was proposed by ANSI (American National Standards Institute) in 1963, and finalized in 1968. Other sources also credit much of the work on ASCII to work done in 1965 by Robert W. Bemer. ASCII was established to achieve compatibility between various types of data processing equipment.

ASCII, pronounced "ask-key", is the common code for microcomputer equipment. The standard ASCII character set consists of 128 decimal numbers ranging from zero through 127 assigned to letters, numbers, punctuation marks, and the most common special characters (see ASCII Table).

A) *Strikethrough* **B)** *Highlight* **C)** *Underline*

4. Navigate to another document to save the markup.

Applying images and stamps

The Images tool allows you to insert raster images (JPG, BMP, or PNG) into the current document. Images are created in an image editor for use with Concordance Desktop Viewer. Concordance Desktop Viewer is shipped with 16 images, such as Draft, Final, Reviewed, and Witness.

00010003

CONFIDENTIAL

NOT FOR PUBLIC RELEASE

Mr S. McCorman
The Boathouse
Lake Texoma
Dallas
Texas 9786.09568

December 19, 1983

Dear Steve,

It was wonderful seeing you and Rita on Sunday. You certainly have the perfect garden for a summer drinks party. Rita's looking stunning, she's obviously recovered from Jeremiah's birth very quickly.

As we discussed last week, the funding of our T.O Texaco is still problematic. I want to reassure you that CONCO 81-2 funds will not go towards retaining any lawyers or accountants for the other milking funds. There are funds earmarked for that particular purpose which are in Dibbs Account Tuesday. We've already made this very clear to the lawyers and accountancy firms involved. If there are any further murmurs, I won't hesitate to take this to the next AGM, not that they would fully understand the implications. It would have the desired effect, should we fail to contain the situation. I shall also be contacting the senior partners underlining our arrangements will not be changed.

Are you aware that after the merger of our Dallas and Chicago committees on 30.11.83 that I am now part of the combined steering committee. Not bad for a newcomer to the politics. I will of course keep you informed of any exciting events.


My fellow committee members are: Parish EJ, Schiermiester N, Kellet PB and Daly JR. You should be ok with Daly JR as well. He phoned me last week just to tell me how impressed he is at your work in this transaction. One in the eye for you kid!


Call me on Thursday for the latest update - ext.3546.

Best Wishes to you, Rita and Jeremiah.



RC Simmons

1. On the **Markup** toolbar, click the **Image** tool .
2. On the **Markup properties** toolbar, do one of the following:
 - From the **Image** list, select an image.
 - Click **Browse**, and then select the image you want to add.
3. Select the area where you want to add the image.
4. Navigate to another document to save the markup.

 The image list in the Markup properties toolbar lists shows the 10 most recently used images providing quick access to the images you apply most often.

Stamps contain predefined information, such as color, content, and other elements that cannot be modified. Concordance Desktop Viewer is shipped with four predefined stamps:

- Attorney's Eyes Only
 - Attorney-Client Privilege
 - Confidential
 - Under Seal
-

00010003

Under Seal

Confidential

Attorney's Eyes Only

Attorney-Client Privilege

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Best Wishes to you, Rita and Jeremiah.



RC Simmons


To add a stamp:

1. On the **Markup** toolbar, click the **Stamp** tool .
2. On the **Markup properties** toolbar, select a stamp from the **Stamp** list.
3. Click the area where you want to add the stamp.
4. Navigate to another document to save the markup.


 The stamp list in the Markup properties toolbar lists the four default stamps that are shipped with Concordance Desktop Viewer.

Applying redactions


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

-  If you need to export the body text for a production, you will need to re-OCR the images after the redactions have been burned in.

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

-  When redacting a bullet or numbered list, it is recommended that you always apply redactions using the Rectangle tool. This ensures that the list content is completely redacted when the image is produced and/or printed. Begin drawing the rectangle in the margin, outside the text area, to ensure all information is redacted successfully.

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

-  When printing CNV documents, redacted documents print with transparent redactions making the text underneath the redaction visible. If you want redactions to print opaque, you need to use the Production tool in Concordance Desktop to *produce* the
-

documents and then print the output documents. For more information see Productions.

There are two ways you can apply a redaction:

- Draw a redaction box over an area of the document or image
- Draw a single redaction line across a sentence or part of a sentence

ASCII

The **American Standard Code for Information Interchange** is a standard seven-bit code that was proposed by ANSI (American National Standards Institute) in 1963, and finalized in 1968. Other sources also credit much of the work on ASCII to work done in 1965 by Robert W. Bemer. ASCII was established to achieve compatibility between various types of data processing equipment.

ASCII, pronounced "ask-key", is the common code for microcomputer equipment. The standard ASCII character set consists of 128 decimal numbers ranging from zero through 127 assigned to letters, numbers, punctuation marks, and the most common special characters (see ASCII Table).

ASCII Table

Dec	Hx	Oct	Chr	Dec	Hx	Oct	Chr	Dec	Hx	Oct	Chr	Dec	Hx	Oct	Chr
0	0	000	NUL (null)	32	20	040	Space	64	40	100	@	96	60	140	;
1	1	001	SOH (start of heading)	33	21	041	!	65	41	101	A	97	61	141	;
2	2	002	STX (start of text)	34	22	042	"	66	42	102	B	98	62	142	;
3	3	003	ETX (end of text)	35	23	043	#	67	43	103	C	99	63	143	;
4	4	004	END (end of transmission)	36	24	044	\$	68	44	104	D	100	64	144	;
5	5	005	ENQ (enquiry)	37	25	045	%	69	45	105	E	101	65	145	;
6	6	006	ACK (acknowledge)	38	26	046	&	70	46	106	F	102	66	146	;
7	7	007	BEL (bell)	39	27	047	'	71	47	107	G	103	67	147	;
8	8	010	BS (backspace)	40	28	050	(	72	48	110	H	104	68	150	;
9	9	011	TAB (horizontal tab)	41	29	051	)	73	49	111	I	105	69	151	;
10	A	012	LF (NL line feed, new line)	42	2A	052	*	74	4A	112	J	106	6A	152	;
11	B	013	VT (vertical tab)	43	2B	053	+	75	4B	113	K	107	6B	153	;
12	C	014	FF (NP form feed, new page)	44	2C	054	,	76	4C	114	L	108	6C	154	;
13	D	015	CR (carriage return)	45	2D	055	-	77	4D	115	M	109	6D	155	;
14	E	016	SO (shift out)	46	2E	056	.	78	4E	116	N	110	6E	156	;
15	F	017	SI (shift in)	47	2F	057	/	79	4F	117	O	111	6F	157	;
16	10	020	DLE (data link escape)	48	30	060	0	80	50	120	P	112	70	160	;
17	11	021	DC1 (device control 1)	49	31	061	1	81	51	121	Q	113	71	161	;
18	12	022	DC2 (device control 2)	50	32	062	2	82	52	122	R	114	72	162	;
19	13	023	DC3 (device control 3)	51	33	063	3	83	53	123	S	115	73	163	;
20	14	024	DC4 (device control 4)	52	34	064	4	84	54	124	T	116	74	164	;
21	15	025	NAK (negative acknowledge)	53	35	065	5	85	55	125	U	117	75	165	;
22	16	026	SYN (synchronous idle)	54	36	066	6	86	56	126	V	118	76	166	;
23	17	027	ETB (end of trans. block)	55	37	067	7	87	57	127	W	119	77	167	;
24	18	030	CAN (cancel)	56	38	070	8	88	58	130	X	120	78	170	;
25	19	031	EM (end of medium)	57	39	071	9	89	59	131	Y	121	79	171	;
26	1A	032	SUB (substitute)	58	3A	072	:	90	5A	132	Z	122	7A	172	;
27	1B	033	ESC (escape)	59	3B	073	;	91	5B	133	[	123	7B	173	;
28	1C	034	FS (file separator)	60	3C	074	<	92	5C	134	\	124	7C	174	;
29	1D	035	GS (group separator)	61	3D	075	=	93	5D	135	]	125	7D	175	;
30	1E	036	RS (record separator)	62	3E	076	>	94	5E	136	^	126	7E	176	;
31	1F	037	US (unit separator)	63	3F	077	?	95	5F	137	_	127	7F	177	DEL

Computers can only understand numbers, so an ASCII code is the numerical representation of a character such as 'a' or '@' or an action of some sort. ASCII was developed a long time ago and now the non-printing characters are rarely used for their original purpose. ASCII was actually designed for use with teletypes and so the descriptions are somewhat obscure. If someone says they want your CV however in ASCII format, all this means is they want 'plain' text with no formatting such as tabs, bold or underscoring - the raw format that any computer can understand. This is usually so they can easily import the file into their own applications without issues. For instance, Notepad creates ASCII text, or in MS Word you can save a file as 'text only'.



A

B



C

A) Redacted paragraph **B)** Redacted text within a paragraph **C)** Highlighted text


To add a redaction:


1. On the **Markup** toolbar, click the **Redaction** tool .
 2. Using the **Redaction** tool, do any of the following:
 - To redact sentence-level text, click within the text and draw the tool along the text.
 - To redact a section of a document, click outside the text area and draw a rectangular box around the text.
 - To redact a list, click outside the margin of the list, and draw a rectangular box around the text.
-  We recommend that you use different colors when applying redactions and highlighting text. This ensures that the markup type can be easily differentiated when viewing a document or image.
3. With the redaction selected, on the **Markup Properties** toolbar, locate the **Reason** list.
 4. In the **Reason** list, do one of the following and then press **Enter**:
 - Type a new reason.
 - Click an existing reason from the list.



-  If you do not enter a reason for the redaction and press Enter or select a reason from the list, the current redaction reason shown in the Reason list will be applied to the redaction.
-  The redaction list displays only 40 redaction reasons based on alphabetical order.
4. Navigate to another document to save the redaction.

To change the properties of a redaction:


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

2. Select the redaction you want to change.
3. On the **Markup properties** toolbar, do any of the following:
 - To change the redaction color, click the **Color** button , and select a new color from the color picker.
 - To change the redaction reason, type a new reason or select it from the list, and then press **Enter**.
4. Navigate to another document to save the redaction.


Editing markups

You can change the appearance, size, and location of markups after you add them. All changes are tracked in the Markup History view of the Media Information pane.


To edit a markup's properties:

1. From the markup toolbar, click the **Selection** tool .
2. Select the markup you want to edit.
3. From the **Markup properties** toolbar edit any of the properties.

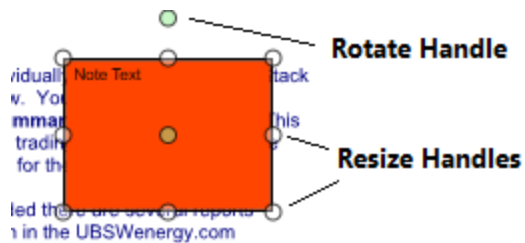
To edit another user's markups:

1. From the markup toolbar, click the **Selection** tool .
2. Press Shift and then select the markup you want to edit.

To rotate or resize a markup:



1. On the **Markup** toolbar, click the **Selection** tool .
2. Select the markup.

The markup displays a rotate handle and resize handles around the perimeter.



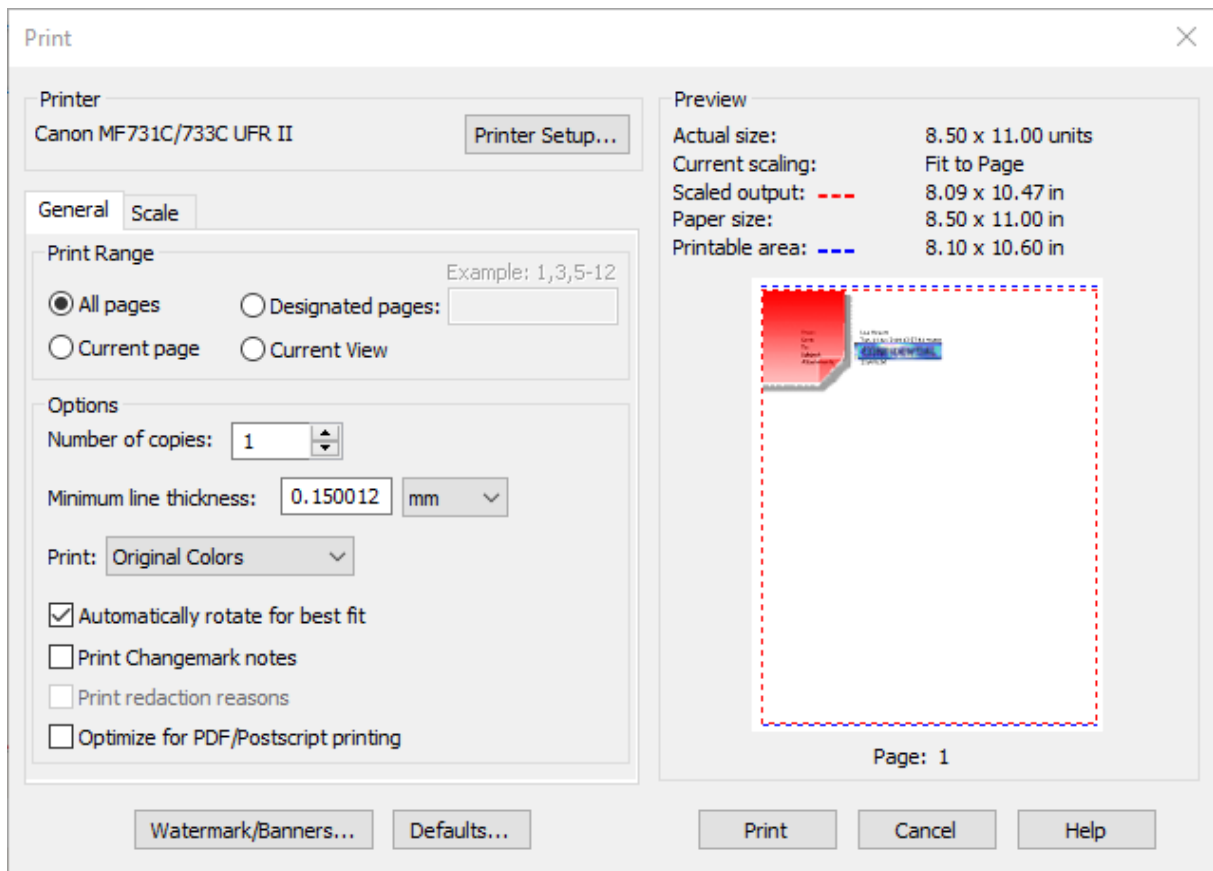
3. Do one of the following:
 - To rotate the markup, drag the green rotate handle in the direction you want to rotate the markup.
 - To resize the markup, drag one of the resize handles to transform the markup to the desired size.

To delete a markup:

1. On the **Markup** toolbar, click the **Selection** tool .
2. Do any of the following:
 - To select a single markup to delete, select the markup you want to delete.
 - To select multiple markups, press **CTRL** and select the markups you want to delete.
 - To select all the markups on the page, drag the **Selection** tool  across all the markups on the page.
3. Press **Delete**.

Printing individual documents with Concordance Desktop Viewer

Using the print command in Concordance Desktop Viewer, you can print the current document displayed in the viewer. If you need to print a set or batch of documents, you can run a query and use the CDV Printing command in Concordance Desktop. See, Batch Printing with Concordance Desktop Viewer.




When printing documents, be aware of the following:

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

To print the current document in the viewer:

1. In the Concordance Desktop Viewer window, locate the document you want to print.
2. From the **File** menu, click **Print**.
3. In the **Printer** section, select the printer to use.

4. To modify the printer settings, click the **Printer Setup** button, specify the paper size, orientation, and other general printing options, and then click **OK**. Options will vary with different printers and drivers.
 5. In the **Print** dialog box, click the **General** tab, if not already displayed.
 6. In the **Print Range** section, click one of the following:
 - Select **All Pages**, to print all the pages in the document.
 - Select **Current page** to print the current document displayed.
 - Select **Designated Pages** to define specific pages or a range of pages from the current document.
 - Select **Current View** to only print the area of the image that is displayed in the viewer workspace.
 7. In the **Options** section, specify the following:
 - In the **Number of copies** field, type or select the number of copies you to print.
 - In the **Minimum line thickness** field, type a value from 0 to 99 for the thinnest line weight for markups, and then click **points** (1 point = 1/72 inch) or **mm** (millimeters) for the unit value.
 7. From the **Print** list, click one of the following:
 - Click **Lines as Black** to print all lines black, markups print with color (if applicable).
 - Click **As Grayscale** to print in shades of gray.
 - Click **Original Colors** to print using the colors shown in the viewer.
 8. Specify any of the following print settings:
 - Select the **Automatically rotate for best fit** check box to allow more of the image to fit within the margins of the printed page.
 - Select the **Print Changemarks notes** check box to include the text in any notes in the current document on a separate sheet.
 - Select the **Print redaction reasons** check box to include the text in any redactions in the current document on a separate sheet.
 - Select the **Optimize for PDF/Postscript printing** check box if you are printing a PDF document.
 -  The Optimize for PDF/PostScript Printing option resolves the issue where some older printers and the PDF Distiller and Writer may not properly invert printouts resulting in reversed prints (black background and white foreground). When selected, this produces a bitmap of the current document/image that is sent to the printer giving accurate printouts for the problematic printer or print driver. However, selecting this option results in slower print time and a larger print spool file.
 9. To add header, footer, or watermark text to the printed page, click the **Watermark/Banners** button, edit the text strings, and then click **OK**.
-

To edit headers/footers and watermarks:

1. Click the folder next to the Header/Footer or the Watermark you want to edit.
2. For each header, footer, or watermark, click the <blank> field, and then 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 you want.

Available macros

Macro	Description
%Date	Inserts the current date
%SysDatePlusDays (X)	Inserts a date the specified number of days after the system date.
%Time	Inserts the current time the print is executed based on a 12-hour clock
%MilTime	Inserts the current time the print is executed based on a 24-hour clock
%Title	Inserts the current title of the document
%Page	Inserts the page number of the document
%TotalPages	Inserts the total number of pages of the document
%BatesPgNo(X)	Inserts a page number (x) to include for each printed document. The number entered is the beginning page number for each document. Multi-page documents are numbered incrementally. For example, %BatesPgNo(0001) would print 0001 on each single-page document. However, if a document had more than one page, the first page would appear as 0001, the second as 0002, and so on.
%Login, User	Inserts the user name of the person who executed the print
%Hostname	Inserts the hostname of the machine where the print was executed from
%IPAddress	Inserts the IP address of the machine where the print was executed from
%%	Inserts a single % character
©	Inserts a copyright symbol
®	Inserts a registered trademark

5. To edit the font for all headers, footers, and watermarks, click the **Font** button, and then in the **Font** dialog box, specify the font name, style, and size.
-

6. To view a list of all the headers, footers, and watermark set for the production, click **List**.
7. When finished, click **OK**.

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.

10. In the **Print** dialog box, if desired, click on the **Scale** tab to select options such as **Fit document within banners**.
11. When finished, click **Print**.

Concordance Viewer


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

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

Supported file types

The Concordance viewer works with the following file types:

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

-  Imported eDocs and eMails are automatically converted to near-native PDF files for viewing.
- For load file imports, there is an option to convert to PDF for near-native viewing during database creation. If the .opt has unsupported file types, they can be

converted at import or converted later using the Optimize feature on a document, a query, or the database.

Concordance Viewer basics

Displaying documents in the Concordance Viewer

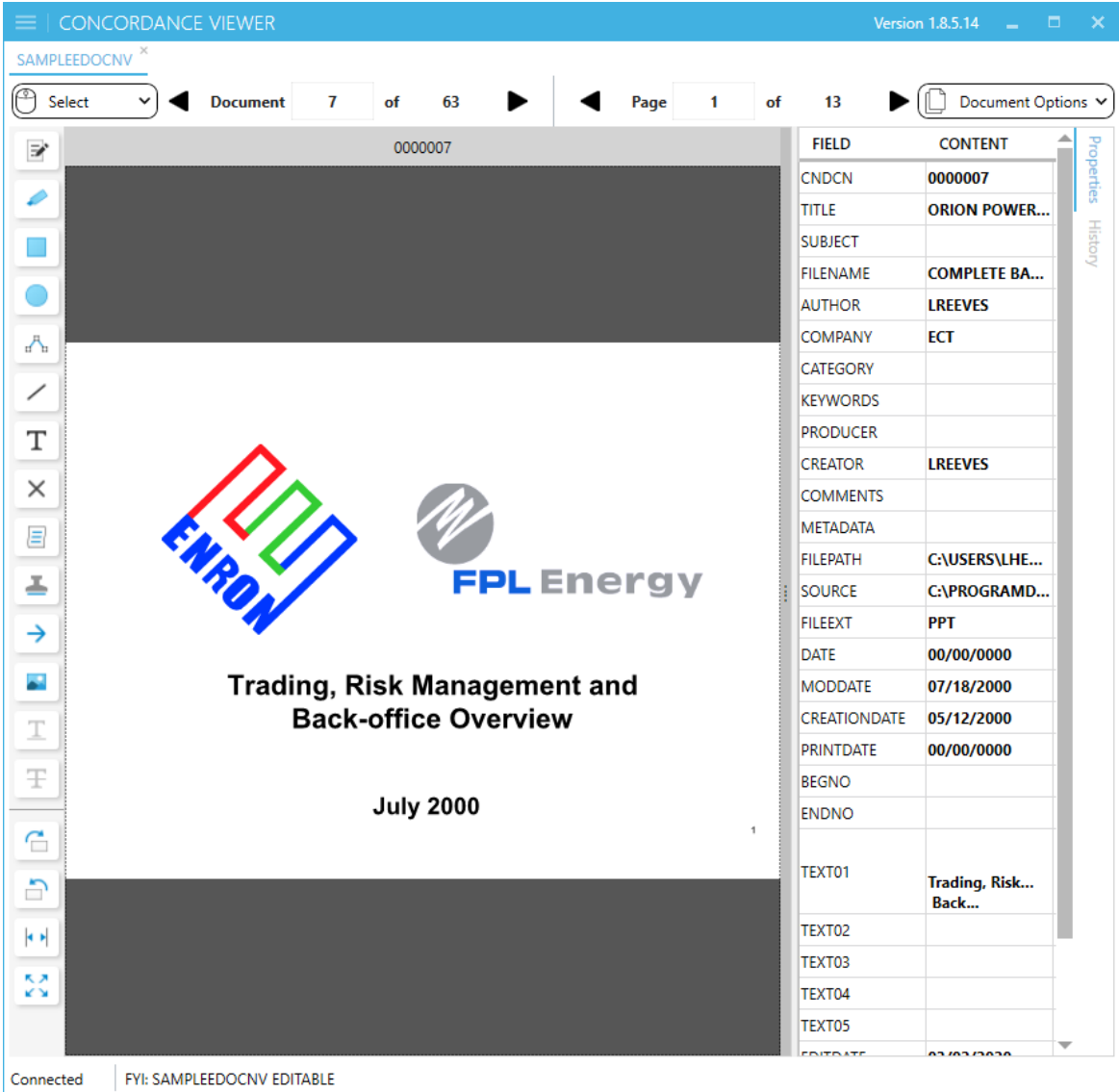
Using the media key (image key) field in Concordance Desktop, the viewer can synchronize with the current database and display the associated documents.

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

To open documents in the viewer:

1. In Concordance Desktop, open the database you want to view.
2. On the Dynamic toolbar, click the **View Image** (camera) button.

Documents may consists of multiple pages. A multi-page document will reflect 1 of # of pages, when on the first page of the document.



Concordance Desktop viewer

Navigating the Concordance Viewer

The Concordance Viewer in Concordance Desktop opens a separate window and displays the document associated to the record you currently have open in the Concordance Desktop database. Using the tools in the viewer, you can review documents, navigate between documents, apply markups (annotations), and adjust the display of the documents.

The viewer work area displays the image of the current document with any markups that have been applied. The viewer allows you to continuously scroll through all the documents without having to select the next document. Selecting next page or pressing the page down key when on the last page of the current document will scroll the view to

the first page of the next document. You can also use the mouse wheel to scroll through pages while viewing a document.

The Thumbnails pane in the viewer displays small images of the pages of the current document. Thumbnail navigation can be achieved with the mouse wheel and the up and down arrow keys.

The pane on the right can be toggled between document Properties and markup History. Currently, document Properties consists of the fields and values for the document from the database, while markup History displays the markup history for the document.


The screenshot shows the Concordance Viewer interface. The main document area (A) displays text from a document titled 'LEEDOCNV'. The text includes a section for 'Accomplishments' and a list of bullet points under the heading 'Enron Online'. The right-hand pane (H) shows document properties in a table:





FIELD	CONTENT
CNDCN	0000003
TITLE	CRAIG BRESLAU
SUBJECT	
FILENAME	ACCOMPLISH...
AUTHOR	CBRESLA
COMPANY	ECT
CATEGORY	
KEYWORDS	
PRODUCER	
CREATOR	MICROSOFT W...
COMMENTS	
METADATA	AUTHOR = CB... CATEGORY = CHARACTERS... CHARACT...
FILEPATH	C:\USERS\LHE...
SOURCE	C:\PROGRAMD...
FILEEXT	DOC
DATE	00/00/0000
MODDATE	07/10/2000
CREATIONDATE	07/10/2000
PRINTDATE	00/00/0000
BEGNO	
ENDNO	
TEXT01	Craig Breslau Accomplishme...
TEXT02	Following are t...
TEXT03	

At the bottom of the window, it shows 'Connected' and 'FYI: SAMPLEEDOCNV EDITABLE'.

(A) Viewer work area **(B)** Markup toolbar **(C)** Markup properties toolbar **(D)** Navigation toolbar **(E)** View toolbar **(F)** Mouse Mode **(G)** Thumbnails pane **(H)** Document information pane **(I)** Document Options **(J)** Viewer Menu

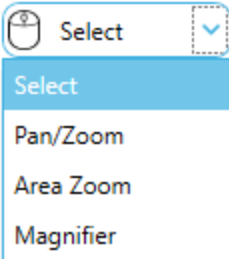
Viewer Menu

The Viewer Menu can be accessed by selecting the hamburger  icon in the upper left corner of the viewer.

Menu Item	Description
	Closes the Viewer Menu and returns to the viewer.
 Exit	Closes the Concordance Viewer.
 Print	Opens the Concordance Printing dialog.
 Help	Opens the Concordance Desktop Answer Center.

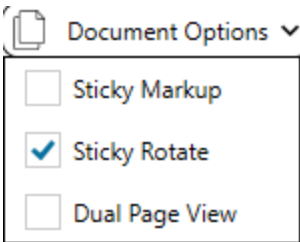
Mouse Mode

The Mouse Mode determines how the mouse will function while performing various actions. It is important to make sure the mouse mode is set appropriately based on what you want to do in the Concordance Viewer.



Mouse Mode	Mouse Cursor	Description
Select	Arrow	Allows for selecting items or areas on the page to apply and edit markups. Most markup activities will use this mouse mode.
Pan/Zoom	Magnifying Glass	Mouse wheel in this mode zooms in/out on the displayed image
Area Zoom	Precision (Cross)	Use the mouse to select an area on the page. Cursor changes to magnifying glass, then click inside the selected area to zoom that selection.
Magnifier	Magnifying Glass	Hold the left mouse button to display a zoom area. You can move this area around to magnify an area on the page.













Document Options






Document Option	Description
Sticky Markup	When selected, it retains the last selected markup. This setting allows multiple applications of the same markup without having to select the markup again from the markup toolbar.
Sticky Rotate	When selected, it retains the rotated settings as you page through a record. This setting is especially helpful if you are reviewing a spreadsheet. Sticky rotate is also effective when viewing a homogenous population of documents that all need rotation. Sticky rotate is retained between document navigation until the setting is unchecked.
Dual Page View	Displays the pages of a document in two columns in the viewer. The first page is top left. The second page is top right. If there are more than two pages in the document then the third page is second from the top on the left. The number of rows of pages depends on the image size.

The Markup toolbar

The Markup toolbar provides a variety of tools for adding markups (annotations) to a document during the review process.


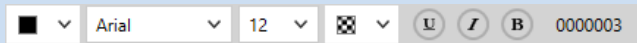
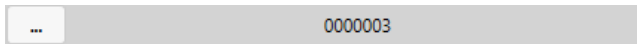
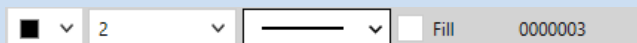
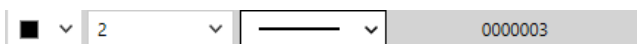
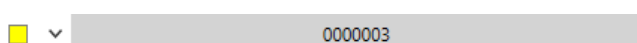
Tool	Name	Description
	Area Redaction	Blocks out areas on the page that are considered confidential or sensitive from being viewed or copied after production. If text is selected, then it redacts the selected text.
	Highlighter	Highlights the selected text.
	Rectangle	Draws a rectangle around the selected area on the page.
	Ellipse	Draws an ellipse around the selected area on the page.
	Connected Lines	Draws a jointed line on the page.
	Line	Draws a straight line in any direction on the page.
	Text	Places a box that contains text on the page.
	Crossout	Draws an X on the page.
	Note	Places a box on the page to hold short notes.
	Stamp	Places a predefined stamp on the page.
	Arrow	Draws a line with an arrow.
	Image	Places an external raster image (JPG, BMP, or PNG) on the page.

Tool	Name	Description
	Strikethrough	Draws a strikethrough line over the selected text.*
	Underline	Draws an underline under the selected text.*

 *Strikethrough and Underline markup tools are only available if the document contains selectable text and text is selected.

The Markup properties toolbar

The Markup properties toolbar displays properties you can set for the selected markup tool when adding or editing a markup. The properties of the toolbar changes depending on the type of markup selected.

Markup Type(s)	Markup property toolbars	Name
Redaction		Redaction
Text, Note, and Stamp*		Text
Image		Image
Rectangle and Ellipse		Shapes
Line, Connected Lines, Crossout, and Arrow		Lines
Highlighter		Highlighter

Redaction

The types of lines markup toolbar contains several properties for defining the line markups in the viewer such as color, width, and line style. Sets the reason for redaction. The reason for redaction will be displayed in the center of the redacted area when redactions are selected to be included in produced documents.



Property	Description
Colors	Sets the color to use for the redaction. See more details about the Color Picker below.
Redaction Reason	Sets the reason for the redaction. This may be blank.
CNDCN	The document's CNDCN is listed.

More information on applying redaction markups can be found in the Annotating documents section of the Answer Center.

Text

The text markup toolbar contains several properties for designing text markups in the viewer such as color, font style, size, and effects.

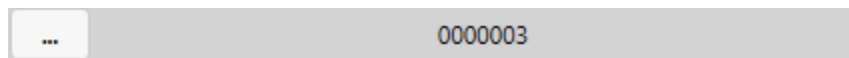


Property	Description
Colors	Sets the color for the font and the surrounding text box. See more details about the Color Picker below.
Font Name	Select from the font style drop-down list.
Font Size	Select from the font size options drop-down list*.
Background Color	The default for the text background can be changed using the color drop-down list and selecting an alternative color.
Underline, Italic, Bold	Clicking on U (Underline), I (Italic), and/or B (Bold) adds effects to the font. When an effect is selected, the icon is highlighted
CNDCN	The document's CNDCN is listed.

*The stamp markup doesn't have the property for size as it automatically adjusts to the size of the text box.

More information on applying text, note, or stamp markups can be found in the Annotating documents section of the Answer Center.

Image

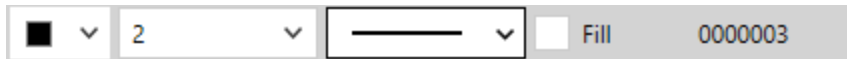


The image toolbar allows the loading of images so that an external raster image (JPG, BMP, or PNG) can be placed on the page.

Property	Description
Ellipsis	Opens Image Markup window to browse to (JPG, BMP, or PNG) to apply to image.
CNDCN	The document's CNDCN is listed.

Shapes

The shapes markup toolbar contains several properties for designing graphic markups in the viewer such as color, width, line style, and fill.

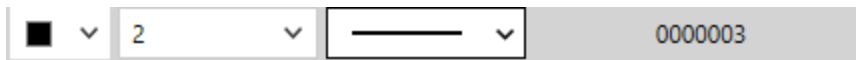


Property	Description
Colors	Sets the color for the shape and fill if enabled. See more details about the Color Picker below.
Line Width	Sets the width of the lines in the shape.
Line Style	Sets the style of the line (solid, dashes, dash-dot, or dots).
Fill	Fills the shape to make a solid image
CNDCN	The document's CNDCN is listed.

More information on applying rectangle or ellipse markups can be found in the Annotating documents section of the Answer Center.

Lines

The types of lines markup toolbar contains several properties for defining the line markups in the viewer such as color, width, and line style.

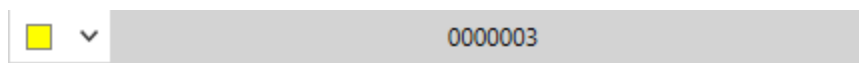


Property	Description
Colors	Sets the color for the line type. See more details about the Color Picker below.
Line Width	Sets the width of the lines.
Line Style	Sets the style of the line (solid, dashes, dash-dot, or dots).
CNDCN	The document's CNDCN is listed.

More information on applying line, connected lines, crossout, and arrow markups can be found in the Annotating documents section of the Answer Center.

Highlighter

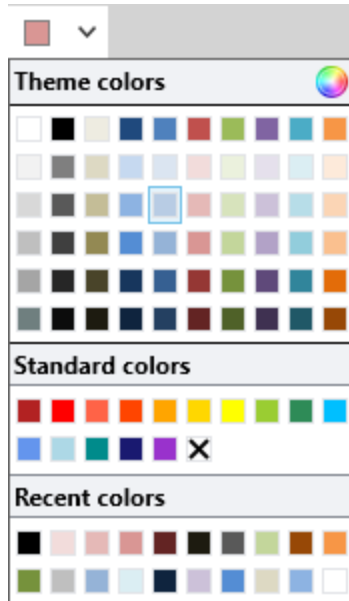
The highlighter toolbar contains the ability to change the color of the highlighter tool.



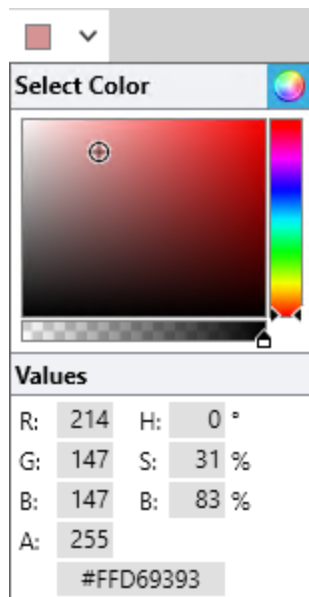
Property	Description
Colors	Sets the color for the highlighter. The result is transparent with this tool. See more details about the Color Picker below.
CNDCN	The document's CNDCN is listed.

Color Picker

The color picker is separated into three sections: Theme colors, Standard colors, and Recent colors.



By selecting the color wheel, you can select a custom color.







A specific color can be selected by entering the designated values in the appropriate fields or by moving the color bar on the right and selecting the corresponding tone in the main square. The bar immediately below the main square adjusts the transparency level of the selected color.


Redactions may appear transparent in the Concordance Viewer but will be fully redacted and overlaid with a solid color when produced.

The Navigation toolbar

The Navigation toolbar allows you to move between documents and records. See, [Displaying documents in the Concordance Viewer](#).







Tool	Name	Description
	Previous Document	Navigates to the previous document in a single or concatenated set of Concordance Desktop databases.
	Next Document	Navigates to the next document in a single or concatenated set of Concordance Desktop databases.
<input type="text" value="3"/>	GoTo Document	Navigates to a specified document within the current query.
	Previous Page	Navigates to the previous page in a multi-page document shown in the viewer, or the next document if on the last page of the current document.*
	Next Page	Navigates to the next page in a multi-page document shown in the viewer.
<input type="text" value="1"/>	GoTo Page	Navigates to a specified page within a document.

 *If you are on the first page of a document and press Previous Page then you will go to the first page of the prior document not the last page of it.

The View toolbar

The View toolbar adjusts the size and orientation of the current document.

Tool	Name	Description
	Rotate Clockwise	Rotates the document in 90 degree clockwise increments.
	Rotate Counterclockwise	Rotates the document in 90 degree counterclockwise increments.
	Fit to Width	Adjusts the zoom width so that the entire width of the document appears in the workspace.
	Best Fit	Adjusts the image size so that the entire image of the document appears in the workspace.

The Thumbnails pane



You can hide or show the Thumbnails pane by clicking the expand thumbnails button on the left side of the thumbnails pane.

The Thumbnails pane displays small images of the pages within the current document. The thumbnail image for the currently selected page is displayed with a dotted line around it. If a page contains markups, it will display with a red box surrounding the thumbnail image.

Click on a specific page in the Thumbnails pane to display that page in the viewer work area.

Use the navigation tools in the Thumbnails pane to navigate the pages of the current document.



Tool	Name	Description
The Up Arrow key/ the Left Arrow key	Previous page	Navigates to the previous page of the document or image.
The Down Arrow key/ the Right Arrow key	Next page	Navigates to the next page of the document or image.
	Previous markup page	Navigates to the previous page that contains markups.
	Next markup page	Navigates to the next page that contains markups.
Enter key	Select Page	Displays the selected page in the main view.
The Page Up key	Page Up Thumbnails pane	Reverses the display of thumbnail in increments of approximately 5 pages.
The Page Down key	Page Down Thumbnails pane	Advances the display of thumbnail in increments of approximately 5 pages.

Document information pane

The Document Information pane contains detailed information about each record shown in the viewer.

FIELD	CONTENT
CNDCN	0000008
TITLE	MEDIATION
SUBJECT	
FILENAME	DOCID000057...
AUTHOR	
COMPANY	
CATEGORY	
KEYWORDS	
PRODUCER	
CREATOR	
COMMENTS	
METADATA	AUTHOR = CATEGORY = COMMENTS = COMPANY = CREATET...
FILEPATH	C:\USERS\JED...
SOURCE	C:\PROGRAMD...
FILEEXT	HTM
DATE	00/00/0000
MODDATE	04/01/2019
CREATIONDATE	05/03/2019
PRINTDATE	00/00/0000
BEGNO	
ENDNO	
TEXT01	Mediation From: Rowland, Jay A...
TEXT02	
TEXT03	

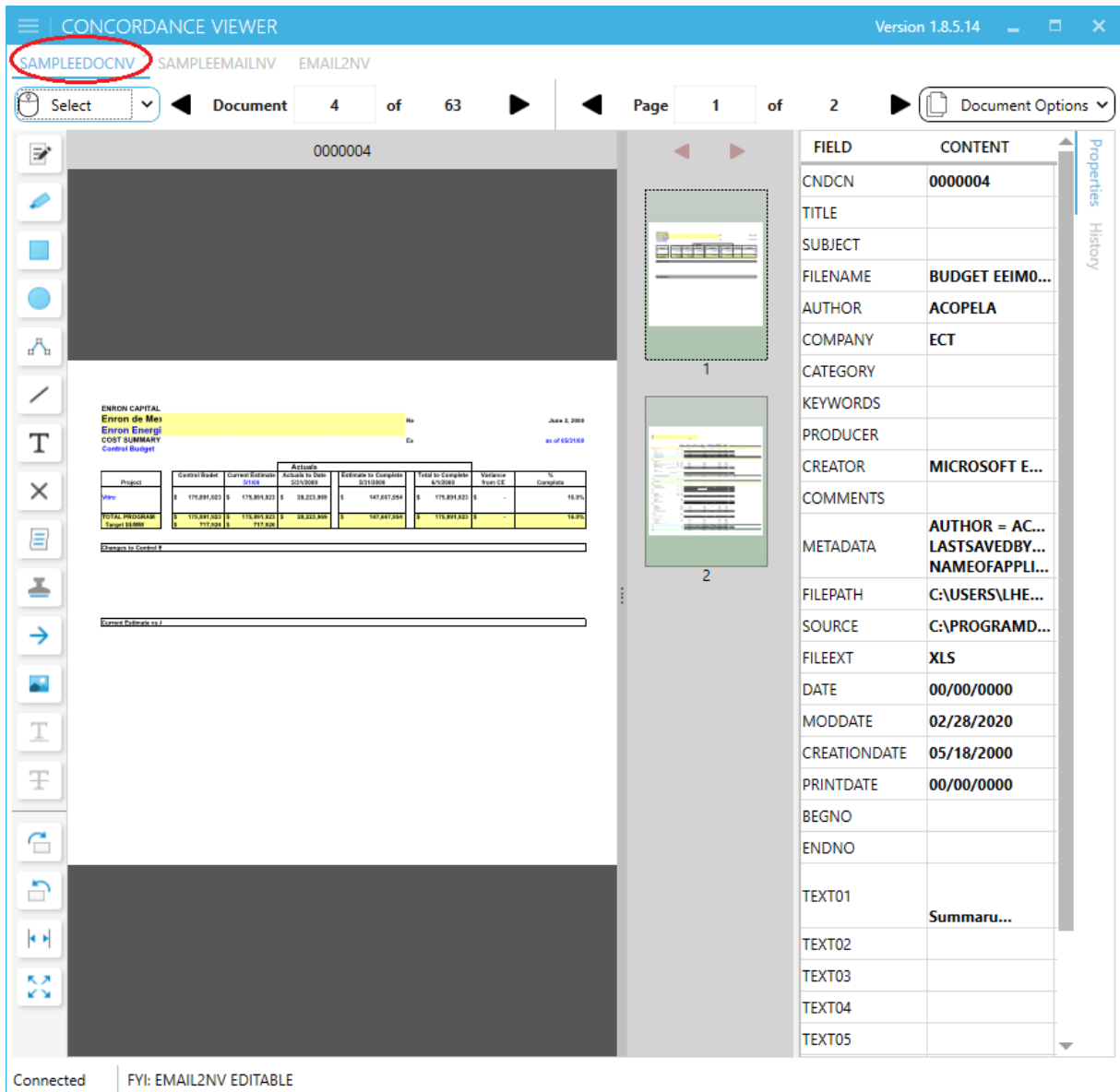
Refresh		Export	
Polygon Redaction	Page 1	Reason: Redacted	Created by User Name on 5/16/2019 at 06:21 PM
Ellipse	Page 1		Created by User Name on 5/14/2019 at 08:33 PM
Ellipse	Page 1		Created by User Name on 5/14/2019 at 08:32 PM
Highlight	Page 1		Created by User Name on 5/14/2019 at 08:32 PM
Line	Page 1		Created by User Name on 5/13/2019 at 02:49 PM
Line	Page 1	Modified (Move) by User Name on 5/14/2019 at 08:32 PM	Created 5/13/2019 at 02:49 PM
Highlight	Page 1		Created by User Name on 5/14/2019 at 08:31 PM
Highlight	Page 1		Created by User Name on 5/14/2019 at 08:31 PM
Highlight	Page 1		Created by User Name on 5/14/2019 at 08:31 PM
Rubber Stamp	Page 1		Created by User Name on 5/7/2019 at 08:16 PM
Rubber Stamp	Page 1	Modified (Move) by User Name on 5/7/2019 at 08:17 PM	Created 5/7/2019 at 08:16 PM
Rubber Stamp	Page 1	Modified (Move) by User Name on 5/14/2019 at 08:31 PM	Created 5/7/2019 at 08:16 PM
Highlight	Page 1		Created by User Name on 5/14/2019 at 08:30 PM

Properties
History

Media Tab	Description
Properties	Displays numeric, date, text and paragraph data, up to 40 characters, from the document's corresponding Concordance Desktop field.
History	Displays the markup history, in descending page order, of all markup additions, modifications, and deletions that have taken place for the current document.

Opening views

When synchronized with Concordance Desktop, each tab in Concordance Desktop has an associated tab in the Concordance Viewer, displaying the associated document view. You can have up to 16 views open at the same time. Each view is accessible using the named tabs at the top of the workspace. The database you are currently viewing will be underlined.



Changing between databases in the viewer

The database that is currently displayed is the database tab that is highlighted in blue.

To change to another database view in the Concordance Viewer do one of the following:

- Select the database name by clicking on it.
- Toggle to the database name by holding the Ctrl key and selecting the Tab key until the desired database is selected.

To close the a Database in the Viewer

1. Select the X to the upper right of the database that you would like to close.

2. A Warning is displayed across the viewer.

Disconnecting from database CNDTTEST1
Are you sure ?



3. Select **OK** to close the database.
4. Select **Cancel** to leave the database open.

Magnifying records in the viewer

In the Concordance Viewer, you can zoom, magnify, pan and rotate documents depending on the record type and particular content. For instance, handwritten documents are harder to read online and perhaps illegible in some instances. Special magnifying tools from the mouse options and view toolbar allow you to read with ease and inspect signature details.

To adjust the magnification of the document view:

Based on the Mouse Mode selection, and using the View toolbar, do any of the following:

- To zoom in or out on a document, select the **Pan/Zoom** tool then use the mouse wheel. Rotate the wheel forward to increase the magnification or rotate the wheel down to decrease the magnification.
 - To enlarge a selected area, click the **Area Zoom** tool and drag the tool across the area you want to enlarge then double click in the box to zoom.
 - To open a magnifier window, click **Magnifier** and drag the tool over the area you want to magnify.
- 💡 The Zoom function in the Concordance Viewer is sticky by default across documents in the database. The documents remain in zoom mode until either Fit to Width or Best Fit are selected.
- To rotate a document in 90 degree increments, click the **Rotate Clockwise** or the **Rotate Counterclockwise** button.
 - To fit the entire width of a document in the workspace, click the **Fit to Width** button.
 - To fit the entire image of a document in the workspace, click the **Best Fit** button.

Using sticky markup and sticky rotate:

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

The Sticky Markup and Sticky Rotate functions are located on the Document Options menu:

- **Sticky Markup** - keeps your markup settings as you move from record to record. If you uncheck the selection, then you will need to select the markup each time to use it.
- **Sticky Rotate** - retains the rotated settings as you page through a record. These settings are especially helpful if you are reviewing a spreadsheet. If you uncheck the selection, and then navigate to the next record, the record defaults to its original view.

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

Sticky rotate is also effective when viewing a homogenous population that all need rotation. Sticky rotate is retained between document navigation until the setting is unchecked.

Using the document information pane

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

FIELD	CONTENT
CNDCN	0000008
TITLE	MEDIATION
SUBJECT	
FILENAME	DOCID000057...
AUTHOR	
COMPANY	
CATEGORY	
KEYWORDS	
PRODUCER	
CREATOR	
COMMENTS	
METADATA	AUTHOR = CATEGORY = COMMENTS = COMPANY = CREATET...
FILEPATH	C:\USERS\JED...
SOURCE	C:\PROGRAMD...
FILEEXT	HTM
DATE	00/00/0000
MODDATE	04/01/2019
CREATIONDATE	05/03/2019
PRINTDATE	00/00/0000
BEGNO	
ENDNO	
TEXT01	Mediation From: Rowland, Jay A...
TEXT02	
TEXT03	

Refresh
Export

Polygon Redaction Page 1
Reason: Redacted
Created by User Name on 5/16/2019 at 06:21 PM

Ellipse Page 1
Created by User Name on 5/14/2019 at 08:33 PM

Ellipse Page 1
Created by User Name on 5/14/2019 at 08:32 PM

Highlight Page 1
Created by User Name on 5/14/2019 at 08:32 PM

Line Page 1
Created by User Name on 5/13/2019 at 02:49 PM

Line Page 1
Modified (Move) by User Name on 5/14/2019 at 08:32 PM
Created 5/13/2019 at 02:49 PM

Highlight Page 1
Created by User Name on 5/14/2019 at 08:31 PM

Highlight Page 1
Created by User Name on 5/14/2019 at 08:31 PM

Highlight Page 1
Created by User Name on 5/14/2019 at 08:31 PM

Rubber Stamp Page 1
Created by User Name on 5/7/2019 at 08:16 PM

Rubber Stamp Page 1
Modified (Move) by User Name on 5/7/2019 at 08:17 PM
Created 5/7/2019 at 08:16 PM

Rubber Stamp Page 1
Modified (Move) by User Name on 5/14/2019 at 08:31 PM
Created 5/7/2019 at 08:16 PM

Highlight Page 1
Created by User Name on 5/14/2019 at 08:30 PM

The Document information pane organizes the information into two views.

Tab	Description
Properties	Displays numeric, date, text and paragraph data, up to 40 characters, from the document's corresponding

Tab	Description
History	<p>Concordance Desktop fields.</p> <p>Displays a complete history, in descending page order, of all markup additions, modifications, and deletions that have taken place for the current document.</p>


The **Properties** tab displays detailed information about the document.

Select the **History** tab to view markup history. The **Refresh** button updates the history showing the latest changes to the markups for the current document. The **Export** button exports all of the markup changes to a csv for further review or reporting.

The main view of the markup history tab displays the following information if there are markups saved.

Item	Example	Description
Markup name	Polygon Redaction	Name of the markup. In the case of redaction, the specific type of redaction is listed (area redaction, or polygon redaction).
Page	Page 1	The page containing the markup or the markup removal.
Modification (Not displayed when creating markups.)	<p>Modified (Move) by Reviewer One on 4/19/2019 at 04:17 PM</p> <p>Modified (Reason) by Reviewer One on 4/19/2019 at 04:17 PM</p> <p>Deleted by Reviewer One on 4/19/2019 at 04:17 PM</p>	Describes the change that was made to the markup since creation. This includes the user who made the change, date of change, and the time of the change (based on the reviewer's local time).
Reason	Highly Confidential	The reason is displayed for redactions. The reason is entered at the


Item	Example	Description
		time the redaction is placed or edited. The reason may be blank.
Created by	Created by Reviewer One	The user name of the reviewer that made the change.
Date	5/14/2019	The date of the markup change in MM/DD/YYYY format.
Time	at 08:32 PM	The time that the markup change occurred based on the reviewer's local time.

 Markups that were converted from earlier Concordance versions will show add and deletion entries only.

Annotating documents

Applying redactions

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

 If you need to produce text files, you will need to OCR the produced images after the redactions have been burned into the production output.

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

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

There are two ways you can apply a redaction:

- Draw a redaction box over an area of the document or image.
- Redact a sentence or part of a sentence through text selection.

The screenshot shows the Concordance Viewer interface. The document is titled "OEC Memorandum" and includes an ENRON logo. The header information is as follows:

0000002

Date: March 2, 2020
 To: Gus Eghneim
 From: Grady James
 Subj: Oil Release from Unit 3 Mist Eliminator

The document content includes several paragraphs. Two redactions are highlighted with callouts:

- Area Redaction:** A yellow rectangular box covers a paragraph describing NEPCO's response to an oil spill, including the use of oil booms and absorbent pads.
- Text Redaction:** A blue rectangular box highlights a sentence: "NEPCO had done an excellent job cleaning up the area."


On the right side of the viewer, there is a metadata table:


FIELD	CONTENT
CNDCN	0000002
TITLE	
SUBJECT	
FILENAME	615INCIDENT....
AUTHOR	MARK S DOBLER
COMPANY	ENRON INTER...
CATEGORY	
KEYWORDS	
PRODUCER	
CREATOR	MICROSOFT W...
COMMENTS	
METADATA	AUTHOR = MA... CATEGORY = CHARACTERS... C...
FILEPATH	C:\USERS\LHE...
SOURCE	C:\PROGRAMD...
FILEEXT	DOC
DATE	00/00/0000
MODDATE	06/15/2000
CREATIONDATE	06/15/2000
PRINTDATE	00/00/0000
BEGNO	
ENDNO	
TEXT01	OEC Memoran... Date: June 15,... To: G...


At the bottom of the viewer, a status bar indicates: "Connected | FYI: SAMPLEEDOCNV LOCKED for edit by YOU on 3/4/2020 10:39:09 AM"


Area Redaction and Text Redaction within a paragraph

To add an area redaction:


1. On the **Markup** toolbar, click the **Redaction** tool .
2. Using the **Redaction** tool, do any of the following:
 - To redact a section of a document, draw a rectangular box around the section to redact.
 - To redact a list, click outside the margin of the list, and draw a rectangular box around the text.

 We recommend that you use different colors when applying redactions and highlighting text. This ensures that the markup type can be easily differentiated when viewing a document or image.
3. With the redaction selected, on the **Markup Properties** toolbar, locate the **Reason** list.
4. In the **Reason** list, do one of the following and then press **Enter**:
 - Type a new reason.
 - Click an existing reason from the list
 - OR you may leave the reason blank

 If you do not enter a reason for the redaction and press Enter or select a reason from the list, the current redaction reason shown in the Reason list will be applied to the redaction.

 The redaction list displays only 40 redaction reasons based on alphabetical order.
5. Save the redaction by removing focus from it. To remove focus, you can click outside the redaction, select another tool or navigation button, or even navigate to another document.

To add a text redaction:

1. Use your mouse to select the text you want to redact.
 2. Click the Redaction Tool on the **Markup** toolbar.
 3. Select the text redaction to change any of the markup properties such as color or Reason for redaction.
 4. Save the redaction by removing focus from it. To remove focus, you can click outside the redaction, select another tool or navigation button, or even navigate to another document.
-  You can select your text redaction font properties via the Markup Properties
-

toolbar at the top of the window.

- ⚠ Text-based redactions are not enabled when a document is rotated. Use the area redaction tool or restore the document to the original orientation to use a text-based redaction.

To change the properties of a redaction:

1. On the **Mouse options** toolbar, click the **Select** tool.
2. Select the redaction you want to change.
3. On the **Markup properties** toolbar, do any of the following:
 - To change the redaction color, click the **Color** button and select a new color from the color picker.
 - To change the redaction reason, type a new reason or select it from the list, and then press **Enter**.
4. Save the redaction by removing focus from it. To remove focus, you can click outside the redaction, select another tool or navigation button, or even navigate to another document

- ⚠ When redacting a bullet or numbered list, it is recommended that you always apply redactions using the Area Redaction tool. This ensures that the list content is completely redacted when the image is produced and/or printed. Begin drawing the rectangle in the margin, outside the text area, to ensure all information is redacted successfully.

- ⚠ 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.

Applying markups

During the discovery process, marking up record detail is the phase when deeper content investigation and case record preparation begins.

CONCORDANCE VIEWER Version 1.8.5.14

SAMPLEEDOCNV x

Select Document 62 of 63 Page 1 of 5 Document Options

0000062

Requires Further Review

US/CANADA GOVERNMENT AFFAIRS
 UPDATE: June 1-July 7, 2000

California
ISO Sets Lower Price Caps
 The Board of the California ISO voted to lower price caps for ancillary services and imbalance energy from \$750 to \$500. A vote to further lower the caps to \$250 was rejected by a 12 to 12 tie. The Board also added provisions that reduced the price cap on replacement reserves from \$750 to \$100 and required suppliers to bid all available generation into the market in California when the California load reaches 38GWh.

At a subsequent meeting on July 6, the Board again rejected a proposal to further reduce the price cap to \$250.

CPUC Issues Post-Transition Order
 The California Public Utilities Commission ("CPUC") issued an order addressing "end of transition" issues. The major issues include the following:

- Prohibits the utilities from capping monthly PX prices OR offering new alternative pricing products in order that the market will provide these products.
- Rejected SDG&E's proposal for a procurement PBR as premature.
- Maintained a mandatory buy requirement for the three UDCs until all three have recovered their transition costs, but expanded the buy requirement to include other "qualified" exchanges. This portion of the decision was short-circuited by the legislature which maintained the mandatory buy requirement exclusively for the California PX unless or until the Commission performs a study and submits the results to the legislature. In any event, the Commission cannot act prior to June 2001 on this issue.

The CPUC adopted a new allocation method for Competition Transition Charges ("CTCs") related to QF contracts. The new allocation method is based on the top 100 hours of demand on the utility system, which will have the effect of shifting some costs from small consumers to large consumers. This result, while moderately worse than the existing methodology, is significantly better than the initial proposal of an equal-cent-per-kWh allocation in the proposed decision. Enron, along with the large consumer groups, actively lobbied against the proposed decision on this issue.

- The decision provides for a lump-sum refund of San Diego Gas & Electric's excess bond proceeds rather than amortizing the excess proceeds over time. From our book perspective, this is positive as the refund will occur during the term of our contracts. Prospectively, however, this refund mechanism may increase rates for residential and small commercial customers as the repayment of the bonds will continue for several years after the end of the transition period and the mandated 10% rate reduction will have ceased.

Research these rules

FIELD	CONTENT
CNDCN	0000062
TITLE	US/CANADA G...
SUBJECT	
FILENAME	US-CANADAU...
AUTHOR	EES
COMPANY	ENRON
CATEGORY	
KEYWORDS	
PRODUCER	
CREATOR	MICROSOFT W...
COMMENTS	
METADATA	AUTHOR = EES CATEGORY = CHARACTERS... CHARACTERS...
FILEPATH	C:\USERS\LHE...
SOURCE	C:\PROGRAMD...
FILEEXT	DOC
DATE	00/00/0000
MODDATE	07/07/2000
CREATIONDATE	07/07/2000
PRINTDATE	00/00/0000
BEGNO	
ENDNO	
TEXT01	US/CANADA G... UPDATE: June...
TEXT02	
TEXT03	
TEXT04	
TEXT05	


Connected FYI: SAMPLEEDOCNV LOCKED for edit by YOU on 3/5/2020 1:15:06 PM

The Markup toolbar includes a variety of tools you can use to mark up (annotate) a document or image during review. Applying markups includes redacting information and adding notes. You can also apply color markings to highlight or underline text and add a circle or box to emphasize a block or region of key content. All of these elements can easily be edited, moved, or resized.


There is no limit to the number of markups you can add to a document.

Markups for the current document/record are displayed in the history tab of the Document information pane. The markup history displays markup type, author, date, and time. Markup history is also saved in the .cib file. See, Viewing document information.


To add text:

1. On the Markup toolbar, click the **Text** tool .
2. Using the **Text** tool, select the area where you want to add the text.
3. Double click on the text box to open the text edit box.
4. Click on the text edit box once for the cursor to appear for adding text.
5. In the text edit box, type the text you want to add.
6. On the **Markup properties** toolbar, specify any of the following:
 - To change the color of the box and text, click the first color drop down, and then select a color from the color picker. The outline color of the text box is set to be the same as the current font color.
 - To change the font, in the font name list, select a font.
 - To change the font size, in the list, select a font size.
 - To change the background color of the text box, click the second color drop down which opens the color picker dialog box, and sets the background to the color selected. The color choice displayed as a box with an X (Automatic) sets the background as transparent with all text visible.
6. Set the font style, do any of the following:
 - To underline the text, click the **Underline** button.
 - To italicize the text, click the **Italics** button.
 - To make the text bold, click the **Bold** button.
7. Save the markup by removing focus from it. To remove focus, you can click outside the markup, select another tool or navigation button, or even navigate to another document.





To add a note:

1. On the **Markup** toolbar, click the **Note** tool .
 2. Using the **Note** tool, select the area where you want to add the note.
 3. Double click on the note box to open the note edit box.
 4. Click on the note edit box once for the cursor to appear for adding text.
 5. In the note edit box, type the text you want to add.
 6. On the **Markup properties** toolbar, specify any of the following:
-

- To change the color of the box and text, click the first color drop down, and then select a color from the color picker. The outline color of the text box is set to be the same as the current font color.
 - To change the font, in the font name list, select a font.
 - To change the font size, in the font size list, select a font size.
 - To change the background color of the text box, click the second color drop down which opens the color picker dialog box, and sets the background to the color selected. The color choice displayed as a box with an X (Automatic) sets the background as transparent with all text visible.
7. Set the font style, do any of the following:
 - To underline the text, click the **Underline** button.
 - To italicize the text, click the **Italics** button.
 - To make the text bold, click the **Bold** button.
 7. Save the markup by removing focus from it. To remove focus, you can click outside the markup, select another tool or navigation button, or even navigate to another document.



-  A Note remembers the last text that was entered in the previous note when creating a new Note markup. Text will always have a blank text box when you create a new markup.
- You can use Rich Text Formatting (RTF) in notes and text, including copying RTF content from another application and then pasting into a note. The text will be converted to your current settings for the note.

To add lines:

1. On the **Markup** toolbar, click one of the following:
 - To draw a straight line, click the **Line** tool .
 - To draw a jointed line, click the **Connected Line** tool .
 - To place an X over an area on the document, click the **Crossout** tool .
 - To draw an arrow, click the **Arrow** tool .
 2. Draw on the document:
 - To draw a line, crossout, or arrow, drag the tool across the document where you want the markup to appear.
 - To draw connected lines, click to create the starting point, move the tool, and then click to create each segment. Double click when finished drawing the last line segment of the connected lines.
 3. To change the line properties, on the **Markup properties** toolbar, do any of the following:
-




- To change the color, click the color drop down, and then select a color from the color picker.
 - To change the line width, select the value from the drop-down list.
 - To change the line style, select the style from the drop-down list.
4. Save the markup by removing focus from it. To remove focus, you can click outside the markup, select another tool or navigation button, or even navigate to another document.

To add shapes:

1. On the **Markup** toolbar, click one of the following:
 - To draw a rectangle or square, click the Rectangle tool  .
 - To draw an ellipse or circle, click the arrow next to the Rectangle tool, and then click the Ellipse tool  .
2. Draw in the document:
 - To draw a rectangle or ellipse, drag the tool across the document where you want the markup to appear.
3. To change the shape properties, on the **Markup properties** toolbar, do any of the following:
 - To change the color, click the color drop down, and select a color from the color picker.
 - To change the shape style, select the style from the line style list.
 - To make a solid shape, select **Fill**.
4. Save the markup by removing focus from it. To remove focus, you can click outside the markup, select another tool or navigation button, or even navigate to another document.

To add text edit markups:

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

1. Select the desired text that you will markup.
 2. On the **Markup** toolbar, click one of the following:
 - To draw a strikethrough, click the strikethrough button  .
 - To draw an underline, click the underline button  .
 - To redact the selected text, click the Redact button  . Then select the reason and color from the Redaction properties toolbar.
 3. The selected text now has the desired markup.
-

4. Save the markup by removing focus from it. To remove focus, you can click outside the markup, select another tool or navigation button, or even navigate to another document.
- ✍ If you have Sticky Markup enabled in Document Options, then the markup selections will be applied to all text selections after adding your first text markup. This continues until you change the markup style or remove the sticky markup selection.

To edit text markups:

1. To edit text markups created in the Concordance Viewer the mouse options need to be set to Select.
 2. When the markup tooltip is visible, left click on the markup.
 3. The selected markup can be edited.
 - If you are using the underline or strikethrough markup, you can change the color in the markup properties toolbar.
 - If you are using the redaction markup, then the redaction edits can be made with the redaction properties toolbar.
 - If you would like to delete the markup, then select the **Delete** key.
- ✍ The markup can be applied to multiple lines/paragraphs of continuous text in one action. Removing the markup from the same selected text may be multiple actions. Selecting the **Delete** key repeatedly will remove the markups one at a time.
- If a selection of text has multiple markups then each type of markup would need to be selected and deleted in order to remove all markups from the selection.

Applying images and stamps

The Images tool allows you to insert images (JPG, BMP, or PNG) into the current document. Images are created in an image editor for use with Concordance Viewer.

CONCORDANCE VIEWER Version 1.8.5.14

SAMPLEEDOCNV Select Document 61 of 63 Page 1 of 1 Document Options

0000061 Refresh Export Properties History

REVIEWED

SOLD TO:
 Enron Capital & Trade Resources Corp.
 c/o Enron Engineering & Construction Co.
 333 Clay Street, Suite 400
 Houston, TX 77022-7361
 Attention: Robert Meisen

INVOICE NO.: 11
INVOICE DATE: 12-Jun-00
APPLICATION NO.: 011 Fee
BILLING MONTH: June-00

CONTRACT DESCRIPTION:
 Enron Capital & Trade Resources Corp.
 Y2000 Peaking Projects

REMIT VIA WIRE TRANSFER TO:
 CITIBANK, NEW YORK
 ABA # 021 000 089
 ACCOUNT NAME: NATIONAL ENERGY
 PRODUCTION CORP.
 ACCOUNT # 4073-1721

TERMS OF PAYMENT: NET 5

To invoice you for the Fee portion of the work completed on the below referenced projects.

2094 - Lincoln Energy Center	\$	3,066,700
2096 Gleason Power I, L.L.C.	\$	3,066,700
2095 Wheatland	\$	3,066,700
Total Amount Due	\$	9,200,100

PLEASE PAY THIS AMOUNT: \$ 9,200,100


NFY
 Nicholas F. Viscount
 Approved


cc: Rowena Buterbonia

Confidential

Connected FYI: SAMPLEEDOCNV LOCKED for edit by YOU on 3/5/2020 3:06:22 PM


To insert an image:

1. On the **Markup** toolbar, click the **Image** tool .
2. On the **Markup properties** toolbar click the **ellipsis** button, the Image Markup window opens for browsing to the image you want to add.
3. Select the image and click **Open**.
4. Select the area where you want to add the image.
5. Save the markup by removing focus from it. To remove focus, you can click outside the markup, select another tool or navigation button, or even navigate to another document.

 The image list in the Markup properties toolbar lists shows the 10 most recently used images providing quick access to the images you apply most often.

Stamps contain a default red "Confidential" stamp. The color, content, and font style can be modified.

To add a stamp:

1. On the **Markup** toolbar, click the **Stamp** tool  .
2. On the Markup properties toolbar do any or all of the following to modify the stamp:
 - To change the color of the box and text, click the Color drop down, and then select a color from the color picker. The outline color of the text box is set to be the same as the current font color.
 - To change the font, in the font name list, select a font.
 - Set the font style, do any of the following:
 - To underline the text, click the Underline button.
 - To italicize the text, click the Italics button.
 - To make the text bold, click the Bold button.
3. Click the area where you want to add the stamp. Hold the mouse button while dragging it to the desired size. The text will automatically size to fit the image.
4. Save the markup by removing focus from it. To remove focus, you can click outside the markup, select another tool or navigation button, or even navigate to another document.

Editing markups

You can change the appearance, size, and location of markups after you add them. All changes are tracked in the Markup History tab of the Document Information Pane within the Concordance Viewer.

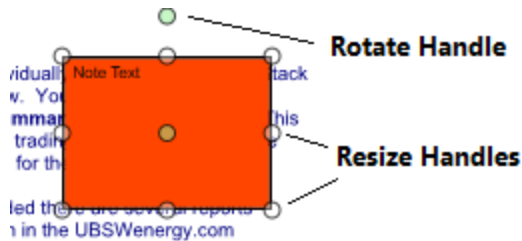
To edit a markup:

1. From the Mouse Mode drop down choose **Select**.
2. Use your mouse to select the markup you want to edit.
3. Use any of the available markup tools to modify the markup as desired.

To rotate or resize a markup:

1. From the Mouse Mode drop down choose **Select**.
-

2. Use your mouse to select the markup you want to rotate or resize. The markup displays a rotate handle and resize handles around the perimeter.



3. Do one of the following:
 - To rotate the markup, hover your mouse on the green rotate handle until your cursor changes to a rounded arrow, then click and drag the green rotate handle in the direction you want to rotate the markup.
 - To resize the markup, hover your mouse on one of the resize handles until the cursor changes to a resize arrow, then click and drag to the desired size.

To delete a markup:

1. From the Mouse Mode drop down choose **Select**.
2. Use your mouse to select the markup you want to delete.
3. Press the **Delete** key on your keyboard.



Printing individual documents with Concordance Viewer

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

When printing documents, be aware of the following:

- When printing documents that have been reviewed and redacted using the viewer, be aware that any redaction placed on the document will print transparent revealing the text underneath. If you want to print redactions as opaque, you should select the **Opaque** option in the **Print Redactions as** drop down.
- Printing documents that contain markups to Adobe PDF using the File > Print option, does not permanently burn the markups in the document. If you want markups burned in, you must run the documents through the Production process in Concordance Desktop, then print the produced document.

To print a single document in the viewer:

1. From the hamburger menu  in the upper left corner, click **Print**.
 2. Set the printing parameters you want, including specifying which document you want to print. See the printing parameter details in Batch Printing with Concordance Viewer
 3. Click **Start printing**.
-  Printing and Production headers/footers and watermark settings are separate entities. Parameters you set in the printing dialog box are only available for printing.

Print Preview

Prior to printing you can also see a preview by clicking on the **Preview** button at the bottom of the Concordance Printing dialog. The preview will display in a separate Print Preview window, showing the first page of the current document. You can **Print** directly from the preview window, or **Cancel** the preview to return to the Concordance Printing dialog.

CONCC PRINT PREVIEW

The UBSWenergy.com Trader
Accessing Stack Manager and Basic Review

How to Access Stack Manager and the new UBSWenergy.co

Using the Citrix Cluster:

1. Access Remote Services at: <http://remoteservices.netco.>
2. Choose UBSWenergy Cluster from the drop down menu
3. Login to the Citrix Cluster with your Corp. ID and Pass
4. Launch Stack Manager from the Start Menu
5. Login to Stack Manager using the new UBSWenergy.c and password provided to you

With a Stand Alone UBSWenergy.com Machine:
The migration of Stand Alone machines to the UBS envirc progress; therefore, for purposes of the Simulation please Cluster for access to the UBSWenergy.com environment : Manager.

Access to the new website:
For the Simulation please use the following link:
http://www.ubswenergy.com/site_index.html

Basic Stack Manager Questions and Review

- What do the icons on the tool bar of Stack Manager do?

Log In User Activate Stack Inactivate All Suspend Product Remove Product Open Product Watch Product S

Zoom [Slider] Print Cancel Cancel

Concordance Desktop

User Guide

Reference Information

Chapter

5

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.

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* Concordance Desktop Viewer incorporates software created by OpenText and its use is limited to the terms of the licensing agreement.

CloudNine™ Concordance® Desktop

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