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## Concordance

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Presenter: Terry Leang

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.

- 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
- An intuitive user interface for navigating and reviewing documents
- Advanced markup tools to review and annotate documents and images
- Track document markups added or removed during review
- Apply designations and bates stamps
- Produce color/grayscale images to PDF or TIFF

My Database - Concordance

File Edit View Search Documents Tools Help My Databases

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

Term Hits

Databases

- Search
- Tags
- Notes

Workspace My Database

BEGNO = 00010021  
 ENDNO = 00010021  
 DOCDATE = 10/17/1983  
 DOCTYPE = Invoice  
 DOCTITLE = Cowco 81-2 Milking Program  
 Gonff,JA  
 AUTHOR =  
 PAGES = 1  
 REVIEWSTATUS = Privileged  
 OCR1 = \*\*\*00010021\*\*\*  
 00010021

Cowco  
 Calcium House  
 380 Agler/Hill Drive  
 Washington DC 54326-5432  
 Tel: 876 356 2332  
 Fax: 876 356 8752

FAO: COWCO 81-2 Milking Program Participants

Our Ref: CTRUGonff JA  
 October 17, 1983  
 Dear Sirs,

BEGNO	ENDNO	DOCTYPE	DOCTITLE	RECIPIENT	AUTHOR
00010021	00010021	Invoice	Cowco		Gonff,JA
00010022	00010022	Correspondence	Cowco		Gonff,JA
00010023	00010024	Financial Paper	Table of Data Concerning Loans to		
00010025	00010025	Correspondence	Untitled	Douman,EM	Nordgren,R
00010028	00010028	Memorandum	Gonff, 1st South	Heiser,RT	Hausler,MD
00010027	00010027	Memorandum	Untitled	Heiser,RT	Hausler,MD
00010028	00010029	Correspondence	Untitled	Moise,MC	Harris,LA
00010030	00010030	Correspondence	Untitled		Weller,CE; Hausler,MD
00010031	00010032	Schedule	Cowr Security		
00010033	00010034	Schedule	Property Real		
00010035	00010035	Correspondence	Untitled	Wester,CE	Rigling,N
00010036	00010064	Financial Report	Untitled		
00010065	00010066	Note	Gonff JA Cash Flows for 1982-83		
00010067	00010069	Note	Gonff JA Balance Sheet		
00010070	00010070	File Note	Conversation Between Gary B an		Hausler,MD
00010071	00010071	Correspondence	Untitled	Gonff,JA	Darling,OH
00010072	00010072	Contract	Untitled	Gonff,JA	Gonff,JA
00010073	00010073	Correspondence	Untitled	Gonff,JA	Darling,OH
00010074	00010077	Financial Report	GRC, Subsidiaries and Affilate, Cc		
00010078	00010081	Financial Report	GRC, Subsidiaries and Affilate, Cc		

Ready Document 13 [13] of 209 TAG DEL CAP NUM

Concordance Native Viewer

File View Markups Help

EDOC

DOCID:0000007

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## Document Review

Document Review Flow Chart

```

    graph LR
      A[Loading into EDoc Support Application] --> B[Search and segment document based on coded data. OCR used to filter results to hits of the case.]
      B --> C[Code additional info about the documents during your review.]
      C --> D[Determine documents for production.]
      D --> E[Contact Privilege for production and review numbers.]
      E --> F[Pro Copy can print or export production lists.]
      F --> G[Pro Copy can apply your review number, removing the original, encumbered number.]
      G --> H[Build Witness Lists.]
      H --> I[Determine what documents will be needed for trial.]
  
```

7/19

8/19

9/19

10/19

11/19

Document Information

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DCB: EDOC EDITABLE

# Tips and Tricks!

- Running a Production
- Exporting Load Files
- Production Database

My\_Database - Concordance

File Edit View Search Documents Tools Help My Databases

Search

Databases

Workspace

Concordance Production

Help

Production Run Parameters

Parameter Set Selection

Load User Parameter Set Save As Default Parameter Set

Save User Parameter Set Remove Current Parameter Set

Parameter Set Selected:

1 Production Run Parameters

Document Range All

Create Production Numbers No

2 Output Location Run Parameters

CIB Database Output Mode Create

CIB File C:\Data\need-to-specify/need-to-specify.cib

Root Destination Folder C:\Data\need-to-specify

Create Volume Folders No

Create File Folders No

Production Output Type TIFF Multi Page (LZW - NOT compatible with Concordance)

Color Settings Grayscale

Fit Image Inside Headers/Footers No

Create OPT File No

3 Markup Types (Yes = Markup Included)

Select All No

Redaction No

Text No

Note No

Image No

Stamp No

Document Range

Select to process ALL or a RANGE of documents within the current Concordance query.

Headers / Footers

Edit Headers and Footers  Include Hdr/Ftr Spec.

Production Run Control

Start Help

Size: 600 x 769

BEGNO  
00010021  
00010022  
00010023  
00010025  
00010026  
00010027  
00010028  
00010030  
00010031  
00010033  
00010035  
00010036  
00010065  
00010067  
00010070  
00010071  
00010072  
00010073  
00010074  
00010078

AUTHOR  
PAGES  
REVIEWSTATU  
OCR1

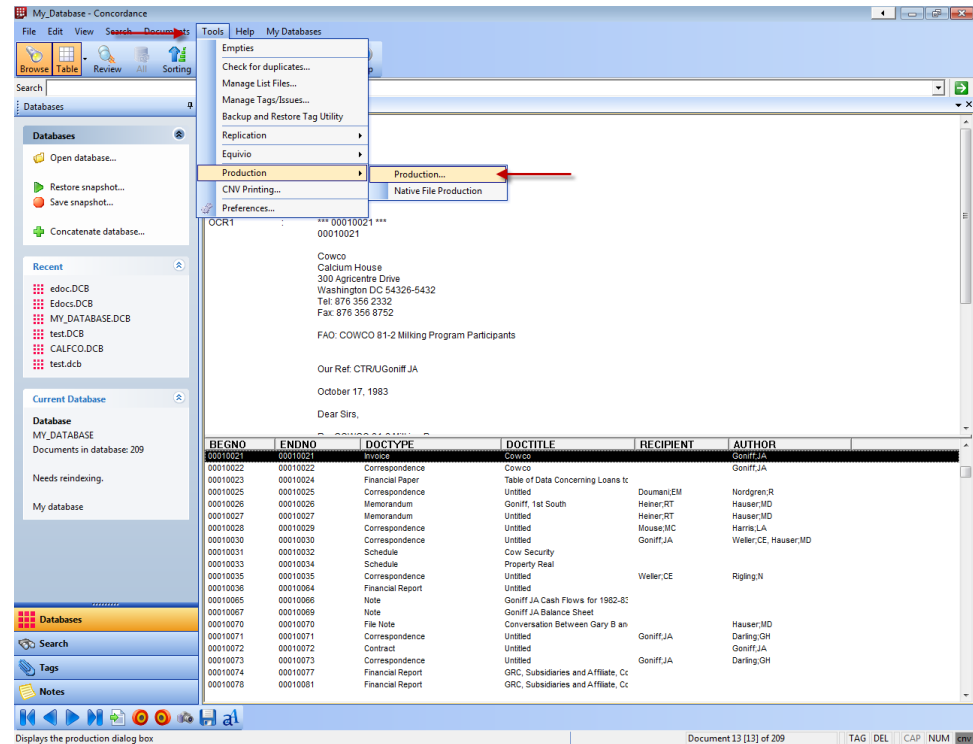
00010077 Financial Report GRC, Subsidiaries and Affiliate, Cc  
00010081 Financial Report GRC, Subsidiaries and Affiliate, Cc

AUTHOR  
Goniff,JA  
Goniff,JA  
Nordgren,R  
Hauser,MD  
Hauser,MD  
Harris,LA  
Weller,CE, Hauser,MD  
Rigling,N  
Hauser,MD  
Darling,GH  
Goniff,JA  
Darling,GH

Ready Document 13 [13] of 209 TAG DEL CAP NUM cmv

## About Productions

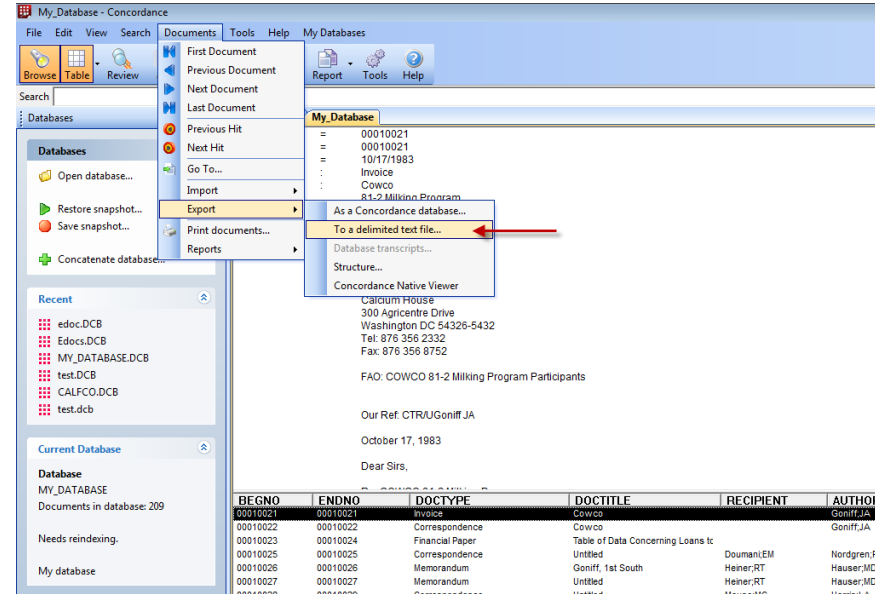
- Once a document collection review is completed, documents typically need to be produced to opposing parties. Database administrators prepare the electronic production using Concordance Desktop and Concordance Desktop Native Viewer or Concordance Desktop Image based on queries or tagged sets of documents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



- Tag or Code documents for Production during review
- Ask users to exit the database
- Make a backup of your database
- Create a Query from your tag
- Tools > Production > Production
- If necessary, save production parameters



- When you export database records to a delimited text file, the export includes every record in current query, in the order they are listed.
- Be sure to query your production tag or run a search a relational search to locate all the documents that you've produced.
- For example, `BEGPROD = *`
- If you've just run a production, your current query should be active containing the documents you've produced.
- Go to: Documents > Export > Delimited Text. Make sure to choose the production fields you used to track your production and include only the required metadata fields per your production specifications.



The screenshot shows the LexisNexis software interface. The 'Documents' menu is open, and the 'Export' option is selected. A sub-menu is displayed with 'To a delimited text file...' highlighted. The main window shows a list of documents with columns for BEGNO, ENDNO, DOCTYPE, DOCTITLE, RECIPIENT, and AUTHOR.

BEGNO	ENDNO	DOCTYPE	DOCTITLE	RECIPIENT	AUTHOR
00010021	00010021	Invoice	Cowco		Goniff,JA
00010022	00010022	Correspondence	Cowco		Goniff,JA
00010023	00010024	Financial Paper	Table of Data Concerning Loans to		
00010025	00010025	Correspondence	Untitled	Douman,EM	Nordgren,R
00010026	00010026	Memorandum	Goniff, 1st South	Heiner,RT	Hauser,MD
00010027	00010027	Memorandum	Untitled	Heiner,RT	Hauser,MD

- Perform properties checks in your export location by right clicking on each folder > Properties for a file count.
- Do the number of images produced match your query?
- Do the number of records you exported in your delimited text file match the number of records you've produced?
- Optional
  - Create a production database by importing your production into a brand new database.
  - Rolling imports with rolling productions into the production database
  - Enables the admin to ensure the production is flawless.

## **Concordance Answer Center:**

**[http://help.lexisnexis.com/litigation/ac/cn\\_desktop/index.html?welcome.htm](http://help.lexisnexis.com/litigation/ac/cn_desktop/index.html?welcome.htm)**

## **Concordance Technical Support**

- **Email: [concordancesupport@lexisnexis.com](mailto:concordancesupport@lexisnexis.com)**
- **Phone: 1-866-831-0497 (option 4)**
- **Hours: 9:00 a.m. to 9:00 p.m. Eastern Time, Monday - Friday.**



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**Q & A**

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